

Essentials for Office 365 2.15.0

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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Product Activation

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

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

Registration	×
Activation Status	No License
Please enter your Activat XXXXX-XXXXX-XXXXX-2	ion Code or Username/Email and then Activate below. XXXXX-XXXXX
Activate Online Now	Activate Manually (Internet access is not available)
license	
	^
1	×
Configure Proxy	Close

- 2 Use the information in the following to determine the appropriate **License Validation** option to select.
 - **NOTE:** Most systems can use the Online activation method as long as the system has internet access. If you are unable to use the online activation method due to security settings or lack of internet access, the Offline activation option can be used. This option will still require some internet access, but allows for the authentication to be done from another machine that is not as restricted by security or has a connection to the internet.

If you want to validate the license	Then
online	accept the default option (Activate Online).

If you want to Then Validate the license
validate the license a) Select Activate Offline. offline a) Select Activate Offline. 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. Image: Im

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

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

🥵 Enter License Data	×
٢	>
Apply Close	

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

Essentials console.

legistration	×
Activation Status	License is Valid
Please enter your Activa	tion Code or Username/Email and then Activate below.
Activate Online Now	Activate Manually (Internet access is not available)
License	
VIII Andrew Miller, Miller Andrew Miller, Miller Andrew Miller	
Configure Proxy	Close

Tool Overview

Quest[®] Essentials for Office 365 offers a complete solution for Office 365 pre-migration analysis, migration, and management.

Key Features include:

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

Pre-migration analysis support

Essentials for Office 365 enables you to perform pre-migration analyses for the following platforms:

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

Migration support

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

Quest Essentials is optimized for migrations to and from Microsoft 365. While it **used to be** possible to migrate to/from SharePoint on premises, Quest recommends that you use 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	√	~	~	~	
Вох	✓	~	✓	<	
Dropbox		~	 ✓ 	<	
File Share	<	~	✓	<	

For Additional Office 365 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

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

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

Minimum Requirements

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

Hardware

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

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

Software

- Windows 10 or higher
- Java 11

NOTE: if Java 11 is not already installed on your workstation, you can download the latest developers version (jdk-11.0.0.) here.

Select Windows 11/x64 Java Development Kit (sha 256)



Once downloaded, extract the files to to a directory on your workstation (e.g., C:\Tools (which will create the folder jdk-11.0.2)).

You will be asked for the path to the installation folder during the Essentials installation.

• Disable anti-virus software or disable scanning of Quest 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.
 - i 📑 i 🗹 📑 🖬 Application Tools Essentials \times anager Home Manage ~ 🕐 Δ Share View ✓ ♂ Search Essentials Q ~ Copy Goo Name Date modified Туре Size 📌 Quick access configuration 2/4/2020 10:11 AM File folder E Desktop * 2/4/2020 10:07 AM File folder features 🕂 Downloads 🖈 jre 5/28/2019 10:37 AM File folder 🗄 Documents 📝 p2 5/28/2019 11:13 AM File folder Pictures plugins 2/4/2020 10:15 AM File folder AppClean 12/16/2019 2:53 PM Application 311 KB csvs AppClean 12/16/2019 2:53 PM Configuration sett... 1 KB Essentials Test Fi 2/4/2020 10:15 AM XML Document 139 KB artifacts 👌 Music 1/14/2020 6:37 AM Text Document 347 KB derby office265backup 👂 Essentials 6/3/2019 8:47 AM Application 311 KB 2/4/2020 10:07 AM Configuration sett... Open ssentials 1 KB 6/3/2019 8:47 AM Application 311 KB 👴 Run as administrator ssentialscmd ssentialscmd 6/3/2019 8:47 AM Configuration sett... 1 KB Troubleshoot compatibility estored-ini 5/28/2019 11:12 AM File 1 KB Pin to Start qlite4java-win32-x64.dll 6/3/2019 8:47 AM Application extens... 668 KB Scan with Windows Defender... install 9/14/2018 10:49 AM Application 145 KB 🖻 Share Pin to taskbar Restore previous versions Send to > Cut]== | Copy Create shortcut 💡 Delete 💡 Rename Properties
 - a. Navigate to the Properties for the Essentials.exe

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



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

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

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

Computer\HKE\	LOC	AL_MACHINE\SOFTWARE\Microsof	t\Wir	dows\CurrentVersion\Policies\System		
	>	Management Infrastructure	^	Name	Туре	Data
	>	Media Center		ab (Default)	REG SZ	(value not set)
	-	MicrosoftEdge		ConsentPromptBehaviorAdmin	REG DWORD	0x0000000 (0)
	>	MMDevices		ConsentPromptBehaviorUser	REG DWORD	0x0000003 (3)
	>	Mrt		W dontdisnlavlastusername	REG DWORD	0x00000000 (0)
	>	NcdAutoSetup		W DSCAutomationHortEnabled	REG DWORD	0×00000002 (2)
	>	NetCache		20 EnableCurrerSuppression	REG_DWORD	0x00000002 (2)
	>	NetworkServiceTriggers		20 EnableCursorSuppression	REG_DWORD	0x00000001(1)
	>	Notifications		Lie EnableFull Truststartup Tasks	REG_DWORD	0x0000002 (2)
	-	OEMInformation		ing EnableInstallerDetection	REG_DWORD	0x0000001(1)
	-	OneDriveRamps		100 EnableLinkedConnections	REG_DWORD	0x00000001 (1)
	>	OOBE		EnableLUA	REG_DWORD	0x00000001 (1)
	-	OpenWith		EnableSecureUIAPaths	REG_DWORD	0x0000001 (1)
	-	OptimalLayout		8 EnableUIADesktopToggle	REG_DWORD	0x00000000 (0)
	>	Parental Controls		8 EnableUwpStartupTasks	REG_DWORD	0x0000002 (2)
	-	PerceptionSimulationExtensions		8 EnableVirtualization	REG_DWORD	0x0000001 (1)
		Personalization		ab legalnoticecaption	REG_SZ	
	>	PhotoPropertyHandler		ab legalnoticetext	REG_SZ	
	Y	Policies		20 PromptOnSecureDesktop	REG_DWORD	0x00000000 (0)
		ActiveDesktop		30 scforceoption	REG DWORD	0x00000000 (0)
		- Attachments		n shutdownwithoutlogon	REG DWORD	0x00000001 (1)
		DataCollection		SupportFullTrustStartupTasks	REG DWORD	0x00000001 (1)
		Users		Support Iwn Start un Tasks	REG DWORD	0v0000001 (1)
		Explorer		Wundochwithoutlogon	REG DWORD	0×00000001 (1)
				20 Velidete Admin Carde Sina etunes	REG_DWORD	0.00000000 (0)
				lie valdateAdminCodeSignatures	KEG_DWORD	0x0000000 (0)
		> 📙 System				
		PowerEfficiencyDiagnostics				
	>	PrecisionTouchPad				
		PreviewHandlers				
		Privacy				

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

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

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

rioperties:			
er 🕴 🔽 🚽 Quest			– 🗆 ×
File Home Share	View		~ 🕐
lopy Goc ← → × ↑ 🛄 → Th	is PC → Local Disk (C:) → Program Files	s > Quest v 🖑 Search Ques	e کر
Ouick access	Name	Date modified Type	Size
	Essentials	2/4/2020 10:11 AM File folder	
Open			
Open in new window			
Pin to Quick access			
🖶 Scan with Windows Defender			
Give access to	>		
Restore previous versions			
Include in library	>		
Pin to Start			
Send to	>		
Cut			
Сору			
Create shortcut			
😌 Delete			
💔 Rename			
Properties			
Pictures			

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



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



Key Features

 \checkmark Single-hop migration to the cloud

 \checkmark 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.
- \checkmark Maximize the utility of available Office 365 services.
- ✓ Support Chinese and GCC High Tenants.

Automatic Updates

Auto-Updates is a feature available within 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.





A new update is available. Do you want to install it?

Disable tool automatic updates.

To enable it back, please, go to Help-> Profile manager -> Global Variables -> Enable Automatic Updates -> True.

Yes No

 \times

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".

🤌 Product Update Manager		Х
A new update is available. Do you want to install it?		
☑ Disable tool automatic updates. To enable it back, please, go to Help-> Profile manager -> Global Variables -	> Enable Automatic Updates -> T	rue.
	Yes No	

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.

General	Your Settings will be saved	'or future operations.				
	Invalid Characters and In	valid file extension		Global Variables Settings		
Connection	Forbidden Chars:		Mappings	Default User Account:		
Migration	Forbidden Folder and Files Na	imes:	Mappings	Max. Threads for Copy:	5	
Email Notification	Memory Settings			Max. terms while loading:	10000	
Advanced	Total Memory Detected (GB)	7		Page Encoding:	UTF-8	~
	Total Memory Usage	80%	¥	Template Encoding:	UTF-8	~
	Configured Memory (GB)	- 4	Apply	ADFS 2.0 Expiration(Minutes):	0	
				#Attemts for target site:	100	
	Password Management			Enforce MS Office Metadata:		
	Change master password Re	et password cache		Embedded Webparts mode:	✓	
	Password Encryption:			Enable Automatic Updates:		
	Enter new Password: ****		<i>1</i>	For SharePoint On-Premis	e Only	
	Confirm Password: ****		ø	Query Delay:	-1	
	Encrypted Password: WSf	1EbEyEKYOjYGpRSVGLL1fAz69DT6OzaKr4K3WTnOx	Encrypt	Query Chunk Size:	2000	
	Update Password in all ex	sting Script Jobs		Authentication Preference:	NTLM	~
	Update Source Password Up	Jate Target Password		For Connectivity Timeout:	60	
Recet to Defaults				For Outlook Exchange On	v	

Cleaning Essentials Tool Location

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

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

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

1. Close the Essentials tool.

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



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



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.

📄 Debug Mode 🖒 Reset "Do not Show" 📄 Proxy Mode 🔂 Log Manager 🔻

Profile Manager

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

🖻 Settings		\rangle
General	1 Your Settings will be saved for future operations.	
	Copy Permissions:	Asynchronous
Connection	Include Versions: Without Version 10	
Migration		◯ Disable
Currell Nineldineation		Azure Turbo: Enable (Microsoft provided)
	Overwrite if file exist: ✓	O Enable (User provided)
Advanced	For Drives Tab Only	Storage Account Information:
	Skip Non Owned Objects:	Account:
	Include First Reference File Only:	Key: 🖉 Validate
	1 Include Orphaned Files:	Refresh Azure Logs Policy
	Skip Files Greater Than: 2 GB	First Daily Refresh: 🖌 6:00 PM
	Migrate to Folder:	Second Daily Refresh: 2:21 PM
	For Backup Only	
	Amazon S3 Service Point: s3.amazonaws.com	

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

<u>Azure</u>

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

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

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

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

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

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

Connection

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

General	Your Settings will be saved for future open	ations.		
Connection	SharePoint Online Connection Source SharePoint Admin UIL:	DropBox Connection App Ker:		
Migration	Target SharePoint Admin URL:	App Secret:		
nail Notification	Target SharePoint Site URL:	Admin User:		
Advanced	Box Connection	Access Token:		
	Admin User:	Google Connection		
	Box.net Client ID:	Path to .p12 Key File:		
	Box.net Client Secret:	Service Account:		
	Box.net Redirect UR: https://www.quest.com	Admin User:		

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.

General	Your Settings will be saved for future operations.		
Connection	Copy Subsites: Copy Views:	Hyper Mode Settings	
	Copy Features: Copy Forms:	🚯 OAuth: 🧹 🚯 Hyper Back	up:
Migration	Conv Hidden Eidde: Conv Workflows:	Generate Status Report: 🗹 🕕 Classic Mailbox Back	kup:
Email Notification	Remove Folder Structure:	Delete Report Jobs: 🗹 Backup System Li	sts:
Advanced		Classic Navigator Mo	ide:
	Generate Failed Items File: Manual Automatic Content Type Load Limit: 400	#Parallel Threads: 35	
	Regional Date Format:	#Azure Threads: 15	
	① Custom Identity Provider:	0 #Retry: 10	
	Cloud:	is not responding Import did not complete Timeout waiting for connection from pool Can not create lookup fields because list(s) target Parent content type does not exist) doesn't exists on
	Path Overflow Option		~
	Truncate Long Path: 🗹	Temporary Files Location: C:\Users\UTrosman\AppData\Local\Temp	
	Max Length Before Overflow: 200	f #Jobs per Tab: 100	
	Overflow Folder Name Length: 5		

Reset to Defaults

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

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

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

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

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

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

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

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

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

There are a couple of examples of the regional date format

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

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

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

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

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

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

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

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

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

Hyper Mode Settings

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

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

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

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

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

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

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

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

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

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

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

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

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

Email Notification

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

🖻 Settings			Ĺ,	\times
General	Enable Email Notificat	tion:		^
Connection	Configure Email Set	rver (SMTP/Online)		
		O365 Server O SMTP/Custom Mail Server		
Migration	*User:			
Email Notification	*Password:		Ø	
Advanced	Protocol:	DEFAULT	V	
	Host Name:			
	Port:	25		
	Customize Email Not	ification		
	Recipient(s):			
	Subject:	{project:name}:{operation}: Time Start. {time:start} & Time Completed: {time:completed}		
	• Padu	Project Name: (project.name):{operation} Time Start: {time:start} & Time Completed: {time:completed} Login: {login} Summary: {summary}	^	
	U body.		~	
	Attachment:	(attachment/report)		
Reset to Defaults	Failure Notification:	Send Test Er	mail	~

Email Server Configuration

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

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

Exchange Online (Office 365)

To use your Exchange Online in Office 365:

1. Select the "0365 Server" option.

O365 Server

○ SMTP/Custom Mail Server

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

required)

*User:	
Password:	

Exchange On-premises

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

To use your Exchange on-premises:

- 1. Select the "SMTP/Custom Mail Server" option
 - 🔾 O365 Server

SMTP/Custom Mail Server

2. Enter the Host Name of your Exchange server

Guant

Host Name:

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

Protocol:	DEFAULT
	DEFAULT
ost Name:	SSL
st Name:	TLS

- 4. Enter the Port Number (default is 25)
 - **Port:** 25

Email Subject and Message Configuration

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

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

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

Recipient(s): Admin, Name

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

() Subject: {project:name}:{operation}: Time Start: {time:start} & Time Completed: {time:completed}

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

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

Body:

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

Send Test Email

Available Placeholders

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

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

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

user1@email.com,user2@email.com,user3 @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 SUMMAR	(
State	Source	Target	Object	Success	Info	Warnings	Failed	Duration	Migrated Size
Currential	akokhan@metavistech.com	C:\Users\ <u>dmytro.babii\runtime</u> - app\ <u>multiJobBackup</u>	Files	5	0	0	0	22 s	940
Successful			Folders	2	0	0	0	940 ms	Kb
Current d	terrer and a Querter interterer	C:\Users\dmytro.babii\runtime-	Files	0	0	2	0	15 s	0.1/1
Successful	tamara.reako@metavistech.com	app\multiJobBackup	Folders	2	0	5	0	 	0.00
Current d		C:\Users\ <u>dmytro.babii\runtime</u> - app\ <u>multiJobBackup</u>	Files	2	0	0	0	18 s	37,7
Successful ypany	<u>ypanchisnyn@metavistech.com</u>		Folders	2	0	0	0		Mb
		C:\Users\dmytro.babii\runtime- app\multiJobBackup	Files	13	0	255	2	26 s	17.05
Falled	<u>v.kucner@metavistech.com</u>		Folders	2	0	24	0	483 ms	1,7 60

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 remainder of the advanced profile manager settings.

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

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 Essentials 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 Essentials interface follow these steps.

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



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

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

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

Password Encryption through Command Script

To encrypt your password using an Essentials command script, follow these steps.

 Start a cmd prompt and navigate (cd) to the Essentials 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 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.

0					×			
Proxy Conf	figuration	n Dialog						
You can	configure	application pro	xy settings					
🗹 Enable P	roxy							
Pac URL	Enter URL	L to pac file						
Host	Enter pro	xy host address	;					
Port	Port 0							
User	User Enter user for proxy auth							
Password	Password Enter password for proxy auth							
 Advance 	d configur	ation						
Bypass								
			Import	Save	Cancel			

Proxy Configuration

Sometimes a connection toan 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**.

Ū	×						
Proxy Configuration Dialog							
You can	configure application proxy settings						
🗹 Enable P	гоху						
Pac URL	Enter URL to pac file						
Host	Enter proxy host address						
Port	0						
User	Enter user for proxy auth						
Password	Enter password for proxy auth						
▼ Advance	d configuration						
Bypass							
	Import Save Cancel						

The following is an overview of the proxy settings:

Enable Proxy - turns the entire proxy tool on/off. Pac URL – URL value for scripted PAC proxy Host - server name / server IP to direct proxy Port - port for direct proxy User - user account Password - password for user account Advanced Settings: Bypass - white list of sites where proxy should be ignored, URLs must be separated by semicolons. Import Settings - imports values from Internet Explorer, recommended way to set up proxy Save - saves settings and closes dialog. if checkbox active and fields are empty - error massage "Set proxy settings "

Cancel - closes dialog without changes.

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

Proxy Configuration During Product Activation

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

Registration	×
Activation Status	License is Valid
Please enter your Activa	tion Code or Username/Email and then Activate below.
Activate Online Now	Activate Manually (Internet access is not available)
	paine (Longin Hispaine, Accione, Filippine, Joshua
s -	• • • • • • • • • • • • • • • • • • •
Configure Proxy	Close

Azure Turbo and CSOM

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

NOTE:

• Only Standard Storage Accounts are supported for this operation.

• Minimum recommendations would be a quad core CPU, 8GB of available memory (Memory Management), 20GB of local hard drive space and as fast an upload speed as possible. Limiting any of these components can decrease the performance drastically.

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

00	Advanced Options	
Ť	Enable Azure Turbo Mode	
	O Microsoft Provided Storage 🛛 💿	
	User Provided Storage Select	
	Send notification	0

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-azurecontainers-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 tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.
- Send Notification enter specific user email addresses to denote who will receive notifications. Set up User Notifications here in order to use this feature.

Differences in migration with CSOM and Azure

• CSOM doesn't support migration of Shared with me data. It can only be migrated using Azure Turbo mode.

• CSOM doesn't support version label migration; metadata and authorship will be preserved correctly, but version labeling is reset post migration.

Your Azure Storage Account

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

To locate your Azure Storage Name and Access Key:

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

Manage Access Keys	~
When you regenerate your storage access keys, you nee machines, media services, or applications that access th keys. Learn more	ed to update any virtual is storage account to use the new
STORAGE ACCOUNT NAME	
mvcentralus	
PRIMARY ACCESS KEY	
	regenerate
SECONDARY ACCESS KEY	
	regenerate
	$\langle \cdot \rangle$

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.

 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.



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

🗹 Enable Azure Turbo Mode 🛛 🔞		
O Microsoft Provided Storage	0	
User Provided Storage	Select	?
O Defer Upload to Azure	Select	?

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

(b)	×
Azure	
8 Choose storage account to use	
Storage account	~ Connect
	OK Cancel

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

storage Account					~
Account Key	•••••	•••••	•••••	•••••	•••••
	Show K	ley			
		Use Proxy			
		Deres Confine			
		Proxy Configu	Iration		

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.

\$		×
Azure		
Press OK button to finish		
Storage account		✓ Connect
	ОК	Cancel

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

≽ Connect to Azure: natalia	×
Azure	
Storage Account	2
	_

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

Monitoring Azure Turbo Migration

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



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

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

Cor	🖞 Contents 📅 Progress 😥 Hyper Migration 🎯 Azure Turbo Quieue 💠 🗔 🔹 🔯 🗤 😨 🗖									
https	4					completed			search by Job GUID	8
List		Created	Status	Summary	Log	Azure Manifest URL	Azure Source URL	Job GŬID		^
۵,	Documents	2018-07-17 15:33	Completed	*		https://natag.blob.core	https://natag.blob.core	fc4c2579-f		
۵,	Documents	2018-07-17 15:33	Completed	*		https://natag.blob.core	https://natag.blob.core	fbb3dd70		
۵,	Documents	2018-07-17 15:35	Completed	*		https://natag.blob.core	https://natag.blob.core	fb50e4bd		
Δ,	Documents	2018-07-17 15:49	Completed	\$		https://natag.blob.core	https://natag.blob.core	f20014da		
Δ,	Documents	2018-07-17 15:46	Completed	\$		https://natag.blob.core	https://natag.blob.core	f016247c-6		
۵,	Documents	2018-06-28 14:51	Completed	\$		https://spodm1sn1m03	https://spodm1sn1m03	ef10077d		
۵,	Documents	2018-07-17 15:31	Completed	*		https://natag.blob.core	https://natag.blob.core	ec9f0101-9		
۵,	Documents	2018-07-17 15:15	Completed	*		https://natag.blob.core	https://natag.blob.core	eb21c180		

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

i

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



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

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

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



Supported Specification for Essentials Azure Turbo Mode

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

Currently supported and required:

• Azure Storage Account

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

Content Only (but the rest still migrates too)

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

• Queue Times and Processing

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

File Size Limitation

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

Creating User Mapping

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

Scenario 1

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

Scenario 2

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

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

@metavistech.com,@appdevsite.onmicrosoft.com

c:0t.c|tenant|ff6207ef-2987-45ee-bd8f-8011b22bd755,c:0t.c|tenant|ewrwe07ef-ewerrwe7-45ee-bd8f-8011b22bd755 Google_Group,SharePoint_Group_

Scenario 3

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

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

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.

Settings							
General	• Your Settings will be saved for future operations.						
Connection	Copy Permissions:	Azure Migration Mode: Osynchronous Synchronous					
Migration	Incremental Copy: 10 Days	Disable					
Email Notification	Overwrite if file exist:	C Enable (User provided)					
Advanced	For Drives Tab Only	Storage Account Information:					
	Skip Non Owned Objects:	Account:					
	Include First Reference File Only:	Key: 🖉 Validate					
	1 Include Orphaned Files:	Refresh Azure Logs Policy					
	● Skip Files Greater Than: 2 GB ∨	First Daily Refresh: 🗹 6:00 PM					
	Migrate to Folder:	Second Daily Refresh: 12:09 PM					
	For Backup Only						
	Amazon S3 Service Point: s3.amazonaws.com						

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.

Mapping for copy from File Share

Reset to Defaults

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

This operation has the following requirements for use:

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

To create a mapping report, perform the following:

1. On the Migration Analysis tab click Mapping Report.

	Home	Migration Analysis	View	Migrator	F	ile Manager	Drives	Security Manager
	5 👌	S >		8	box	\$		→X
	Farm High Level	SharePoint	One Drive	Google	Box	Dropbox	File Share	Mapping Report
	SharePoint Pre-	Migration Analysis		Drives Pre	-Migratior	ı Analysis		Other Reports
1	he Mappin	ng Report w	izard op	ens.				
I	n the wiza	rd. select th	e File Sha	are tab				

Apping Report

2.

Connect to generate Mapping report

Office 3 File Shar Google

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

Target Office 365 Conne	ection Parameters	
SharePoint Admin URL:		+ Admin 🕡
	Successfully connected to SharePoint Admin URL	
	Connected admins:	

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

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

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

Source User	Target User	¥	*to create user mapping file delete first line with Headers from this table, go to File -> Save As-> Select file type CSV UTF-8 (Comma delimited) (*.csv)
Latter Market W. Market Street Westight	station for any second		
Contraction of the state of the state	Contraction of the state of the second		
Construction of the local sectors in the local sector of the local	Construction of the local sectors		
Construction designation that and	Construction designation that are		
Pault grout accident con	Pault-Breatanniach.com		
Intelligential states	Instightentiaction of a set		
and the production of the local	ALC: MALERIA		
and the providence of the second	August association		
Automotive Station (Section 2)	ALC: MALERIA		
tearnal drong restaurchard unit	ALC: MALERIA		
Advanced in an indication of the local	ALC: MALERIA		
de til en de setter start und	designed in the second second		

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

Load from CSV or 🚻 Load from Tenant 📀

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

Select

Mapping for copy from Google Drive

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

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

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

	Drive	Q Search Drive			•	() ()		Suite M
+	New	My Drive 👻				Contacts		^
Priority		Quick Access					-	
• 🛆	My Drive					Vault	Admin	Hangouts
•	Shared drives							
8	Shared with me				_	:=	S_	Q
0	Recent	 Annual, Rocket Annual, Rocket 	 1.888 1.978 1.988 	· · · · · · · · · · · · · · · · · · ·	_	Forms	Keep	Cloud Sea
☆	Starred					G		
Ū	Trash					Collections		
	Storage		Internet and the second sec	B Harrist Spot 1.	e:			
	256.7 MB used	_				2		~

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

Users

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

4. Select the "Download Users" option.

Users Showing all users Add new use	r Bulk upload users Dowr	iload users More 🔻			
+ Add a filter					
□ Name ↑	Email	Status	Last sign in	Email usage	
Alt Alt	Alt@classifycloud.com	Active	A year ago	0 GB	
Automation1 QA	automation1@classifyclou	Active	2 days ago	0 GB	

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

Download user info		
Select columns		
 Currently selected columns 5 columns available. Show all. All user info columns and currently selected columns available. Show all. 	lected colun	nns
Select format		
O Google Sheets		
Comma-separated values (.csv)		
	CANCEL	DOWNLOAD

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

0 1					
First Name [Required]	Last Name	Email Address [Required]	Status [RE	Last Sign I	Email Usage [READ ONLY]
Alt	Alt	Alt@classifycloud.com	Active	########	0.0GB
Automation1	QA	automation1@classifycloud.com	Active	########	0.0GB
Developer	Essentials	dev@classifycloud.com	Active	########	0.0GB
Google	google	google@classifycloud.com	Active	########	0.0GB
Jay	Strickland	js.support@classifycloud.com	Active	########	0.0GB
John	Johnson	jjohnson@classifycloud.com	Active	########	0.0GB
Mark	Mark	Mark@classifycloud.com	Active	########	0.0GB
Neha	Agarwal	NehaA@classifycloud.com	Active	########	0.0GB
QA	Light	QA-Light@classifycloud.com	Active	########	0.0GB
QA1	Regression	reg@classifycloud.com	Active	########	0.0GB
QA2	Regression	reg2@classifycloud.com	Active	########	0.0GB
QA3	Regression	reg3@classifycloud.com	Active	########	0.0GB
reg1GD	regDrive1	reg1gd@classifycloud.com	Active	########	0.0GB
reg2GD	regDrive2	reg2gd@classifycloud.com	Active	########	0.0GB
Report	Google	report@classifycloud.com	Active	########	0.0GB

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

8. Select the Admin option from the available apps.

Good afte	rnoon								Install Off	fice ~
+	•	•	w	×		N	4	ti ji		
Start new \vee	Outlook	OneDrive	Word	Excel	PowerPoint	OneNote	SharePoint	Teams	Yammer	
Admin	All apps									

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

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

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

us	ers.					
≡		MetaVis Technologies				
ŵ	Home	Active users				
8	Users ^		0			
	Active users	🖄 Add a user 🗉 User templates	었 Add multiple users 📋 N	Multi-factor authentication	○ Refresh <u> ↓</u> Export Users ····	
	Contacts	Diseles and A			1	
	Guest users	Display name	Username	Licenses		
	Deleted users	~userName	: ~user@met	tavistech.com	Unlicensed	

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

AC	AD	AE	,
e	UsageLocation	UserPrincipalName	Whe
ninistra	US	~user@metavistech.com	201:
		Gabbe5687a2b741d6b0fae364a3a756b8@metavistech.com	201!
er upda	US	111charlesmbaron@metavistech.com	201!
123	UZ	111evelyneadams@metavistech.com	201!
100	i ic	111iaanniaahandlav@matavistach.com	2011

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

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

Mapping for copy from Google Shared Drive

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

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

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



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

1. Select the Admin option from the available apps.

Good afternoon								Install Off	ice 🗸	
+ Start new ~	Qutlook	OneDrive	Word	Excel	PowerPoint		SharePoint	Teams	Vammer	
A	\rightarrow	OneDrive		2.00	· · · · · · · · · · · · · · · · · · ·	eneriete	Sharer on t			
Admin	All apps									

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



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

Groups

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

Learn more about group types

Add a group ↓ Export groups 🖒 Refresh		1496 items 🏒	$^{igstyle }$ Search
Group name ↑		Group email	Туре
0AMoceb2RJH8zUk9PVA	÷	0AMoceb2RJH8zUk9PVA@metavistech.com	Office 365
10test	÷	10test@metavistech.com	Office 365
1test	÷	1test@metavistech.com	Office 365

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



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

Google Shared Drive (unique ID and users), toan 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.

ADMIN CONSOLE						
Ш	Insights					
0	Users & Groups					
	Content					
	Reports					
$k\epsilon$	Relay					
	Governance					
	Platform					
	Account & Billing					
•	Enterprise Settings					
÷	Back to my Account					

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.

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

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

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

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

Good afternoon								Install Offic	ce 🗸	
+	•	•	w	x		N	5	ų	-	
Start new \vee	Outlook	OneDrive	Word	Excel	PowerPoint	OneNote	SharePoint	Teams	Yammer	
Admin	All apps									

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

8	II Microsoft 365 admin	center			
=	=		MetaVis $>$ Search users	, groups, settings or tasks	+ Add card
៤	分 Home		Essentials		
۶	R Users	^			
Г	Active users		User management		
	Contacts			_	
	Guest users		User manage	ement	
	Deleted users		Add, edit, and remove user acc	ounts, and reset passwords.	
Ŕ	c ^A Groups	~			
E	∃ Billing	~			
U	🖉 Setup		Add user Edit u	user Reset password	· ·
6	Customize navigation				
	· · Show all				

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

≡		MetaVis Technologies					
ŵ	Home	Active users	ctive users				
8	Users ^	Q Add a user II User templater	-8 Add multiple years - A Multi-factor authentication	C Refrech			
1	Active users	Add a dsei 🛛 🖻 osei templates		O Refresh			
	Contacts	Display name 1	licemame	licences			
	Guest users	Display harrie	Osername	Unlicensed			
	Deleted users	~userName	: ~user@metavistech.com				

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

AC	AD	AE	
е	UsageLocation	UserPrincipalName	Whe
ninistra	US	~user@metavistech.com	201:
		Gabbe5687a2b741d6b0fae364a3a756b8@metavistech.com	201!
er upda	US	111charlesmbaron@metavistech.com	201!
123	UZ	111evelyneadams@metavistech.com	201!
100	l IC	111iaanniaahandlav@matavistach.com	2011

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

SourceUser,TargetUser

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

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

Mapping for copy from DropBox

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

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



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

<	¥
	Admin console
	Insights
	Members
	Activity
	Content
	Groups
	Billing
	Settings
	Help

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

Members					¢ 😐
Search members					
Name or email					Invite members
Name	Status +	Usage 🕖	Two-step verification		Active ~
40	14414411	5.05 MB	Optional	٥	Add licenses
•	1001-00100	125.86 GB	 Optional 	0	Export member data

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

\$	Dropbox Business reports							
Files	Overview							
My files Shared	Click here to describe this folder and turn it into a Space Show examples							
Deleted files	Create new me *	Modified *	Members *	:= •				
	0 2018-03-09 TEST	9/3/2018 11:54 am	Only you					
	2018-08-30 full log	30/8/2018 3:27 am	Only you					
	2018-08-30 full log	30/8/2018 3:27 am	Only you					

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

Clipboard 5 Font 5 Alignment 5 Number 5

▼ : × ✓ fx	Email			
А	В	С	D	E
First name	Last name	Email	Role	Status
43046721Jo	mickey@metamini.com	joe@metavistech.com	Gabbe5687a2b741d6b0fae364a3a756b8@metavistech.com	Active
Mickey	Mouse	mickey@metamini.com	111charlesmbaron@metavistech.com	Active
Automation1		automation1@metavistech.com	111evelyneadams@metavistech.com	Active
Big DBox	mickey@metamini.com	drobbox@metavistech.com	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.

Styles

8. Select the Admin option from the available apps.

Good afternoon							Install Off	fice ~		
+	•	•	w	×		N	4	ti ji		
Start new \vee	Outlook	OneDrive	Word	Excel	PowerPoint	OneNote	SharePoint	Teams	Yammer	
Admin	All apps									

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

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

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

us	ers.					
≡		MetaVis Technologies				
ŵ	Home	Active users				
8	Users ^		0			
	Active users	🖄 Add a user 🗉 User templates	었 Add multiple users 📋 M	Aulti-factor authentication	○ Refresh	
	Contacts	Diseles and A			1	
	Guest users	Display name	Username		Licenses	
	Deleted users	~userName	: ~user@meta	tavistech.com	Unlicensed	

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

AC	AD	AE	
е	UsageLocation	UserPrincipalName	Whe
ninistra	US	~user@metavistech.com	201:
		Gabbe5687a2b741d6b0fae364a3a756b8@metavistech.com	201
er upda	US	111 charles mbaron@metavistech.com	201!
123	UZ	111evelyneadams@metavistech.com	201!
100	l IC	111ioanniashandlau@motavistach.com	2011

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

SourceUser, TargetUser

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

Mapping for copy between Tenants

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

This operation has the following requirements for use:

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

To create a user mapping report, perform the following:

1. On the Migration Analysis tab click Mapping Report.



3. Enter your SharePoint Admin URL for the source Office 365 connection and click Connect. On the Connect to SharePoint popup, enter your SharePoint credentials and click Connect. If you receive any message other than "Successfully connected to SharePoint Admin URL", please double check your credentials or contact support. If you would like to add additional Administrator accounts to this report, click Admin+.
| Source Office 365 Conn | ection Parameters | | |
|------------------------|--|---------|---|
| SharePoint Admin URL: | | + Admin | 0 |
| | Successfully connected to SharePoint Admin URL | | |
| | Connected admins: | | |

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

Target Office 365 Conne	ction Parameters		
SharePoint Admin URL:	•	+ Admin	0
	Successfully connected to SharePoint Admin URL		
	Connected admins:		

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

Source User	Target User	¥	*to create user mapping file delete first line with Headers from this table, go to File -> Save As-> Select file type CSV UTF-8 (Comma delimited) (*.c
Contraction of Protocolish and	Contraction of the Instance in		
Construction of the local sectors	Construction of the local sectors in the local sector of the local		
Constraint and the Brattan start and	Commission and an alternative stands on the		
Pault grout accident con	Pault-Breatantiach con		
Startightentian start	Institution and a cost		
and the production of the local	ALC: MALERIA		
and the second second second	August association		
Automation start and	August apparents		
International Prophysics and	August association		
Advanced and development of the	And in concerning the		
distinguishments and	designed in the second second		

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

Load from CSV or 🕌 Load from Tenant 📀

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

Select

Mapping for copy from OnPrem SharePoint

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

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



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

→			~ Ö	earch Essentials Test Files	۶
ganize 👻 New folder				8== -	(
🗄 Documents 🖈 ^ Name ^	Date modified	Туре	Size		
E Pictures 🖈	11/4/2019 1:18 PM	File folder			
csvs	6/4/2018 10:10 AM	File folder			
Essentials Test Fi	1/10/2020 12:36 PM	File folder			
h Music	11/4/2019 1:21 PM	File folder			
office265backup	1/20/2020 11:56 AM	File folder			
Confliction of the second second	11/5/2019 10:22 AM	CSV File	16 KB		
Chebrive					
This PC					
3D Objects					
🔲 Desktop 🗸					
an fan it it it it it					
File name: Site User Mapping Report					
Save as type: *.csv					

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

Good afte	rnoon								Install Offi	ce 🗸
+	o	•	w	×		N	1	ųji		
Start new \vee	Outlook	OneDrive	Word	Excel	PowerPoint	OneNote	SharePoint	Teams	Yammer	
A 33 Admin	All apps									

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

	Microsoft 365 admin o	enter		
≡			MetaVis $>$ Search users, groups, settings or tasks	- Add card
ŵ	Home		Essentials	
8	Users	~		
	Active users		User management	
	Contacts			
	Guest users		User management	
	Deleted users		Add, edit, and remove user accounts, and reset passwords.	
۹٩	Groups	~		
	Billing	~		
Ð	Setup		Add user Edit user Reset password	I ~
Ø	Customize navigation			
	Show all			

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

≡		MetaVis Technologies		
ώ	Home	Active users		
8	Users ^	8 Add a user 🛛 🗐 User templates	Add multiple users A Multi-factor authentication	C Refresh J. Export Users
	Active users	r⊊ Add a dsei El Osei templates		O Kellesil [™] Export Osers [™]
	Contacts	Diculary name 1	lisamana	Licences
	Guest users	Display name	Username	Licenses
	Deleted users	~userName	~user@metavistech.com	Unlicensed

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

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

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

SourceUser, TargetUser

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

Remapping Content Types

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

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

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

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

>							×
roperties	lata						
specity target metad	lata						
Content Type: Docu	ument						~
Name *	<copy from:="" name="" value=""></copy>					<	v
Title	<copy from:="" title="" value=""></copy>					<	~
Created At	<copy at="" created="" from:="" value=""></copy>					<	~
Modified At	<copy at="" from:="" modified="" value=""></copy>					۲	v
Created By	<copy by="" created="" from:="" value=""></copy>					<	~
Modified By	<copy by="" from:="" modified="" value=""></copy>					<	~
Version Comments					< >	<	~
				* indicat	es a requi	red f	ielo
Save Template Load	d Template						
Generate Script	[] Schedule	< Back	Novt >	P1-1-1	6-1	- Al	

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

🍤 Navigator 👘 🖻 😓 🗁	— 🗆 🜆 м	igration 📑 Con	tents 🖷 P	rogress			
 Office 365 Diffice 365 	admin Jar	ina Trosman > D	ocuments				
 ♥ mtps://metavstech ● Sites Wifeoup ● OneDrive Sites ● OneDrive Sites ● OneDrive Sites ● One Corpc ♥ Docure > ● Docur	Admin Admin Copy Paste Create Bac Collect Sta Collect Sta Connect to Connect to Consect to Audit Obje Use CSV to	me Attachments Writing kup tistics Data Site Dowser S ML State Comment State Solution	Type Folder	Modified 2017-10-25 Ctrl+C Ctrl+V	9 09:20:33 PM 06:25:04 PM 01:08:34 AM 01:08:35 AM 06:25:04 PM 06:37:09 PM 06:37:09 PM 06:32:04 PM 12:36:39 PM 01:08:46 AM 01:08:38 AM 01:08:34 AM	SharedWith 2 12 16 17 19 14 9 13 21 15 3 4 6	Modified By Janna Trosman Janna Trosman
> 6Create	Permission Create Analysis Objects View in Na Compare V Show Site Create Sub	vigator With Map ssite		>	01:08:41 AM 01:08:46 AM 01:08:44 AM	5 5 8 7	Janna Trosman Janna Trosman Janna Trosman
<	Reports Pre-migrat Copy/Pror Properties Open Azur	ion Analysis note to New Site re Turbo Queue	• Collection)	Site Cont Site User SharePoi	ents Report(s Report(csv) nt Site and Li ete by Repor	csv) st Templates(csv) t

Site Content Options

\$	_		×
Summary			
Source Site Location			1 1
Site Title: Janna Trosman			
Site URL: https://metavistech-my.sharepoint.com/pers	Connect		
Include Sub-Sites			
(the report will include data for all sub-sites of the sele	cted site)		
Include Custom Fields			
(if custom fields are used in any list the report will disp	lay them)		
Include Versions			
Include Number of Versions			
Summary Only			
(the report will only show data summarized by lists)			
Save Report to:		Brow	vse
LI Generate Script	sh	Cance	1

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.

6	
Summary	
Mass Delete By Report	
Delete From Report:	Browse
Delete folders	
	Finish Cancel

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



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

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

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

6. Press Finish to begin the process.

Site User Report

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

Navigator			Administrator III Prograss	
			Administrator Brogress	
 Office 365 Inttps://metav Sites w/Group 	istech-admin.sharepoint.com oup		Reports	*
> S 1test (Ctrl+C Ctrl+V	Content Utilization Site Activity OneDrive for Business ontent tivity ettings prrelation	
	Use CSV to Permissions Create Analysis		> > > > > > > > > > > > > > > > > > > >	
	View in Diagram Locate On Diagram Compare With Show Site Map Create Subsite		>	
	Reports Pre-migration Analysis Opy/Promote to New Site C Properties Open Azure Turbo Queue	ollection	Site Contents Report(csv) Site Users Report(csv) SharePoint Site and List Ter Mass Delete by Report	nplates(csv)

Site and List Templates Report

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



Template Mapping

When moving Sites or Lists there is occasionally a need to change the underlying template for these objects. Some examples of these use cases are moving to a different version of SharePoint where a template may have been deprecated or simply trying to remove custom templates to reduce complexity. The application contains an option to do this in Advanced Option.

MY		_ 🗆 🗙
Copy Si	te Properties	
Profiles	Site-Default	*
		^
₽	Site Copy Options	
-		
	List Copy Options	
	Advanced Ontions	
	Overwrite ir file exists	
	Apply Filter Filter	
	Re-Map Users Load	
	☑ Re-Map Site and List Templates Load	
	Remove WEB Elements	
A	Look and Feel Options	~
🔄 Ge	nerate Script Schedule < Back Next > Finish	Cancel

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"

Quest Produc	ts - Solutions - Resources - Services -	Support - Trials Partners - Communities					م ۵
			Quest offices are closed on jain	wary 1, 2020. If you are encountering a Severity Level 1 iss.	e phone Technical Support.		
= Support Periol							tif Ny Downlaads (0
Become a portal pra	N > Support > ContactSupport						
🔒 Ny Account 🗠				Contact Suppor	rt		
My Groups				How can we help	?		
My License Assets							
Wy Products				Search Kaowedge Ease	×.		
My Profile							
My Barranty Assets							
Self Service Tools				Technical Support	rt Isses		
Notifications & Alerts							
Product Support	My technical support Requests						
Software Downloads	to the scalable	Pressa	1.105	anythy	Openes	Last Optimies	
Technical Documentation	Here All Technical Connect Descent						
User Forums	And a construct redshift						
video tucoriais							

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

Quest	Products v Solutions v Resources v Services v Support v Trials Partners v Communities v Q							
	Quest offices are closed on January 1, 2020. If you are encountering a Severity Level 1 issue phone Technical Support.							
Become a portal pro 🚯	Become a portal pro K My Downloads (0) My Service Requests							
My Service R	lequests							
Search By Product Requester	Service Request Number Title Keyword Search Reset Go Search	h						
Status Last Updated Account ID Severity	C Current Search Terms Current Search Terms Current Search Terms Current Search Terms Product: All Products Last Updated S0 Days Status: Open@ Investigating@ Updated by Customer@ Customer Response Requested@ Severity.All Se							
Reset Go Search	ID Title Product A Status Severity Opened Last Updated							
My Account My Groups My Leonse Acsess My Produces My Profile My Service Request My Profile My Service Tools Knowledge Base My Account Nortifications & Alterts Product Support Software Downloads Technical Documentation User Forums Video Tutorials Centact Us Leonsing Assistance	No matching records found Welcome To Your Quest Service Requests The My Service Request section provides a query service that allows you to filter and view the service requests that you or someone in your organization has created. The list of service request are displayed based on the filters listed under current search terms. The default view when the section is accessed is to display currently open request submitted by you. If you or not see any request alignized based on the filters listed under current search terms listed. Adding or Benowing Search Terms Add or remove search terms in the following ways: Adjust the current results by clicking on the red x next to each criteria under current search terms to remove the filter from the results. Under Search By in the top left expand the categories and select the criteria you want then press the go Search. Remember there are a number of pre-selected filters so make sur review each ategory. A the top in the gray bar filter by Service request Number or Keyword in the title. Viewing Results Wee Meaults in the following ways: A meaning of the Service Request are returned per page with each column sortable within the paged results. Clicking on the Service Request title will display details and allow to update service request status and add notes. For more information and Frequently Asked Questions about managing service request status Getting Started with My Service Request.	do re to						
Renewals Representative Submit a Service Request View All								

6. On the request form, select 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. Quest Products Solutions Resources Services Support Trials Partners Communities

	😰 Quest offices are closed on January 1. 2020. If you are encountering a Severity Level 1 issue phone Te
Support Portal	
Become a portal pro 🛛 🕚	Support > ContactSupport > CreaterTechnicalServiceRequest
Self Service Tools ^	Create Technical Service Request
Knowledge Base	
My Account	
Notifications & Alerts	Select Product Submit: Request
Product Support	
Software Downloads	Select Product
Technical Documentation	Provide the information of the product you're experiencing an issue with.
User Forums	Product*
Video Tutorials	Metalogia Essentials for Office 365 v Don't see your product?
0. 14. 4	
	Level 1 - Critical Business Impact Issue, it must be initiated by phone. Learn More Call Support.
My Groups	Consequences of the second secon
My License Assets	
My Products	Software Version*
My Profile	Pleaze Select v
My Marcanty Access	
wy warranty Assets	

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

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

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

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

Collateral to Send to Support

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

Screenshots - it is almost always easier to diagnose issues and collect information using pictures. Please try to send several screenshots with relevant data along with other logs.

System Log Files and Post migration XML Logs -

Post migration XML Logs - are generated with most operations and are displayed in the Log Viewer. All (or specific) items in the log can be selected and saved on your computer for later use.

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

select Log Manager, and then select Save logs.



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

Debug Mode

Selecting **Debug Mode** from the help tab will set 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.

	Ho	me	View	Migrator	File I	Manager	Drives	Security N	lanager	Term Store Manager	Admi	nistrator	Backup	Help
Activ	P vation	About	Prof	file Manager	O Support	? User Manual	Chec	k for Updates	📋 Debug N	lode 🕛 Reset "Do i de 📑 Log Manag	not Show" Jer 🔻			
						н	elp							

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.

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	\checkmark	
Вох	✓	✓
DropBox	✓	✓
Google Drive	✓	✓

File Share	\checkmark	√
Google Shared Drive	✓	\checkmark
Target		
Office 365 (SharePoint Online, OneDrive, Microsoft Teams, Office 365 Group Sites)	✓	✓
SharePoint On Prem	\checkmark	
Features		
OAuth		✓

User Logs and Log Viewer

User Logs and Where to find them

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

.log - is the log file updated whenever Essentials an operation. this file has a size limit of 1mb, once this limit is reached a new .log is created and the old one is renamed to .bak_0.log. Only 10 of these files will exist at one time, after which the first will overwrite itself.

bak_0.log	12/24/2019 4:44 PM	Text Document	1,003 KB
Bak_1.log	12/24/2019 4:44 PM	Text Document	1,003 KB
.bak_2.log	12/24/2019 4:44 PM	Text Document	1,002 KB
.keystore	12/24/2019 4:44 PM	KEYSTORE File	1 KB
📄 .log	12/24/2019 4:44 PM	Text Document	70 KB

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

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

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

Viewing Logs in the Log Viewer

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

The **Logs** option from the ribbon.



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

Hyper Mi	gration 📑 Contents	Register Progress				
1 - 1 >						
Нуре	r Migration Type	Started		Source Us	ser	
) 📥 Or	eDrive to OneDrive	2020-Feb	Show Logs			eport@metavistech
		Z) Zip Logs			
		R	Show Statu	is Report		
		6	Refresh Log	gs		
			Resume Co	ру Јођ		
		×	Delete User	Record	Delete	
		_				2

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

now history for last days : β		oading progres	5	×	
tarted	Duration	Operation	Source	Target	^
2020-Feb-05 17:43:58 MSK	34 m 51 s 178 ms	Backup Sha	Sharepoint Site	Backup	
2020-Feb-05 17:57:19 MSK	3 sec	Item Import	E:\	https://metavistec	
2020-Feb-05 17:57:06 MSK	less than a seco	Remove Item	https://metavistec		
2020-Feb-05 17:56:49 MSK	7 sec	Item Import	E:\	https://metavistec	
2020-Feb-04 18:18:13 MSK	2 m 8 s 132 ms	SharePoint	Sharepoint Site	Sharepoint Site	
2020-Feb-04 17:49:08 MSK	2 m 16 s 833 ms	Refresh (To	Sharepoint Site	Sharepoint Site	
2020-Feb-04 18:05:10 MSK	1 m 14 s 500 ms	OneDrive to	OneDrive for Busin	OneDrive for Busin	
2020-Feb-04 17:49:08 MSK	9 m 31 s 968 ms	SharePoint	Sharepoint Site	Sharepoint Site	
2020-Feb-04 16:49:32 MSK	8 m 19 s 308 ms	SharePoint	Sharepoint Site	Sharepoint Site	
2020-Feb-04 16:45:40 MSK	1 m 56 s 689 ms	SharePoint	Sharepoint Site	Sharepoint Site	
2020-Feb-04 16:13:51 MSK	2 m 9 s 295 ms	SharePoint	Sharepoint Site	Sharepoint Site	×
Refresh Azure Turbo Logs	_				Close

		search by name
ource : Sharepoint Site	Started : 2020-Feb-10 12:24:03 EST	
arget : Sharepoint Site	Duration : 3 m 41 s 107 ms 🔞	
/ersion : 2.4.1.202002061523	Total Size (MB) : 62.836	
)peration : SharePoint Online to SharePoint Online (Total report) Total Items : 28 (25/0/0/3) 🔞	
Image: Second	m/sites/SPO to SPO onenote_copy_azure (OAuth) to h	https://metavistech-portal1.sharepoint.com/
Failed During Current Round	folder for notebooks/Openate inside subfolder/Uptitl	ed Section one - Premature and of Content-
Site Pages/Home.aspx - Item does n	ot exist. It may have been deleted by another user. Erro	prCode: -2130575338
Site Pages/How To Use This Library.	aspx - Item does not exist. It may have been deleted by	another user. ErrorCode: -2130575338
✓ □ Successfully Copied During All Copy Ro	ounds	
🗌 📀 Documents/Custom notebooks		
🗌 📀 Documents/Custom notebooks/One	enote inside a folder	
🗌 🔮 Documents/Custom notebooks/One	enote inside a folder/OneNote_RecycleBin	
🗌 🔮 Documents/Custom notebooks/One	enote inside a folder/OneNote_RecycleBin/OneNote_D)eletedPages.one
Documents/Custom potebooks/Onc	enote inside a folder/OneNote_RecycleBin/OneNote_R	RecycleBin.onetoc2
Documents/Custom notebooks/One Documents/Custom notebooks/One	enote inside a folder/Open Notebook.onetoc2	
Occuments/Custom notebooks/One Occuments/Custom notebooks/One Occuments/Custom notebooks/One	enote inside a folder/Open Notebook.onetoc2 enote inside a folder/Section to overwrite.one	
Occuments/Custom notebooks/One Occuments/Custom notebooks/One Occuments/Custom notebooks/One	enote inside a folder/Open Notebook.onetoc2 enote inside a folder/Section to overwrite.one	>
Documents/Custom notebooks/One Occuments/Custom notebooks/One Occuments/Custom notebooks/One	enote inside a folder/Open Notebook.onetoc2 enote inside a folder/Section to overwrite.one	>

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.

🤌 Log View	er							×
Select All	Deselect All	All ~	View in Browser	View Details	Statistics	Analyze Errors	search by name	3
Source : E:\Testing\small files Started : 2020-Feb-06 14:28:21 MSK								
Target : http:	s://metavisted	h.sharepoint.com/sit	tes/natasite/Docum	nents Duration	: 42 sec			
Version : 2.4.	1.20200204134	10		Total Size	(kB): 193.5			
Operation : I	tem Import			Total Item	ns : 49 (18/0/31/0	0) 🕜		
Operation: Item Import Total Items: 49 (18/0/31/0) Image: Strength Strengthestart Strength Strength Strength Strength Strengthesth							~	
Save As	Save As 🗄 Load 💿 History Close							

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**.

summary	×
Export to file : E:\map\fs\1.csv completed	
Do not show this message again	
	Open File OK

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

	AutoSave 💽 🖪 🥠 🗸 🖓 🗸			1.csv - Excel				
Fi	ile Home Insert Page Layout Formulas D	ata Review View	Add-ins Help	LOAD TEST Team $ ho$ Search				
ſ	Calibri • 11 • A^ A	≡ <u>=</u> ≫. eb	Wrap Text Gen	eral - Normal	Bad			
Pa	$\begin{array}{c c} & & \\ \hline & \\ aste \\ & \\ & \\ & \\ & \\ & \\ & \\ & \\ & \\ & \\ $	≡≡≡ ₫	Merge & Center 🝷 \$		Explanatory			
	Clipboard r ₂ Font r ₃	Alignment	r _a	Number 🕞	S			
D1	D19 V : X V fx Testing/small files/NOTE - Copy (7) - Copy - Copy.docx							
	Δ	B	с.	D	F			
1	Source File	Target SharePoint Site	Target SharePoint List	SharePoint File Name	ContentType Lo			
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**.

 natasite Iists III Content and III Content and 	Structure Reports	> >>> >>>>>>>>>>>>>>>>>>>>>>>>>>>>			
 G Form Microl OOB S Reusal Site As Site C 	Copy Paste Delete From SharePoint View Contents Filter List	Ctrl+C Ctrl+V	M CLIPCE ssentials CCH ons nap		
> Site Co > Site Pa > The Style L > Suivi_ > Workf	View In Browser Audit Object Use CSV to	>	BC Intex Διπh 및 Upload/Copy Content		
Subsites	Create Analysis Objects	>	Tag Content Upload Public Folders Download Content to File System ystem Volume Information		
	List Contents Report(csv) Properties		EMP esting orkflows		

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

•		- 0	×					
Upload or Copy Content using CSV								
Select CSV file and advanced optic	ons							
Profiles Upload Default			~					
Profiles Opload-Default			Ť					
File Location :								
C:\Users\JTrosman\OneDrive - Q	uest\Desktop\CSV for E	ssentials\Essentials 1	ēst Fi					
Source File	Target SharePoint Site	Target SharePoint Li	st ShareP					
C:\Documents and Settings	-	Corporate	Docum					
<			>					
Check All Uncheck All Check	Connection							

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

Use Charset for Encoding f	ile windows-1251 \vee
Delete item(s) from Sou	rce
Use Created / Modified	Properties from Spreadsheet 🛛 😨
🖂 Overwrite if file exists 🧕	
Incremental copy	
Defer Required Fields	0
Copy Permissions 🔞	
Include Versions	
Include All Versions	
🔿 Include most recent Ve	arsions 10
🗆 Fashla Azura Turka Mi	

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.



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.

	Arch	hive		Report		View					
	Con	vtents 🜠 Hyp	er Back	up				@ 📴	X 🕈 🔂 🤇	0 - 0	Backup Navigator
											✓ ✓ Ø backup 3 O Oct-19-2018 11:00:09 AM (Full)
		Hyper Backup	Type	Started		Source User			Target Location		Oct-19-2018 11:19:12 AM (Full)
	0	😑 Backup Sha	rePoint	2018-Oct-17	16:07:47 MSK	https://metavistech	sharepoint.com/site	ts/HBackup01	backup 2-Oct-17-	2018 04:0	backup 2
1.6	0	😑 Backup Sha	arePoint	2018-Oct-19	13:44:27 MSK	https://metavistech	sharepoint.com/site	es/HBackup01	backup 3-Oct-19-	2018 01:4	, a coupe
ш											

Hyper Backup Tab

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



Column Title	Description
lcon	 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 cannot 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 the Quest Metalogixc Essentials enterprise application 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.

		16	
Connection	Copy Subsites: Copy Views:	Hyper Mode Settings	
	Copy Features: Copy Forms:	OAuth:	Hyper Backup:
Migration	Copy Hidden Fields: Copy Workflows:	Generate Status Report:	Classic Mailbox Backup:
ail Notification	Remove Folder Structure:	Delete Report Jobs:	Backup System Lists:
Advanced	Gonerate Failed Items Files @Manual Automatic	#Parallel Threads:	35
		#Azure Threads:	15
	Content Type Load Limit: 400	Retry:	10
	Regional Date Format:		is not responding
	Custom Identity Provider:		Import did not complete
	Change Log Storage Location		Can not create lookup fields because list(s) doesn't exists or
	File System:	Auto Resume Rules: target Parent content type does not e	Parent content type does not exist
	Cloud:		
	Path Overflow Option	í.	
	Truncate Long Path:	Temporary Files Location:	
	Max Length Before Overflow: 200	#Jobs per Tab:	100

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.

Connect	t to SharePoint		
Connecting	g to [https://metavi	stech-admin.sh	arepoint.com]
User	provide a start	tach com	₽
Password	••••		
Domain			
	Using Proxy	Using OA	ıth
	Connect	Ca	ancel

?

Claims

- **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.

wietalogix Essential Wigration Client quest.com

This app would like to:

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



Consent on behalf of your organization

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

Accepting these permissions means that you allow this app to use

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

wetalogix Essential Wigration Client quest.com

This app would like to:

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



Consent on behalf of your organization

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

Accepting these permissions means that you allow this app to use

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

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

Domain			
	Use Proxy Proxy Configuration	✓ Using OAuth	

OAuth and Claims

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

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

Work with OAuth and Claims

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

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



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

	SharePoint Admin URL: https://metavistech-admin.sharepoint.com		
		Enter a valid SharePoint Administration URL and then press Connect	
3. Provide a URL for the target, and click Connect			
	SharePoint Admin URL: https://metavis	tech-admin.sharepoint.com	Connect 📀
		Enter a valid SharePoint Administration URL and then press Connect	

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

🤌 Conne	ct to SharePoint	_	×
Connectir	ng to [https://metavistech-	admin.sharepoint.com]-	
User	proved the second of	-	₽
Password			
Domain			
	Using Proxy	Using OAuth	
	Connect	Cancel	
	Claims	0	

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

-			
	Microsoft		-
	← metaqa2@metadrive.c	onmicrosoft.com	and the second
	Enter password		The second
	•••••		
Martin California	Forgot my password		
		Sign in	
	19-7-1 X	Terms	of use Privacy & cookies ···
Connect		Can	ncel

6. Consent to the permissions and click Accept.



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



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

OAuth Limits

NOTE:

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

Resume Jobs

Resume Migration Job

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

To resume copy jobs do the following:

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

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

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

resu 🔊	me Hyper Migration	×
?	There are indices left from previous migration. Press "Resume" if you want to Resume "Clear" if you want to clear database and run migration from scratch.	migration. Press
Note: "Clear failed	"Resume" will proceed failed migration for users selected on next screen of copy wizard " will initiate new migration for users selected on next screen of copy wizard and delete migration after Finish button.	after Finish button. information about
R	esume Clear	Cancel/View Jobs

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

UX 700 - -

configuration.

6) ()	\mathbf{X}	7	Ø	Ø	

	Hyper Backup Type	Started	Source User	Target Location
\odot	Backup SharePoint	2018-Oct-29 12:52:18 MSK	https://metavistech.sharepoint.com/sites/HBackup01	HBackup01-Oct-29-2018 1
\bigcirc	Backup SharePoint	2018-Nov-15 13:31:12 MSK	https://metavistech.sharepoint.com/sites/nonline	1234444-Nov-15-2018 13-3
\bigcirc	Backup SharePoint	2018-Nov-15 13:34:56 MSK	https://metavistech.sharepoint.com/sites/nonline	dddddd-Nov-15-2018 13-3
	Backup SharePoint	2018-Nov-15 15:45:22 MSK	https://metavistech.sharepoint.com/sites/nonline	dddddd-Nov-15-2018 15-4
	Backup SharePoint	2018-Nov-15 16:03:43 MSK	https://metavistech.sharepoint.com/sites/nonline	tert3-Nov-15-2018 16-03-3
\bigcirc	Backup SharePoint	2018-Nov-15 15:56:22 MSK	https://metavistech.sharepoil 🙆 Refresh Logs	-Nov-15-2018 15-56-1
\bigcirc	Restore SharePoint	2018-Nov-15 13:37:30 MSK	dddddd-Nov-15-2018 13-34 5 🕕 Resume Backup	://metavistech.sharep
			🔀 Delete Job	

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

Auto Resume

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
--

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

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

Admin Pool

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

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

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

Office 365 Connection Parameters							
SharePoint Admin URL:	https://metavistech-admin.sharepoint.com	+ Admin 🔞					
	Successfully connected to SharePoint Admin URL						
	Connected admins: nataadmin@metavistech.com: nataadmin2@metavistech.com						

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

Tracking

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

2019-02-12 13:54:20 :: ModalContext	:: 0 :: 0/0	:: Prepare Resources	:: 0 ms	:: No Actions
2019-02-12 13:54:20 :: ModalContext	:: 0 :: 0/0			:: (0) Connecting under - adminl@quest.com
2019-02-12 13:54:22 :: ModalContext	:: 0 :: 0/0	11		:: (1) Connecting under - admin2@quest.com
2019-02-12 13:54:23 :: ModalContext	:: 0 :: 0/0	11		:: (2) Connecting under - admin3@quest.com
2019-02-12 13:54:25 :: ModalContext	:: 0 :: 0/0	11		:: (3) Connecting under - admin4@quest.com
2019-02-12 13:54:27 :: ModalContext	:: 0 :: 0/0	11		:: (4) Connecting under - admin5@quest.com
2019-02-12 13:54:32 :: ModalContext	:: 0 :: 0/0	11		:: <u>https://quest-my.sharepoint.com/personal/user_quest_com</u>
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@guest.com by CSOM
2019-02-12 13:54:34 :: hyper-process-thr	ead-0 :: 1 :: 0/17	:: Retrieve Children	:: 7 ms	:: D:/buttons
2019-02-12 13:54:35 :: hyper-process-thr	ead-2 :: 2 :: 1/17	:: Download (184 b)	:: 0 ms	:: D:/buttons/Bord Report.png
2019-02-12 13:54:36 :: hyper-process-thr	ead-1 :: 2 :: 1/17	:: Create Object	:: 757 ms	:: (4) (4) (1) Documents/test/folder
2019-02-12 13:54:36 :: hyper-process-thr	ead-1 :: 2 :: 1/17	:: Get Core Properties	:: 15 ms	:: D:/buttons/folder
2019-02-12 13:54:36 :: hyper-process-thr	ead-2 :: 2 :: 1/17	:: Upload (184 b)	:: 893 ms	:: (2) Documents/test/Bord Report.png
2019-02-12 13:54:36 :: hyper-process-thr	ead-2 :: 2 :: 1/17	:: Get Core Properties	:: 2 ms	:: D:/buttons/Bord Report.png
2019-02-12 13:54:37 :: hyper-process-thr	ead-1 :: 2 :: 1/17	:: Set Core Properties	:: 1 s 150 ms	:: (1) Documents/test/folder
2019-02-12 13:54:37 :: hyper-process-thr	ead-1 :: 2 :: 1/17	:: Retrieve Children	:: 0 ms	:: D:/buttons/folder
2019-02-12 13:54:37 :: hyper-process-thr	ead-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-thr	ead-2 :: 1 :: 3/17	:: Download (793 b)	:: 0 ms	:: D:/buttons/Clear.png
2019-02-12 13:54:38 :: hyper-process-thr	ead-2 :: 1 :: 3/17	:: Upload (793 b)	:: 430 ms	:: (1) Documents/test/Clear.png
2019-02-12 13:54:38 :: hyper-process-thr	ead-2 :: 1 :: 3/17	:: Get Core Properties	:: 1 ms	:: D:/buttons/Clear.png
2019-02-12 13:54:38 :: hyper-process-thr	ead-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).

终 Log Viewer		×
Select All Deselect All All ~	View in Browser View Details Statistics Analyze Errors	
Source : Dropbox	Started : 2018-May-01 09:24:46 EDT	
Target : OneDrive for Business	Duration : 36 s 264 ms	
Version : 2.1.4.201804300743	Total Size (MB) : 1.467	
Operation : Dropbox to OneDrive (Total report)	Total Items : 10 (10/0/0/0) 🕡	
✓ 🗌 🗹 Mass migration from joe@metavisto	ech.com to jtrosman@metavistech.com by CSOM	
🗸 🗸 🔽 Successfully Copied During All C	Copy Rounds	
123.txt - Permissions: OK		
IT - Permissions: OK		
IT/enum.txt - Permissions: O	K	
II/test.txt - Permissions: OK		
I/test2.txt - Permissions: OK		
library - Permissions: OK	h Demining OK	
Ibrary/document o level 0.tx	t - Permissions: OK	
Test - Permissions: OK		
□ □ □ Test/1.00 Folders(3/0/0/0)	Duration:36 c 264 mc Migrated Size 1 /67 MB	
	Sulation.50 3 204 ms inigrated Size 1.407 mb	
Save As 📳 Load 💿 History	Reprocess Failed Items 🔞 Clos	e

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

The states of Post Migration logs can vary as follows:

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

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

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

Delete User Record

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

To Delete user records do the following:

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

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

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

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

Refresh Azure Logs Policy

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

NOTE:

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

To enable auto refresh post migration logs do the following.

0 X V 0 0 - 0

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

 		0			
Con	tents 🖷 Progress 🛜 Hyper Migration 🤡	Azure Turbo Jobs			💿 🔂 🔍 🗙 🖣 🔯 🥝 🗖 🗖
	Hyper Migration Type	Started	Source User	Target User	Summary Record
0	Mass Migration File System to OneDrive	2018-May-01 09:32:14 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\spsadmin	jtrosman@metavistech.com	
0	Mass Migration File System to SharePoint	2018-May-01 09:37:02 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	https://metavistech-my.sharepoint.com/personal/admin_metavistech_com/Corporate2016/SharedDocuments/	
. (Mass Migration File System to SharePoint	NOT STARTED	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	https://metavistech-my.sharepoint.com/personal/adorofeev_metavistech_com/Corporate2016/SharedDocuments/	
0	Mass Migration File System to SharePoint	2018-May-01 09:52:31 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	https://metavistech-my.sharepoint.com/personal/amorgan_metavistech_com/Corporate2016/SharedDocuments/	
0	Mass Migration File System to SharePoint	2018-May-01 09:37:02 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	https://metavistech-my.sharepoint.com/personal/admin_metavistech_com/Corporate2016/SharedDocuments/	
	Mass Migration File System to SharePoint	NOT STARTED	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	https://metavistech-my.sharepoint.com/personal/adorofeev_metavistech_com/Corporate2016/SharedDocuments/	
0	Mass Migration File System to SharePoint	2018-May-01 09:52:31 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	https://metavistech-my.sharepoint.com/personal/amorgan_metavistech_com/Corporate2016/SharedDocuments/	
0	Mass Migration File System to SharePoint	2018-Jun-18 10:55:49 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	https://metavistech-my.sharepoint.com/personal/jtrosman_metavistech_com/Corporate2016/SharedDocuments/	
0	Mass Migration Dropbox to OneDrive	2018-May-01 09:24:54 EDT	joe@metavistech.com	jtrosman@metavistech.com	Files(6/0/0/0), Folders(3/0/0/0) Duration:36

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

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

Filter tab

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

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

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

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

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

Refresh Tab

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

Home	View	Mig	irator	File Manag	per D	rives	Security Ma	nager Term St	ore Manager	Administrator	Backup	Help »										
۵		3	box	\$		Ê		A 2	2	10 n	2	bx ?	2	→X	1							
OneDrive Sharel	Point G	oogle	Box	Dropbox	Сору	Paste	Select All	Copy Google Dr	ive Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box C	opy Dropbox	User Mapping Report	Logs	Azure Turbo						
🧐 Navigator		1	Hyper Mi	igration		capbour					citoris								🕼 🗇 😼 🕕 🕽	< 🍭 🍸	0 <mark>0</mark> -	
> 🗁 Corporate	∃ € ₽	<	1-1	>																		
> 💱 Dropbox > 🥃 OneDrive			Hype	er Migration ffice 365 Gr	Type oup to O	ffice 365	Start Group 2019	ed J-Dec-16 10:22:0	Source User 123@metavis	tech.com (OA	Target User 123@meta	wistech.com	Su (OA Fil	mmary Record es(0/0/0/0), Fold	ers(0/0/0/	0) Duration: 0	ms Migrated Size 0	Duration IN PROGR				

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

Delete Tab

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



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

Successful Paused Failed		
		Save logs
	ОК	Cancel

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

H	ome Vie	ew N	ligrator	File Mana	ger	Drives S	ecurity Manag	er Term Store	Manager	Administrator	Backup	Help	»			
	5>	8	box	\$		Ê	*	<u>A</u>		D 🤈	2	box <mark>2</mark>	*	2		
OneDrive	SharePoint	Google	Box	Dropbox	Сору	Paste	Select All	Copy Google Drive	Copy File Sha	re Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbo>	 OneDrive Management 	Logs	Azur
Connect To Clipboard										A	ctions					View
烙 Navigato	r 🗉 '	€ } ▽		🔀 Hyper N	ligration	Content	s 🔫 Progres	s					💶 🗠 😼 (II) 🗙 🍭 🍸	Ø	- 0
> 🗁 Corp > 😻 Dropi	orate box			< 1-1	>											
	Hyper Migration Type							Started	So	urce User	Targe	et User	5	Summary Record		
	💿 📥 Mass Migration OneDrive to OneD.							2019-Aug-08 0	8:39:29							

Clean Tab

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

Ho	ome Vie	w M	igrator	File Man	ager	Drives S	ecurity Manage	er Term Store	Manager	Administrator	Backup	Help	>>			
	5>	8	box	\$				<u>A</u> 2	2	D 🤉			*			
OneDrive	SharePoint	Google	Box	Dropbox	Сору	Paste	Select All C	opy Google Drive	Copy File Shar	e Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	OneDrive Management	Logs	Azur
	Co	nnect To				Clipboard				A	ctions					View
烙 Navigato	r 📃 🗧	≩ ,	- 8	🛜 Hyper I	Migration	Content	s 🔫 Progress	s					💶 l 🔂 🚺	D 🗙 🍭 🍸	00	- 0
> 🗁 Corpo > 💱 Dropi	orate box			< 1-1	>											
				Нур	er Migrat	ion Type		Started	Sou	urce User	Targe	et User	5	Summary Record		
				🛛 🔿 📥 🛚	/lass Migr	ation OneDri	ve to OneD	2019-Aug-08 0	8:39:29							

You must click refresh once the removal has completed.

F	lome Vi	ew 1	Migrator	File Mana	ger	Drives Se	curity Manag	jer Term Store	Manager	Administrator	Backup	Help	»			
	5>	8	box	\$		Ê	*	<u>A</u> 2		₽ <u></u> ?	2	box 7	*	2		¢
OneDrive	SharePoint	Google	e Box	Dropbox	Сору	Paste S	elect All	Copy Google Drive	Copy File Share	e Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	OneDrive Management	Logs	Azur
	C	onnect To)			Clipboard				A	ctions					View
烙 Navigat	or 📃			🔀 Hyper N	ligration	Contents	Progree	55					💶 🗇 😼 🤅	D 🗙 🍭 🍸	Ø	- 0
-> 🗁 Corj -> 😻 Droj	porate pbox			< 1-1	>											
	Hyper Migration Type							Started	Started Source User Target User Summary Recorr					ummary Record		
				💿 📥 M	ass Migra	tion OneDri	ve to OneD	. 2019-Aug-08 0	8:39:29							

Report Tab

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:

Metalogix Essentials for Office 365 (Enterprise Edition +)		– a ×
Home View Migrator File Manager Drives	es Security Manager Term Store Manager Administrator Backup Help »	
🔺 🔹 🛃 🔤 😻 📫 🕯	🛍 🗔 🖕 🍢 😰 🏖 😰 😰 🖉	
OneDrive SharePoint Google Box Dropbox Copy P	Paste Select All Copy Google Drive Copy File Share Copy My Sites Copy Tenant Copy Box Copy Diopbox OneDrive Logs Azure Turbo Management	
Connect To Clip	lipboard Actions View	
🧶 Navigator 📄 🧐 🗸 👻 🗖	3 😿 Hyper Migration 📑 Contents 🖶 Progress	💷 🗠 📴 📜 🗙 🔻 🔯 🖉 🗖
> 😂 Corporate > 💱 Dropbox		
	Hyper Migration Type Started Source User Target User Summary Record Duration	
	III A Mass Migration OneDrive to OneD.	

This will generate a report which looks like the following:

Fi	le <u>Home</u> ir	nsert Draw	Page Layout Formu	las Data	Review V	iew Help		nat you want to do										යි Share	🖓 Comr
	Paste 💰	Calibri B	× 11 × A*	∧* = <u>A</u> - =	Ш	= *·	èb Wrap += █ Merge	Text : & Center *	General \$~	% 9		Conditions Formatting	I Format as Table *	Cell Styles *	Insert Delete	Format Σ · A Z Σ Σ Σ Σ Σ Σ Σ Σ Σ Σ Σ Σ Σ	rt & Find & ter * Select *	Share This File *	Vebex
	Clipboard 12		Font	6		Alignme	nt	6		Number	6		Styles		Cells	Edit	ing	Webe	×
A1		× -	x Source																
	A		в	с	D	E	F		G		н	1.1	J	к	L	м	N	0	Р
1	Souro	e	Target	State				Files		1.					Fo	olders		Duration	Size
2				Successfu	successful	information	warning total	warning becaus	e ot owne	rsnip warr 0	iing because of s	ize failed	successful	ntormation 6	warning total	warning because of owner:	snip failed	31 s 341 ms	0 bytes

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:

烙 Metalogix E	ssentials for	Office 365 (Enterpris	e Edition +)																		
Hom	e View	Migrat	tor I	File Manager	Drives	Security Manager	Ter	m Store Manage	er A	dministrator	Backup	Help	*	•								
5>	Ð	$\textcircled{\ }$				£ 🔺		Ŧ	1	🕢 Refresh E	ackup Navig	ator										
SharePoint	To Local Storage	To Cloud Storage	Update	To Original Location	Impo	ort from import from ocal Cloud	Pro	ject Summary	Logs													
Connect To		Backup		Restore		Archive		Report		View												
烙 Navigator				🖻 😫 🗸 '	- 8	🛃 Hyper Backup	^o Conte	ents										1	I 🗇 🗉	X 1	7 0 (<u>o</u>
> 🤃 Corpora	ate x					< 1 - 79 >																
						Hyper Backup	Туре	Started		Source Use						Target Locati	on					^
						💿 🦲 Backup On	eDrive															
						💿 🧿 Backup On	eDrive															
						🖉 🔵 Backup On	eDrive															
						Backup On	eDrive															
						🥥 👅 Backup On	eDrive															

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.

👕 Contents 🖷 Progress 🛛 🚼 Hyper Migration		×
Download Job: https://metavistech-admin.sharepoint	.com	
Rogelio Buenviaje: WebID: {7AA50170-C585-4801-B8F2	2-9A39054A4D01)	
	Download Job: https://metavistech-admin.sharepoint.com —	
	Rogelio Buenviaje	
	WebD: (7AA50170-C585-4801-88F2-9A39054A4D01)	
	Always run in background	
	Run in Background Cancel Details >>	

Status Report

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

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

4 Office 365 Group to Office 365 Gr	roup	2019-Dec-03 13:09:43 MSK	nikolaev
Office 365 Group to Off	roup	2019-Dec-03 13:59:06 MSK	nikolaev
OneDrive to OneDrive	0	Show Logs	iata@n
OneDrive to OneDrive		Zip Logs	iata@n
lacktriangle Contend and Conte		Show Status Report	lata@n
OneDrive to OneDrive			ata@n
OneDrive to OneDrive	6	Refresh Logs	ata@n

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

Organize	New	Open
Release > .metadata > Status Rep	oorts	
↑ Name		
TestMigrationMon I	Dec 16 13-36-08 MSK 2019_1.	xlsx

The report will look as follows:

		•	TestMigrationMon Dec 16 13-	-36-08 MSK 20	19_1.xlsx - E	ixcel				
File Home Insert Page Layout Formulas Data	Review View Add-ins	Help LOAD TEST Tea	m 🔎 Tell me what yo	ou want to do						
Calibri ▼ 11 ▼ A^ A [×] =	≡ = ॐ - ab Wrap Text	General *		ormal	Bad	C	Good	Neutral	Calcul	ation
Paste v ≪ Format Painter B I U v · · · · · · · · · · · · · · · · · ·	Ξ Ξ Ξ Ξ 🗮 🖽 Merge & Cen	ter • \$ • % 9 50 -00	Conditional Format as Formatting • Table •	neck Cell	Expland	ntory	Followed	d Hy Hyperli	nk Input	
Clipboard 12 Font 12	Alignment	G Number G	5			Styles	5			
C30 • : × ✓ fx										
A	В	С		D	E F	G	н	1	J	K L
1 State	Source	Target	:	Object Suc	cess Info	Warnings	Failed	Duration	Migrated Size	
2				Files	3 2	2	2 1			
Failed		and the second second second		Folders	2 0	0	0	2 m 34 s 624 ms	^{12M} 3	
4										
5 Object Path	Status 💌	Details	A 							
6 Ver/Metalogix_Essentials_Source_Code_2.2.docx	Not Started									
asdasd/Team Directory/FQA.docx	Not Started									
8 Ver/Q1 Reports.docx	Not Started									
9 Fetch Root for	Successful									
123/Regression_Extertal_User_Non_Owned_Folder_by_QA2	Successful									
1 123/Regressions_Permissions	Successful									
49000	Successful									
3 1000	Failed	Access denied. You do not have	permission to perform the	his action or	access this	resource.	ErrorCoc	de: -2147024891		
4 NTestText.aspx	Warning	A file with the name SitePages,	NTestText.aspx already e	xists. It was	last modif	ied by i:0#	.f memb	pership devuser	@appdevsite.o	nm on 16 Dec 20
5 dasdasdas/Ver/Q1 Reports.docx	Warning	A file with the name Shared Do	cuments/dasdasdas/Ver/	Q1 Reports.	locx alread	dy exists. If	t was las	t modified by i:0	#.f membershi	p a.oskin@appd
4										
6 5										
→ → → → → → → → → → → → → → → → → → →							4			

The contents of the report are:

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

Home Tab

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



Connecting To SharePoint and OneDrive for Business

Quest Essentials is optimized for migrations to and from Microsoft 365. While it used to be possible to migrate to/from SharePoint on premises, Quest recommends that you use Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

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

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



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

Shar	ePoint Connection Wizard				×
aref	Point Connection Wizard				
Shar	ePoint URL is invalid				
lame	On-Prem Farm				0
ype	On-premises Farm (Central Administration requi	red)		~	0
RL	1			~	0
r	Discover Site Collections				
	(Central Admin access is required to view and sele	ect existing site col	llections)		
Loa		\bigcirc			
	d Entire Sub-Site Structure (Slower)				
Loa	d Entire Sub-Site Structure (Slower) d Entire Sub-Site Structure and Objects (Slowest)	0			
Loa	d Entire Sub-Site Structure (Slower) d Entire Sub-Site Structure and Objects (Slowest)	0			
Loa	d Entire Sub-Site Structure (Slower) d Entire Sub-Site Structure and Objects (Slowest)	0			

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

Select Web Application					×
Select Web Application					
Central Admin URL: http://s-s	p16-xprod:10	00/default.aspx		Conr	nect
Server Farm Admin: SHAREPO	DINT\system				
	Connected t	o Central Admin UR	ar I		
Web Application Name		URL			
Corporate 2016		http://s-sp16-	xprod:2016/		
SharePoint - 80		http://s-sp16-	kprod/		
SharePoint Central Administra	tion v4	http://s-sp16->	xprod:1000/		
	< Back	Next >	ОК	Cance	el

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

select Web Application —		×
Select Site Collection		
Server Url: http://s-sp11 v		
URL ^		
/sites/Corporate2016		
URL Search search reset		
Getting users		
		×
Last update of cache file was on: Temporary cache file not found		
< <u>B</u> ack <u>N</u> ext > OK	Cance	I

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



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

Quest Essentials is optimized for migrations to and from Microsoft 365. While it used to be possible to migrate to/from SharePoint on premises, Quest recommends that you use 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.

Select Web Application			П	×
elect Web Application			_	
ciect web Application				
Central Admin URL: http://s-sp16-xprod:1	000/default.aspx		Conr	nect
Server Farm Admin: SHAREPOINT\system			1	
Connected	to Central Admin URL			
Web Application Name	URL			
Corporate 2016	http://s-sp16-xprod:2016/	1		
SharePoint - 80	http://s-sp16-xprod/			
SharePoint Central Administration v4	http://s-sp16-xprod:1000/	1		
< Back	Next > OK		Cance	-

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

select Web Application -		×
Select Site Collection		
Server Url: http://s-sp11 v		
URL		
/sites/Corporate2016		
URL Search search reset		
Getting users		
		×
Last update of cache file was on: Temporary cache file not found		
< <u>B</u> ack <u>N</u> ext > OK	Cance	I

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



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



Connecting to OneDrive

If you wish to connect toan Office 365 temant, then follow these steps:

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



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

🤌 Sha	rePoint Connection Wizard					×
Share	Point Connection Wizard					
🔕 Plea	ase Enter Project Name					
Name						0
Туре	Office 365 Tenant (Tenant Administration require	ed)) v	0
URL					\sim	0
Or	Discover Site Collections 📀					
	(Central Admin access is required to view and sele	ect exist	ing site coll	lections)		
Loa	ad Entire Sub-Site Structure (Slower)	0				
Loa	ad Entire Sub-Site Structure and Objects (Slowest)	?				
			<u>F</u> inish	ı	Cano	el:

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

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

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

烙 Connec	t to SharePoi				Х			
Connectin	g to							
User						2		
Password								
Domain								
		Use Pro	×y nfiguration					
	Connect			Cancel				
	Claims		0					

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

Select Web Application	Select Web Application							
Select Web Application								
Select a Web Application								
Central Admin URL: https://m	Connec	t						
Server Farm Admin: i:0#.f men								
Connected to Central Admin URL								
Web Application Name	URL							
SPO Sites								
Sites w/Group								
OneDrive Sites								
Check All Uncheck All								
		OK	Cance	l				

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**.

\$	_		×
Select SPO Site(s)			
			^
I have involve in the second care later. Without			
https://www.intention.it.ukurepoint.com/ukur.it.gk			
International data in the second construction in			~
<			>
URL Search search reset Check All Uncheck All			
Getting sites			
Last update of cache file was on: 03/06/20 11:22 AM			
	Ж	Can	cel

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

🤌 Dow	/nload Status	×
1	Download Completed for project "Office 365"	
Do	not show this message again OK	1
-		-
	Run in Background Cancel	

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 Essentials user interface.



Delete

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

H	lome	View	Migr	ator	File Manager	Drives	s Securit	y Manager 💦 1	Term Store Mana	ger
SharePoir	nt OneD	rive	Сору	Paste	Select All	8	Manage	➔ Import ➡ Export ► f Load from F	File	
Connect To				Clipboa	rd	Delete	Term Store	Project	View	
Right clicl	Right click on a job and select Show Logs.									
🛃 Нуре	r Backup	Co	ontents							



Either option will open the Log Viewer:

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

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

Description of functionality:

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

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

History

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

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

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

History

Show history for last days : 5		oading progres:	5		
Started	Duration	Operation	Source	Target	
2019-Jul-22 12:11:03 EDT	17 s 197 ms	Initial Proce	Backup	OneDrive for Busin	
2019-Jul-22 12:05:15 EDT	less than a seco	Remove Ou	Archives	All Backups	
2019-Jul-22 11:56:31 EDT	less than a seco	Remove Ou	Archives	All Backups	
2019-Jul-18 11:42:32 EDT	less than a seco	Remove Ou	Archives	All Backups	
2019-Jul-18 11:33:32 EDT	less than a seco	Remove Ou	Archives	All Backups	
2019-Jul-18 08:16:05 EDT	less than a seco	Remove Ou	Archives	All Backups	
2019-Jul-18 08:08:45 EDT	less than a seco	Remove Ou	Archives	All Backups	
Load Refresh Azure Turbo Logs					

Close

Х

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

Migration Analysis Tab

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

SharePoint Pre-Migration Report

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



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

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

Farm High Level Migration Analysis

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

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

	Home	Migration Analysis	View Mig	grator File Manage	r Drive	es S	ecurity Manag	ler	Term Store Mana	iger Ad	lministra
Farm	S S High Level	SPO High Level	Detailed On-Prem	Nintex On-Prem	D One Drive	Google Drives P	Box Pre-Migration	Dropbox Analysis	File Share	Mapping Report	

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.

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

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

lect Web Applicat	on				×
Select Web Applicat	ion				
Central Admin URL: h	ttps://	con 10840		Connect	
Server Farm Admin: N	IV\natalia				
	Connected to	Central Admin URL			
Web Application Name	e URL	Ser	ver URL		^
SharePoint - 5556	http://	htt	:p://	~	
🗹 SharePoint - 80	http://	htt	:p://	~	
SharePoint - Kerber	os - 5 http://	htt	:p://	~	-
SharePoint Central	Admini http://	htt	:p://	· · · · · · · · · · · · · · · · · · ·	· 🗸
Check All Uncheck A	11				
			OK	Cancel	

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

SharePoint Farm High Level Report	_	D X
Farm Central Admin URL* https:// Send notification	۲	 ✓ Connect
Schedule	Finish	Cancel

Report Overview

Number et Large List

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

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

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

	ciipodard isi	-ont is	Alignment	Number	3			Styles				Cens i te	alung	IDEAS	
	D1 ▼ : × √ fx	Last Modified													
	A		В	с	D	E	F	G	н	1	J.	к	L	м	
1	1 Site URL		Title	Description	Last Modified	Total Size (Custom Fe	Large List	Large List Vie	Managed Metadata List	Locked Site	Unsupported Web Template	Publishing Sites	Total Items	
1	2 http://sp15mlx5.ad2.softwarium.net/	sites/testlocksite				(N			Y			0	J
3	3 http://sp15mlx5.ad2.softwarium.net/	sites/2013FarmReportLargeLi	rar 2013FarmReportLargeLibraryRoot		2020-Aug-05 16:3	3 28.425	N/A	Y	N	Y	N	N	N	20010	,
4	4 http://sp15mlx5.ad2.softwarium.net/	sites/testreadonly2	testreadonly2		2020-Aug-05 16:3	3 1.96	N/A	N	N	Y	N	N	N	9	,
5	5 http://sp15mlx5.ad2.softwarium.net		Team Site		2020-Aug-05 16:3	3 1.953	N/A	N	N	Y	N	N	N	9	,

Site URL : Site URL

Title: Site title

Description: Site Description

Last Modified: Site Last Modified date

Total Size (Mb): Site Last used size

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

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

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

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

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

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

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

Total Items: total number of items

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

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

No. of Subsites: total number of sub sites

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

Supported:

SP 2013, 2016, 2019

Limits:

Claims is not supported.

SharePoint Online High Level Migration Analysis

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

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

Home	Migration Analysis	View N	/ligrator File Manage	r Driv	ves S	ecurity Mana	iger	Term Store Ma	nager Ac	lministra
s 👌	S >	5>	×	1	8	box	\$		→X	
Farm High Level	SPO High Level	Detailed On-Prem	Nintex On-Prem	One Drive	Google	Box	Dropbox	File Share	Mapping Report	
	SharePoint Pre	e-Migration Analysis			Drives P	re-Migratior	ı Analysis		Other Reports	
The ChareD	aint Onling	llightour	with a name	~						

The SharePoint Online High Level wizard opens.

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



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

Load from CSV or 🚹 Load from Tenant 💿

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

Select All Deselect All

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



Detailed On-Prem Pre-Migration Analysis

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

1. On the Migration Analysis Tab, click SharePoint.

Home	Migration Analysis	View	Migrator File I	Manager Di	rives S	ecurity Manaç	ger	Term Store Ma	anager Adr	ninistra
S 👌			Ninter Or		8	box		File Share	→X	
raim nigh Level	SharePoint Pre-Mi	gration Analysis	Nintex On-Pren	n One Drive	Drives P	Pre-Migration	Analysis	rile share	Other Reports	

The SharePoint Pre-Migration wizard opens.

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

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

- 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 premigration analysis works for file systems and file shares that can be mounted as a networked drive.
- 5. Select "Finish" to begin the Pre-Migration Analysis.

Site Analysis Parameters

The Following applies to SharePoint Pre-Migration Analysis only.

☑ Analyze Sites

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

☑ Include Sub-sites

Site Templates

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

Site Features

Site Features can provide additional functionality to SharePoint. To ensure site features are available, this option will scan each site to identify which features have been activated. If a Target Location was

specified, then the analysis will compare the list of activated features in the source against the list of available features in the target location. If a feature is marked as Condition 3, it was not detected as an available feature in the target location. If a Target Location was not specified, then the analysis will identify and highlight features based on a pre-determined list of out of the box SharePoint features. If a feature is marked as Condition 3, it was not recognized as an out of the box feature.

Web Parts

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

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

Site Master Pages

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

Include Sub Sites

i

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

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

List Analysis Parameters

The Following applies to SharePoint Pre-Migration Analysis only.

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

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

Total List Items

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

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

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

Note:

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

Total List Size Limitation

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

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

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

Item Analysis Parameters

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Last Modified (SharePoint Pre-migration Analysis only)

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

Custom Master Pages (SharePoint Pre-migration Analysis only)

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

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

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

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

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

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

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

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

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

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

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

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

Last Accessed (File Share Pre-Migration Analysis only)

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

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

Detailed Reporting Level (SharePoint Pre-migration Analysis only)

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

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

Version Size Calculation (SharePoint Pre-migration Analysis only)

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

Summary Only (File Share Pre-Migration Analysis only)

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

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

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

Report Overview

Templates Tab

Contains information about Site and List Templates where.

Object URL - URL to the site or list/library

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

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

Features Tab

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

Object URL - URL to the site

Object Name - the title of the site

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

List Analysis

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

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

Object Name - the title of the list/lib

Total Items – number of list/lib items

List Size (Mb) – library or list size

Workflows Tab

Contains information about workflows, the type and platform.

Site URL - site URL

Type - List workflow, Site Workflow, or Reusable Workflow

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

Workflow Name - Workflow Name

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

Page Analysis Tab

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

Object URL – path to page

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

Nintex On-Prem Premigration Analysis

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

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

Home	Migration Analysis	View	Migrator File Ma	anager	Drives	Se	curity Manag	ler	Term Store M	anager	Administra
S 👌	S >	5>	×		1	8	box	\$		→X	
Farm High Level	SPO High Level	Detailed On-Prem	Nintex On-Prem	0	ne Drive	Google	Box	Dropbox	File Share	Mapping Repor	t
	SharePoint Pre-Mi	gration Analysis				Drives Pre	-Migration	Analysis		Other Reports	

The Nintex On-Prem Premigration wizard opens.

SharePoint connection parameters

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

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

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

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

lect On-Prem Web Application							
Select On-Prem Web Application							
Central Admin URL: http://sp2	019mlx1.ad2.softwarium.net:279	80	Connec	t			
Server Farm Admin: AD2\adm	inistrator						
	Connected to Central Admin U	RL					
Web Application Name	URL	Server URL	alv1 ad2 coffu				
SharePoint - 2350	http://sp2019mix1.ad2.softw	http://sp2019n	nix 1.au2.softw	Č –			
SharePoint Central Admi	http://sp2019mlx1;27980/	http://sp2019n	nlx1:27980	÷			
				~			
Check All							
Check Air Oneneck Air							
		OK	Cance				

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

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

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

Drives Pre-Migration Analysis

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



Analyze OneDrive

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

This operation has the following requirements for use:

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

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

1. On the Migration Analysis Tab, click OneDrive.



The Analyze OneDrive wizard opens.

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

烙 Analyze OneDrive		- D X
Select which OneDrive to analyze	and location for pre-migration report	
Source Office 365 Connection Param	ters	
SharePoint Admin URL:		+ Admin 🔞
	Successfully connected to SharePoint Admin URL	
	Connected admins:	

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

Load from CSV or 🚻 Load from Tenant 🔞	
time filter text	
User	
<	>

Select All Deselect All

- 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.

 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

Select

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

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

Google connectio	on parameters			
Admin User:	mark@classifycloud.com			
P12 Key File:	C:\Users\spsadmin\Desktop\1ea63990ed840839c0d11ff6d6db2ae9f04e8f65-privatekey.p12			
Service Account:	52150061400-d7kqvgo0pqtq4k50sgl3jlt7ukfflc7c@developer.gserviceaccount.com			
	Successfully connected to Google Drive			

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

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

Load from CSV or 🚹 Load from Google Drive 📀		
type filter text		
Select All		~
E Schedule	< Back Next > Finish	Cancel
 Click the Select button to specify Location and name for report: 	a location and a name for this report	Selec

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

Please visit the following link to view the list of unsupported Google Drive objects.

Please visit the following link for an overview on how to script and schedule jobs such as Analyzing Google Drive, and Copying Google Drives.

Analyze Box

This option allows Essentials to analyze Box, creating a report that provides an overview of the number of folders, subfolders, and files contained in each selected user's account. The report then rates the priority of each account by it's size.

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

This operation has the following requirements for use:

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

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

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

	Home	Migration Analysis	View	Migrator	Fil	le Manager	Drives	Security Manager
	5	S>	1	8	box	\$		→X
	Farm High Level	SharePoint	One Drive	Google	Box	Dropbox	File Share	Mapping Report
SharePoint Pre-Migration Analysis			Drives Pr	Other Reports				

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

♦ Analyze Box
Select which Box to analyze and location for pre-migration report

Box connection parameters	
Admin User:	Connect

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

		0						
🕭 Conne	ct to Box					×		
Connecting to [https://www.box.com]								
User	100.000					~		
Password	•••••	••						
Domain								
Use Proxy Proxy Configuration								
	Connect			Cancel				
	Claims		0					

- **NOTE:** If you attempt to connect or open a Box drive through the software and it does not respond, you may require an alternate framework. Please review the section Alternate Framework for instructions on how to install the alternate framework.
 - 4. Click the **Load from Box** button to load in a list of available Box drives to include with this analysis. For performance reasons, if you have a large number of Box drives in your tenant you may wish to create a single column CSV file with the user accounts and choose the option **Load**
| HOIL COV INSIGUA. SCIECT THE DOX ANYES THAT YOU WISH TO INCLUDE WITH THIS HIGHLIOT |
|---|
|---|

s Analyze Box	_		×
Select which Box to analyze and location for pre-migration report			
Roy connection parameters			
Admin User: mklinchin@metavistech.com		Connect	0
Successfully connected to Box			
Load from CSV or 👬 Load from Box 🔞			
type filter text			
User			^
			_
			_
			~
<		1	>
Select All Deselect All			
Select All Deselect All			>

5. Select a location and name for the report.

Location and name for report: Select

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.

🤌 Analyze Dro	pbox			×
Select which	Dropbox to analyze and location for pre-migration report			
Dropbox conne	ction parameters			
Admin User:				
Access Token		•	Connect	0
	Successfully connected to Dropbox			

If you receive any message other than Successfully connected to Dropbox, double check your supplied information and try again. If you are still experiencing issues, please contact Support for further assistance.

3.

i

NOTE: If you attempt to connect or open a Dropbox drive through the software and it does not respond, please contact Quest Support for a updated version of the required framework.

- **NOTE:** If you attempt to connect or open a Dropbox drive through the software and it does not respond, please contact support for a updated version of the required framework.
- 4. Click the Load from Dropbox button to load in a list of available Dropbox Business drives to include in this analysis. For performance reasons, if you have a large number of Dropbox Business drives in your tenant you may wish to create a single column CSV file with the user accounts and choose the option "Load from CSV" instead. Select the Dropbox Business drives that you wish to include in this analysis.

Load from CSV or H Load from Dropbox	
type filter text	
User	^
	×
Select All Deselect All	

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

Location and name for report:

Select

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.

0	— C) ×
File Share Pre-migration Analysis		
Source Location : 🔞		^
Select Source Folder		
C:\Users\		
○ Select Source Folders from CSV Spreadsheet		

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

🗹 File Path Length	256	0
🗹 Component Name Length	128	0
🖂 Name Contains Invalid Characters		0
Blocked File Extensions		0
🗹 Forbidden Names		0
File Size Limitation (MB)	50	0
Search for duplicate files		?
Created	03-Feb-2021 🗘 12:56:07 PM 🗘 🗸	0
Last Modified	03-Feb-2021 🗘 12:56:07 PM 🗘 👻	0
Last Accessed	03-Feb-2021 🗘 12:56:07 PM 🗘 👻	0
Send notification	0	-

File Path Length - To stay within the guidelines of SharePoint, this option will scan this file share location and identify the file path. You will find paths longer than the set value in the report. Default value is 256 characters.

Component Name Length – The report will record if a path component is bigger than the set value. Microsoft recommends the effective limit of a path component be set to 128 characters. Default value is 128 characters.

Name Contains Invalid Characters - Certain characters are considered invalid and therefore forbidden to be used in standard SharePoint naming conventions. The report will record any Files with Invalid Characters in the name.

Blocked Files Extension - SharePoint blocks specific file types from being uploaded. Enabling this option will scan the file share location and identify the content based on this list of defined blocked file extensions and inform users about any potential blocks. Default values are aspx, asmx, ascx, master, xap, swf, jar, xsf, htc.

Forbidden Names - Due to SharePoint Online restrictions, file names may not contain any of these defined strings. The report will record any Files with Forbidden Names. Default values are taken from Profile Manager > Advanced > Forbidden Folder and Files Names.

File Size Limitation (MB) - This option will record items in the report which are greater than the set value. Default is 50 MB.

Search for duplicate files - Enabling this option will scan the file share location and identify the files that have the same name and extension stored within the folder's structure.

Created - The report will record Files with a created date older than the specified value.

Last Modified - The report will record Files with a last modified date older than the specified value.

Last Accessed - The report will record Files with a last accessed date older than the specified value.

Send Notification - Essentials will send the specified user an email notification after the report is completed.

- **NOTE:** The analysis parameters have default settings that scan for files that are outside of the out of the box parameters for SharePoint. You can make changes to the default parameter settings in the wizard in the event that your SharePoint environment has been customized to allow for files outside of SharePoint's original parameters. The premigration analysis works for file systems and file shares that can be mounted as a networked drive.
- 4. Select "Finish" to begin the Pre-Migration Analysis.

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.

lapping Report

Connect to generate Mapping report

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

	• •	
Source Office 365 Connection Parameters		
SharePoint Admin URL:		+ Admin 🔞
	Successfully connected to SharePoint Admin URL	
	Connected admins:	

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

Target Office 365 Connection Parameters			
SharePoint Admin URL:		+ Admin	0
	Successfully connected to SharePoint Admin URL		
	Connected admins:		

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

	user	loginnar	ne@*.*	[•] , userlo	oginnam	1e@*.	*
--	------	----------	--------	-----------------------	---------	-------	---

10	La bronne them	191	
source user	rarget Oser	·	to create user mapping the delete first line with readers from this table, go to File -> save As-> select the type CSV OTF-6 (Comma delimited) (*.csv)
Charles and a first second second second second	and the second		
contraction of the second second second	Contraction of the second second second second		
Construction of the last sector of the last	Construction of the last of the local sector		
Construction designation that see	Constraint and a drag production had not		
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Inscriptional acceleration of the	Inscriptional account of the		
and the prostant start of the	ALC: MALERIA		
and the product of the local sector	ALC: MALERIA		
Advertige state that have been	ALC: MALERIA		
tearnable of the production of the second	ALC: MALETING		
Advanced from the prostant that have	ALC: ALL PROPERTY AND A REAL PROPERTY AND A RE		
double and the strength of the	desired in the second second		

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

Load from CSV	or	👬 Load from Tenant	0
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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:

Select

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

To create a mapping report, perform the following:

1. On the Migration Analysis tab click Mapping Report.

	Home	Migration Analysis	View	Migrator	File Manager	Drives	Security Manager					
	Farm High Level	SharePoint	One Drive	Google	Box Dropbox	File Share	→X Mapping Report					
	SharePoint Pre-M	digration Analysis		Drives Pre-	Migration Analysis		Other Reports					
The Mapping Report wizard opens.												
2.	In the wizard, select the File Share tab.											
	Connect to g	enerate Mapp	oing report									
	Office 3	File Shar	Google .									
-												

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

Target Office 365 Connection Parameters

SharePoint Admin URL:		+ Admin	?
	Successfully connected to SharePoint Admin URL		
	Connected admins:		

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

Location and name for report:

- 6. Click Finish to begin the analysis.
- 7. The report generated will follow the following rule:

userloginname@*.*, userloginname@*.*

Source User	Target User	¥	*to create user mapping file delete first line with Headers from this table, go to File -> Save As-> Select file type CSV UTF-8 (Comma delimited) (*.csv)
Latter Market A. M. Market and Market Parking of	starting and the second		
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Construction of the second second second	Construction of the second second second		
Construction designs and and	Constraint and a drag fragmentant and		
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Partigination start - con-	Intelligentation that have		
and the providence of the second	ALC: MALERIA		
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Advertige that the design of t	ALC: MALERIA		
team and the generation that is not	ALC: MALERIA		
Advanced from the prostance to the house	ALC: MALENCE		
and the second second second	the state of the s		

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

Load from CSV or 🕌 Load from Tenant 📀

Select

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

Google to Tenant

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

This operation has the following requirements for use:

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

To create a mapping report, perform the following:

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

Home	Migration Analysis	View	Migrator	F	ile Manager	Drives	Security Manager
S Solution Farm High Level	SharePoint	One Drive	Google	Box	Dropbox	File Share	→X Mapping Report
SharePoint Pre-N		Drives Pre		Other Reports			

The Mapping Report wizard opens.

2. In the wizard, select the Google tab.

s Mapping Report	_		×						
Connect to generate Mapping report									
Office 3 File Shar Google									

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

Source		
Admin User:	deadly final com	
P12 Key File:	Chairsy (web/00000000001 Webblace/Orkell) pro-	Load
Service Account:	405-d'hoppliptpikShg135-aMc1-@dealope.perioaci	Connect 📀
	Successfully connected to Google Drive	

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

Target Office 365 Conne	ction Parameters			
SharePoint Admin URL:			+ Admi	n 🕐
		Successfully connected to SharePoint Admin URL		
		Connected admins:		

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

Select

7. The report generated will follow the following rule:

<u>userloginname</u>	@*.* OR Shared	Gro	<u>up ID number (ie: 0ABDWpGG8AGwXUk9PV) ,</u>						
userloginname@*.*									
Source User	Target User	¥	*to create user mapping file delete first line with Headers from this table, go to File -> Save As-> Select file type CSV UTF-8 (Comma delimited) (*.csv)						
Constantian production on	Contraction of Participation and								
Construction of the last sector of	Construction of the last sector of								
and the second sec	the second second second second second								
includes and the	Sector Se								
and the property of the local states	ALC: MALENCE								
and the product of the Province	ALC: MALERIA								
Adverage and a contract of the	ALC: MALENCE								
tearnable of production that see	ALC: MALTING								
Advanced teaching metal-metal-scene	ALC: MALENDA								

The mapping is done by matching accounts with the same name, or by matching accounts with the same display name.

- 8. In order to use the mapping report generated within Essentials, open it in excel, delete the source and target workbook sheets, and the first line with the headers from the user mapping report worksheet. Go to File > Save As> Select file type as CSV UTF-8.
- You can now use the .csv file in the Copy Google Drives/Google Shared Drives to Office 365 wizard and the Google Drives/Google Shared Drives to Microsoft Teams wizard, by selecting Load from CSV on the wizard's first page.

Load from CSV or 🕌 Load from Tenant 💿

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

Migrator Tab

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

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

Interface

The application consists of two primary panes and one optional pane: (1) Navigator, (2) Hyper Migration/Contents/Progress, (3) Connections. A set of wizards is automatically generated when items or objects are tagged, copied or moved.

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

Home	Migration Analysis	1	View	Migrator File Manag	er Driv	ves Security N	lanager	Term Store Manager	Administrator	Backup	Help	
SharePoint Connect To	Copy Paste	Delete	Copy Site *	Live Compare! Pr Sites	amote to Site Collection	Select All	Tag Documents/Item	Filter	Orphaned Users Copy Advanced	In SharePoint Contents Refresh	Logs	
Navigator		8 🕹 🕴		Migration 📑 Cont	ents 🖷 Prog	ress						`∎ ±∃ □ % °N > X M □ ▼ Ø = □
 ✓ ① Sit ✓ ⑤ 	tes w/Group 10test (STS#1)		^	10test > Documents	01109							Views: All Documents ×
~	Lists			Name	Туре	Modified	N	1odified By				
	> Calendar te	st		Custom file.do	cx Documen	t 2019-07-01 0	6:52:06 AM Ti	imur Nikonov				
	> Custom list											
•	> E Form Temp	lates										
•	> Site Assets	lates										
	> 🖻 Site Pages											
	🗦 🖻 Style Library	y				2						
	🛅 Subsites											
~ <u>S</u>	365GroupMigrati	on01 (STS	#1									
~	Lists											
	> i appdata											
	> Composed	Looks										
<		3	× `									
+ Connection	15 🖾	0										
> Socal Di	sk (C:)											
South State Sta	Drive											
	3											
https://met	tavistech sharenoir	at com/site	as/365c	roupmigration01								

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

Navigator Pane

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

	- -	Сору	Ctrl+C
	- E	Paste	Ctrl+V
SX Unlock For Writing	Ctrl+C	Delete From SharePoint	
Paste Create Backup	Ctrl+V	View Contents	
Ø Refresh	Y	Filter List	
Use CSV to	<u>,</u>	View In Browser	
Permissions Analysis	>	Use CSV to	>
Objects	>	Analysis	>
Reports Pre-migration Analysis Reports	>	Objects	>
Properties	-	List Contents Report(csv)	
	(Properties	

Site Level Right-Click Menu

List Level Right-Click Menu

Hidden Lists

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



Contents Area

The Content area displays the actual data inside a list or library. In addition to navigation the user can create, delete, classify and drag and drop content in bulk from this window

Cor	ntents					🏣 13 🗀 9	le 🖭 🔿 🗙 🗈 🗖 💆 🖓 🗆 🗖
Cent	ral Admin	stration > Health Analyzer Rule [lefinitions				Views: All Rules ~
Nan	ne	Туре	Title	Schedule	Enabled	Repair Automatically	^
	1000	Health Analyzer Rule Definition	Accounts used by application pools or service identities are in the local machine Administrators group.	Daily	Yes	No	
	9000	Health Analyzer Rule Definition	Business Data Connectivity connectors are currently enabled in a partitioned environment.	Daily	Yes	No	
	11000	Health Analyzer Rule Definition	Web Applications using Claims authentication require an update.	Daily	Yes	No	
	20000	Health Analyzer Rule Definition	The server farm account should not be used for other services.	Weekly	Yes	No	
	75000	Health Analyzer Rule Definition	The Unattended Service Account Application ID is not specified or has an invalid value.	Daily	Yes	No	
	4000	Health Analyzer Rule Definition	Application pools recycle when memory limits are exceeded.	Weekly	Yes	No	
	16000	Health Analyzer Rule Definition	Databases used by SharePoint have fragmented indices.	Daily	Yes	Yes	
	17000	Health Analyzer Rule Definition	Databases exist on servers running SharePoint Foundation.	Weekly	Yes	No	
	25000	Health Analyzer Rule Definition	The paging file size should exceed the amount of physical RAM in the system.	Weekly	Yes	No	
	43000	Health Analyzer Rule Definition	Databases used by SharePoint have outdated index statistics.	Daily	Yes	Yes	
	44000	Health Analyzer Rule Definition	The timer service failed to recycle.	Weekly	Yes	No	

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

Located in the top left-hand corner is a breadcrumb definition of the list or library, whose files are represented in the window. The top right corner contains a set of icons that represent available activities for the user. Most of these options can be exposed by right-clicking on items inside the window. The list of available activities will depend on what is selected or not selected in the contents window.

Permissions Window

A set of windows is displayed within the content pane area and is designed to display permissions, groups and levels used within a specific site, list or item. The windows may be accessed by doing the following:

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



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

0	· ·				
🗸 🗁 SharePoint		10	000	Health Analyzer Rule Definition	Accounts
📇 Central Adminis	tration	90	000	Health Analyzer Rule Definition	Business I
🗸 🚺 Central Adminis	tration	11_	.000	Health Analyzer Rule Definition	Web App
🗸 📶 Lists		20_	.000	Health Analyzer Rule Definition	The serve
> 🖻 Administ	trative Report Library	75_	.000	Health Analyzer Rule Definition	The Unat
之 Admin		01.0	ρο	Health Analyzer Rule Definition	Applicatio
> 📢 Annou	Сору	Ctrl+C	000	Health Analyzer Rule Definition	Databases
> 🛄 appda	Paste Paste	Ctrl+V	000	Health Analyzer Rule Definition	Databases
> 🛄 Calend	X Delete From SharePoint		000	Health Analyzer Rule Definition	The pagir
> 🔟 Compo			000	Health Analyzer Rule Definition	Databases
> 🛄 Conter	View Contents		000	Health Analyzer Rule Definition	The timer
> 🔟 Conter	🚏 Filter List		000	Health Analyzer Rule Definition	Search - O
> 🛄 Distribi 🛛	View In Browser		000	Health Analyzer Rule Definition	The Visio
> 🔽 Health			000	Health Analyzer Rule Definition	The Visio
> 🔟 Job Rej 🗄	Audit Object		000	Health Analyzer Rule Definition	The Visio
> 🖻 List Ter	Use CSV to	>	000	Health Analyzer Rule Definition	The Visio
> 🖻 Master			000	Health Analyzer Rule Definition	The Visio
> 🛞 Resour	Create	>	000	Health Analyzer Rule Definition	The Visio
 Ifil marian 	Analysis	>	00	Health Analyzer Rule Definition	Alternate
•			h		*****
🕂 Connections 🛛	Objects	>	-	Show List Views	
A Floppy Disk Drive	List Contents Report(csv)		6	Show Workflows	
See Local Disk (C:)			4	Show InfoPath Forms	
CD Drive (D:)	Properties		13	Show Permissions	
> Outlook		19			
S Google Drive		22		Show webParts	
, Second		₽ 24	×	Show SharePoint Designer Obje	ects

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

Name	Туре	Title	
1000	Health Analyzer Rule Definition	Accounts use	d by application pools or service identities are
9000	Health Analyzer Rule Definition	Business 💕	Copy Ctrl+C
11000	Health Analyzer Rule Definition	Web Apj 📔	Paste File(s) Ctrl+V
20000	Health Analyzer Rule Definition	The serv 🗙	Delete Del
15000	Health Analyzer Rule Definition	The Una 🏠	
4000	Health Analyzer Rule Definition	Applicat 📎	Tag
16000	Health Analyzer Rule Definition	Databası 📷	Сору То
17000	Health Analyzer Rule Definition	Databasi	New Folder
25000	Health Analyzer Rule Definition	The pag	Helend/Genu Content
43000	Health Analyzer Rule Definition	Databas 🔛	opioad/Copy Content
44000	Health Analyzer Rule Definition	The time 🏪 📋	Download Content to File System
68000	Health Analyzer Rule Definition	Search -	Compress Storage
69000	Health Analyzer Rule Definition	The Visic	Audit Ohiest
10000	Health Analyzer Rule Definition	The Visic 💷	Audit Object
1000	Health Analyzer Rule Definition	The Visic 🕜	Refresh
72000	Health Analyzer Rule Definition	The Visic 💆	
73000	Health Analyzer Rule Definition	The Visic 📋	Open
74000	Health Analyzer Rule Definition	The Visic 🔑	Show Permissions
2000	Health Analyzer Rule Definition	Alternat	View In Browser
3000	Health Analyzer Rule Definition	The App 🙍	Grant nermission
8000	Health Analyzer Rule Definition	Automa 🌅	
10000	Health Analyzer Rule Definition	Built-in i 🤍	Show Users for object

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

Web Parts Window

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

The Web Parts window may be accessed by doing the following:

• Site Level - right-clicking on a site, and selecting Objects followed by Show Web Parts

✓	Earm Administrators
Central Administration	> A Delegated Administrators
✓ S Centra ✓ Copy ✓ Call List ✓ Copy ✓ Paste ✓ O Create Backup ✓ O Collect Statistics Data ✓ O Connect to Site ✓ O Refresh ✓ O Refresh	Ctrl+C Ctrl+V
View In Browser Save site to XML Save site to XML Audit Object Use CSV to	>
Create Analysis	> >
Connections Objects	> 🌝 Show Workflows
Floppy Dir Compare With Compare With Com	Show WebParts Show Term Store Show Look And Feel Settings Show ShaveRpiret Reviewer Objects
Penerts	Show sharer one besigner objects

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

✓ I SharePoint		/	ca	roider		
Central Adminis	tration	> 🗁 .	private	Folder		26 Oct 20
Central Adminis	tration	> 🗁 i	mages	Folder		26 Oct 20
V Central Adminis	lation	> 🗁 l	Lists	Folder		26 Oct 20
	and a Damant Library	> 🕞 1	m	Folder		26 Oct 20
			efault.aspx	Document	4059	26 Oct 20
> 🗹 Adm 📷	Сору	Ctrl+C	ettingStarted.aspx	Document	2937	26 Oct 20
> 📢 Ann 🔐	Paste	Ctrl+V	ewsfeed.aspx	Document	4249	26 Oct 20
> 🛄 appo > 🧰 Cale 🗙	Delete From SharePoint					
> 🔟 Corr 📃	View Contents					
> 🔟 Con 🤕	Filter List					
> 🔟 Con 🚣						
> 🔟 Distr 🥯	View In Browser					
> 🔽 Heal 📷	Audit Object					
> III Job I > 🖻 List	Use CSV to	>				
> 🖻 Mas	Create	>				
> 🛞 Resc			-			
	Analysis	>	-			
Connections 🛛	Objects	>	🐻 Show List Vie	ews		
뷇 Floppy Disk Dri 📇	List Contents Report(csv)		🍪 Show Workfl	ows		
> 🥪 Local Disk (C:) 🏼 🏻	List contents report(csv)		Show InfoPa	th Forms		
> 🥝 CD Drive (D:) 👔	Properties		Chan Damain			
> 📴 Outlook 🛛 🛁			Jonow Permis	sions		
> 🚼 Google Drive			🕼 Show WebPa	arts		
			🔆 Show ShareP	oint Designe	er Obje	cts

Similar to content, users will be able to select one or more of these objects and copy them from one place to another. The right-click menu also contains an additional option, "Save XML Config to File".

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

🖉 Progress 🥵 Permissions 🔜 Web Parts 🖾	í <u>s</u> e
http://dev.metavistech.com:8092/sites/dev	
Web Part	
🔁 Calendar	
🗟 Sites in Category - CategoryResultsWebPart (wpz)	

Term Store Window

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

The Term Store can be accessed by right-clicking on a site, selecting **Objects** followed by **Show Term Store**.



Similar to content, users will be able to select one or more of these objects and copy them from one place to another. To learn more about additional capabilities for managing term store objects, please

see the Term Store Manager section.

🥙 Term Store 🙋 Progress				
No.1 all and District control of				
Term Name	Term Type	Term Synonyms	Description	
Managed Metadata Service	Term Store			
V 📂 People	Term Group			
Department	Term Set			
Job Title	Term Set			
Location	Term Set			
Search Dictionaries	Term Group			
> i Company Exclusions	Term Set			
> 🗇 Company Inclusions	Term Set			
> 🗇 Query Spelling Exclusions	Term Set			
> 🗇 Query Spelling Inclusions	Term Set			
> 📻 System	Term Group		These term sets are used	

List Views Window

The List Views window is displayed within the content pane area and is designed to display views used within a specific list.

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



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

° Contents 🖉 Progress 🚮 Web Parts 🔯 List Views 🖾	- 0
Corporate 2016 > Form Templates	
Name	
🔛 All Documents	
U All Forms	

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.

ľ	Paste	Ctrl+V
Ø	Refresh	
\checkmark	Hidden Lists	

Workflows Window

There are two similar windows within the content pane area that are designed to display both SharePoint Designer (SPD) and Out-of-the-Box (OOB) workflows used within a specific list.

The workflow window can be accessed by right-clicking on a list and selecting **Objects** followed by **Show Workflows**. This will give you access to both SPD and OOB workflows.



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

🖉 Progress 📑 Contents 😽 Look and Feel 🗠 Activi	ties 🧭 Workflows 🛛	
ckworkflows > Library01		
Workflow Name		

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**.

× 😕	-	and the second age			
✓ S Corpor		Сору	Ctrl+C		
× , cs.	1" L	Paste	Ctrl+V		
× 🖪	Ð	Create Backup			
> 🛄	ø	Collect Statistics Data			
> <u>"</u> " > %	₽	Connect to Site			
> EG	ଡ	Refresh			
Suc Suc Suc Suc Suc Suc Suc Suc Suc Suc	0	View In Browser			
> 🗁 OneDrive		Save site to XML			
🗸 🗁 SharePoint	B	Audit Object			
v 🔂 Central		Use CSV to	>		
🗸 📶 List		Permissions	>		
> <u>"B</u>		Create	>		
		Analysis	>		
Connections		Objects	>	Ø	Show Workflows
🍓 Floppy Dis		о			Show WebParts
> 🥪 Local Disk		Compare With	>		Show Term Store
> 😃 CD Drive (÷.	Show Site Map			Show Look And Feel Settings
S Google Dr	ťa	Create Subsite		÷.	Show SharePoint Designer Objects
				1	show sharer on the besigner objects
		Reports	>	-	
	3	Reports Pre-migration Analysis	>	Γ	
	3 2	Reports Pre-migration Analysis Import	>		
	2 2	Reports Pre-migration Analysis Import Export	>		
	2 2 2	Reports Pre-migration Analysis Import Export Copy/Promote to New Site Collection	>		
	S 20 20 8 8 8 8	Reports Pre-migration Analysis Import Export Copy/Promote to New Site Collection Properties	>		

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

•	
° Contents 🖉 Progress 🖳 Web Parts 🔯 List Views 🧭 Workflows 🙀 Look and Feel 🖂	
The set of the local set of the s	
Page Name	
Title, Icon, Description	
Tree View	
⊈ Site Theme	
☐ Page Layouts and Site Templates	
I Wavigation	
C Top Link Bar	
⊈ Quick Launch	
☐ ☐ Welcome Page	

SharePoint Designer Objects Window

The SharePoint Designer Objects window is displayed within the content pane area and is designed to display SharePoint Designer Objects used within a specific site.

The SharePoint Designer Objects window can be accessed by right-clicking on a Site, selecting **Objects** followed by **Show SharePoint Designer Objects**.

✓	2016		
🗸 🦳 L 💕	Сору	Ctrl+C	
> 🖬 👘	Paste	Ctrl+V	
2 📮 😨	Create Backup		
	Collect Statistics Data		
> 😚 💽	Connect to Site		
20	Refresh		
> 🛱 Office 36 🖸	View In Browser	-	
> 🗁 OneDriv 🐼	Save site to XML	-	
✓	Audit Object	-	
🗸 🚺 Cent	Use CSV to	>	
~ 🛄 L	Permissions	>	
5 🖬	Create	>	
Connections	Analysis	>	
Jak Floppy [Objects	> 6	Show Workflows
> So Local Di	Compare With	> [Show WebParts
> 🥝 CD Drive 🚊	Show Site Map		Show Term Store
S Google I	Create Subsite	9	Show Look And Feel Settings
sobgiel	Panasta	>	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.

🕈 Contents 🙋 Progress				t:
Sharenoint Designer Objects	in			
Sharepoint Designer Object				
Name	Туре	Size	Modified At	
> 🗁 _catalogs	Folder		26 Oct 2017 14:07:18 -0000	
> 🗁 _cts	Folder		26 Oct 2017 14:07:16 -0000	
> 🗁 _private	Folder		26 Oct 2017 14:07:13 -0000	
> 🗁 images	Folder		26 Oct 2017 14:07:13 -0000	
> 🗁 Lists	Folder		26 Oct 2017 14:07:17 -0000	
> 🗁 m	Folder		26 Oct 2017 14:08:35 -0000	
📄 default.aspx	Document	4059	26 Oct 2017 14:08:51 -0000	
GettingStarted.aspx	Document	2937	26 Oct 2017 14:08:36 -0000	
newsfeed.aspx	Document	4249	26 Oct 2017 14:08:52 -0000	

Connect to Resources

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

Connecting to SharePoint Site and Site Collections

Quest Essentials is optimized for migrations to and from Microsoft 365. While it **used to be** possible to migrate to/from SharePoint on premises, Quest recommends that you use Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

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

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



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

۲	SharePoint Connection Wizard – 🗖	×
Shar	ePoint Connection Wizard	
🙆 Ple	ase Enter Project Name	
Nam	e	0
Туре	SharePoint Site or Site Collection (On-premises or Office 365)	0
URL	· · · · · · · · · · · · · · · · · · ·	0
Or	Discover Site Collections	
	(Central Admin access is required to view and select existing site collections)	
	ad Entire Sub-Site Structure (Slower)	
	Finish Cance	I

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.

Central Admin URL: http://s-sp16-xprod:1000	/default.aspx	
Server rann Admin. ShAker Ontri System		ct
Connected to	Central Admin URL	
Web Application Name	URL	
Corporate 2016	http://s-sp16-xprod:2016/	
SharePoint - 80	http://s-sp16-xprod/	
SharePoint Central Administration v4	http://s-sp16-xprod:1000/	

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

Next >

OK

Cancel

< Back

Select Web Application	_		\times
Select Site Collection			
Server Uri: http://s-sp11 v			
URL			
/sites/Corporate2016			
URL Search reset			
Getting users			
			$\left \times \right $
O Last update of cache file was on: Temporary cache file not found			
< <u>B</u> ack <u>N</u> ext > OK		Cance	el

- 5. With this connection type you are given the option to select the following:
 - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site.
 To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
 - Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.
 - **NOTE:** this may be a lengthy process depending on the number of sub-sites in this location and is *only* available for this connection type.

🔈 Sha	arePoint Connection Wizard					×
hare	Point Connection Wizard					
) Nar	me contains invalid character: :					
Name	NUMBER OF STREET					0
Туре	SharePoint Site or Site Collection (On-premises of	or Office	e 365)		~	0
URL	Adaptive and speed (Printing Corporate) (Print				\sim	?
Or	Discover Site Collections					
	(Central Admin access is required to view and sele	ect exis	ting site co	llections)		
Loa	ad Entire Sub-Site Structure (Slower)	?				
Loa	ad Entire Sub-Site Structure and Objects (Slowest)	?				
			Cinin	h	Care	al

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

🕭 Dow	/nload Status	×
0	Download Completed for project	
Do 🗌	not show this message again OK	
	Run in Background Cancel Details >>	

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



Connecting to SharePoint On-Premises Farms

Quest Essentials is optimized for migrations to and from Microsoft 365. While it **used to be** possible to migrate to/from SharePoint on premises, Quest recommends that you use Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

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

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



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

Shar	ePoint Connection Wizard				×
naref	Point Connection Wizard				
Shar	ePoint URL is invalid				
lame	On-Prem Farm				?
ype	On-premises Farm (Central Administration requi	red)		~	?
RL	1			~	2
r	Discover Site Collections				
	(Central Admin access is required to view and sele	ect existing site o	ollections)		
Loa	d Entire Sub-Site Structure (Slower)	0			
Loa	d Entire Sub-Site Structure and Objects (Slowest)	0			

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.

let Web Application						×
elect Web Application						
Central Admin URL: http://s-s	p16-xprod:10	00/default.aspx			Conr	nect
Server Farm Admin: SHAREPO	DINT\system					
	Connected t	o Central Admin UR	ar I			
Web Application Name		URL				
Corporate 2016		http://s-sp16-	xprod:2016/			
SharePoint - 80		http://s-sp16-	kprod/			
SharePoint Central Administration v4 http://s-sp16-xprod:1000/						
	< Back	Next >	ОК		Cance	el

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

select Web Application	_		×
Select Site Collection			
Server Url: http://s-sp1t v			
URL			
/sites/Corporate2016			
URL Search search reset			
Getting users			
			\times
Ø Last update of cache file was on: Temporary cache file not found			
< <u>B</u> ack <u>N</u> ext > OK		Cancel	

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



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



Connecting to Office 365 Tenant

If you wish to connect toan Office 365 temant, then follow these steps:

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



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

🤌 Sha	arePoint Connection Wizard					×
Share	Point Connection Wizard					
🔇 Plea	ase Enter Project Name					
Name						0
Туре	Office 365 Tenant (Tenant Administration require	ed)			~	0
URL					~	0
Or	Discover Site Collections					
	(Central Admin access is required to view and sele	ect existing	g site colled	tions)		
Loa	ad Entire Sub-Site Structure (Slower)	0				
Loa	ad Entire Sub-Site Structure and Objects (Slowest)	0				
			Finish		Canv	el
			<u>F</u> inish		Cano	el

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

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

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

烙 Connec	t to SharePoi	nt			×
Connectin	ig to				
User					2
Password					
Domain					
		Use Pro	×y nfiguration		
	Connect			Cancel	
	Claims		0		

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

Select Web Application	_		×						
Select Web Application									
Select a Web Application									
Central Admin URL: https://me	etavistech-admin.s	sharepoint.	com		Connect				
Server Farm Admin: i:0#.f membership jtrosman@metavistech.com									
	Connected to Central Admin URL								
Web Application Name		URL							
SPO Sites									
Sites w/Group									
OneDrive Sites									
Check All Uncheck All									
			OK		Cancel				

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

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

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

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

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

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



Copy Sites

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

- Copy and paste method.
- Copying sites without loading the source and the target in the navigation pane.
- Copying Site Collections and My Sites without loading the source and target in the navigation pane.

Copy and Paste Method

This is the most common and simple approach to copying sites. It requires the user to, in most cases, have the source and target loaded into the Navigation pane (refer to Connecting to SharePoint for additional information). Note: copy and paste method now allows users to use claims base authentication to connect to sites.

- 1. In the navigator pane, locate the site(s) you wish to copy. Hold down the CTRL key to select multiple individual items or SHIFT key to select multiple consecutive items.
- 2. After you have selected the source site(s) there are several ways to identify the destination location:
 - You may simply Drag-and-Drop the Sites.
 - Use the Copy and Paste options from the right-click menu.

~ í	3	a title and any	Name
	Corporate 2016		INdfile
	🗸 🦰 Lists 💕	Сору	Ctrl+C
	🏹 🖻 De 📴	Paste	Ctrl+V

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

Home	Migration Analysis	Vie	v Migrator	F	File Manager	Drives	Securit	y Manager	Ter	m Store Manager	Admin	istrator	Backup	Help
SharePoint	Copy Paste	8	opy Live C	empare!	Promote to Site Collection		Select All	Tag	Dpen	🕎 Filter	Crphaned Use Copy	n	S In SharePoint Contents	Iogs
Connect To	Clipboard	Delete		Sites				Doc	uments/Items		Advanced		View	

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.

\$	_		×
Source site selection			
Select a source site			
Parent Site/Site Collection URL (e.g. http://www.yoursharepoint.com/sites/yoursite):			
Mp 1 g 2 good 22 obs (openhalf 1		~ Conn	ect

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:

4.

- For the process of migrating My Sites, Essentials for Office 365 does not provision a new My Site in the destination farm. It is required that all My Sites already exist in the destination and Essentials will migrate the contents of the Personal and Shared libraries into this site.
- This operation requires the user to have access to Central Admin and is not currently supported for Office 365.
- 1. In the Migrator Ribbon select the **Copy Site** button and the **Copy Site Collections/MySites** option.

	🕭 Metalogix Essentials for Office 365 (Enterprise Edition +) v.2.9.0.202108161356								-	σ	×						
	Home	Migration Analys	is	View	Migrator	File Manager	Drives	Security I	Manager	Terr	n Store Manager	Administrator	Backup	Help			
	SharePoint	Copy Paste	8	Copy Site *	Live Compare	Promote to Site Collection		Select All	Tog E	Open New Folder	Filter	Orphaned Users Copy	S In SharePoint Contents	Nogs			
	Connect To	Clipboard	Delete	Cop	y Site				Docume	nts/Items		Advanced	View				
2.	🧐 Navigator		₿\$	Сор	y Site Collect	ions/MySites	gress								₩ 130%%		0

3. 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.

•	_		×
Select Web Application Select a Web Application			
Source Central Admin URL: http:// 1000/default.aspx		Connect	

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

elect web Application			
Source Central Admin URL: http://s-	default.aspx	Conne	ect
erver Farm Admin:			
	Connected to Central Admin URL		
Web Application Name	URL	Server URL	
Corporate 2016	http://s-sp16-xprod:2016/	http://s-sp16-xprod:2016	
SharePoint - 80	http://s-sp16-xprod/	http://s-sp16-xprod	
SharePoint Central Administratio	http://s-sp16-xprod:1000/	http://s-sp16-xprod:1000	
Check All Uncheck All			

- 6.
- 7. From the list of the provided Site Collections select the ones you wish to copy and press the **Next** button.

		×
elect Site Collection		
Server Url: http://s-sp10 v		
URL		
✓ /sites/Corporate2016		
✓ /sites/LondonOffice2016		
JRL Search search reset Check All Uncheck All		
Getting users		
		X
		1.1
Ø Last update of cache file was on: Temporary cache file not found		

8. 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

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.

🥵 Live Compare	2				×
Site URL: List/Library:	101 of a 117 and 100 and 100	v v	Site URL: List/Library:		v v
		y from Left to Right	Copy from F	Right to Left	Legend 🔞
✓ S Corporat > f Colu > f Colu > f Cont > I Lists	te 2016 mn Groups ent Types		2 fauth 2 fau Column G Content Ty Lists	uth roups ypes	
> Perm > Perm > A Grou > Webl	nissions nission Levels ps Parts		Permission Permission Croups WebParts	ns n Levels	
> 👌 Work > 🖾 Term > 🔂 Subs	cflows Store ites	2	Workflows	8	
H Full Comp	are 🔞 Load Compare Report 🕼		11	Quick Compare 💿	Close

Full Compare

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

NOTE: Depending on the amount of content and selected options, this may require an extended amount of time. For this reason, the report is run in the background.

The completed report, (stored as a csv file), may be loaded into this interface using the "Load Compare Report" button (see the Load Compare Report section for more details on loading a compare report).

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

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


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

×
rsite):
Connect

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



<u>F</u> inish	Cancel
----------------	--------

🤌 Live Comp	- bare				×
Site URL:	http://: /Corporate2016	~	Site URL:	https:// com	~
List/Library:		~	List/Library:		*
	Copy from Left to	Right	Copy from I	Right to Left	Legend 🕝
0% - Estimatio	n				
H Full Con	mpare 🕢 Load Compare Report 🕢		1	Quick Compare 🕡	Close

4. Select Full Compare from the bottom of the Live Compare screen.

5. Select the properties you would like to apply to your Full Compare and click **Run**.

	×
Full Compare Properties	
Use enhanced content compare	
Include Item Level Permissions 🔞	
Include Groups Membership	
User Mapping Load	
🗹 Include Subsites 🛛 🔞	
Generate Script Schedule Cancel Pup	•
a Generate Script a Schedule Cancel Kun	

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.



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.

\$				\times
Select site				
Parent Site/Site Collect	ion URL (e.g. http://www.voursharepo	int.com/site	s/voursite	e):
http://	Corporate2016		~ Con	nect

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



<u>F</u> inish	Cancel

4. Select **Quick Compare** from the bottom of the Live Compare screen.

🤌 Live Comp	are			×
Site URL: List/Library:	http://: /Corporate2016	*		× ×
	Copy from Left to	Right	t Copy from Right to Left	Legend 🕝
0% - Estimatio	n			
11 Full Con	npare 🔞 Load Compare Report 🥝		III Quick Compare	Close

5. Select the properties you would like to apply to your Full Compare and click **Run**.

\$	×
Quick Compare Properties	
Use enhanced content compare 🕜	
🗹 Include Item Level Permissions 🛛 🔞	
Include Groups Membership	
User Mapping Load	
Cancel	Run

Use Enhanced Content Compare: This option will use the last modified date to identify differences in content that exists in both sites (lists and libraries). Normally the comparison is limited to identifying differences in content that exists in one site but not the other.

i NOTE: Depending on the amount of content this comparison may require extended periods of time.

Include Item Level Permissions: The differences in Item Level Permissions between the selected sites or lists will be analyzed as part of the compare.

NOTE: Permission comparison may require extended periods of time depending on the amount of content and permissions

Include Group Membership: The differences in the Group Memberships between the selected sites or lists will be analyzed as part of the compare.

User Mapping: This option should be used in the event that a mapping file was used during the initial copy from source to target. This is especially useful if you have mapped accounts from source to target.

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

Load Compare Report

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

To load a compare report do the following:

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



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

Live Compare			2
Site URL: List/Library:	v v	Site URL: List/Library:	• •
	Copy from Left to Right	Copy from Right to Left	Legend 🥥
% - Estimation			
14 Full Compare 🕡 Load Compare Report		Uuick Compare	Close

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

Open												Х
$\leftarrow \rightarrow \checkmark \uparrow$	> This	PC > Desktop	>					√ Ū	Search Deskto	р		٩
Organize 🔻 Ne	w folder									€ 10 6 10		?
 Quick access Desktop Downloads Documents Pictures csvs Music Videos OneDrive This PC Network 	* * *	corporateb ackup2016	CSVS	framework 1.8_65-x64- aj	Create-Clo udUsers-Te mplate	full compare	MapFileSys temToOffic e365UsersE xample	Run Custom Action - Load fro				
	File na	me: full compar	e					~	*.csv			\sim
									Open		Cancel	

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

\$		_		×
Select site				
Parent Site/Site Col	lection URL (e.g. http://www.yoursharepoi	int.com/site	s/yoursite	e):
http://	Corporate2016		∼ Con	inect

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

>			
elect site			
Parent Site/Site Collectio	n URL (e.a. http://www.vourshare	noint com/sites/	voursite):
http://	Corporate2016	~	Connec
> 5 Corporate 2016			
		Finish	Cancel

- 6. Repeat steps 4 and 5 for the second site from your full compare .csv file for comparison. Once you have completed these steps the full compare .csv file will be loaded into the Live Compare window.
- 7. You can now copy items from left to right and vice versa.

Hyper Mode

When the Classic Navigator Mode setting, found in the Profile Manager's Migration tab, is **disabled**, Essentials will perform the actions in this section using the classic hyper mode of migration.

General	Your Settings will be saved for future operations.		
Connection	Copy Subsites: Copy Views:	Hyper Mode Settings	
	Copy Features: Copy Forms:	🚯 OAuth: 🗸	Hyper Backup:
Migration	Copy Hidden Fields: Copy Workflows:	Generate Status Report:	Classic Mailbox Backup:
Notification	Remove Folder Structure:	Delete Report Jobs:	Backup System Lists:
Advanced			Classic Navigator Mode:
	Generate Failed Items File: Manual Automatic Content Type Load Limit: 400	#Parallel Threads:	35
	Pagional Date Format:	#Azure Threads:	15
	Custom Identity Provider:	#Retry:	10
	Cloud:	Auto Resume Rules:	is not responding Import did not complete Timeout waiting for connection from pool Can not create lookup fields because list(s) doesn't exist target Parent content type does not exist
	Path Overflow Option		
	Truncate Long Path: 🗹	Temporary Files Location:	C:\Users\JTrosman\AppData\Local\Temp
	Max Length Before Overflow: 200	#Jobs per Tab:	100
	Overflow Folder Name Length: 5	e "Jobs per lub.	100

Migration Configuration Wizard

The wizard allows you to choose between two options:

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

Copy Site to Existing Site

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

NOTE: If multiple sites are selected for copy, we advise only using the Copy Site to New Site option. Selecting other options may result in conflicts during the copy process.

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

SharePoint Online to	SharePoint Online	e Migration			×					
Select which type of	site copy shoul	d be run								
Copy Site to Existi	ng Site]						
The source site will b	e copied to an exis	sting target site								
Copy Site to New Site										
The source site will be copied as a sub-site of the target site										
S chedule	< Back	Next >	Finish	Canc	el					

2. On the Migration Configuration page, give your project a name and select all the options you would like to apply to this migration. Click **Finish**.

SharePoint Online to SharePoint Online Migration	_									
Migration Configuration										
Select the options to enable for this migration.										
Project Name:* TEST										
Content Options										
Copy Sub-Sites 🕡										
Copy Content										
Include Versions										
Include All Versions										
 Include most recent Versions 10 										
Copy Permissions 🔞										
🗌 Copy Features 🛛 🕢										
Copy Workflows Convert Workflows to 2013 Style	2									
Copy Forms 🔞										
Copy Navigation 💿										
✓ Overwrite if file exists ☐ Incremental copy ▲ Last days										
Skip files greater than 💿 MB										
Re-Map Users Load 🙆										
Apply Filter Filter										
<u>00 </u>										
Schedule < Back Next >	Finish	(Cancel							

Copy Site to New Site

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

NOTE: If multiple sites are selected for copy, we advise only using the Copy Site to New Site option. Selecting other options may result in conflicts during the copy process.

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

SharePoint Online to SharePoint Online Migratio	ו			×							
Select which type of site copy should be run											
1											
○ Copy Site to Existing Site	<u>(</u>										
The source site will be copied to an existing targe	t site										
Copy Site to New Site											
The source site will be copied as a sub-site of the target site											
Schedule < Back Nex	t > Finish		Cancel								

2. Specify the new site's name and URL, both of which must be created prior to performing this migration. Select the option you would like applied to the copy of your site. Click **Finish**.

SharePoint Online to SharePoint Online Migration			×								
Migration Configuration											
Select the options to enable for this migration.											
Project Name:* TEST											
Site URL: metavistech-admin.sharepoint.com/test											
Content Options											
Copy Sub-Sites 🕡											
Copy Content											
Include Versions											
Include All Versions											
Include most recent Versions 10											
Copy Permissions 🔞											
Copy Features 🔞											
Convert Workflows to 2013 Style 🔞											
Copy Forms 🔞											
Copy Navigation 🕖											
Overwrite if file exists 💿											
Incremental copy 😢 Last 🛛 days 🗠											
Skip files greater than 💿 MB											
Re-Map Users Load 💿											
Apply Filter Filter											
Schedule < Back Next > Finish		Cance	I								

Copy/Promote to New Site Collection

Upon selecting to Promote to Site Collection, the Migration Configuration Wizard will be generated. The following are the steps required to copy/promote a site or site collection to a new site collection. (If you would like to copy a site that was not previously loaded in the Navigator pane, then first follow the steps in the Copy Sites Without Loading The Source or Target Site in the Navigator pane section, if you would like to promote a site collection or my sites that were not previously loaded in the Navigator pane, then first follow the steps in the Copy Site collections and My Sites Without Loading into the Navigator Pane section):

1. Select the "Promote to Site Collection" button in the Sites section of the Migrator tab. **NOTE:** this option will only be available for site and site collections that have already been loaded into

the Navigator pane.

Hom	e Viev	v Arc	hitect	Migrator	File Manager	Drives Pr	ublic Folders	Security M	lanager	Term Store Manager	Inform	ant Administrator	Backup	Help
SharePoint	Copy	Paste	8	Copy Site *	E> + - E> Live Compare!	Promote to Site Collection	Сору	Select All	Tag	Copy To	F ilter	File Share SharePoin	In SharePo Contents	oint 🗾 Logs
Connect To	Clipbo	bard	Delete		Sites		List/Library		[Documents/Items		Migration Analysis	Vie	w

- 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**.

Promote to New Site Collection			×
Migration Configuration			
😢 Project Name can't be blank.			
Project Name:*			
Target Office 365 Connection Parameters			
SharePoint Admin URL:	\sim	Connec	t 😨
Target Site Collection URL:			
Copy Sub-sites			
Include Content Versions			
 Include Content Versions Include All Versions 			
 Include most recent Versions 10 			
Copy Permissions 🔞			
Copy Features 🔞			
Copy Workflows Convert Workflows to 2013 Style 🔞			
🗌 Copy Forms 🔞			
Copy Navigation 🔞			
✓ Overwrite if file exists			
Incremental copy 🕖 Last 🛛 🛛 days 🗠			~
Schedule Finish		Cancel	

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:

> 🧀 _cus > 🗁 _priv

> 🗁 imag

Ctrl+C Ctrl+V

👝 Liet

Right Click Menu
 Corporate 2016
 Lists
 Copy
 Form 1
 Poste
 Site As
 Site As
 Site Paste
 Site As
 Site A

> 🗟 Style Li		View Contents	
📅 Subsites	7	Filter List	
> 🗁 Office 365	0	View In Browser	
> 🗁 OneDrive		Audia Ohiora	
🗸 🗁 SharePoint	ED.	Audit Object	
🚣 Central Admir		Use CSV to	>
🗸 😏 Central Admir			
🗸 📶 Lists		Create	>
> 🖻 Admin		Analysis	>
> 💆 Admin			
		Objects	>
🕂 Connections 🖾	⊡ ∓	List Contents Report(csv)	
Elonny Disk Drive	D	cist contents hepoti(csv)	
Socal Disk (C:)	۵	Properties	

• Copy and Paste buttons in the Migrator Ribbon



3. The application will bring up the Copy List/Library Migration Wizard. Specify any options you wish to include as part of your migration. Once you are satisfied with the settings, click **Finish**.

8	-	_		×
Copy List/Library				
Specify parameters for list copy				
Destination Site				^
Name: 10test URL: https://metavistech.sharepoint.com/sites/10test				
List Name Documents				
List Copy Options				
Copy Content				
Copy Content Permissions				
Copy Versions				
Include All Versions				
 Include most recent Versions 10 				
Copy List Permissions				
Deferred Group Copy 🔞				
Copy Views				
🗌 Copy Custom Doc Template 🔞				
Remove Folder Structure				
Copy Workflows 💿				
Convert Workflows to 2013 Style				
Copy Forms 🔞				\checkmark
Generate Script	Finish		Cancel	

- **NOTE:** In order for Nintex Forms to be copied over successfully, you must first preconfigure Nintex forms on both the source and target, and must select **Copy Forms** in the Copy List/Library wizard, or the copy forms portion of the migration will not work.
 - 4. Migrator will begin the process of copying the selected content and provide feedback via a status window. In the event that some type of error occurs during the operation, a report will be provided with a detailed description.

Copy, Move, and Tag SharePoint Content

SharePoint uses three primary methods for categorizing content:

- The hierarchy of sites, lists and folders (which is similar to how file systems store files in folders) and;
- Metadata (via content types and fields) to 'tag' or classify content for find-ability and filtering.
- AutoTagging (via fields) to automatically 'tag' or classify documents by their contents. For more information about AutoTag see Field Value Selection Screen.

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

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

- In the navigator pane, locate the lists containing the content you wish to move or copy. Double-click on the list to load its contents into the Contents pane. If the site containing your content is not available in the navigator pane, follow the instructions for Connect to SharePoint.
- 2. From the list of items in the List/Library Contents pane, select all the items that you wish to transfer to a different location. Hold down the CTRL key to select multiple individual items or SHIFT key to select multiple consecutive items.

° Contents 🙋 Progress				[월] [1] [1] [1] [1] [1] [1] [1] [1] [1] [1
Corporate 2016 > Document	ts			Views: All Documents \sim
Name	Туре	Modified	Modified By	
Important Notes.txt	Document	2017-11-30 11:05:00 AM	System Account	
Procedures.bt	Document	2017-11-30 11:05:00 AM	System Account	

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

٦	🕆 Contents 🙋 Progress								
	Corporate 2016 > Documer	<u>its</u>							
	Name	Туре	Modified	Modified By					
	Important Notes.txt	Document	2017-11-30 11:05:00 AM	System Account		6 ⁰	Сору	Ctrl+C	1
	Procedures.txt	Document	2017-11-30 11:05:00 AM	System Account		X	Delete	Del	1
					Q	8	Tag		
						Ř.	Copy To		
					C	7	New Folder		
					1		Upload/Copy Content		
						6	Download Content to File System		
					E	•	Compress Storage		
						0	Audit Object		
						୭	Refresh		
						B	Open		
						o	View In Browser		
						ß	Grant permission		
					1	Z	Compare permissions		

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

and select Paste from its right click menu.

		•		
🧏 Navigator		G] 🔩 ▽ 🗆 E	🛯 📑 Conten
✓ S Co	rporate 2016 Lists		-	Corpora
>	For 🂕	Сору		Ctrl+C
>	🛄 Mic 📔	Paste		Ctrl+V
>	Site X	Delete From SharePoint		
>	🖻 Sty 📃	View Contents		
	Subsite 🍟	Filter List		
V 🗁 Office	365	View In Browser		
> ==	OneDri 📷	Audit Object		
> 🗁 OneDi	rive Point	Use CSV to		>
🚣 Ce	entral Ad	Create		>
~ S Ce	ntral Ad Lists	Analysis		>
>	📑 Adı	Objects		>
>	Adı 🖓 Anı	List Contents Report(csv)	
>	🔲 apr 🚯	Properties		

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

	Hom	e Vie	w Are	chitect	Migrator	File Manager	Drives Pu	blic Folders	Security Manager	Term Store Manager	Inform	ant Administrator	Backup Help	
s	harePoint	Copy	Paste	8	Copy Site •	E + - E Live Compare!	Promote to Site Collection	Copy	Select All Tag	Copy To	Filter	File Share SharePoint	S In SharePoint Contents	Logs
c	onnect To	Clipt	oard	Delete		Sites		List/Library		Documents/Items		Migration Analysis	View	

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

Contents 🦉 Progress				1	
orporate 2016 > Documer	nts			Views: All Documents ~	
lame	Туре	Modified	Modified By		
Important Notes.txt	Document	2017-11-30 11:05:00 AM	System Account		
Procedurer bit	Document	2017-11-30 11-05-00 AM	Sustem Account		

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

C	Contents 🤄 Progress						
	Corporate 2016 > Documen	<u>its</u>					
	Name	Туре	Modified	Modified By			
	Important Notes.txt	Document	2017-11-30 11:05:00 AM	System Account			
	Procedures.txt	Document	2017-11-30 11:05:00 AM	System Account		Сору	Ctrl+C
					X	Delete	Del
					0	Tag	
					 1	Сору То	
					 5	New Folder	
					1	Upload/Copy Content	
						Download Content to File System	
					6	Compress Storage	
					B	Audit Object	
					Ø	Refresh	
					B	Open	
					0	View In Browser	
					8	Grant permission	
					<u>*</u>	Compare permissions	

- 4. Once a user has copy and pasted an item to a destination, or selected the "Copy To..." option, the Summary page of the copy wizard appears. Give your project a name.
- 5. This summary page provides you with an overview of where the item is being copied to, as well as advanced options to choose from. To complete the copy click **Finish**.

\$		_		×
Summary				
Content total s	ummary			
Project Name:*	Test			
Target Conten	t Location			^
Site URL:	https://metavistech.sharepoint.com/sites/10test			
List:	Form Templates			
Folder:				
Content Type:	InfoPath Form Template			
1 documents w	ill be updated.			
Q × Advan	ced Options			
🗹 Over	write if file exists 💿			
Incre	emental copy 💿 Last 💦 days 🗹			
Copy	/ Permissions			
🗹 Ena	ble Azure Turbo Mode 😰			
	Nama of Dura violation of Change of			>
Create CS	/ File for Uploading, Tagging or Copying files 🔞			
Schedule		Finish	Cancel	
- Schedule		- THIST	Carlee	

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.

General	Your Settings will be saved for future operations.		
Connection	Copy Subsites: Copy Views:	Hyper Mode Settings	
	Copy Features: Copy Forms:	1 OAuth:	Hyper Backup:
Migration	Conv Hidden Fields: Conv Workflows:	Generate Status Report:	Classic Mailbox Backup:
ail Notification	Remove Folder Structure:	Delete Report Jobs:	Backup System Lists:
Advanced			1 Classic Navigator Mode:
	Generate Failed Items File: Manual Automatic Content Type Load Limit: 400	#Parallel Threads:	35
	Regional Date Format:	#Azure Threads:	15
	Custom Identity Provider:	#Retry:	10
	Cloud:	. ① Auto Resume Rules:	is not responding Import did not complete Timeout waiting for connection from pool Can not create lookup fields because list(b) doesn't exist target Parent content type does not exist
	Path Overflow Option		
	Truncate Long Path: 🧹	Temporary Files Location:	C:\Users\UTrosman\AppData\Local\Temp
	Max Length Before Overflow: 200	#Jobs per Tab:	100
	Overflow Folder Name Length: 5		

Reset to Defaults

Site Migration Wizard

The wizard allows you to choose between three options:

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

Copy Site to Existing Site

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

NOTE: If multiple sites are selected for copy, we advise only using the Copy Site to New Site option. Selecting other options may result in conflicts during the copy process.

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

	- L	Х
elect which type of site copy should be run		
		_
Copy Site to Existing Site		
The source site will be copied to an existing target site		
The course site will be conied as a sub-site of the target site		
The source site will be copied as a sub-site of the target site		
	1	
The source site will be copied/promoted to a new site collection		
Generate Script Schedule < Back Next > Finish	Cancel	

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

\$			×
Target Site selection			
Select a target site(s)			
Parent Site/Site Collection URL (e.g. http://www.yoursharep	oint.com/sites/yoursite):		
https://	com	~ Con	nnect

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

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

\$				_		×
Target Site selection						
Select a target site(s)						
Parent Site/Site Collection URL (e.g. http://www	w.yoursharepoin	t.com/sites/you	ursite):			
https://		cc	m		Con	nect
5				 		

Generate Script Schedule < Back Next > Finish Cancel

Essentials for Office 365 User Guide Migrator Tab
--

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

6	_		×
Copy Site Properties			
Profiles Site-Default	~	Save	New
Ste Copy Options			^
variation of the second secon			
🗹 Copy Sub-Sites 🛛 🔞			
Copy Site Permissions 💿			
Deferred Group Copy			
🔿 Copy Site Groups 🛛 🔞			
Copy site collection features 🔞			
Copy features 🔞			
🗹 Copy Site Home Page 🛛 🔞			
Copy Sharepoint Designer Objects 🔞			
Copy Site Workflows			
List Copy Options			
2019 Copy Lists and Libraries			
Copy content			~
Generate Script Schedule < Back Next > Finish		Can	cel

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

Summary				
You are about to copy				
Source Site:				,
Name: Corporate 2016				
URL:				
Target Site:				
Name: Alexander Dorofeev				
URL:	contration from prediction for the			
Copy "Corporate 2016" to "Alexander Dorofeev" with t	he following options			
Copy content types:	Yes			
Copy Lists and Libraries:	Yes			
Copy content:	Yes			
Copy Versions:	Yes			
Copy Content Permissions:	No			
Copy Permissions:	Yes			
Copy Views:	Yes			
Copy Custom Doc Templates:	No			
Enable Turbo Mode:	No			
Enable Azure Turbo Mode:	No			
Copy Workflows:	No			
Copy InfoPath:	Yes			
Defer Required Fields:	No			
Copy SubSites:	Yes			
Copy site permissions:	Yes			
Copy site groups:	No			
📑 Generate Script 📑 Schedule	< Back Next > Fin	ish	Cance	al

Copy Site to New Site

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

NOTE: If multiple sites are selected for copy, we advise only using the Copy Site to New Site option. Selecting other options may result in conflicts during the copy process.

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

elect which type of site copy should be run	
O Copy Site to Existing Site	(C)
The source site will be copied to an existing target site	•
Copy Site to New Site	
The source site will be copied as a sub-site of the target	site
O Copy/Promote to New Site Collection	
The source site will be copied/promoted to a new site co	ollection
🔓 Generate Script 🛛 🗐 Schedule	< Back Next > Finish Cancel

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

\$		_		×
Target Site selection				
Select a target site(s)				
Parent Site/Site Collection URL (e.g. http:/	//www.yoursharepoint.com/sites/yoursite):			
https://	com		~ Con	inect

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.

			-		×
r					
elect a target site(s)					
arent Site/Site Collection URL (e.g. http://www.you	rsharepoint.com/	sites/yoursite):			
https://	-	com		~ Con	nect
s 🔊					
F Generate Script 🛛 두 Schedule	< Back	Next >	Finish	Cance	el

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

\$			×
Copy Site	Properties		
Site Name:	London		
Site Title:	London Office Portal		

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

			×
Copy Site	Properties		
Site Name:	London		
Site Title:	London Office Portal		
Profiles S	ite-Default ~	Save	New
3 5	Site Copy Options		^
2013	Copy content types 🔞		
E] Copy Sub-Sites 🛛 🔞		
	Copy Site Permissions 🕡		
	Deferred Group Copy		
	🔿 Copy Site Groups 🛛 🔞		
	Copy site collection features 🔞		
] Copy features 🛛 🔞		
2	🛾 Copy Site Home Page 🛛 🔞		
	Copy Sharepoint Designer Objects 🔞		
C] Copy Site Workflows		
C] Copy Master Page Gallery 🛛 🔞		~
E Gener	rate Script Schedule < Back Next > Einish	Can	cel

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

ummary			
You are about to copy			
Source Site:			
Name: Corporate 2016			
URL:			
Target Site:			
Name: Alexander Dorofeev			
URL:	erende alle diese, radio ritech, con		
Copy "Corporate 2016" to "Alexander Dorofeev" with	the following options		
Copy content types:	Yes		
Copy Lists and Libraries:	Yes		
Copy content:	Yes		
Copy Versions:	Yes		
Copy Content Permissions:	No		
Copy Permissions:	Yes		
Copy Views:	Yes		
Copy Custom Doc Templates:	No		
Enable Turbo Mode:	No		
Enable Azure Turbo Mode:	No		
Copy Workflows:	No		
Copy InfoPath:	Yes		
Defer Required Fields:	No		
Copy SubSites:	Yes		
Copy site permissions:	Yes		
Copy site groups:	No		
			-1

Copy/Promote to New Site Collection

This function can be accessed in two ways:

- Through the selection of the "Copy/Promote to New Site Collection" option within the Site Migration Wizard (start at step 1 below).
- Through the selection of the "Promote to Site Collection" button in the Sites section of the Migrator tab. **NOTE:** this option will only be available for site and site collections that have already been loaded into the Navigator pane. (start at step 2 below).

н	ome)	'iew Ar	chitect	Migrator	File Manager	Drives P	ublic Folders	Security Ma	nager	Term Store Manager	Inform	ant Administrator	Backup H	elp
SharePoin	t Copy	Paste	8	Copy Site *	E> + - E> Live Compare!	Promote to Site Collection	Copy	Select All	Tag	Copy To	Y Filter	File Share SharePoint	S In SharePoir	it 🗾 Logs
Connect To	Cl	pboard	Delete		Sites		List/Library		1	Documents/Items		Migration Analysis	View	

Upon selecting to Promote to Site Collection, the Site Migration Wizard will be generated. The following are the steps required to copy/promote a site or site collection to a new site collection. (If you would like to copy a site that was not previously loaded in the Navigator pane, then first follow the steps in the Copy Sites Without Loading The Source or Target Site in the Navigator pane section, if you would like to promote a site collection or my sites that were not previously loaded in the Navigator pane, then first follow the steps in the Copy Site collections and My Sites Without Loading into the Navigator Pane section):

○ Copy Site to Existing Site	
The source site will be copied to an existing tar	rget site
○ Copy Site to New Site	
The source site will be copied as a sub-site of the	the target site
Opy/Promote to New Site Collection	
The source site will be copied/promoted to a n	new site collection

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

SAMPLES\spsadmin

100

Site Collection Admin:

Site Collection Quota (MB):

Select which type of site copy should be run

•		
Copy Site Properties		
8 Please connect to Central Ac	dmin	
Target Central Admin URL:	http://	Conne
	Please connect to Central/Tenant Administration	
Enter the Target Si	ite collection URL.	
Enter the Target Si	ite collection URL.	
Enter the Target Si Copy Site Properties	ite collection URL.	
Enter the Target Si Copy Site Properties Target Central Admin URL:	ite collection URL.	 Conne
Enter the Target Si Copy Site Properties Target Central Admin URL:	ite collection URL. http:///aspx Connected to Central Administration	Conne

?

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

>				×
Copy Site Properties				
Target Central Admin URL:	https://metavistech-admin.sharepoint.co	om	Conn	ect
	Connected to Tenant Adr	ninistration		
Target Site Collection URL:	https://metavistech.sharepoint.com/site	s/365groupmigration01	0	
Site Collection Admin:	i:0#.f membership jtrosman@metavistec	h.com		
Site Collection Quota (MB):	100		0	
Site Copy Options				
Copy Site Permissio				
	n Conv			
Copy Site Gro				
	features			
Copy Site Home Pa	e 🙆			
Copy Sharopoint D	rigner Objects			
	allery 🐨			
				7
Generate Script	le < Back Next >	Finish	Cancel	

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**.

S			\times
Summary			
You are about to copy			
Source Site:			^
Name: Corporate 2016			
URL:			
Target Site:			
Name: Alexander Dorofeev			
URL:			
Copy "Corporate 2016" to "Alexander Dorofeev" with the following options			
Copy content types: Yes			
Copy Lists and Libraries: Yes			
Copy content: Yes			
Copy Versions: Yes			
Copy Content Permissions: No			
Copy Permissions: Yes			
Copy Views: Yes			
Copy Custom Doc Templates: No			
Enable Turbo Mode: No			
Enable Azure Turbo Mode: No			
Copy Workflows: No			
Copy InfoPath: Yes			
Defer Required Fields: No			
Copy SubSites: Yes			
Copy site permissions: Yes			
Copy site groups: No			\checkmark
Generate Script Schedule < Back Next > Finish	h	Cancel	I

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 1 🗁 🔳 🗁 _cus 👝 _priv ✓ S Corporate 2016 > 🗁 imag Eists
 >
 Copy

 >
 Form 1

 >
 MicroF
 👝 Liet Ctrl+C Ctrl+V > 🖻 Site As 🗙 🛛 Delete From SharePoint Site Pa
 Site Pa
 Site Pa
 View Contents 🍟 Filter List 📅 Subsites > 🗁 Office 365 💿 View In Browser > 🗁 OneDrive audit Object B SharePoint Central Admir Use CSV to., Central Admir Create Lists > 🖻 Admin > 🔽 Admin Analysis Objects 🕂 Connections 🖾 List Contents Report(csv) Second
 - 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**.

•			\times
Copy Lists/Libraries			
Select items to update in the target site(s)			
✓ S Central Administration (http://s-sp16-xprod:1000)			
Documents Form Templater			
Collapse All Expand All			
E Generate Seriet E Schedule / Back	Einish	Canad	
E Generate Scribt E Schednie < Back Next >	Finish	Cancel	

5. On the Parameters page, specify any options you wish to include as part of your migration. Once you are satisfied with the settings, click **Finish**.

\$			×
Copy List/Library			
Specify parameters for list copy			
Destination Site			^
Name: 10test URL: https://metavistech.sharepoint.com/sites/10test			
List Name Documents			
List Copy Options			
Copy Content			
Copy Content Permissions			
Copy Versions			
Include All Versions			
O Include most recent Versions 10			
Copy List Permissions			
🖂 Deferred Group Copy 🔞			
Copy Views			
🗌 Copy Custom Doc Template 🔞			
Remove Folder Structure			
Copy Workflows 💿			
Convert Workflows to 2013 Style			
Copy Forms 🔞			V
🛃 Generate Script 🔄 Schedule	Finish	Cancel	

- **NOTE:** In order for Nintex Forms to be copied over successfully, you must first preconfigure Nintex forms on both the source and target, and must select **Copy Forms** in the Copy List/Library wizard, or the copy forms portion of the migration will not work.
 - 6. Migrator will begin the process of copying the selected content and provide feedback via a status window. In the event that some type of error occurs during the operation, a report will be provided with a detailed description.

Copy, Move, and Tag SharePoint Content

The following details the steps required to Copy, Move and Tag SharePoint Content when the Classic Navigator Mode is enabled in the Profile Manager.

SharePoint uses three primary methods for categorizing content:

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

- Metadata (via content types and fields) to 'tag' or classify content for find-ability and filtering.
- AutoTagging (via fields) to automatically 'tag' or classify documents by their contents. For more information about AutoTag see Field Value Selection Screen.
 - **i NOTE:** Auto Tagging is not available to Power User products.

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

- In the navigator pane, locate the lists containing the content you wish to move or copy. Double-click on the list to load its contents into the Contents pane. If the site containing your content is not available in the navigator pane, follow the instructions for Connect to SharePoint.
- 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.

C C	ontents 🧟 Progress				12 1日 日 歌 明 〇 爵 × 岡 〒 ♥ 〇 『 日
<u>Co</u>	rporate 2016 > Document	ts			Views $ $ All Documents \vee
N	ame	Туре	Modified	Modified By	
	Important Notes.txt	Document	2017-11-30 11:05:00 AM	System Account	
	Procedures.bt	Document	2017-11-30 11:05:00 AM	System Account	

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

ame	Туре	Modified	Modified By			
Important Notes.txt	Document	2017-11-30 11:05:00 AM	System Account	-102	Conv	Ctrl
Procedures.txt	Document	2017-11-30 11:05:00 AM	System Account		Copy	Cui
				~	Delete	
					Tag	
					Сору То	
					New Folder	
					Upload/Copy Content	
				D _B	Download Content to File System	
					Compress Storage	
				B	Audit Object	
				Ø	Refresh	
					Open	

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

and select Paste from its right click menu.

			•			
	Navigator			▣ 🕏 ་ "		Conter
ſ	∽ 🚯 Co ~ 📶	rporate 2016 Lists	ate		^	<u>Corpora</u>
l	>	For 💕	Сору			Ctrl+C
l	>	🛄 Mic 📔	Paste			Ctrl+V
	>	Site X	Delete From SharePoint	t		
l	>	🖻 Sty 📃	View Contents			
l	1	Subsite 🍟	Filter List			
l	Office	365	View In Browser			
l	> ==	OneDri 📷	Audit Object			
	> 🗁 OneDi 🗸 🗁 Sharef	rive Point	Use CSV to			>
l	E Ce	entral Ad	Create			>
l	∽ 5) Ce	ntral Ad	Analysis			>
l	>	🖻 Adı	Objects			>
	>	Adı 🖓 Anı	List Contents Report(cs	v)		
l	>	🔲 apr 🚯	Properties			

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

	Hom	e Vie	w Are	chitect	Migrator	File Manager	Drives Pu	iblic Folders	Security Manager	Term Store Manager	Inform	ant Administrator	Backup Help	
2	iharePoint	Сору	Paste	8	Copy Site •	E> + - E> Live Compare!	Promote to Site Collection	Copy	Select All Tag	Copy To	Filter	File Share SharePoint	S In SharePoint Contents	Logs
0	onnect To	Clipb	oard	Delete		Sites		List/Library		Documents/Items		Migration Analysis	View	

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

Content	ts 🦉 Progress	hoges It 23 I II				
Corporate	te 2016 > Document	5			Views	All Documents ~
Name		Туре	Modified	Modified By		
📄 In	mportant Notes.txt	Document	2017-11-30 11:05:00 AM	System Account		
- D.	ten and user but	Decomposit	2017 11 20 11:05:00 654	Sustana Account		

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

C	Contents 🤄 Progress						
	Corporate 2016 > Documen	<u>its</u>					
	Name	Туре	Modified	Modified By			
	Important Notes.txt	Document	2017-11-30 11:05:00 AM	System Account			
	Procedures.txt	Document	2017-11-30 11:05:00 AM	System Account		Сору	Ctrl+C
					— ×	Delete	Del
						Tag	
						Сору То	
						New Folder	
						Upload/Copy Content	
						Download Content to File System	
						Compress Storage	
					6	Audit Object	
					Ø	Refresh	
					•	Open	
					0	View In Browser	
						Grant permission	
					1/	Compare permissions	

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

list targ	et location. Click N	ext.					
\$							×
Location							
Specify loc	ation and content type						
Location							
		Select	Different Site				
Site URL:	http://s-sp16-xprod:1000						\checkmark
List:	Shared Documents						~
Gene	erate Script 🛛 📳 Schedule		< Back	Next >	Finish	Cance	:I

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.

			_		>
operties					
pecify target metada	ta				
Content Type: Docu	ment				`
Name *	<copy from:="" name="" value=""></copy>			<	•
Title	<copy from:="" title="" value=""></copy>			<	1
Created At	<copy at="" created="" from:="" value=""></copy>			<	1
Modified At	<copy at="" from:="" modified="" value=""></copy>			<	•
Created By	<copy by="" created="" from:="" value=""></copy>			<	•
Modified By	<copy by="" from:="" modified="" value=""></copy>			<	•
Version Comments		 		^ <	`
		 		v	
			* indicates a r	required fr	ielo
Save Template Lo	ad Template				

6. The Summary page has an Advanced Options area, specify any options you wish to include as part of your migration. On this page you can also select the "Create CSV File for Uploading, Tagging or Copying Files" option - this option is described in detail in this section. Once you are
| \$ | | | | _ | | × |
|------------------|---|--------|--------|--------|--------|---|
| Summarv | | | | | | |
| Content total | summary | | | | | |
| Target Conte | nt Location | | | | | ^ |
| Site URL: | March and second 1991 | | | | | |
| List: | Shared Documents | | | | | |
| Folder: | | | | | | |
| Content Typ | e: Document | | | | | |
| 2 documents | will be updated. | | | | | |
| Profiles Ite | m-Default | | | ✓ Say | /e New | |
| | Include All Versions Include most recent Versions 10 nclude sub-folders | | | | | |
| | Dyanurita if fila aviete | | | | | |
| | ncremental copy 🕜 Last 🛛 days 🗸 | | | | | |
| | Copy Permissions | | | | | |
| | Deferred Group Copy | | | | | Ŷ |
| Create (| CSV File for Uploading, Tagging or Copying files | 0 | | | | |
| F Generat | e Script | < Back | Next > | Finish | Cance | |

NOTE:

- For Migrator Version, in the event any errors are thrown, you may reprocess any failed items after resolving the underlying issues.
- For lists with Content Approval enabled, an Approval Status field will be displayed. This field can be used to bulk approve/reject selected content.

Classification Properties Screen

				_		×
operties						
pecify target metada	ta					
Content Type: Docu	ment					¥
Name *	<copy from:="" name="" value=""></copy>				1	v
Title	<copy from:="" title="" value=""></copy>					, v
Created At	<copy at="" created="" from:="" value=""></copy>				Ì	Ū
Modified At	<copy at="" from:="" modified="" value=""></copy>				<	v
Created By	<copy by="" created="" from:="" value=""></copy>				<	¥
Modified By	<copy by="" from:="" modified="" value=""></copy>				<	¥
Version Comments					<u>`</u> <	¥
					Ť	
				* indicates a	required f	ïeld
Save Template Lo	ad Template					
Generate Script	E Schedule	< Back	Next >	Finish	Cancel	

The Classification Properties Screen contains the following content:

- **Content Type** By default, the wizard preloads the default content type for the destination location. The user may select an alternate content type by using the drop-down button. If a new content type is selected, the list of fields below will be updated correspondingly. The application will automatically attempt to match the fields from the source content type(s) to the destination. This option allows you to retain existing content type(s) for selected items. This is useful when moving or copying a set of items from multiple content types.
- **NOTE**: this is only available when Data Analysis Mode is disabled.
- **Tagging/Classification** Essentials Migrator provides several methods for "smart" tagging, which is accomplished through the use of two buttons located to the right of each field.
 - Left-Arrow Button One way to efficiently tag content is to group items that need to be tagged with a common value. For examples, you may have a set of files that share a common project name or number, a choice, check box or lookup value, (Yes/No) or a common user name. The left-arrow button provides access to directly enter or modify the value of the field. The wizard will automatically provide controls corresponding to the type of field being worked on.
 - **Down-Arrow Button** Pressing this button will generate the Field Value Selection window which is intended to allow the user more control over tagging. The functionality for this window is described in the Field Value Selection Screen section.

- **Plus Button** This button is only shown for multi-valued fields. When enabled, any new values are appended to existing ones. When disabled, new values will replace existing ones.
- **NOTE:** Because the Name field in a Library must have a unique value, only the down-arrow is enabled. This allows the user to change the value of this field by mapping to another normalized field.
- Save Template/Load Template buttons Many classification operations are done over and over again for different sets of content. These buttons allow the user to store and recall all the tagging parameters set in this window.

Field Value Selection Screen

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

left Value Selection	— D X
Select source for field: Created At <kep original="" value=""> <set empty="" to="" value=""></set></kep>	
Available Columns	Load Field Values option is disabled. To load available values, Turn on Data Analysis Mode in the Contents tab menu. Note: Loading metadata may be a lengthy process depending on number of selected items and corresponding fields
Show Hidden Fields Value will be copied from column: Created At	Cancel Select

- Keep Original Value Selecting this check box will retain the value in the source for this field.
- Set to Empty Value Selecting this check box will remove any existing value from the field.
- Available Columns Selecting a field name from this list will designate it as the "source" and result in the metadata values from this field to be transferred to the destination for each item.
- Available Values When a "source" field is selected from the Available Columns list, the metadata values for all the items are displayed in the Available Values list.
 Note: This option is only available if Data Analysis Mode I 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**.

				;
ımmary				
Content total s	ummary			
Target Conter	ıt Location			
Site URL:	http://s-sp16-xprod:1000			
List:	Shared Documents			
Folder:				
Content Type	Document			
2 documents v	vill be updated.			
Profiles Iten	n-Default			✓ Save New
Create C	SV File for Uploading, Tagging or Copyin	ıg files (🕜		

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



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

Upload/Copy Content from the right-click menu.

> 🖪 Shared Do	cume	ents		_	
> 🖪 Solution G		Сору	Ctrl+C	1	
> 📇 SSA12e5cf	174	Paste	Ctrl+V		
Style Libra	×	Delete From SharePoint		F	
> 🎆 User Infor		View Contents		E	
> 🖪 Web Part (7	Filter List		L.,	
ctions 🖾	0	View In Browser		F	
oppy Disk Drive (A:	B	Audit Object		E	
cal Disk (C:)		Use CSV to	>	P	Upload/Copy Content
utlook		Create	>	Ø	Tag Content
ogle Drive		Analysis	,		Upload Public Folders
2		Analysis	· · · · · · · · · · · · · · · · · · ·		Download Content to File System
		Objects	>		
	Ст.	List Contents Report(csv)		E	
	60	Properties			

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

•		\times
Upload or Copy Content using CSV		
Select CSV file and advanced options		
Profiles Upload-Default	 	\sim
File Location :		
C:\Users' \Copy and Tag SharePoint Items.csv		

5. Select the Source SharePoint Sites from the list that your CSV provided. You may check individual items or the **Check All** button at the bottom to select everything. Click **Check Connection** to check the connection to the source sites.

D			×
Ipload or Copy Content using CSV			
Select CSV file and advanced options			
Profiles Upload-Default			\sim
File Location :			
C:\Users\ Copy and Tag SharePoi	nt Items.csv		
Source Sharepoint Site	Source Sharepoint List	Source Sharepoint F	ile
http://s-sp16-xprod:2016/sites/Corporate2016	Documents	Important Notes.txt	1
http://s-sp16-xprod:2016/sites/Corporate2016	Documents	Procedures.txt	
<			>
2 out of 2 items selected			
Check All Uncheck All Check Connection			

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

Profiles			
r ronnes	Upload-Default		~
ile Locat	tion :		
C:\User	rs\spsadmin\Desktop\Copy and Tag SharePoi	nt Items.csv	
Source	Sharepoint Site	Source Sharepoint List	Source Sharepoint File
	http://s-sp16-xprod:2016/sites/Corporate2016	Documents	Important Notes.txt
✓ h	http://s-sp16-xprod:2016/sites/Corporate2016	Documents	Procedures.txt
<			
00	Advanced Options		
0			
	Use Charset for Encoding file windows-125	1 ~	
		oreadsheet 🔞	
	Use Created / Modified Properties from Sp		
	Use Created / Modified Properties from Sp		
	Use Created / Modified Properties from Sp Overwrite if file exists Incremental copy		

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.
- 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.

Source

2. Select Orphaned Users Copy within the Advanced section of the header.



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

Select Source

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.

 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.

👂 Navigator 📃 🔄 🌣 🗢			Contents 🔤 Progre	ss 🧭 Azur	e Turbo Jobs 🧭 Azure T	urbo Queue	
Subsites	^		<u>> Doc</u>	<u>uments</u>			
Lists		1	lame	Туре	Modified	SharedWith	Modified By
Form Templates			> 🗁 Attachments	Folder	2017-10-30 02:20:33 AM	2	Ianna Trouman
> 🛄 Social			i 🗁 IT	Folder	2018-04-30 11:25:04 PM	12	Ianna Trouman
> 🖻 Style Library			🕞 🗁 library	Folder	2018-04-30 11:25:04 PM	14	Ianna Trouman
📅 Subsites			> 🗁 Notebooks	Folder	2017-11-26 10:37:09 PM	9	ianna Trooman
🗸 🚺 laa Fadadaa			🕞 🗁 Test	Folder	2018-04-30 11:25:04 PM	13	ianna Trouman
> 🛗 Lists			123.txt	Document	2018-05-31 06:08:46 AM	15	ianna Trooman
> 📅 Subsites			Book.xlsx	Document	2018-05-31 06:08:38 AM	3	ianna Trouman
🗸 🚺 Tenant Administration			Book1.xlsx	Document	2018-05-31 06:08:41 AM	4	ianna Trouman
> 📶 Lists			Book2.csv.xlsx	Document	2018-05-31 06:08:44 AM	6	ianna Trouman
> 🛅 Subsites			Book2.xlsx	Document	2018-05-31 06:08:41 AM	5	Ianna Trooman
✓			Book3.csv.xlsx	Document	2018-05-31 06:08:46 AM	8	Ianna Trouman
🗸 🚺 Alexander Developer			Book3.xlsx	Document	2018-05-31 06:08:44 AM	7	Ianna Trouman

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

- 2. From the list of files located in the Contents pane, select all the files for tagging. Hold down the CTRL key to select multiple individual files or SHFT key to select multiple consecutive items.
- 3. Right-click on any of the selected files, and select the Tag option from the drop down menu. This will initiate the tagging wizard.



- Update the field values to the desired settings. Refer to the sections on the Classification Properties Screen and the Field Value Selection Screen for additional information on your options.
- 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.

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

)	Navigator		0 🕏	\bigtriangledown		Contents	B Progress	s 🧭 Azure	e Turbo Jobs	ど Azure Ti	urbo Queue	
	► 5) -	Subsites			^	Janua Tra	<u>> Docur</u>	<u>ments</u>				
	×	Documents				Name	-	Туре	Modified		SharedWith	Modified By
	>	🖻 Form Templates				> 🗁 At	tachments	Folder	2017-10-30 02	2:20:33 AM	2	Ianna Trouman
	>	Social				🔉 🗁 IT	F	Folder	2018-04-30 1	1:25:04 PM	12	ianna Trooman
	>	🖻 Style Library				> 🗁 lib	rary F	Folder	2018-04-30 1	1:25:04 PM	14	Ianna Trooman
	1	Subsites				> 🗁 No	tebooks f	Folder	2017-11-26 10	0:37:09 PM	9	Ianna Trooman
	🗸 🚺 🔤	Fedorkov				> 🗁 Te	st f	Folder	2018-04-30 1	1:25:04 PM	13	Janna Trooman
	> 📶	Lists				12	3.txt [Document	2018-05-31 06	5:08:46 AM	15	Ianna Trooman
	> 📅	Subsites				/ Bo	ok.xlsx [Document	2018-05-31 06	5:08:38 AM	3	Ianna Trooman
	🗸 🚺 Tei	nant Administration				🖉 Bo	ok1.xlsx [Document	2018-05-31 06	5:08:41 AM	4	ianna Trooman
	> 💼	Lists				🖉 Bo	ok2.csv.xlsx [Document	2018-05-31 06	5:08:44 AM	6	Ianna Trooman
	> 🖬	Subsites				🖉 Bo	ok2.xlsx [Document	2018-05-31 06	5:08:41 AM	5	Ianna Trooman
~ 1	😂 Corpo	rate London				🖉 Bo	ok3.csv.xlsx [Document	2018-05-31 06	5:08:46 AM	8	Ianna Trooman
	🗸 🚺 📖	eander Dorofeev				a Bo	ok3.xlsx [Document	2018-05-31 06	5:08:44 AM	7	Janna Trooman

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

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

Home	View	Migrator	File	Manager Driv	es Security Manager	Term Store Ma	nager	Administrator	r	Backup Help	>>					
SharePoint	Copy	Paste		opy Live Compar	el Promote to Site Collection	Nintex Deployment	Copy	Select All	o Tag	Copy To	Filter	File Share	SharePoint	Orphaned Users Copy	S In SharePoint Contents Refresh	1 Logs
Connect To	Clipboz	ard C	elete		Sites		List/Library			Documents/Items		Migratio	n Analysis	Advanced	View	
🧐 Navigator	🚯 Navigator 🗧 🖏 👘 🖆 Hyper Migration 😭 Contents 🖷 Progress 🔤 🙀 🖓 🖉 📽															
v 😑	65													A		
~	(martine in	and when		and in the local division of the local divis	Carl 1 Decarrierte									V	ews: All	~
Condition Sizes (PSPERPR Figure Type Multiled DawnMith Multiled by Figure Type Multiled DawnMith Multiled by																

- 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.

Home		View M	ligrator File Manage	r	Drives Security Manager	Term Store I	Vanager	Administrator
_	"	Grant permiss	ion					
		View In Brows	er .					
		Open						
		-						
	0	Refresh						
	B	Audit Object						
		Compress Sto	rage					
		Download Co	ntent to File System					
		Upload/Copy	Content					
		New Folder						
	<u> </u>	Сору То						
	\bigcirc	Tag						
Book	~	Delete		Del				
Book		Copy	C	.trl+C				
Book	2.csv.)	dsx Document	2018-05-31 06:08:44 AN	16				
Book	1.xlsx	Document	2018-05-31 06:08:41 AM	14				
🖉 Book	.xlsx	Document	2018-05-31 06:08:38 AN	1 3				
123.t	xt	Document	2018-05-31 06:08:46 AN	1 15				
> 🗁 Test	DOOKS	Folder	2018-04-30 11:25:04 PM	1 13				
> 🗁 librar	y books	Folder	2018-04-30 11:25:04 PM	1 14				
> 🗁 IT		Folder	2018-04-30 11:25:04 PM	1 12				
> 📂 Attac	hmen	ts Folder	2017-10-30 02:20:33 AM	1 2				
		lype	Modified	Shared				

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

Properties

Specify target metadata ¥ Content Type: Document <Keep Original Value> Name * V < Title <Keep Original Value> < v <Set by SharePoint> < v Created At <Set by SharePoint> < v Modified At Created By <Set by SharePoint> < ∨ Modified By <Set by SharePoint> < v

*	indicates	а	reo	uired	l field
	maicates	•	100	i an co	nera

Save Template Load Template

Generate Script	< Back	Next >	Finish	Cancel
-----------------	--------	--------	--------	--------

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

Field Value Selection				×
Select source for field: Name				
Keep Original Value>				
Set to Empty Value>				
Available Columns	1	Available Values	 	
Eolder 7 in the File Path				
Eolder 8 in the File Path		Book1 vlsv		
Selder 9 in the File Path		Book2 csy xlsx		
Modified At		Book2 xlsx		
	- 1			
Name (Document)				
Title (Document)				
		1		
<	>	<		>
Show Hidden Fields				
Value will be copied from colump: Name				
value win be copied norn column. Name			r	
			Cancel	Select

- 7. Once the tagging selections are made, press the Next button located at the bottom of the window. A summary screen will be generated asking you to confirm the operation. Press Finish to initiate the tagging. The application will complete the tagging process and provide a notification window.
- **NOTE:** After completion of the tagging wizard, files may have the same name. Since this behaviour is not supported by SharePoint, the toll will add a "Created At" value as a suffix to duplicate files.

Name	Туре
> 🗁 folder	Folder
🔁 Model2.pptx	Document
👜 Tag Example.docx	Document
💼 Tag Example-20190809031925.docx	Document

NOTE:

- For the Migrator version of this wizard, users may select the "Create CSV File for Uploading, Tagging and Copying Files", which will create a CSV file that may be edited and used for tagging at a later time (see Copy and Tag SharePoint Items Using CSV).
- For Migrator version of this wizard, in the event any errors are thrown, you may reprocess any failed items after resolving the underlying issues.
- For lists with Content Approval enabled, an Approval Status field will be displayed. This field can be used to bulk approve/reject selected content.

Incremental/Delta Copy

You can perform an incremental/delta copy:

• during content migration

OR

• for an existing job, to copy changes on the source made after a full migration.

Incremental Copy/Delta Migration During Content Migration

There are multiple scenarios where copying only incremental changes from the source environment to the target are preferable to create a full copy of all content.

Migrator supports incremental copying of content into both libraries and lists but there are several key differences when using the Incremental Copy feature (Advanced Options).

1				×
py Site Properties				
rofiles Site-Default			✓ Save Ne	w
Site Copy Options				^
2013				÷
List Copy Options				
🙀 🔻 Advanced Options				
Overwrite if file exists				
Incremental copy 🕡 Last	days 🗸			
🗌 Enable Azure Turbo Mode 🛛 🔞)			
O Microsoft Provided Storage				
User Provided Storage	Select 🕡			
O Defer Upload to Azure	Select 🕡			
Apply Filter	Filter			
Re-Map Users	Load 🕡			
Re-Map Site and List Templates	Load 🕢			
Remove WEB Elements	Load 📀			
				¥

NOTE: The use of Incremental Copy has a significant impact on performance and it is recommended that users apply a filter (e.g. modified at, property is greater than migration date) to reduce the duration of this operation.

Libraries implement incremental copies using the file names. When the **Incremental Copy** option is selected any duplicate items on the target will be replaced with the source item.

Lists (unlike Libraries) implement incremental copies through an internal attribute (item id). This attribute is automatically generated and sequenced by SharePoint and cannot be overwritten. Therefore, a different approach is used to identify new and updated items, but the result is the same as for Libraries. Any duplicate items will be replaced with the source item.

The Incremental copy option has a filter that allows for the determination of the number and age of the changes that will be brought over during the incremental copy. By selecting the number of days, weeks, or months, you can choose to only bring over differences from the last full copy that was made in the determined time.

Delta Migration - If selecting "0" as the value for the incremental filter, the tool will do a content analysis of both source and target and bring over any content that is identified as differential. In the case of this migration, if a file exists on the source that is not on the target, said file will be copied to the target. In the event that the item exists in the target, the tool will check to see if the item on the source is newer than the one on the target (based off of the last modified date). If the item on the source is newer, then the item will be copied from the source to the target.

NOTE:

- This operation is extremely time, processor, and memory intensive as it has to scan every item on both your source and target environments. We only recommend using the "0" delta migration in cases where it is absolutely necessary. Otherwise, set a filter which will specify a time period for the comparison.
- Due to their inherit complexity, Wiki Page libraries and Discussion lists will not be processed during incremental or delta migrations.

Incremental/Delta Copy for an Existing Job

Once a full migration has been run, an incremental or delta copy can be run without the need to create a new project.

IMPORTANT: By default, Azure is enabled as a recommended migration method, although it can be changed in the Profile Manager. However, it is not recommended that you use a different migration method for incremental copy. For example, if CSOM was used for the full migration it should also be used for the incremental copy.

To run an incremental/delta copy on an existing job:

- 1. In the Migrator tab, select the job for which you want to run an incremental/delta copy.
- 2. Right-click and choose Run Incrementally.

	Project Name	Source	Target
0	Run Incre	https://metavistech.sharepoint.com/sites/MaksTest	https://
		Show Logs Zip Logs Show Status Report Run Incrementally	
		Refresh Logs Resume Copy Job Delete User Record Delete	

3. In the Run Incrementally dialog, select the appropriate option. Use the information in the following table for guidance.

If you want to	Then select			
copy content that has changed on the source using the Last Start Date as a filter	Incrementally from Last Start Date.			
have Essentials compare source and target content and replace older content on the target with newer content on the source	 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.

← → C ☆	(i) appsource.micro	osoft.cor	n/en-us/product/office/V	VA104137886	
Microsoft	AppSource	Apps	Consulting Services	nintex forms	nı
		Apps	> Nintex Forms for 0	Office 365	
			Х	Nintex Forms for Office 365 ♀ save for later Nintex USA LLC.	
		Pricin Addit requir Produ Share	GET IT NOW g onal purchase may be ed brint	Nintex Forms for Office 365 helps you work faster, work smarter, and work anywhere Supercharged for Office 365 - Create powerful, dynamic web forms to collect data within SharePoint Online. With Nintex Forms for Office 365 you can quickly and easily create tailored, engaging forms	

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

s	Site contents				
ome	Lists, Libraries, and other Apps				SITE WORKFL
xebook xcuments ges cent Nintex Forms for Office	add an app	Documents 0 items Modified 5 minutes ago	MicroFeed 2 items Modified 5 minutes ago	Nintex Forms for Office	Site Assets 1.2em Nintex Forms for Office 365 Version: 20.11 by Nintex USA LLC
365 te contents cycle Bin	Subsites				Nintex Forms for Office 365 helps you work faster, work smarter, and work anywhere
EDIT UNKS	new subsite This site does not have any subsites.				HELP ABOUT DETAILS ···

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



4. Connect Essentials to your Source and Target.

Select the source Site and copy it to the target site as an Existing Site (see the Copy Site section for further details)

Or, select the source list and copy it to the target (see the Copy Lists and Libraries section for further details)

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



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



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

Nintex Fo for Office 365	rms		7	
Title. Example				
TypeOfRequest SomeNewRule				
Attachments	C:\Users\User\Documents\Recommendations.docx C:\Users\User\Documents\Estimates.xlsx	Delete Delete		
Double click to edit				
	SAVE		CANCEL	

InfoPath Forms Window

The InforPath Forms Window is displayed within the content pane area and is designed to display InfoPath Forms used within a specific list.

The InfoPath Forms Window can be accessed by right-clicking on a List and selecting **Objects** followed by **Show InfoPath Forms**.

v 🛱	The second second	Tre 🛒	e View
✓ S Corporate 2016		🕎 Site	e Theme
V 📶 Lists		🖵 Pag	ge Layouts and Site Templates
> 🗗 Doc			gation
> 🖻 For 🏴	Сору	Ctrl+C	Link Bar
> 🛄 Mic 🔐	Paste	Ctrl+V	k Launch
> 🖻 Site 🗙	Delete From SharePoint		ome Page
> 🛞 Site	15 6 1 1		
> 🖻 Styl 🛄	View Contents		
📅 Subsite 🍸	Filter List		
> 🗁 Office 365 🛛 👩	View In Browser		
> 🗁 OneDrive	Audit Object		
V 🗁 SharePoint	Addit Object		
Central Ad	Use CSV to	>	
Central Ad	Granta		
	Cleate		
> Le Adr	Analysis	>	
	Objects	>	🔛 Show List Views
Connections 🖾 👝			Show Workflows
Elenny Disk Di	List Contents Report(csv)		Show InfoDath Forms
S Local Dick (C)	Properties		
CD Drive (D:)	•		Show Permissions
Qutlook		Drawati	🔯 Show WebParts
Google Drive		Properti	🗙 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.

Activities 🔛 InfoPath Fo	orms 🛛	
Content Type	InfoDath Dath	-
Form	Versioned InfoPath/forms/template.xsn	
	Activities HallinfoPath F ed InfoPath Form Form	Activities Activities Activities Activities ed InfoPath Content Type InfoPath Path Form Versioned InfoPath/forms/template.xsn Image: Ima

Workflow Migration

Nintex Workflow Migration

Nintex Workflows are included when the option to Copy Workflows (Site or List) is enabled within Essentials. The Copy Workflows option is available on the Properties page of most wizards.

N		—	×
Copy Si	ite Properties		
Profiles	Site-Default	✓ Save	New
52	Site Copy Options		^
2013			
Ö	▼ List Copy Options		
2013	Copy Lists and Libraries		
	Copy content		
	Copy Content Permissions		
	Copy Versions		
	Include All Versions		
	O Include most recent Versions 10		
	Copy List permissions		
	Copy views		
	🗌 Copy Custom Doc Template 🛛 🕢		
	Copy Sharepoint Designer Objects 🔞		
	Copy Workflows		
	✓ Copy InfoPath		
	Defer Required Fields		~
T Ge	anerate Scrint Schedule & Back Nexts Ei	nish C:	incel
- <u>E</u> 06	Back Next >	iiiiii Ca	

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 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

On-premises Actions	Online Actions
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".

On-premises Parameter	Comments
Create individual tasks for all group members.	An equivalent parameter is not available and therefore this configuration will be lost.
Allow delegation	An equivalent parameter is not available and therefore this configuration will be lost.
Store outcome in	
Store outcome achieved in	
Priority	
Item Permissions (section)	
Advanced Options (section)	
Task Notification (ribbon option)	Equivalent to "Initial email options" and only Subject and Email body are available.
Not Required Notification (ribbon option)	Equivalent to "Cancellation email options" and only Subject and Email body are available.
Reminders (ribbon option)	Equivalent to "Reminder email options" and only Number of times to repeat, Subject and Email body are available.
	Equivalent to "Escalate and auto-complete options" with the following exceptions:
Escalation (ribbon option)	 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.

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

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

Build String

During migration to SharePoint Online, the on-premises Nintex Workflow action "Build String" will be transformed into the Nintex Online Workflow action "Build String".

On-premises Parameter	Comments
Parse for tokens twice	If this option is enabled, then the workflow will need to be rebuilt post migration.
Store result in variable options	The Nintex online action only supports the "Store results in" options choice or text. Variables containing a person will not be migrated properly and may need to be rebuilt post migration.

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

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

Calculate Date

During migration to SharePoint Online, the on-premises Nintex Workflow action "Calculate Date" will be transformed into the Nintex Online Workflow action "Add Time to Date".

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

On-premises Parameter	Comments
Date	"User Profiles" and "Workflow Constants" have no equivalent and therefore are not supported.
Date - Include Time	"Include Time" has no equivalent and therefore is not supported.
Years	"Years" has no equivalent and is therefore converted into Months.
Time is	"Time is" has no equivalent and therefore is not supported. Values will be migrated as they are stored.

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

Change State

During migration to SharePoint Online, the on-premises Nintex Workflow action "Change State" will be transformed into the Nintex Online Workflow action "Set Next State".

On-premises Parameter	Comments
Action is supported as configured.	

Check Out Item

During migration to SharePoint Online, the on-premises Nintex Workflow action "Check Out Item" will be transformed into the Nintex Online Workflow action "Check out item".

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

On-premises Parameter	Comments
Where variables	"User Profiles" and "Workflow Constants" are not supported.

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

Convert Value

During migration to SharePoint Online, the on-premises Nintex Workflow action "Convert Value" will be transformed into the Nintex Online Workflow action "Convert Value".

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

On-premises Parameter	Comments
Error handling (section)	An equivalent parameter is not available and therefore this configuration will be lost.

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

Create Item

During migration to SharePoint Online, the on-premises Nintex Workflow action "Create Item" will be transformed into the Nintex Online Workflow action "Create List Item".

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

On-premises Parameter	Comments
Overwrite an existing item	An equivalent parameter is not available and therefore additional list items may be created. If required, consider adding a Delete Item action to handle this scenario.
Store new item ID in	Only GUIDs are supported in the online equivalent.

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

Delete Item

During migration to SharePoint Online, the on-premises Nintex Workflow action "Delete Item" will be transformed into the Nintex Online Workflow action "Delete item".

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

On-premises Parameter	Comments
Where value with a Person or Group reference	No equivalent person or group references available so these will be created as a text string value.

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

Discard Checkout

During migration to SharePoint Online, the on-premises Nintex Workflow action "Discard Check Out" will be transformed into the Nintex Online Workflow action "Discard Check Out Item".

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

On-premises Parameter	Comments
Where value with a Person or Group reference.	No equivalent person or group references available so these will be created as a text string value.

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

End Workflow

During migration to SharePoint Online, the on-premises Nintex Workflow action "End Workflow" will be transformed into the Nintex Online Workflow action "Terminate Current Workflow".

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

On-premises Parameter	Comments
Message was not required.	Message is now required so if the source was empty, a default value will be added.

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

Filter

During migration to SharePoint Online, the on-premises Nintex Workflow action "Filter" will be transformed into the Nintex Online Workflow action "Filter".

On-premises Parameter	Comments
Condition	The following Expression variants do not have an equivalent:
	 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

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".

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

Math Operation

During migration to SharePoint Online, the on-premises Nintex Workflow action "Math Operation" will be transformed into the Nintex Online Workflow action "Do Calculation".

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

On-premises Parameter	Comments
Lookups "User Proflie" and "Workflow Constants" are not available in the Nintex Online "Do Calculation" action.	If either of these lookups are being used, then the workflow will need to be rebuilt post migration.

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

Pause For

During migration to SharePoint Online, the on-premises Nintex Workflow action "Pause For..." will be transformed into the Nintex Online Workflow action "Pause for Duration".

On-premises Parameter	Comments
Years	 "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

On-premises Parameter	Comments
	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).

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".

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.

On-premises Parameter	Comments
Various filter/sort option	Several filter and sort options have no equivalent in the online action. Please review your configured options carefully.

Regular Expression

During migration to SharePoint Online, the on-premises Nintex Workflow action "Regular Expression" will be transformed into the Nintex Online Workflow action "Regular Expression".

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

On-premises Parameter	Comments
Action is supported as configured for all references with equivalents.	Online actions have a limited list of references. Please review your workflow carefully and update required references where necessary.

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

Run If

During migration to SharePoint Online, the on-premises Nintex Workflow action "Run If" will be transformed into the Nintex Online Workflow action "Run If".

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

On-premises Parameter	Comments
Condition	Not all conditions (expressions) have an equivalent in the online action. For example, a valid SharePoint User will need to be rebulit manually using an alternative expression post migration.

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

Run Parallel Actions

During migration to SharePoint Online, the on-premises Nintex Workflow action "Run Parallel Actions" will be transformed into the Nintex Online Workflow action "Parallel Block".

On-premises Parameter	Comments
Text names	An equivalent parameter is not available and therefore this configuration will be lost.

On-premises Parameter	Comments
Notes	An equivalent parameter is not available and therefore this configuration will be lost.

Send Notification

During migration to SharePoint Online, the on-premises Nintex Workflow action "Send Notification" will be transformed into the Nintex Online Workflow action "Send an Email".

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".

On-premises Parameter	Comments
Condition	The equivalent Expression parameter does not contain the full suite of options available in the on-premises version. Please be sure to review this workflow action and make any adjustments where necessary.

Set Field Value

During migration to SharePoint Online, the on-premises Nintex Workflow action "Set Field Value" will be transformed into the Nintex Online Workflow action "Set Field in Current Item".

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

On-premises Parameter	Comments
"Set" references	An equivalent parameter is not available for "User profiles" or "Workflow constants". If either is used, then the workflow will need to be rebuilt manually.

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

Set Variable

During migration to SharePoint Online, the on-premises Nintex Workflow action "Set Variable" will be transformed into the Nintex Online Workflow action "Set Workflow Variable".

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

On-premises Parameter	Comments
"Set" reference	An equivalent parameter is not available for "User profiles" or "Workflow constants". If either is used, then the workflow will need to be rebuilt manually.

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

Set Workflow Status

During migration to SharePoint Online, the on-premises Nintex Workflow action "Set Workflow Status" will be transformed into the Nintex Online Workflow action "Set Workflow Status".

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

On-premises Parameter	Comments
Status text dropdown options	Only the selected value will be migrated. Unused options will not be available in the migration action.

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

State Machine

During migration to SharePoint Online, the on-premises Nintex Workflow action "State Machine" will be transformed into the Nintex Online Workflow action "State Machine".

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

On-premises Parameter	Comments
Action is supported as configured.	

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

Switch

During migration to SharePoint Online, the on-premises Nintex Workflow action "Switch" will be transformed into the Nintex Online Workflow action "Switch".

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

On-premises Parameter	Comments
"Select the value to evaulate" references	An equivalent parameter is not available for all possible values and therefore this configuration may be lost. Please review your workflows which contain this action to be sure they are supported in the online version.

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

Update Item

During migration to SharePoint Online, the on-premises Nintex Workflow action "Update Item" will be transformed into the Nintex Online Workflow action "Update List Item".

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 	

On-premises Parameter	Comments		
	applicable) and make any adjustments necessary.		

Wait for Item Update

During migration to SharePoint Online, the on-premises Nintex Workflow action "Wait for item update" will be transformed into the Nintex Online Workflow action "Wait for Field Change in Current Item".

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

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

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

Save Site to XML

When a site or site collection is loaded into Essentials, a great deal of information is cached by the product. Occasionally users need to re-purpose that information for other needs. The "Save Site to XML" functionality provides a facility for exporting this information into a commonly used format.

1. Right-click on the site you wish to save and select the Save Site to XML option from the provided menu.



2. Enter a location to store the file in the provided field. Secelt **Finish** to complete the operation.

•		×
Save site to XML		
Save to:	Brov	vse
<u> </u>	Cance	el
File Manager Tab

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 Essentials File Manager fulfills including the ability to Load and Download (off board) content with metadata. Here is a sampling of these features:

- Uploading Content
 - \circ Ability to set metadata as part of the loading process.
 - Ability to extract metadata from file system folders and assign them to SharePoint metadata.
 - $\,\circ\,$ Ability to retain or unwind the folder structure in SharePoint.
 - \circ Ability to retain the core properties such as created/modified by and created/modified at.
 - Load files and metadata using a spreadsheet (CSV).
 - $\,\circ\,$ 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.
 - \circ Ability to retain pseudo-versions in File Systems.
 - Ability to remove downloaded content.
 - \circ Ability to copy NTFS file system folder permissions.

Interface Overview

The application consists of two primary panes and one optional pane: (1) Navigator, (2) Contents/Objects Area, (3) Connections area. A set of windows is automatically generated when a Loading or Downloading operation is performed.

Dearbart Cay File Link Based Entert Dormal Entert		
Sing CS/		
Nergetor E 1	Content N horses	1日日の中のX目()
V D Alexander Territori	hera horas documi	Yeas: Al v
 Second Second Sec		
Connections II Proppy Disk Drive (Ac) Generations Generations		
) (a) EDEWY (D)) (a) Cudock) (a) Google Drive		

The picture above represents the default arrangement for these panes.

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

Navigator Pane

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

Hidden Lists

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



Contents Area

The Content area displays the actual data inside a list or library. You may use this screen to select individual items to Download from your environment.

🕆 Contents 🛛 🗝 Progre	ess 🧭 Azur	e Turbo Jobs		
Janna <u>> Doc</u>	<u>uments</u>			
Name	Туре	Modified	SharedWith	Modified By
> 🗁 Attachments	Folder	2017-10-29 09:20:33 PM	2	Janna
> 🗁 IT	Folder	2018-04-30 06:25:04 PM	12	Janna
> 📂 library	Folder	2018-04-30 06:25:04 PM	14	Janna
> 🗁 Notebooks	Folder	2017-11-26 06:37:09 PM	9	Janna
> 🗁 Test	Folder	2018-04-30 06:25:04 PM	13	Janna
02.xls	Document	2017-02-06 12:36:39 PM	21	Natali
123.txt	Document	2018-05-31 01:08:46 AM	15	Janna
Book.xlsx	Document	2018-05-31 01:08:38 AM	3	Janna
Book1.xlsx	Document	2018-05-31 01:08:41 AM	4	Janna
Book2.csv.xlsx	Document	2018-05-31 01:08:44 AM	6	Janna
Book2.xlsx	Document	2018-05-31 01:08:41 AM	5	Janna
Book3.csv.xlsx	Document	2018-05-31 01:08:46 AM	8	Janna
Book3.xlsx	Document	2018-05-31 01:08:44 AM	7	Janna

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

Located in the top left-hand corner is a breadcrumb definition of the list or library whose content is represented in the window.

Connections Panel

This area of the screen is available through the File Manager, Public Folders and Google modules. Analogous to Windows Explorer's navigation area, users can select local or mapped drives and folders and then double-click to display the contents in the Content pane. From there the user can upload the content into SharePoint environment using Drag and Drop, Copy/Paste or even a CSV. All these methods will be described in more detail in the Common Functions section below.



NOTE: Essentials File Manager is also integrated with Windows Explorer. So you may drag or copy files from Windows Explorer directly into File Manager.

Connect to SharePoint and OneDrive for Business

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

Connecting to SharePoint Site and Site Collections

Quest Essentials is optimized for migrations to and from Microsoft 365. While it used to be possible to migrate to/from SharePoint on premises, Quest recommends that you use Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

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

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



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

٥	SharePoint Connection Wizard -		×
SharePoint Connection Wiza	rd		
Please Enter Project Name			
Name			0
Type SharePoint Site or Site Colle	ection (On-premises or Office 365)	~	0
URL		~	0
Or Discover Site Collections	0		
(Central Admin access is req	uired to view and select existing site collections)		
Load Entire Sub-Site Structure	(Slower) 💿		
Load Entire Sub-Site Structure	and Objects (Slowest) 🔞		
	Finish	Cancel	

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.

Central Admin URL: http://s-sp16-xprod:1	1000/default.aspx	Connect
Server Farm Admin: SHAREPOINT\system	1	
Connected	to Central Admin URL	
Web Application Name	URL	
Corporate 2016	http://s-sp16-xprod:2016/	
SharePoint - 80	http://s-sp16-xprod/	
SharePoint Central Administration v4	http://s-sp16-xprod:1000/	

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

log Select Web Application		\times
Select Site Collection		
Server Url: http://s-sp1i ~		
URL	 	
/sites/Corporate2016		
URL Search search reset		
Getting users		
		\times
Ø Last update of cache file was on: Temporary cache file not found		
< <u>B</u> ack <u>N</u> ext > OK	Cance	ł

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

🦻 Share	Point Connection Wizard —		\times
ShareP	pint Connection Wizard		
🔕 Name	contains invalid character: :		
Name	No. 1 without The Makeson		0
Type S	SharePoint Site or Site Collection (On-premises or Office 365)	\sim	0
URL	April 1 april 1 april 2011 March 2 aprenti 2011	\sim	0
Or I	Discover Site Collections 🕡		
((Central Admin access is required to view and select existing site collections)		
Load	Entire Sub-Site Structure (Slower)		
Load	Entire Sub-Site Structure and Objects (Slowest) 🛛 🔞		
	<u> </u>	Canc	el

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



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

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



Connecting to Office 365 Tenant and OneDrive

If you wish to connect toan Office 365 temant, then follow these steps:

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



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

Sha	rePoint Connection Wizard					×
nare Plea	Point Connection Wizard ase Enter Project Name					
lame						0
уре	Office 365 Tenant (Tenant Administration require	d)			~	0
JRL					~	?
Dr	Discover Site Collections					
	(Central Admin access is required to view and sele	ect existir	ig site colle	ections)		
	ad Entire Sub-Site Structure (Slower)					
		v				
Loa	ad Entire Sub-Site Structure and Objects (Slowest)					
			Finish		Cano	el

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

domain then enter your user name, password and Domain in the provided fields and click **Next**.

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

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

🤌 Connec	t to SharePoi	nt		—	×
Connectin	ig to				
User					2
Password					
Domain					
		Proxy Cor	9 figuration		
	Connect			Cancel	

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

Select Web Application		_		×
Select Web Application				
Select a Web Application				
Central Admin URL: https://m	etavistech-admin.sharepoint.com		Connec	t
Server Farm Admin: i:0#.f men	bership jtrosman@metavistech.co	om		
	Connected to Central Admin UR	L		
Web Application Name	URL			
SPO Sites				
Sites w/Group				
OneDrive Sites				
Check All Uncheck All				
		OK	Cance	l

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**.

\$	_		×
Select SPO Site(s)			
			^
The local state in the second conclusion. When it			
https://www.intention.in.ukarapacint.com/whee.https			
International destruction on the destruction Paintee			~
<			>
URL Search search reset Check All Uncheck All			
Getting sites			
Last update of cache file was on: 03/06/20 11:22 AM			
	Ж	Can	cel

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

🤌 Download Status	5	×
Download	Completed for project "Office 365"	
Do not show thi	is message again OK	
	Run in <u>B</u> ackground Cancel <u>D</u> etails >:	>

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

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



Connecting to SharePoint On-Premises Farms

Quest Essentials is optimized for migrations to and from Microsoft 365. While it **used to be** possible to migrate to/from SharePoint on premises, Quest recommends that you use 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.

AarePoint Connection Wizard SharePoint URL is invalid Jame On-Prem Farm (Central Administration required) (RL	Shar	rePoint Connection Wizard				×
SharePoint URL is invalid Jame On-Prem Farm ype On-premises Farm (Central Administration required) JRL I Discover Site Collections Central Admin access is required to view and select existing site collections) Load Entire Sub-Site Structure (Slower) Load Entire Sub-Site Structure and Objects (Slowest)	narel	Point Connection Wizard				
Jame On-Prem Farm (i) On-premises Farm (Central Administration required) URL I I Image: Central Administration required Or Discover Site Collections (Central Admin access is required to view and select existing site collections) Load Entire Sub-Site Structure (Slower) (cod Entire Sub-Site Structure and Objects (Slowest)	Shar	rePoint URL is invalid				
ype On-premises Farm (Central Administration required) IRL Discover Site Collections (Central Admin access is required to view and select existing site collections) Load Entire Sub-Site Structure (Slower) Load Entire Sub-Site Structure and Objects (Slowest)	lame	On-Prem Farm				0
IRL	уре	On-premises Farm (Central Administration requir	ed)		~	0
Or Discover Site Collections © (Central Admin access is required to view and select existing site collections) Load Entire Sub-Site Structure (Slower) @ Load Entire Sub-Site Structure and Objects (Slowest) @	JRL				~	?
(Central Admin access is required to view and select existing site collections) Load Entire Sub-Site Structure (Slower) (?) Load Entire Sub-Site Structure and Objects (Slowest) (?)	Dr	Discover Site Collections 🕡				
Load Entire Sub-Site Structure (Slower) (2)		(Central Admin access is required to view and sele	ct existing site co	ollections)		
Load Entire Sub-Site Structure (Slower)						
Load Entire Sub-Site Structure (Slower) (2) Load Entire Sub-Site Structure and Objects (Slowest)						
Load Entire Sub-Site Structure and Objects (Slowest) 🛛 🔞	Loa	d Entire Sub-Site Structure (Slower)	0			
	Loa	d Entire Sub-Site Structure and Objects (Slowest)	0			
			Eini		C	

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

Select Web Application					×
Select Web Application					
Central Admin URL: http://s-s	p16-xprod:10	00/default.aspx		Conr	nect
Server Farm Admin: SHAREPO	DINT\system				
	Connected t	o Central Admin UR	ar I		
Web Application Name		URL			
Corporate 2016		http://s-sp16-	xprod:2016/		
SharePoint - 80		http://s-sp16-	kprod/		
SharePoint Central Administra	http://s-sp16->	xprod:1000/			
	< Back	Next >	ОК	Cance	el

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

select Web Application —		×
Select Site Collection		
Server Url: http://s-sp11 v		
URL ^		
/sites/Corporate2016		
URL Search search reset		
Getting users		
		×
Last update of cache file was on: Temporary cache file not found		
< <u>B</u> ack <u>N</u> ext > OK	Cance	I

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



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



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.

💻 🕑 📑 = I	
File Home Share View	
\leftarrow \rightarrow \checkmark \uparrow 📃 \Rightarrow Network \Rightarrow SAMPLES-DC	
3D Objects	
Open	
Open in new window	
Pin to Quick access	
Scan with Windows Defender	
Always available offline	
Restore previous versions	
Pin to Start	
Map network drive	
Сору	
Contrabutat	
Create shortcut	
Properties	
S SD10 A	

3. Open Essentials, and note that the file share is now available in the Connections section.

NOTE: If you want to run Essentials as an admin, you will first need to add the Admin to the user group for the file share, otherwise you wont be able to see the file share in the Connections panel.

Home	View	Migrat	or File M	anager	Drives	Security Ma	anager Te	erm Store Manager	Administra	ator Backup	Help »				
ShareP	Point Go	ogle E	ox 💸 Box Dropbo	ox Coj	by Past	e Select All	Copy Goog	gle Drive Copy File S	hare Copy My to Onel	y Sites Copy Tenant Drive Actions	Copy Box	Copy Dropbox	OneDrive Management	Logs	Azure Turbo View
Navigator															
► Corporate	-	_ <u>₹</u> ≦ Hy < 0	- 0 >	I											
> 5 Tenant Ac > 5 Dropbox > 🛱 OneDrive	dministrat	i	Hyper Migra	tion Type	Started	Source User	Target User	Summary Record	Duration						
٢	>														
🐈 Connecti 🛛															
Floppy Disk > Social Disk (C)	Drive (A:) C:)														
> 🕘 CD Drive (D:)) ve (Z:)														
> 📴 Outlook > <u> </u> Google Drive	e														

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

droppe 🍤	d the content to. Click Next .			×
Location				
Specify loc	ation and content type			
Location				
	Select Different Site			
Site LIRI -	https://metavistech-my.charenoint.com/perconal/itrosman.metavistech.com			v
List:	Corporate			~
2.50	corporate			·
📑 Gene	rate Script 🔄 Schedule 🛛 🕹 Kack 🛛 Next >	Finish	Canc	el

3. The second window will give you the ability to apply metadata values. It is a good idea to take advantage of this feature and apply as many metadata values as possible since all the data is validated against SharePoint. There are many capabilities for intelligent and auto tagging available including mapping to NTFS values such as folder names, file names, owners, etc.; or to select values directly from SharePoint managed metadata, choice and lookup lists. Once you

>						×
roperties						
Specify target r	metadata					
Content Type:	Document					~
Name *	<copy file="" from:="" name="" value=""></copy>				<	~
Title	<copy from:="" title="" value=""></copy>				<	~
Created At	<copy at="" created="" from:="" value=""></copy>				<	~
Modified At	<copy at="" from:="" modified="" value=""></copy>				<	~
Created By	<copy by="" created="" from:="" value=""></copy>				<	¥
Modified By	<copy by="" from:="" modified="" value=""></copy>				<	~
Modified By	<copy by="" from:="" modified="" value=""></copy>				<	
				* indicates	a required f	ield
Save Templat	e Load Template					
		_			-	
Generate	Script E Schedule	< Back	Next >	Finish	Cancel	1

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.

			•				×
ummary							
Content total	summary						
Target Conte	ent Location						
Site URL:	https://metavistech-my.sharepoint.	.com/personal/jt	rosman_meta	vistech_com			
List:	Corporate						
Folder:							
Content Typ	e: Document						
Profiles Ite	m-Default				~	Save 1	Vew
*	vanced Options						
		-	٦				
Create (CSV File for Uploading, Tagging or Cop	ying files 🛛 🕜					
			_				
_							
Generat	e Script 🔄 🛃 Schedule		< Back	Next >	Finish	Cance	el

5. Although the file content may vary based on the selected metadata, the structure of the CSV spreadsheet will remain consistent. The CSV file will consist of the following columns:

Column Name	Description
Source File	Identifies the physical path to the file that will be uploaded
Target SharePoint Site	Identifies the target site for the file listed in the source file column. The field is left blank by default but may be specified to upload content into different sites and lists using the same CSV file. In order to take advantage of this feature the CSV file must be uploaded on a site not a list level.
Target SharePoint List	Identifies the target list for the import
SharePoint File Name	Identifies the SharePoint item name that will be used for the import ("/" is used to identify folders)

Column Name	Description
Content Type	Identifies the SharePoint content type that will be used for the import. <i>This</i> <i>content type should already exist</i> <i>within the target SharePoint list and</i> <i>must be spelled exactly the same way</i> <i>to avoid errors</i>
Custom Fields	Any custom fields would be listed following the content type. <i>These</i> fields must already exist within the target SharePoint list (and content Type). The values entered here must also pass any SharePoint validation or restrictions for the corresponding field.
Created At	Identifies the content creation date which is extracted from the file system. If left blank the value will be set to the current date and time.
CSV ID Col	This is a reserved field utilized for incremental copy functionality. Do <u>not</u> enter anything into this field.
Modified At	Identifies the last content modification date which is extracted from the file system. If left blank the value will be set to the current date and time
Created By	Identifies the user who created the content. If left blank the value will be set to the user currently logged into SharePoint
Modified By	Identifies the user who last modified the content. If left blank the value will be set to the user currently logged into SharePoint.

Column Name	Description
Mark Version	For versioned libraries, identifies the version level for the item being imported ("Major" or "Minor"). If a quasi-versioning system was used in the file system, this field along with the SharePoint File Name can be used to recreate the versions in SharePoint. In order to implement this functionality, use the same file name in the SharePoint File Name field and then specify the appropriate version level in this field. If left blank, the default version level will be used during import.
Version Comment	Specifies the comment that will be used when importing items

- **NOTE:** The layout <u>must not</u> be changed, otherwise the imported file will not be recognized. However, the content may be edited to your preferences. Please remember that any values that are modified or edited must be valid to SharePoint, otherwise they will be ignored or an error will be generated.
- 6. Identify the library or folder destination for your files, and upload content using CSV by doing one of the following:
 - Select **Upload Content Using CSV** from the ribbon in the File Manager section.



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

lavigator 😓		📑 Contents 🛛 🖷 Pr	rogress 🧭 Azure T	urbo Jobs	
✓ (⇒ Corporate) ✓ (5) Alexander Do	rofeev	C:\			
✓ Ists		Name		Size	Modified At
	Сору	Ctrl+C	h		
	Paste	Ctrl+V	and Settings		
S 🖪 🗙	Delete From SharePoint				
📅 Sub: 🔔			les		
🗸 🚺 Janna Ti 💾	View Contents		les (x86)		
🔉 🫲 Lists 🍸	Filter List		ita		
📅 Sub: 💿	View In Browser				
✓ 🚯 Joe Fed > 🦳 Lists 🛅	Audit Object		ume Information		
> 📅 Sub:	Use CSV to	>	Upload/Copy	/ Content	
V S> Tenant /	Create	>	Tag Content		
> 🔂 Subi	Analysis	>	🦺 Upload Publi	c Folders	
> 🗁 Corporate l	Ohiasta		Download Co	ontent to Fil	e System
> 📲 Office 365	Objects	/	-	200433430	1909-12-01 194
> 🦻 OneDrive	List Contents Report(csv)				
> III Office 365 F (3)	Properties				

Backup Help

- 7. Next the **Upload or Copy Content using CSV** screen will be generated. Enter the location of your .csv file or .bck file.
 - **NOTE:** The .bck files are automatically created by the application when downloading the entire site and sub-sites (see Downloading Content from SharePoint for more information).

•			_				
Upload or C	copy Content using	csv					
Select CSV file	and advanced options						
Profiles Up	load-Default			\sim			
File Location :							
C:\Users\sp	sadmin\Desktop\	ing files into sharepoing	using a conspread/heat.				
Source File	Target SharePoint Site	Target SharePoint List	SharePoint File Name	ContentType			
<				>			
Check All	Uncheck All Check	Connection					
	dvanced Ontions			^			
0 <u>ö</u>							
Use	Charset for Encoding file	windows-1251	~				
	Delete item(s) from Sourc	e					
Use Created / Modified Properties from Spreadsheet 🛛 🔞							
	Overwrite if file exists 🔞						
h	ncremental copy 🛛 🔞			~			
Generate	e Script 🔄 Schedule		Finish	Cancel			

- 8. You may check individual items or the **Check All** button at the bottom to select everything. In addition if you are using a custom character set select it in the provided field.
- 9. To start the import, just press the **Finish** button.

Uploading Files into SharePoint

The option is designed to enhance and expand SharePoint's ability to import files located in Windows or other operating systems. There are several advantages to using Essentials to do this operation.

- You can upload, tag and check-in content in one step and for multiple items
- You may reuse existing file system (NTFS) attributes to tag the content.
- Users often implement a folder based hierarchy inside the file system to categorize content. These folder names can be automatically extracted during upload and used as metadata in SharePoint.
- There are no limitations to how many files you can upload at one time.

- NTFS file permissions are also supported during the copy process (see Copying NTFS Permissions section for more information).
- **NOTE:** NTFS Permission copy is not available to Power User products.

The process of importing files is very similar to the process of copying items within SharePoint, with one major exception. Rather than selecting the source content from a SharePoint list, it is selected from within the Connections pane or from Windows Explorer. The remainder of the process is described in the Copy/Move (and Tag) SharePoint Content section. Please refer to these sections for additional information.

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

Mapping Folders to SharePoint Fields

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

To do this follow these steps:

1. Initiate the upload process by copying your local files into a SharePoint Library. Select **Next** and proceed to the Properties screen.

				×
ocation				
pecify loc	ation and content type			
ocation				
	Select Different Site			
Site URL:	https://metavistech-my.sharepoint.com/personal/	1000		~
List:	Corporate			\checkmark

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

roperties Specify target metadata Content Type: Document Name * <copy file="" from:="" name="" value=""> < Title <copy from:="" title="" value=""> < Created At <copy at="" created="" from:="" value=""> < Modified At <copy at="" from:="" modified="" value=""> < Created By <copy by="" created="" from:="" value=""> < Modified By <copy by="" from:="" modified="" value=""></copy></copy></copy></copy></copy></copy>	-						^
Specify target metadata Content Type: Document Name * <copy file="" from:="" name="" value=""> Title <copy from:="" title="" value=""> Created At <copy at="" created="" from:="" value=""> Modified At <copy at="" from:="" modified="" value=""> Created By <copy by="" created="" from:="" value=""> Kodified By <copy by="" from:="" modified="" value=""></copy></copy></copy></copy></copy></copy>	Properties						
Content Type: Document Name * <copy file="" from:="" name="" value=""> Title <copy from:="" title="" value=""> < Created At <copy at="" created="" from:="" value=""> < Modified At <copy at="" from:="" modified="" value=""> < Created By <copy by="" created="" from:="" value=""> < Modified By <copy by="" from:="" modified="" value=""></copy></copy></copy></copy></copy></copy>	Specify target r	netadata					
Name * <copy file="" from:="" name="" value=""> <</copy>	Content Type:	Document					۷
Name * <copy file="" from:="" name="" value=""> <</copy>							_
Title <copy from:="" title="" value=""> <</copy>	Name *	<copy file="" from:="" name="" value=""></copy>				<	~
Created At <copy at="" created="" from:="" value=""> <</copy>	Title	<copy from:="" title="" value=""></copy>				<	~
Modified At <copy at="" from:="" modified="" value=""> <</copy>	Created At	<copy at="" created="" from:="" value=""></copy>				<	~
Created By <copy by="" created="" from:="" value=""> <</copy>	Modified At	<copy at="" from:="" modified="" value=""></copy>				<	~
Modified By Copy Value From: Modified By>	Created By	<copy by="" created="" from:="" value=""></copy>				<	~
	Modified By	<copy by="" from:="" modified="" value=""></copy>				<	¥
					* indicate	s a required f	ield
* indicates a required field							
* indicates a required field	Save Templat	e Load Template					
* indicates a required field Save Template Load Template							
* indicates a required field Save Template Load Template							
* indicates a required field Save Template Load Template							
* indicates a required field Save Template Load Template			-				
* indicates a required field	L Generate	Script	< Back	Next >	Finish	Cance	

- 3. This will bring up the Field Value Selection Screen. On this screen, in the Available Columns section, you will find fields named *Folder 1 in the File Path*, *Folder 2 in the File Path* and so on. These are relative to the root of the files structure you are uploading.
 - **NOTE:** You can also enable Data Analysis Mode from the Contents tab menu in order to see the folder names in the Available Values section of the screen.

stield Value Selection		— 🗆 X
Select source for field: Name Keep Original Value> Set to Empty Value>		
Available Columns Available Columns File Program File Revision Number File Subject File Subject Folder 1 in the File Path Folder 2 in the File Path Folder 3 in the File Path Folder 5 in the File Path Folder 5 in the File Path Folder 7 in the File Path Folder 6 in the File Path Folder 7 in the File Path	^ 	Load Field Values option is disabled. To load available values, Turn on Data Analysis Mode in the Contents tab menu. Note: Loading metadata may be a lengthy process depending on number of selected items and corresponding fields
☐ Show Hidden Fields Original value will be kept		Cancel Select

- 4. Select the relative folder that you want to map to your current field and press the **Select** button.
- 5. Complete the wizard and press **Finish** to start the upload.

·								
Summary Content total	summary							
Target Conte	ent Location					 		
Site URL:	https://metav	stech-my.sharepoint	.com/persona	/	tautach com			
List:	Corporate							
Folder:								
Content Typ	e: Document							
_						 		_
Profiles Ite	em-Default					~	Save	Nev
000 <u>) A</u>	dvanced Options							
00 <u>→ Ac</u>	dvanced Options							
08 <u>▶ Ac</u>	dvanced Options							
	dvanced Options							
O → Ac	dvanced Options							
Create	Ivanced Options	ding, Tagging or Cop	oying files @)				
Create	dvanced Options	ding, Tagging or Coj	oying files 🔞)				

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

Downloading Content from SharePoint

The download content from SharePoint option is intended to allow the user to extract content out of SharePoint into a local storage, attached storage, or file share. There are a variety of situations where this feature is helpful. Some examples include:

- Archive or off-board content from SharePoint.
- Move content from one SharePoint to another that is not accessible through a network.
- Ability to download and then reload content into a re-built environment.

Do the following in order to download content from SharePoint:

1. Select the content you want to download. You can select specific items in the content pane, or specific lists/sites in the Navigation pane.

Navigator 📄 🔄 🗸 🖓 🗖	🕆 Contents 🖷 Progre	ss 🧭 Azure Turbo J	lobs		
✓ Corporate ∧	<u>• Doct</u>	<u>iments</u>			
V III Lists	Name	Type Modifie	ed	SharedWith	Modified By
> 🛄 (Collection, 1985417483a64fb7adc4	> 🗁 Attachments	Folder 2017-10)-29 09:20:33 PM	2	Janna Trouman
> (Reference, 221ac2fa0e0143ff975eb7	> 🗁 IT	Folder 2018-04	1-30 06:25:04 PM	12	Janna Trouman
> (Reference Collection, 224dd5b33ab)	> 🗁 library	Folder 2018-04	1-30 06:25:04 PM	14	Janna Trooman
> 🛄 appdata	> 🗁 Notebooks	Folder 2017-11	-26 06:37:09 PM	9	Janna Trooman
> 🛄 appfiles	> 🗁 Test	Folder 2018-04	1-30 06:25:04 PM	13	Janna Trooman
> 🛄 Composed Looks	02.xls	Document 2017-02	2-06 12:36:39 PM	21	Natalia Nikolaeva
Content type publishing error log	123.txt	Document 2018-05	5-31 01:08:46 AM	15	Janna Trooman
> 📑 Converted Forms	Book.xlsx	Document 2018-05	5-31 01:08:38 AM	3	Janna Trooman
> 🖻 Corporate	Book1.xlsx	Document 2018-05	5-31 01:08:41 AM	4	Janna Trooman
> 🖻 Documents	Book2.csv.xlsx	Document 2018-05	5-31 01:08:44 AM	6	Janna Trouman
> 📑 Form Templates	Book2.xlsx	Document 2018-05	5-31 01:08:41 AM	5	Janna Trooman
> 📑 List Template Gallery	Book3.csv.xlsx	Document 2018-05	5-31 01:08:46 AM	8	Janna Trooman
> A Maintenance Log Library	Book3.xlsx	Document 2018-05	5-31 01:08:44 AM	7	Janna Trouman

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

Home	e Vie	w A	rchitect	Migrator File M	anager Drives	Public Folders	Security Manag	er Term Store Manager	Informant	Administrator	Backup	Help
SharePoint	Сору	Paste	Select All	Upload Content	Download Content	File Share						
Connect To		Clipboa	rd	File N	lanager	Migration Analysis	View					

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

Name		Туре	Modified	Share		
> 🗁 Attachm	ents	Folder	2017-10-29 09:20:33 PM	2		
> 🗁 IT		Folder	2018-04-30 06:25:04 PM	12		
> 📂 library		Folder	2018-04-30 06:25:04 PM	14		
> 🗁 Not	Cop	у	Ctr	+C		
> > lest	Pas	te File(s)	Ctr	I+V		
123.	Del	ete		Del		
Boo N	Tag					
Boo 🖺	Cop	oy To				
🖉 Boo 🗔	Nev	New Folder				
💭 Boo 👰	Upl	Upload/Copy Content				
Boo	Dov	Download Content to File System				
	Cor	Compress Storage				
	Aud	Audit Object				
Ø	Ref	Refresh				
E	Ор	en				
	Sho	Show Permissions				
0	View	View In Browser				
1	Gra	nt permissio	n			
3	Sho	w Users for	object			

- 3. This will open the item or site download wizard, depending on the object you selected for download.
- **NOTE:** An option to include sub-sites is also available but please note that this may result in a lengthy download process

6	- D >
Select Options for Downloading Content	
Select a destination for the content and advanced options	
Profiles Download-Default	· · · · · · · · · · · · · · · · · · ·
Destination location:	Select
Advanced Options	
Include Versions	
Include All Versions	
O Include most recent versions 10	
Include Sub-Sites	
Delete from source	
Apply Filter 🕡	
	~

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

•) ×
Select Options for Select a destination for	Downloading Content the content and advanced options		
Profiles Download-D Destination location: [Browse For Folder		∽] Select
 ✓ Include Ve ● Include A ○ Include n □ Include Su □ Delete from □ Apply Filte Use Charset f 	Desktop ConcDrive SPS Admin SPS Admin Desktop Deskt		~
	<u>E</u> inish	С	ancel

5. Press Finish to begin the download.

<u> </u>	_	
S		×
Select Options for Downloading Content		
Select a destination for the content and advanced options		
Profiles Download-Default		\sim
Destination location: C:\Users\spsadmin\Desktop\corporatebackup2016	S	elect
Advanced Options		
✓ Include Versions		
Include All Versions		
O Include most recent versions 10		
Include Sub-Sites		
Delete from source		
Apply Filter Filter		
Use Charset for CSV File : windows-1251		\sim
Finish	Cano	el
	curre	-

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.

Analyze using the following parameters :

🗹 File Path Length	256				
🗹 Component Name Length	128	0			
Name Contains Invalid Characters		0			
Blocked File Extensions		0			
🗹 Forbidden Names					
File Size Limitation (MB)	50				
Search for duplicate files		?			
Created	03-Feb-2021 🗘 12:56:07 PM 🗘 🗸	?			
Last Modified	03-Feb-2021 🗘 12:56:07 PM 🗘 🗸	?			
Last Accessed	03-Feb-2021 🔹 12:56:07 PM 🔹 💌	?			
Send notification	0				

File Path Length - To stay within the guidelines of SharePoint, this option will scan this file share location and identify the file path. You will find paths longer than the set value in the report. Default value is 256 characters.

Component Name Length – The report will record if a path component is bigger than the set value. Microsoft recommends the effective limit of a path component be set to 128 characters. Default value is 128 characters.

Name Contains Invalid Characters - Certain characters are considered invalid and therefore forbidden to be used in standard SharePoint naming conventions. The report will record any Files with Invalid Characters in the name.

Blocked Files Extension - SharePoint blocks specific file types from being uploaded. Enabling this option will scan the file share location and identify the content based on this list of defined blocked file extensions and inform users about any potential blocks. Default values are aspx, asmx, ascx, master, xap, swf, jar, xsf, htc.

Forbidden Names - Due to SharePoint Online restrictions, file names may not contain any of these defined strings. The report will record any Files with Forbidden Names. Default values are taken from Profile Manager > Advanced > Forbidden Folder and Files Names.

File Size Limitation (MB) - This option will record items in the report which are greater than the set value. Default is 50 MB.

Search for duplicate files - Enabling this option will scan the file share location and identify the files that have the same name and extension stored within the folder's structure.

Created - The report will record Files with a created date older than the specified value.

Last Modified - The report will record Files with a last modified date older than the specified value.

Last Accessed - The report will record Files with a last accessed date older than the specified value.

Send Notification - Essentials will send the specified user an email notification after the report is completed.

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

of the out of the box parameters for SharePoint. You can make changes to the default parameter settings in the wizard in the event that your SharePoint environment has been customized to allow for files outside of SharePoint's original parameters. The premigration analysis works for file systems and file shares that can be mounted as a networked drive.

4. Select "Finish" to begin the Pre-Migration Analysis.

Site Analysis Parameters

The Following applies to SharePoint Pre-Migration Analysis only.

☑ Analyze Sites

Analyze Site Templates
 Analyze Site Features
 Analyze Site Web Parts
 Analyze Site Workflows

Analyze Site Master Pages

☑ Include Sub-sites

Site Templates

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

Site Features

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

Web Parts

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

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

Site Master Pages

Master Pages in SharePoint allow for the customization of the interface and layout which are then

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

Include Sub Sites

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

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

List Analysis Parameters

The Following applies to SharePoint Pre-Migration Analysis only.

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

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

Total List Items

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

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

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

Note:

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

Total List Size Limitation

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

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

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

Item Analysis Parameters

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

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

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

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

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

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

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

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

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.

Summary Content total summary Target Content Location Site URL: https://metavistech-my.sharepoint.com/personal/ List: Corporate Folde: Content Type: Document Profiles [tem-Default v Save New	\$		_		×
Content total summary Target Content Location Site URL: https://metavistech-my.sharepoint.com/personal/ List: Corporate Folde: Content Type: Document Profiles Item-Default Save Profiles Item-Default Save Outloude sub-folders Overwrite if file exists Include sub-folders Overwrite if file exists Incremental copy Last days Defered Group Copy Image: Image: v Defered Group Copy Image: v v Image: Create CSV File for Uploading, Tagging or Copying files Image: Image: Image:	Summary				
Target Content Location Site URL: https://metavistech-my.sharepoint.com/personal/ List: Corporate Folder: Content Type: Document Profiles Item-Default Profiles Item-Default Item-Default Save New Item-Default Item-Default Save Include sub-folders Include sub-folders Overwrite if file exists Item adapts Incremental copy Last Deferred Group Copy Item adapts Deferred Fields Item adapts Item Create CSV File for Uploading, Tagging or Copying files Item adapts Item Script Schedule	Content total	summary			
Site URL: https://metavistech-my.sharepoint.com/personal/ List: Corporate Folde: Content Type: Document Profiles Item-Default	Target Conte	nt location			^
Dist: Corporate Folder: Content Type: Document Profiles Item-Default V Advanced Options Delete item(s) from Source Delete item(s) from Source Include sub-folders Overwrite if file exists Overwrite if file exists Deferred Group Copy Deferred Group Copy Remove Folder Structure Defer Required Fields Create CSV File for Uploading, Tagging or Copying files Save Next> Finish Cancel	Site LIRI -	https://metavistech.mv.sharenoint.com/nersonal/			
Folder: Content Type: Profiles Item-Default Value Value </td <td>List:</td> <td>Corporate</td> <td></td> <td></td> <td></td>	List:	Corporate			
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Profiles Item-Default Advanced Options Delete item(s) from Source Delete item(s) from Source Include sub-folders Overwrite if file exists Overwrite if file exists Overwrite if file exists Overwrite if file exists Overwrite if file exists Overwrite if file exists Overwrite if file exists Overwrite if file exists Overwrite if overwrite if iterverwrite if	Content Type	e: Document			
Profiles Item-Default ✓ Save New ✓ Advanced Options □					
Advanced Options Delete item(s) from Source Include sub-folders Overwrite if file exists Incremental copy Copy Permissions Deferred Group Copy Remove Folder Structure Defer Required Fields Create CSV File for Uploading, Tagging or Copying files	Profiles Ite	m-Default	✓ Sav	e New	
Advanced Options Delete item(s) from Source Delete item(s) from Source Include sub-folders Overwrite if file exists Incremental copy Copy Permissions Deferred Group Copy Remove Folder Structure Defer Required Fields Create CSV File for Uploading, Tagging or Copying files					
Create CSV File for Uploading, Tagging or Copying files Create Script Schedule	Ad - Oct	vanced Options			
□ Include sub-folders □ Overwrite if file exists □ Incremental copy ② Last □ Copy Permissions □ Deferred Group Copy ③ Remove Folder Structure □ Defer Required Fields ③ Create CSV File for Uploading, Tagging or Copying files ④	<u>т</u>	Pelete item(s) from Source			
Include Sub-Voldels Overwrite if file exists Overwrite if file exists Incremental copy Last days Copy Permissions Deferred Group Copy Remove Folder Structure Defer Required Fields Create CSV File for Uploading, Tagging or Copying files Create CSV File for Uploading, Tagging or Copying files Schedule Kack Next > Finish Cancel 		nclude rub. foldere			
□ Overwrite if file exists					
☐ Incremental copy @ Last days ☐ Copy Permissions ☐ Deferred Group Copy @ ☐ Remove Folder Structure ☐ Defer Required Fields @ Create CSV File for Uploading, Tagging or Copying files @ Greate Script Schedule A Back Next > Finish Cancel		Overwrite if file exists 🔞			
□ Copy Permissions □ Deferred Group Copy □ Remove Folder Structure □ Defer Required Fields ② □ Create CSV File for Uploading, Tagging or Copying files ③		ncremental copy 🔞 Last 🔤 days 🗸			
□ Deferred Group Copy Image: Copy of the structure □ Defer Required Fields Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files Image: Create CSV File for Uploading, Tagging or Copying files		Copy Permissions			
□ Remove Folder Structure □ Defer Required Fields ○ Create CSV File for Uploading, Tagging or Copying files ○		Deferred Group Copy 🔞			
□ Defer Required Fields	- F	Remove Folder Structure			
Create CSV File for Uploading, Tagging or Copying files Generate Script Schedule Cancel		Defer Required Fields 🔞			~
Create CSV File for Uploading, Tagging or Copying files Generate Script Generate Script Schedule < Back Next > Finish Cancel					
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Generate Script Schedule < Back Next > Finish Cancel					
	📑 Generat	e Script 🔄 Schedule < Back Next > F	inish	Cance	

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, Essentials File Manager provides the ability to bulk upload user's networked file system drives into their respective OneDrive for Business Document library in your Office 365 tenant. This operation has the following requirements for use:

- The account used to perform the upload needs to have access and at least Read permissions from this computer to all the user's networked file system drives.
- The account used to perform the upload needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the upload will need to know the relationship (mapping) between each user's networked file system drive and their corresponding Office 365 user account.
- Each user account must have either a SharePoint or OneDrive license assigned to it in Office 365.

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

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

Home	Migration Ana	ysis	View 1	Migrator	File Mana	ger	Drives	Security Mana	iger Term S	itore Manager	Administrator	Bac	kup Help	»		
1	₫>	3 🗠	× 💝		Ê.			6 2	2	D 7	2	bac ?	*	×	1	
Office 365	SharePoint G	oogle Box	Dropbox	Сору	Paste	Select All	Copy	y Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Turbo
	Connect	To			Clipboard				Copy File Sh	are to OneDrive						View
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Give v	our pro	piect	a na	me.												

File System to OneDrive for Business Migration		×
Configure your File System to OneDrive for Business migration		
3 Load File System Drives to migrate		

3.

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

Office 365 Connection Pa	rameters	
SharePoint Admin URL:	Nga, Tendari da kenalari a kengari da per	Connect 🕑
	Successfully connected to SharePoint Admin URL	

5. In the Map File System to Users section, load the CSV file that maps the relationship between the networked file system drives and the corresponding Office 365 user account. During the upload, all the content, files, and sub-folders (if configured), will be migrated from within the root of this network path and uploaded into the user's OneDrive for Business Documents library.
- **NOTE:** Click here to download an example mapping file.
- After the mapping file is loaded, click the Check for Users Personal Sites button to run a validation test. This option is designed to validate the existence of the mapped user in Office 365 and also to check for the availability of each user's OneDrive for Business.

 Mapped File System Paths

Map File System to Users: C: Load @						
Check for users personal sites						
User Email	OneDrive Exists					
(manufacture) and a state of the second	Yes					
	User Email	User Email OneDrive Exists Yes				

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

- **Yes** The user account has been found in this Office 365 Tenant and this user's OneDrive for Business has already been provisioned.
- **No** The user account has been found in this Office 365 Tenant, but this user's OneDrive for Business has not yet been provisioned.
- **Invalid User** The user account was not found in this Office 365 Tenant and therefore cannot be included with this operation as currently mapped.
- 7. After the validation process, select all the valid users from the list which you wish to include in this operation and click **Next** to continue.
- 8. On the following page of the wizard, you are presented with a few choices dealing with the content that is to be uploaded. Select the options required, as described below.

Summary

Content total summary

Targ	et Content Location
Liet	ai Admin UKL: https://metavistech-admin.sharepoint.com
00	Advanced Options
	🗌 Overwrite if file exists 🔞
	🗌 Incremental copy 🔞 Last 📃 days 🗸
	Copy Permissions 🕖
	I Migrate to folder: 🔞
	Apply Filter 💿
	Re-Map Users
	Enable Azure Turbo Mode 🔞
	O Microsoft Provided Storage
	User Provided Storage Select
	Send notification Admins, Owner, Current

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

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		Fil	e	Home	Share	View	w	Manage								~ 🕐
с	opy God	\leftarrow		· • •	« Loc	al Disk ((C:)	> Program Files >	Quest >	Essentia	ls → v	5	Search Essentia	ls		Q
	•	3	+ 0	Juick access	^	Name	e	^			Date modified		Туре	Size	2	
	E			Desktop	*	c	onfig	uration			2/4/2020 10:11 AM		File folder			
			L	Downloads	*	fe	eature	es			2/4/2020 10:07 AM		File folder			
				Documents		Jr	re o				5/28/2019 10:37 AM		Filefolder			
				Distures	1	p	2				5/28/2019 11:13 AM		Filefolder			
				Pictures	<i>*</i>	p p	lugin				2/4/2020 10:15 AIVI		Annlingtion		211 VP	
			-	CSVS			oppCi	ean			12/10/2019 2:55 PW		Application Configuration cott		1 10	
			ų.	Essentials Te	st Fi	20 A	rtifac	ean te			2/4/2020 10:15 AM		XML Document		130 KB	
			3	Music		d	lerby				1/14/2020 6:37 AM		Text Document		347 KB	
				office265bac	:kup	E E	ssent	ials			6/3/2019 8:47 AM		Application		311 KB	
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*	Trouble	shoot	t co	mpatibility			ssent	ialscmd			6/3/2019 8:47 AM		Configuration sett.		1 KB	
	Pin to S	tart					estore	ed-ini			5/28/2019 11:12 AM		File		1 KB	
Ħ	Scan wi	th Wi	ndo	ws Defender			qlite4	java-win32-x64.dll			6/3/2019 8:47 AM		Application extens.		668 KB	
È	Share						Ininst	all			9/14/2018 10:49 AM		Application		145 KB	
	Pin to ta	askba	r													
	Restore	previ	ous	versions												
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					_	-	-					_				
~	Create s	shorto	ut													
	Delete															
-	Kename	2				_										
	Propert	ies														

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

Security	Details	Previous Versions			
General	Compatibility	Digital Signatures			
ns program isn't w unning the compa Run compatibility t w do I choose cor ompatibility mode	nting confectly on this versibility troubleshooter. troubleshooter	rsion or windows,			
Run this program	m in compatibility mode for	e i i i i i i i i i i i i i i i i i i i			
Windows 8		×			
Thirdono o					
Settings Reduced color mode Bbit (256) color Run in 640 x 480 screen resolution Disable fullscreen optimizations					
_ Run this program	m as an administrator				
Change high	DPI settings				
1 00	gs for all users				

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.

omputer\HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft	\Wir	ndows\CurrentVersion\Policies\System		
> 📙 Management Infrastructure	^	Name	Туре	Data
> Media Center		ab (Default)	REG SZ	(value not set)
- MicrosoftEdge		110 ConsentPromptBehaviorAdmin	REG DWORD	0x0000000 (0)
> MMDevices		111 ConsentPromptBehaviorUser	REG DWORD	0x0000003 (3)
> Mrt		W dontdisnlavlastusername	REG DWORD	0x00000000 (0)
> NcdAutoSetup		BSC Automation Host Enabled	REG DWORD	0×00000002 (2)
> NetCache		Second Contraction Instantian	REG DWORD	0x00000002 (2)
> NetworkServiceTriggers		20 EnableCursorSuppression	REG_DWORD	0x0000001(1)
> Notifications		Lie EnableFull IrustStartup lasks	REG_DWORD	0x0000002 (2)
- OEMInformation		100 EnableInstallerDetection	REG_DWORD	0x0000001 (1)
- OneDriveRamps		EnableLinkedConnections	REG_DWORD	0x0000001 (1)
> OOBE		EnableLUA	REG_DWORD	0x00000001 (1)
- OpenWith		EnableSecureUIAPaths	REG_DWORD	0x0000001 (1)
- OptimalLayout		👪 EnableUIADesktopToggle	REG_DWORD	0x00000000 (0)
> Parental Controls		🐯 EnableUwpStartupTasks	REG_DWORD	0x0000002 (2)
PerceptionSimulationExtensions		🕫 EnableVirtualization	REG_DWORD	0x0000001 (1)
- Personalization		ab legalnoticecaption	REG_SZ	
> PhotoPropertyHandler		ab legalnoticetext	REG_SZ	
V Policies		100 PromptOnSecureDesktop	REG_DWORD	0x0000000 (0)
- ActiveDesktop		30 scforceoption	REG DWORD	0x00000000 (0)
- Attachments		300 shutdownwithoutlogon	REG DWORD	0x00000001 (1)
V DataCollection		SupportFullTrustStartupTasks	REG DWORD	0x0000001 (1)
Users		Support lwnStartunTasks	REG DWORD	0x00000001 (1)
- Explorer		20 undeckwithoutlogen	REG DWORD	0×00000001 (1)
NonEnum		90 Velidete Adreie Ce de Sienetture	REG_DWORD	0.00000000 (0)
- Servicing		ing valuateAdminCodesignatures	REG_DWORD	0x0000000 (0)
> 🛃 System				
> PrecisionTouchPad				
Privacv				

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

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

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



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



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

curity					
bject name: C:\Program File	es\Quest\Essentials				
roup or user names:					
E ALL APPLICATION PACK	AGES	^			
CREATOR OWNER	CATION PACKAGES				
ST SYSTEM					
Administrators (S-WIN10-JK01\Administrators)					
Administrators (S-WIN10-JI	K01\Administrators)	~			
Administrators (S-WIN10-JI	K01\Administrators)	~ ~			
Administrators (S-WIN10-JI	K01\Administrators)	>			
Administrators (S-WIN10-JI	K01\Administrators) Add	> Remove			
Administrators (S-WIN10JI	K01\Administrators) Add Allow	Remove Deny			
Administrators (S-WIN10-JI	K01\Administrators) Add Allow	Remove			
Administrators (S-WIN10JJ emissions for ALL PPLICATION PACKAGES Full control Modify	K01\Administrators) Add Allow	Remove Deny			
emissions for ALL PPLICATION PACKAGES Full control Modify Read & execute	K01\Administrators) Add Allow	Remove			
Administrators (S-WIN10JI C emissions for ALL PPLICATION PACKAGES Full control Modify Read & execute List folder contents	K01\Administrators) Add Allow	Remove			

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.

s Filter					×
Created At	Equal	\sim	<empty date=""></empty>	\checkmark	
	Less Than \vee		<empty date=""></empty>	\checkmark	
Exclude Folder(s)	Contains	\sim			
File Extension	Equal	\sim			
File Name	Contains	\sim			
File Owner	Contains	\sim			
Last Accessed	Equal	\sim	<empty date=""></empty>	\checkmark	
	Less Than \vee		<empty date=""></empty>	\checkmark	
Modified At	Equal	\sim	<empty date=""></empty>	\checkmark	
	Less Than 🖂		<empty date=""></empty>	\checkmark	
Size (KB)	Equal	\sim			
Skip hidden files	Equal	\sim			
Save Filter Load F	ilter			Clear All Filt	er

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 tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

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

Drives Tab

Essentials for Drives provides a simplified, wizard driven experience to migrating content in, out, or between various drive management systems (local or cloud based). It can also provide additional functionality to managing some or all OneDrive for Business sites within a specific Office 365 tenant.

Interface Overview

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

The navigator can be loaded with individual or enterprise level drives that allow for simple drag and drop migrations between several of these Drive locations.



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

more information about the progress bar see this section.

👕 Contents 🖷 Progress 🛛 😿 Hyper Migration		×				
Download Job: https://metavistech-admin.sharepoint.co	Download Job: https://metavistech-admin.sharepoint.com					
Rogelio Buenviaje: WebID: {7AA50170-C585-4801-B8F2-9	A39054A4D01}					
	冬 Download Job: https://metavistech-admin.sharepoint.com — 🗆 🗙					
	Rogelio Buenviaie					
	WebID: {7AA50170-C585-4801-B8F2-9A39054A4D01}					
	Always run in background					
	Run in Background Cancel Details >>					

The Drive's tab also gives you access to a Hyper Migration tab, also located in the Contents pane area, under the Hyper Migration tab. This tab is where all hyper migration jobs are saved, displayed, and managed. For more information on managing your Hyper Migrations, please see this section.

NOTE: Hyper Migration is currently only available for Migrations where the source is Dropbox, FileShare, or Box.

C C	j Contents 🕫 Progress 🔝 Hyper Migration 🕕 🗙 🕅 🗙 🖉							
	Hyper Migration Type	Started	Source User	Target User	Summary Record	Duration		
0	File System to OneDrive	2018-May-01 09:32:14 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\spsadmin	jtrosman@metavistech.com		1 s 687 ms		
0	File System to SharePoint	2018-May-01 09:33:34 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	/Corporate2016/SharedDocuments		1 s 360 ms		
0	File System to SharePoint	2018-May-01 09:37:02 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	/personal/admin_metavistech_com/Corporate2016/SharedDocuments		1 s 329 ms		
0	💱 Dropbox to OneDrive	2018-May-01 09:24:54 EDT	joe@metavistech.com	jtrosman@metavistech.com	Files(6/0/0/0), Folders(3/0/0/0) Duration:36 s 264 ms Migrated Size 1.467 MB	36 s 264 ms		

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.

1	Migrati	on 📑 Cor	ntents 🖷 Progress						6	I 🗠 🗓 III 🗙 🖉 🟹 🖉 📒 🗆
	1 - 2	>								
	Proj	ect Name	Source	Target	Туре	Started	Finished	Summary Record	Duration	
	Box	to One	JJohnson@metavistech.com	jtrosman@metavistech.com (Basic)	Box to OneDriv	2020-Jul-29 10:41:24 EDT	2020-Jul-29 10:42:07 EDT	Files(10/0/0/0), Folders(14/0/0/0)	43 s 195 ms	
	3 spo	to spo	https://metavistech-portal1.sharepoint.com/sites/SPOtoSPOtemplate0 (Basic)	https://metavistech-portal1.share	SPO to SPO	2020-Jul-29 09:50:08 EDT	2020-Jul-29 09:50:19 EDT	Files(1/0/0/2), Folders(6/0/0/0) Dur	10 s 855 ms	

Column Title	Description
lcon	Indicates whether the migration was successful. A green check-mark indicates a successful

Column Title	Description
	migration. A Pause icon indicates that the migration was paused. A red X indicates an item failed to migrate.
Project Name	The Project Name. If no project name was assigned this column will be blank.
Source	The source user or path. If an account is not using OAuth then it will say (Basic) by source name.
Target	The target user or path.
Туре	The type of job performed, whether it be migration or a csv creation etc.
Started	The date and time the operation was started.
Finished	The date and time the operation completed.
Summary Record	Is a summary of the content that was migrated - this includes the successful, warning, and failed states for migrated content, as well as size and duration information.
Duration	This is the time spent on the migration. If it is an Azure Turbo Synchronized migration, then a double record will appear - indicating the time spent on creating the Azure Turbo job and the uploading of the content to Azure, as well as the time spent for Azure Turbo to finish and refresh its logs.

Recommended Configuration

In order for Essentials Drives to provide optimal performance on your hyper migrations, it is recommended that users set the configuration settings based on their work machine's hardware and Ethernet connection. These settings can be accessed in the Essentials.ini file, where the Essentials tool is installed (C:\Program Files\Quest\Essentials\Essentials.ini).

The following are the settings available for configuration:

• -DeMigrationPoolSize: This is the number of parallel threads that the tool will run to read from the source and then upload to the target. Note that this value is used for both 'Read from

source' and 'Write to target' operations while in CSOM mode, while only for Read operations when in Azure Turbo mode. It is critical that resources are allocated appropriate (CPU, RAM and Internet speed) to match an increase of thread count since the content size increases rapidly as each thread load is multiplied by the Chunk Size settings.

- -DeMigrationChunkSize: This number dictates how many packages are to be copied from the source and then uploaded to the target in one thread. Note that this value is used for both 'Read from source' and 'Write to target' operations while in CSOM mode, while only for Read operations when in Azure Turbo mode.
- -DazurePacketMaxCapacity: This value is used for 'Write to target' operations while in Azure Turbo mode. This number dictates how many objects are to be created in Azure Storage within one package. Ensure that the number of packages are limited to have less than 1000 objects and have less than 100MB within each package. This will result in a faster upload speed to Azure.
- -DazureBatchingUploadThreads: This value is used for 'Write to target' operations while in Azure Turbo mode. This number dictates how many parallel threads are to be uploaded to Azure Storage. Again, this value will change depending on CPU, RAM and Internet speed.

It is also recommended that you reserve more RAM for the Essentials tool, particularly for hyper migration purposes, setting the RAM at 8GB-16GB.

Connecting to Resources

In order to be able to use the 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 toan Office 365 temant, then follow these steps:

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



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

🤌 Sha	arePoint Connection Wizard					×
Share	Point Connection Wizard					
🔇 Plea	ase Enter Project Name					
Name	2					0
Туре	Office 365 Tenant (Tenant Administration require	d)			~	0
URL					~	0
Or	Discover Site Collections					
	(Central Admin access is required to view and sele	ect existin	g site colle	ctions)		
Loa	ad Entire Sub-Site Structure (Slower)	0				
Loa	ad Entire Sub-Site Structure and Objects (Slowest)	?				
			Finish		Cano	el

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

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

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

烙 Connec	t to SharePoi	nt			Х
Connectin	g to				
User					2
Password					
Domain					
		Use Proz	×y nfiguration		
	Connect			Cancel	
	Claims		0		

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

Select Web Application				_		×
Select Web Application						
Select a Web Application						
Central Admin URL: https://me	etavistech-admin.s	harepoint.c	om		Connect	
Server Farm Admin: i:0#.f men	nbership jtrosman	@metaviste	ch.com			
	Connected to Co	entral Admi	n URL			
Web Application Name		URL				
SPO Sites						
Sites w/Group						
OneDrive Sites						
Check All Uncheck All						
			OK		Cancel	

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

\$	_		×
Select SPO Site(s)			
			^
I have involve in the second care later. Without			
https://www.intention.in.ukarapacint.com/whee.https			
International destruction on the destruction Paintee			~
<			>
URL Search search reset Check All Uncheck All			
Getting sites			
Last update of cache file was on: 03/06/20 11:22 AM			
	Ж	Can	cel

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

🤌 Dow	/nload Status	×
1	Download Completed for project "Office 365"	
Do	not show this message again OK	1
-		-
	Run in Background Cancel	

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

Quest Essentials is optimized for migrations to and from Microsoft 365. While it **used to be** possible to migrate to/from SharePoint on premises, Quest recommends that you use 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.

٢	SharePoint Connection Wizard – 🗖	×
SharePoin	t Connection Wizard	
😣 Please En	ter Project Name	
Name		0
Type Share	Point Site or Site Collection (On-premises or Office 365)	0
URL	~	0
Or Disco	ver Site Collections 💿	
(Centr	al Admin access is required to view and select existing site collections)	
Load Ent	ire Sub-Site Structure (Slower)	
Load Ent	ire Sub-Site Structure and Objects (Slowest) 🔞	
	Finish Cance	I.

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

Select Web Application				×		
Select Web Application						
Central Admin URL: http://s-sp16-xprod:10	000/default.aspx		Conne	ect		
Server Farm Admin: SHAREPOINT\system	erver Farm Admin: SHAREPOINT\system					
Connected	to Central Admin URL					
Web Application Name	URL					
Corporate 2016	http://s-sp16-xprod:201	6/				
SharePoint - 80	http://s-sp16-xprod/					
SharePoint Central Administration v4	http://s-sp16-xprod:100	0/				
< Back	Next > OK		Cancel			

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

log Select Web Application		\times
Select Site Collection		
Server Url: http://s-sp1i ~		
URL	 	
/sites/Corporate2016		
URL Search search reset		
Getting users		
		\times
Ø Last update of cache file was on: Temporary cache file not found		
< <u>B</u> ack <u>N</u> ext > OK	Cance	ł

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

🦻 Share	Point Connection Wizard —		\times
ShareP	pint Connection Wizard		
🔕 Name	contains invalid character: :		
Name	No. 1 without The Makeson		0
Type S	SharePoint Site or Site Collection (On-premises or Office 365)	\sim	0
URL	April 1 april 1 april 2011 March 2 aprenti 2011	\sim	0
Or I	Discover Site Collections 🕡		
((Central Admin access is required to view and select existing site collections)		
Load	Entire Sub-Site Structure (Slower)		
Load	Entire Sub-Site Structure and Objects (Slowest) 🛛 🔞		
	<u> </u>	Canc	el

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



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

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



Connecting to SharePoint On-Premises Farms for Pre-mgration Analyses

Quest Essentials is optimized for migrations to and from Microsoft 365. While it **used to be** possible to migrate to/from SharePoint on premises, Quest recommends that you use Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

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

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



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

🕽 Sha	arePoint Connection Wizard			×
hare	Point Connection Wizard			
) Sha	rePoint URL is invalid			
Name	On-Prem Farm			0
Гуре	On-premises Farm (Central Administration required)		~	0
URL	1		~	0
Or	Discover Site Collections			
	(Central Admin access is required to view and select existing sit	e collection:	s)	
Loi	ad Entire Sub-Site Structure (Slower)			
Lo	ad Entire Sub-Site Structure and Objects (Slowest) 🛛 🔞			
		Finish	Car	ncel

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

letect Web Application	Select Web Application				
Select Web Application	n				
Central Admin URL: http://	s-sp16-xprod:10	000/default.aspx		Conn	lect
Server Farm Admin: SHARE	POINT\system			1	
	Connected	to Central Admin URL			
Web Application Name		URL			
Corporate 2016		http://s-sp16-xprod:20	16/		
SharePoint - 80		http://s-sp16-xprod/			
SharePoint Central Adminis	tration v4	http://s-sp16-xprod:10	/00/		
	< Back	Next > Ok	C	Cance	4

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

		\times
Select Site Collection		
Server Url: http://s-sp11 v		
URL		
/sites/Corporate2016		
URL Search reset		
Getting users		
		×
Ø Last update of cache file was on: Temporary cache file not found		
< <u>B</u> ack <u>N</u> ext > OK	Cance	el

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

	1.10.2	
Dov	nload Status	×
0	Download Completed for project	
Do	not show this message again	
	ОК	
	Run in Background Cancel Details >>	

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



Connecting to Google

Connecting to Google Accounts

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

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

He	ome Vier	w Fil	e Manage	r Drives	Secu	rity Mana	ger Ten	m Store Manager	Governance	Administrator	Backup	Help				
	5>	8	box	\$	4	Ê		<u>A</u> 2		D 🤉	2		*	<u></u>	1	
OneDrive	SharePoint	Google	Box	Dropbox	Сору	Paste	Select All	Copy Google Drive	Copy File Share	Copy My Sites	Copy OneDrive	Copy Box	Copy Dropbox	OneDrive	Logs	Azure Turbo
								*	÷	to OneDrive	to OneDrive	÷	÷	Management		
	Cor	nnect To				Clipboard	d			4	Actions					View

- 2. Enter a Project Name.
- 3. 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.
- 4. Provide your Service Account and P12 Key File. This information is gathered directly from your Google environment, so if you have not already please refer to this section for the required steps. Once the values are entered, click **Authenticate**.

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

Connect to G	oogle				\times
Use browser					2
Project Name :	Connect to Google Drives				
Username(s):	040xE6621hPHUIdPW4		4	œ	Ħ
Service Account:	lymarenic6801ymarenic681.am.gserviceaccount.com				
P12 Key File:	JanDine - Gandalandari Jange Dine to Pringersenale Collection	den yr 1	H	i	
Authenticate	Cancel				

The connection is now available in the Navigator pane.



Connecting to Google Admin Console

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

- 1. Open the Google Cloud Developer Console and log in with your Google Admin Account. https://console.developers.google.com
- 2. At the top-left, click \equiv > IAM & Admin > Create a Project.
- 3. Click [New Project].
- 4. Enter a Project name, Organization, and Location then click [Create].

New Project
API TEST
Project ID: eloquent-life-357410. It cannot be changed later. EDIT
Organization *
Location *
BROWSE
Parent organization or folder
CREATE CANCEL

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

5. Select the project from the dropdown.



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





8. At the top-left, click \equiv > APIs & Services > Credentials.



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

≡	Google Cloud : API TES	ST 🔻	Q Search F			
API	APIs & Services	Credentials	+ CREATE CREDENTIALS			
¢	Enabled APIs & services	Create credentials to ac	API key Identifies your project using a simple API key to check quota and access			
***	Library	A Remember t	OAuth client ID Requests user consent so your app can access the user's data			
0*	Credentials		Service account			
ijŸ	OAuth consent screen	API Keys	Enables server-to-server, app-level authentication using robot accounts			
2	Domain verification	Name Name	Help me choose			
Ξó	Page usage agreements	No API keys to displa	Asks a few questions to help you decide which type of credential to use a			

10. In the Service account details section:

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



The Credentials overview page displays.

11. Click Manage Service Accounts.

≡	Google Cloud : API TE	est 👻			۹	11 D	2	0	:	G
API	APIs & Services	Credent	tials -	+ CREATE CREDENTIA	LS 📋 DELET	ΓE				
¢	Enabled APIs & services	Create cre	identials to acces	s your enabled APIs. Le	am more					
#	Library		Remember to c	onfigure the OAuth cons	sent screen with in	formation ab	out you	r applic	ation.	
0+	Credentials		CONFIGURE	CONSENT SCREEN						
92	OAuth consent screen									
	Domain verification	API Key	/S							
Ξò	Page usage agreements		Name	Creation date 🔸	Rest	rictions			Action	15
		OAuth 2	2.0 Client IDs	3						
			Name	Creation date 👃	Type	Clier	nt ID		Action	15
		No OAu	th clients to disp	lay						
		Service	Accounts			M	lanage s	service	account	ts
			Email			Nam	• ↑		Action	15
			test-692@api-te	st-355010.iam.gservice	account.com	Test			/ •	i

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

=	Google Cloud : API TE	st 👻				۹ 🗰	۶.	2	0	
θ	IAM & Admin	Servic	e accounts	+ CREATE SE	RVICE ACCOU	NT	1	P	HELP	ASSIS
•	IAM	Service	e accounts for	project "API TE	ST"					
Θ	Identity & Organization	A service Engine ap	account represents a (ops, or systems running	Google Cloud service i poutside Google. <mark>Lear</mark>	identity, such as in more about s	s code run ervice acc	ning on C ounts.	ompute	Engine	VMs, A
٩	Policy Troubleshooter	Organizat	ion policies can be use	to secure service a	ccounts and blo	ck risky se	ervice ac	count fea	stures, s	uch as
R,	Policy Analyzer	account o	rganization policies.	ion oproad, of the cre	acon or service	accounts	entitely.	-continue	10 000	A SCIVI
	Organization Policies	∓ Fi	itter Enter property	name or value					0	
연	Service Accounts		Email		Status	Name	Ť	Descri	iption	Act
•	Workload Identity Federati		1 test-692@api-t	est-	0	Test		Test		:
•	Labels		o o o o rollani go criti	eedeedan.eem			Man	age de	tails	
	Tags						Man	age pe	rmissi	ons
ż	Settings						Man	age kej	ys.	
0	Privacy & Security						View	netric	S	
_	i macy a decardy						Disa	hle		
	Identity-Aware Proxy						Dele	te		
*	Roles						Dele			

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

≡	Google Cloud : API 1	EST 🕶 🤉 Q 🗰 😰 🛛 🔅 🔞
θ	IAM & Admin	← Test 🖻 HELP ASSISTANT
+ <u>0</u>	IAM	DETAILS PERMISSIONS KEYS METRICS LOGS
θ	Identity & Organization	Keys
٩	Policy Troubleshooter	Service account keys could pose a security risk if compromised. We recommend you avoid downloading account keys could pose a security risk if compromised. We recommend you avoid
Ę	Policy Analyzer	downloading service account keys and instead use the <u>workload identity redetation</u> , you can learn more about the best way to authenticate service accounts on Google Cloud here.
	Organization Policies	Add a new key pair or upload a public key certificate from an existing key pair.
연	Service Accounts	Block service account key creation using organization policies.
	Workload Identity Federati	Learn more about setting organization policies for service accounts
•	Labels	ADD KEY -
	Tags	Create new key Key creation date Key expiration date
\$	Settings	oproad existing key

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

Create private key for "Test"

Downloads a file that contains the private key. Store the file securely because this key can't be recovered if lost.

Key	type
0	JSON
	Recommended
۲	P12
	For backward compatibility with code using the P12 format

CANCEL CREATE	CANCEL	CREATE
---------------	--------	--------

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

≡	Google Cloud : API TE	ST 👻	Q Search Products	, resources, docs (/)			~ i	1 🖬 📀	e : G
θ	IAM & Admin	Servio	ce accounts +	CREATE SERVICE ACCOU	NT 🝵 Deli	ETE 🔸 MANA	OE ACCESS	: 🖻	HELP ASSISTANT
•±	IAM	Servio	ce accounts for project	"API TEST"					
θ	Identity & Organization	A servic Learn m	e account represents a Google Cli ore about service accounts.	oud service identity, such as	code running on	Compute Engine VMs	, App Engine apps,	or systems running	outside Google.
٩	Policy Troubleshooter	Organizi	ation policies can be used to secure	re service accounts and blo	ck risky service a	count features, such	as automatic IAM (Frantis, key creation	/upload, or the
ß	Policy Analyzer								
	Organization Policies	Ŧ	Filter Enter property name or	value					0 11
-12	Service Accounts		Email	Status	Name 🕇	Description	Key ID		Actions
	Workload Identity Federati		155010.iam.gserviceaccou	nt.com	Test	Test description	09662ee4fcb	0dc4fdaf6a87c7e	D44ee
	Labels	_						Manage per	missions
	Tags							Manage key	s
۵	Settings							View metric:	s
0	Privacy & Security							View logs	
۲	Identity-Aware Proxy							Disable	
-	Deles							werete	

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

≡	Google Cloud St APIT	est -
Θ	IAM & Admin	← Test
* <u>e</u>	IAM	DETAILS PERMISSIONS KEYS METRICS LOGS
Θ	Identity & Organization	Service account details
٩	Policy Troubleshooter	Test SAVE
R,	Policy Analyzer	Description
	Organization Policies	Test description SAVE
역	Service Accounts	Email test-692@api-test-355010.iam.gserviceaccount.com
۲	Workload Identity Federation	Unique ID
٩	Labels	101141922381422312784
	Tags	Service account status
\$	Settings	Disabiling your account allows you to preserve your policies without having to delete it.
Ø	Privacy & Security	
۰	Identity-Aware Proxy	
	Roles	Advanced settings
Ξ	Audit Logs	Domain-wide Delegation
•	Asset Inventory	. Granting this service account access to your organization's data via
₫	Essential Contacts	A domain-wide delegation should be used with caution. It can be reversed by disabiling or deletion the service account or by removing access
**	Groups	through the Google Workspace admin console.
ж,	Early Access Center	LEARN MORE ABOUT DOMAIN-WIDE DELEGATION
	Quotas	Client ID: 101141922381422312784
		VIEW GOOGLE WORKSPACE ADMIN CONSOLE (2

- 17. Click **View Google Workspace Admin Console** or open a new tab in your browser and go to https://admin.google.com. Log in with your admin account if necessary.
- 18. At the top-left, click \equiv > Security > Access and data control >API Controls.
- 19. In the Domain wide delegation pane, select **Manage Domain Wide Delegation** to display the Domain Wide Delegation page.

Domain wide delegation
Developers can register their web applications and other API clients with Google to enable access to data in Google services like Gmail. You can authorize these registered clients to access your user data without your users having to individually give consent or their passwords. Learn more
MANAGE DOMAIN WIDE DELEGATION

20. Select Add new.

← →	C iii admin.google.com/ac/	'owl/do	omainwidedelegation?hl=en_US
=	Google Admin	۹	Search for users, groups or settings
â	Home		Security > API Controls > Domain-wide Delegation
	Dashboard		Developers can register their web applications and other API clients with Ge without your users having to individually give consent or their passwords.
, 0	Directory		without your users naving to interviously give consent of their passwords.
• [0	Devices		API clients Add new Download client info
→ Ⅲ	Apps		
- 0	Security		+ Add a hitter
	Overview		Name Client ID Scopes

- 21. Paste in the **Client ID** that you copied to the text file.
- 22. In the OAuth scopes section, add the following string exactly as it appears below (or download it in .txt file format here) then click [Authorize].

https://docs.google.com/feeds,https://www.googleapis.com/auth/admin.directory.group.membe r.readonly,https://www.googleapis.com/auth/admin.directory.group.readonly,https://www.googl eapis.com/auth/admin.directory.user.readonly,https://www.googleapis.com/auth/drive,https://w ww.googleapis.com/auth/drive.file,https://www.googleapis.com/auth/userinfo.email,https://ww w.googleapis.com/auth/userinfo.profile

Client ID		
101141922381422312784		
• Overwrite existing client ID	0	
OAuth scopes (comma-delimited)	2	×
https://docs.google.com/fe	eds,https://www.google	

23. In the Essentials application, go to Drives tab and click **Copy Google Drive** in the ribbon. Select "Copy Google Drive to OneDrive" from the drop down list.

Home	View	Migrator		File Manager	Driv	es	Security Manager	Term Store Mar	iager Ac	dministrator	Backup Hel	р 🔉				
1	5>	8	box	\$		Ê		<u>^</u>	2	D 🤉	<u> </u>	1	2	→X	1	
Office 365	SharePoint	Google	Box	Dropbox	Сору	Paste	Select All	Copy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Mapping Report	Logs	Azure Turbo
	60	nnect To				Clinbs	nard				Actions					Minner

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.

Sogle Drive to OneDrive for Business Migration –											
Select which (Soogle account(s) to migrate										
Project Name:*	Google to OneDrive										
Google connecti Admin User:	on parameters										
P12 Key File:	Load O										
Service Account:	NEONEMAN TOTAL ARCING AND		Connect								
	Press Connect button to connect to Google										

25. Click [Connect].

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

Connecting to Box

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

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

H	ome Vie	w Fi	le Manage	r Drives	Secu	rity Mana	ger Terr	n Store Manager	Governance	Administrator	Backup	Help					
6	5>	8	box	\$		Ê		47	2	₽ <u></u> ,	^	1 22	2 2	(1		
OneDrive	SharePoint	Google	Box	Dropbox	Сору	Paste	Select All	Copy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy OneDrive to OneDrive	Copy Box	Copy Dropbox	OneDrive Management	Logs	Azure Turbo	
	Co	nnert To				Clipboard	d				Actions					View	

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)

service).										
烙 Connect to	Box		_		×					
-Connecting to	[https://www.box.con	n]								
Project Name	e Box									
User	e (file de la contraction de									
Password	Password •••••									
	Use service account	t								
C	Connect		Cancel							
Claims										
Connection progress										

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



Export to CSV

Essentials provides users with the ability to Export a list of Box users to a CSV file. This report can then be used for User Mapping or Source-To-Target CSV file creation for Mass Migrations from the Drives Tab.

	-
	Α
1	user1@box-domain.com
2	user2@box-domain.com
3	

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

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



 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).

lonnect to Box		_	×
Connecting to [https://www.box.com	m]		
Project Name Box1			
User			
Password			
✓Use service account	ti		
Connect		Cancel	
Claims			
Connection progress			
			×

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**.

→ ` ↑ □ > T	his PC > Desktop >			✓ Õ Search Deskter	op 🕽
janize 🔻 New fold	der				
^	Name	✓ Date modified	Туре	Size	
Quick access		11/7/2017 7:15 AM	File folder		
Desktop 🖈	Annual Soll of a	11/14/2017 7:09 AM	File folder		
🕹 Downloads 🖈		11/23/2017 11:31	CSV File	1 KB	
😫 Documents 🖈		11/14/2017 8:41 AM	CSV File	1 KB	
📰 Pictures 🛛 🖈		11/22/2017 11:56	CSV File	1 KB	
csvs		11/7/2017 9:51 AM	CSV File	1 KB	
h Music		11/7/2017 7:12 AM	CSV File	1 KB	
Videos		11/7/2017 7:17 AM	CSV File	1 KB	
VIGCOS		11/27/2017 10:13	CSV File	1 KB	
OneDrive		11/7/2017 9:04 AM	CSV File	1 KB	
This PC		11/14/2017 6:58 AM	CSV File	1 KB	
File name: Box	Users				
Save as type: *.csv	,				
Save as type					

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.

H	ome \	/iew	File Manage	er Drive:	s Secu	urity Mana	ger Te	rm Store Manager	Governance	Administrator	Backup	Help				
6	5>	8	box	\$		Ê		A 2	2	D 7	2		2 2	<u></u>	1	
OneDrive	SharePoir	nt Goog	gle Box	Dropbox	Сору	Paste	Select All	Copy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy OneDrive to OneDrive	Copy Box	Copy Dropbox	OneDrive Management	Logs	Azure Turbo
	(Connect 1	То			Clipboar	d			,	Actions					View

The connecting to Dropbox window displays.

2. Give your project a name.

Select which Dropbox to migrate

Project Name:* Dropbox

- 3. Enter the username of your Dropbox Administrator.
- 4. Make sure Dropbox Business Connection Requirements are met.
- 5. Use the information in the following table to determine the appropriate action to take.

If	Then
you have long-term Access Token obtained prior to Essentials version 2.10	 a) Provide the token in the Access Token field. b) Click Connect. Project Name* Dropbox to OneDrive Dropbox connection parameters Admin User: app Rey App Secret Access Token Get Code @ Access Token Buccessfully connected to Dropbox
you do not have a long-term Access Token obtained prior to 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. intervention Metalogic Essentiate to finish the process 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	
	Project Name.* Dropbox to OneDrive Dropbox connection parameters	
	Admin User: https://www.admin.admi	
	App Secret	
	Access Code 11884/0181744/444444/01F-10001946018.http://com/050pt	Get Code 💿
	Access Token	Connect 💿
	Successing connected to propose	

If you receive any message other than Successfully connected to Dropbox, double check your supplied information and try again. If you are still experiencing issues, please contact Support for further assistance.

NOTE: If you attempt to connect or open a Dropbox drive through the software and it does not respond, please contact support for a updated version of the required framework.

Dropbox will now appear in the Navigator tab located on the left hand side.



Dropbox Business - Connection Requirements

To connect to Dropbox Business, you must:

- I. Create an app to allow Essentials to connect to Dropbox.
- II. Obtain the information needed to connect to Dropbox from Essentials.
- III. Ensure your Dropbox account has the required permissions.

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

NOTE: If you have an existing long-term Access Token that was generated for an earlier release of Essentials, you can continue to use it. However, whenever a new Access Token is created (via the Access Code), it will always be a short-term token.

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

- 1. Login to https://www.dropbox.com/developers/apps using your Team Admin account.
- 2. Go to the My apps section and click Create App

	¥	My apps	Create app	8	¢	
3. Or	n the new app	creation page, select the	following options			
•	Choose an Al	PI: Scoped Access				
	1. Choose an API					
	Scoped access Select the level needs to Dropt	New of access your app pox data. Learn more				
	O Dropbox Legac	<i>ry API (Deprecated) - This uses the legacy app permis</i>	sions model. Not recommended. Learn more			
	O Dropbox Busin	ness API (Deprecated) - This uses the legacy app perm	nissions model. Not recommended. Learn more			

Choose the type of access you need: Full Dropbox

2. Choose the type of access you need

Learn more about access types

	App folder – Access to a single folder created specifically for your app.
۲	Full Dropbox – Access to all files and folders in a user's Dropbox.

Name your app: enter any name

3. Name your app

Metalogix Essentials

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



Create app

4. When the app is created, it should open the App Settings page. If it does not, return back to the My apps section and open this newly created app and click on the Settings tab.

To obtain the information needed to connect to Dropbox from Essentials:

Copy the Access Key and and Access Secret to a file for safe keeping. You will need to enter these when making a connection to Dropbox from Essentials.

😻 Dropbox						Docu	mentation	Guides	Community & s	support	App console
	Metalogix Essentials							д Д	🥶 Mickey Mouse 👻		
	Settings	Permissions	Branding	Analytics							
	Creating a D	Dropbox app re app settings									
	(2) Select a Choose you nee	our app and choose ccess scopes the access scopes, (d them. Get started	e initial settings. or specific permis	sions, that you	r app needs to interact with	Dropbox. We recommend :	starting small and	l adding more pe	ermissions later if		
	3 Add bra Give you	inding ir users important i	nformation about	: your Dropbox	app. Should comply with the	e Dropbox developer branc	ding guide. Get sta	arted			
	Status		Development						Apply for production		
	Development te	eams	0/1				Enable ad	dditional teams	Unlink all teams		
	Development u	sers	Only you					En	able additional users		
	Permission type	2	Scoped App 👩								
	App key App secret		маросьная котороталя	H.							
	OAuth 2		Redirect URIs								
			https:// (http al	lowed for local	host)		Add				

To ensure your Dropbox account has the required permissions:

Click the Permissions tab, and make sure your account has the following permissions:

• .read for all categories

AND

• Team Data - team_data_member.

OneDrive Provisioning

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

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



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

discover all users.

SharePoint Connection Wizard			×
SharePoint Connection Wizard			
Please type SharePoint Site connection information			
Type Office 365 Tenant (Tenant Administration required)		~	0
URL https://metavistech-admin.sharepoint.com		Ý	0
	Finish	Cance	el

3. On the Select Users page, choose **w/o OneDrives** or **w/OneDrives** if you wish to only see users that fit one of those two categories. Select the users you would like to provision a personal OneDrive for and then click the **Create OneDrive** button.

Solution	_		\times
Select Users			
w/o OneDrives w/OneDrives Create OneDrive			
✓ 111evelyneadams@metavistech.com			^
111jeannieehandley@metavistech.com			
2test@metavistech.com			
✓ a.oskin@metavistech.com			
			>
User Search search reset Check All Uncheck All			
Last update of cache file was on: 23/03/21 10:29 AM			
		Close	,

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

Last update of cache file was on: 23/03/21 10:29 AM

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

Pin to Start Map network drive...

Copy Create shortcut Properties S-SP10-A

In order to view a file share in the Connections panel within Essentials, you must map your PC to the file share:

1. Navigate to the file share in windows explorer and select the network location.



- 3. Open Essentials, and note that the file share is now available in the Connections section.
- **NOTE:** If you want to run Essentials as an admin, you will first need to add the Admin to the user group for the file share, otherwise you wont be able to see the file share in the Connections panel.

Home Vi	iew	Migrat	or File Man	ager [Drives	Security Ma	nager Te	rm Store Manager	Administr	rator Backup	Help »		
SharePoint	t Goog	le B	ox Dropbox	Copy	Paste	Select All	Copy Goog	Jle Drive Copy File S	hare Copy M to One	Ay Sites Copy Tenant	Copy Box Copy Drop	obox OneDrive Management	Logs Azure Turbo
•••••					Cipbo	aru				Actions			view
Navigator		🛃 Hy	per Migration										
► Q Corporate	Ň	< 0	- 0 >										
 S Tenant Admir Dropbox OneDrive 	histrati		Hyper Migratio	n Type S	tarted	Source User	Target User	Summary Record	Duration				
<	>												
Connecti 😒 🖛													
T connecti 23													
Elonny Disk Driv	e (A·)												
> 🥪 Local Disk (C:)	/ 3												
> 🥝 CD Drive (D:)	7												
Network Drive (2) Outlook													
> 🛃 Google Drive													
		1											

Copy Google Drive

Limitations When Migrating Google Drive to Office 365

The following Google Drive objects and scenarios are **not supported** when migrating to Office 365.

- Content scenarios
 - $\circ\,$ Content within or shared from a user account which is currently in a "Suspended" state.
 - To prevent duplicate files from being created, the option "Include First Reference File Only" has been added. When this option is enabled only the first returned reference of these linked files will be migrated. All other references will be skipped and an appropriate message will be added to the log file as shown below:

"Skipped copying /GoogleDriveObjectPath because it is another reference object to a file and the option to include only the first reference was selected."

- Documents within a user's Google Drive that are owned by this user, but are not "Shared From" this user (this is related to the prior use of Google's "Transfer Ownership" function) will be skipped. This logic applies to documents only, folders will still be migrated.
- Folder colors
- Google Forms
- Google My Maps and other connected Apps
- Google Photos
- Inline file comments, *except* when migrating Google Docs, Sheets and Slides

- "Link sharing" settings are not retained
- Objects in the "Trash"
- Shared Permissions (Google Drive to Office 365 Group Sites only)
- Shared Permissions or meta-data associated with external users will not be retained.
- Starred or Favorite label on content
 - \circ The item can be migrated, however this label is not retained.
- The migration of Google Shared Drive members to SharePoint Online.
- **NOTE:** For Google Shared Drive items, the Google API does not populate the Owners property, which is mapped to the Created by property in Office 365. (This is documented in the Google Drive for Developers article Files | Drive API | Google Developers.) Therefore, Created by will always be set to the user currently logged into SharePoint.

See also Additional Considerations When Content Types When Migrating Google Drives to OneDrive for Business or SharePoint Online.

Additional Considerations When Migrating Google Drives to OneDrive for Business and SharePoint Online

In addition to Limitations When Migrating Google Drive to Office 365, following are additional considerations specific to migrations from Google Drive to OneDrive for Business and SharePoint Online.

Supported Content Types

The following Google Drive content types are supported when migrating to OneDrive for Business or SharePoint Online.

МІМЕ Туре	Description
application/vnd.google-apps.audio	
application/vnd.google-apps.document	Google Docs
application/vnd.google-apps.drawing	Google Drawing
application/vnd.google-apps.folder	Google Drive folder
application/vnd.google-apps.presentation	Google Slides
application/vnd.google-apps.spreadsheet	Google Sheets
application/vnd.google-apps.unknown	
application/vnd.google-apps.video	

Unsupported Content Types

The following Google Drive content types are *not* supported when migrating to OneDrive for Business or SharePoint Online.

МІМЕ Туре	Description
application/vnd.google-apps.form	Google Forms
application/vnd.google-apps.jam	Google Jamboard
application/vnd.google-apps.script	Google Apps Scripts
application/vnd.google-apps.shortcut	Shortcut
application/vnd.google-apps.site	Google Sites

Linked, Synchronized, and Reference Content

Content that is linked, synchronized or referenced in a second or more Google Drive folders will be copied as individual, discrete files to each of their respective locations in OneDrive for Business or SharePoint Online. Their linked, synchronized or referenced configuration from Google will not be maintained and duplicate files may therefore be created in OneDrive for Business or SharePoint Online.

The two link sharing options listed below will not be retained due to system-provided OneDrive for Business or SharePoint Online permissions.

- Anyone with the link
- Anyone at MyCompany with the link

The following error message will appear in the log when files with either of those link sharing options are processed:

Google "with the link" sharing was not processed on object /objectPath, and should therefore be manually recreated post migration.

Folder Naming

Each folder must have a unique display name to be migrated correctly.

NOTE: While Google Drive allows the creation of folders with spaces at the end of the name, OneDrive and SharePoint Online do not. Therefore, the space at the end of the name will be removed as part of the migration.

Copy Google Drive to an Office 365 Group

This option allows administrators to move content from multiple Google Drives to Office 365 Group Sites default (Documents) library in a single operation.

NOTES:

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

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

This operation has the following requirements for use:

- The Google Drive pre-requisites must be configured successfully prior to the migration.
- The account used to perform the migration into Office 365 Groups needs to be a minimum of a Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each source Google Drive account and their corresponding Office 365 Group name and Office 365 user account.
- The Office 365 Group and its Site must already exist.

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

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



The Google Drives to Office 365 Groups Migrator wizard opens.

2. Select the Copy Google Drives option.

Project Name: Google to Office 365

	Soogle to Office 365 Gro	oup Site Migration
	Select which Google acc	ount(s) to migrate
	Copy Google Drives	○ Copy Google Shared Drives
3.	Select a Profile a	nd give your project a name.
	Profiles Google-Default	

4. Provide your Google Admin login, P12 Key File and Service Account in the Google connection parameters area. You can use the Google Mapping Report to gather this information. Once the values are entered, click Connect. If you receive any message other than Successfully connected to Google Drive, double check the prerequisite steps and then entered values. If you are still experiencing issues, please contact Support for assistance.

Google connection	n parameters		
Admin User:	reak (kolonik), kontena		
P12 Key File:	C:\Users\:	Load	?
Service Account:	serviceaccount.com	Connect	?
	Successfully connected to Google Drive		

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

experiencing issues, please contact Support for further assistance.

Target Office 365 Conn	ection Parameters		
SharePoint Admin URL:	Talpa, Talaadark adam American	Connect	?
Target Site Prefix:	Not required		
	Successfully connected to SharePoint Admin URL		

- 6. Click the Load from Google button or Load From CSV. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded (this CSV file can be created with the help of the Google User Mapping report). Select the ones you want to include in this migration
- **NOTE:** For a large number of Google Drives (>1000), the Load from Google option may take several minutes to complete.

Target Office 365 Conne	ction Parameters				
SharePoint Admin URL:	https://metavistech-admin.sharepoint.com	Connect	0		
Target Site Prefix:	Not required				
	Successfully connected to SharePoint Admin URL				
Load from CSV or	👬 Load from Google 🔞				
type filter text					
			^		
	A Constant of Constant				
	I disation in the second se		~		
Select All Deselect	АП				

- 6. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Google Drive report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.
- **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

type filter text	
User	Migration Priority ^
	1
	2
	3
	~
<	>
Select All Deselect All	Load and Apply Report

7. Check the **Re-Map Users** option and load your Group mapping CSV file (Please see this section for instructions on how to create a CSV Group Mapping file for Google Drive to Office 365 Group, user mapping may also be included in this CSV).

Confirm your mapping by reviewing the list below

Re-Map Users Load 🕖 3 user(s) are mapped with

The CSV for Group mapping is required so that the software can properly resolve the differences between your users' Google account and the corresponding Office 365 Group name as well as maintain content authorship. If your user accounts differ between Google Drive and Office 365 then you will want to add your user mapping to this same file. In the example below, illustrate mapping a source Google Drive (network path) toan Office 365 Group (Office 365 Group Account).

C:\2015 Marketing Plan,MarketingGroup2015@contoso.com X:\2016 Marketing Plan,MarketingGroup2015@contoso.com \\home\users\jsmith\content\draft docs,AllGroup@contoso.com

- Click Check Office 365 Groups in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 Groups were located) and check to determine if each Group currently has a Site provisioned. Click Next. If the group is not found
- **NOTE:** If a Group does not exist on the target then it will be created based on the original migration administrator.

loogle Drive to Office 365 Group	— 🗆 X						
Check for availability of targe	heck for availability of target Sites						
Confirm your mapping by reviewing	the list below						
Re-Map Users Load (2) 3 u	iser(s) are mapped with [C	and a state of the second					
Google Drive User	Searching Office 365 for Group	Office 365 Group Found	Office 365 Group S				
whether the back is the second	which The share the Decares	Dang millioned	ing.				
Contractor Defends of Section 2.	100						
······		Group motiound	NU				

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



Copy Content - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

Include Versions - The process in which Google revision history will be converted into Office 365 Group versions. Please note that this option is only referring to the major revisions (those shown as the "less detailed revisions") and not those that are automatically generated within Google Drives (those shown as the "more detailed" revisions).

Incremental Copy - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

Skip files greater than - This provides the functionality to skip all files larger than the value specified. Unit of measure is configured for MB or GB.

Migrate to Folder - When this option is enabled you can create a (or use an existed) root folder structure in the destination library where your source content will be migrated.

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

Include First Reference File Only - This option addresses the possible scenario where a user creates reference objects (links using Shift + Z in Google Drive) of a file in various locations throughout their Google Drive environment. Skipping these additional references will prevent duplicate files from being migrated to the destination by migrating only the first reference found. Please note that the "first" reference is defined by a list of parent folders returned from Google Drive and the first may not always be the same one on subsequent or incremental migrations. Please also note this option is only applicable to files, all referenced folders will be copied.

Include Orphaned Files - For the purpose of this option, an orphaned file is defined as a file that was created in a folder that was shared with this user and after the file was created, their permission to the shared folder was removed. The file still exists in the user's Google Drive, however it does not reside in any visible folder path and can only be located using the Google Drive Search Bar. When this option is enabled, the migration will identify these orphaned files and migrate them to the mapped Office 365 Group Site's Documents library. In this library, a new folder named "Orphaned Files" will be created which will contain all the migrated orphaned files.

NOTE: The use of this option can decrease overall migration performance.

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

If you want to exclude Google Drive Shared with Me folders, in the **Exclude Folder(s)** field, enter **Shared with Me - GDrive**.



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:

 Format Conversion 		
Documents format	Microsoft Word (OOXML) (.docx)	``
Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)	~
Presentations format	PowerPoint Presentation (OOXML) (.pptx)	`
Drawings format	Portable Network Graphics (.png)	``

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

Advanced Options:

😋 🗠 Advanced Options	
Enable Azure Turbo Mode 🔞	
Microsoft Provided Storage	
◯ User Provided Storage Select	
Send notification	0
Create User Specific Log File 🛛 🔞	

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

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

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

- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

Create User Specific Log File - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

NOTE: Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

🗌 Create User Specific Log File 🛛 📀

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
- 10. Click Finish to begin the migration process.

Please visit the following link to view the list of unsupported Google Drive objects.

Please visit the following link for an overview on how to script and schedule jobs such as Copying Google Drive to Office 365 Group.

Copy Google Shared Drive to an Office 365 Group

This option allows administrators to move content from multiple Google Shared Drives to Office 365 Group Sites default (Documents) library in a single operation.



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

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

This operation has the following requirements for use:

- The Google Drive pre-requisites must be configured successfully prior to the migration.
- The account used to perform the migration into Office 365 Groups needs to be a minimum of a Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each source Google Shared Drive account and their corresponding Office 365 Group name and Office 365 user account.
- The Office 365 Group and its Site must already exist.

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

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



The Google Drives to Office 365 Groups Migrator wizard opens.

2. Select the Copy Google Shared Drives option.

Soogle to Microsoft Teams Site Migration

Google connection parameters

Select which Google account(s) to migrate

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



4. Provide your Google Admin login, P12 Key File and Service Account in the Google connection parameters area. You can use the Google Mapping Report to gather this information. Once the values are entered, click Connect. If you receive any message other than Successfully connected to Google Drive, double check the prerequisite steps and then entered values. If you are still experiencing issues, please contact Support for assistance.

	•		
Admin User:	resk@deskin.kgdow		
P12 Key File:	C:\Users\: .p12	Load	?
Service Account:	serviceaccount.com	Connect	?
	Successfully connected to Google Drive		

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

SharePoint Admin URL:	The second second	- Annya Arra	Connect	?
Target Site Prefix:	Not required			
		Successfully connected to SharePoint Admin URL		

- 6. Click the Load from Google button or Load From CSV. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded (this CSV file can be created with the help of the Google User Mapping report). Select the ones you want to include in this migration, click Next.
- **NOTE:** For a large number of Google Drives (>1000), the Load from Google option may take several minutes to complete.

Target Office 365 Conne	ection Parameters		
SharePoint Admin URL:	https://metavistech-admin.sharepoint.com	Connect	0
Target Site Prefix:	Not required		
	Successfully connected to SharePoint Admin URL		
Load from CSV or	🕌 Load from Google 🔞		
type filter text			
	i um		^
	A Constant of Cons		
	A design of the second s		
	and the second se		~
Select All Deselect	All		

 Check the Re-Map Users option and load your Group mapping CSV file (Please see this section for instructions on how to create a CSV Group Mapping file for Google Drive to Office 365 Group, user mapping may also be included in this CSV).

Confirm your mapping by reviewing the list below

✓ Re-Map Users Load ② 3 user(s) are mapped with

The CSV for Group mapping is required so that the software can properly resolve the differences between your users' Google Shared Drive account and the corresponding Office 365 Group name as well as maintain content authorship, it is very important for Google Shared Drives as they have unique ID indicators. If your user accounts differ between Google Drive and Office 365 then you will want to add your user mapping to this same file. In the example below, illustrate mapping a source Google Shared Drive (unique ID and users) toan 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.

s Google Drive to Office 365 Group Site Migration				×		
Check for availability of targe	Check for availability of target Sites					
Confirm your mapping by reviewing	g the list below					
Re-Map Users Load @ 3 o Check Office 365 Group	user(s) are mapped with [C					
Google Drive User	Searching Office 365 for Group	Office 365 Group Found	Office 365 Group S			
which and the back is the street	which the start that is pro-	- Design and Designal		·		
dense of the set of the set	50					
	NALAL OF MELTING	Group methodal	100			

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

content options
Content Options
Copy Content
✓ Include Versions
Include All Versions
O Include most recent Versions 10
🗌 Incremental copy 💿 Last 🔤 days 🔍
Skip files greater than 💿 📃 MB 🖂
🗌 Migrate to folder: 🔞
🗌 Skip Non-Owned Objects 🛛 😰
🗌 Include First Reference File Only 🛛 😨
🗌 Include Orphaned Files 🔞
Apply Filter Filter 💿

Content Ontions

Copy Content - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

Include Versions - The process in which Google revision history will be converted into Office 365 Group versions. Please note that this option is only referring to the major revisions (those shown as the "less detailed revisions") and not those that are automatically generated within Google Drives (those shown as the "more detailed" revisions).

Incremental Copy - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

Skip files greater than - This provides the functionality to skip all files larger than the value specified. Unit of measure is configured for MB or GB.

Migrate to Folder - When this option is enabled you can create a (or use an existed) root folder structure in the destination library where your source content will be migrated.

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

Include First Reference File Only - This option addresses the possible scenario where a user creates reference objects (links using Shift + Z in Google Drive) of a file in various locations throughout their Google Drive environment. Skipping these additional references will prevent duplicate files from being migrated to the destination by migrating only the first reference found. Please note that the "first" reference is defined by a list of parent folders returned from Google Drive and the first may not always be the same one on subsequent or incremental migrations. Please also note this option is only applicable to files, all referenced folders will be copied.

Include Orphaned Files - For the purpose of this option, an orphaned file is defined as a file that was created in a folder that was shared with this user and after the file was created, their permission to the shared folder was removed. The file still exists in the user's Google Drive, however it does not reside in any visible folder path and can only be located using the Google Drive Search Bar. When this option is enabled, the migration will identify these orphaned files and migrate them to the mapped Office 365 Group Site's Documents library. In this library, a new folder named "Orphaned Files" will be created which will contain all the migrated orphaned files.

NOTE: The use of this option can decrease overall migration performance.

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

Format Conversion:

20	 Format Conversion 	I	
	Documents format	Microsoft Word (OOXML) (.docx)	\sim
	Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)	\sim
	Presentations format	PowerPoint Presentation (OOXML) (.pptx)	~
	Drawings format	Portable Network Graphics (.png)	~

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

Advanced Options:	
O Advanced Options	
🛩 🗹 Enable Azure Turbo Mode 🎯	
Microsoft Provided Storage	
O User Provided Storage Select	
Send notification	0
Create User Specific Log File 🔞	

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

Create User Specific Log File - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included

in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

NOTE: Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

Create User Specific Log File 📀

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
- 10. Click Finish to begin the migration process.

Please visit the following link to view the list of unsupported Google Drive objects.

Please visit the following link for an overview on how to script and schedule jobs such as Copying Google Shared Drives to Office 365 Group.

Copy Google Drive to Microsoft Teams

This option allows administrators to move content from multiple Google Drives to Microsoft Teams in a single operation.

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

This operation has the following requirements for use:

- The Google Drive pre-requisites must be configured successfully prior to the migration.
- The account used to perform the migration into Microsoft Teams needs to be a minimum of a Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each source Google Drive account and their corresponding Microsoft Teams group name and Office 365 user account.
- The Microsoft Team Group must already exist.

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

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



The Google Drives to Microsoft Teams Migrator wizard opens.

2. Select the Copy Google Drives option.

Project Name: Google to Microsoft Teams

	Goo	ogle to Microsoft Tear	ns Site Migration		
	Select	which Google acc	ount(s) to migrate		
	Cop	by Google Drives	○ Copy Google Shared Drives		
3.	Seleo	ct a Profile a	nd give your project a	a name.	
	Profiles	Google-Default			

4. Provide your Google Admin login, P12 Key File and Service Account in the Google connection parameters area. You can use the Google Mapping Report to gather this information. Once the values are entered, click Connect. If you receive any message other than Successfully connected to Google Drive, double check the prerequisite steps and then entered values. If you are still experiencing issues, please contact Support for assistance.

Google connection parameters				
Admin User:	reak (ki and), kaj lora]		
P12 Key File:	Citizes/good-e-Darkes/hald/000400031908840a0014901yanadae_p12	Load	?	
Service Account:	gserviceaccount.com	Connect	0	
	Successfully connected to Google Drive			

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

SharePoint Admin URL:	admin.sharepoint.com	Connect	0
Target Site Prefix:	Not required		
	Successfully connected to SharePoint Admin URL		

6. Click Load from Google to load a list of available Google Drive accounts from your environment. Click Load from CSV to load users from a CSV file. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded (this CSV file can be created with the help of the Google User Mapping report).

Select the accounts you want included in this migration.

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

Load from CSV or 👬 Load from Google Drive 🔞				
type filter text				
addighteedighteed ren intrindering transformer menging to the dight interference on the menging to the dight interference menging to the dight interference				^
Select All Deselect All				~
Schedule	< Back	Next >	Finish	Cancel

- 6. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Google Drive report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.
- **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

type filter text	
User	Migration Priority ^
	1
	2
	3
	· · · · · · · · · · · · · · · · · · ·
<	>
Select All Deselect All	Load and Apply Report

7. Check the **Re-Map Users** option and load your Group mapping CSV file (Please see this section for instructions on how to create a CSV Group Mapping file for Google Drive to Microsoft Teams and see this section for an overview on how to get a list of your Team Sites. Note that user mapping may also be included in this CSV).

Confirm your mapping by reviewing the list below

Re-Map Users Load 🕢 3 user(s) are mapped with

The CSV for Group mapping is required so that the software can properly resolve the differences between your users' Google account and the corresponding Microsoft Teams Group name as well as maintain content authorship. You can also map to Teams Channels. If your user accounts differ between Google Drive and Microsoft Teams then you will want to add your user mapping to this same file. In the example below, lines 1-3 illustrate mapping a source Google Drive to a Microsoft Teams Group by name while lines 4-5 in the same file are used to map the Google user accounts to their respective Office 365 user accounts to maintain item authorship.

sales@company.com,MicrosoftTeams Group Name marketing@company.com,MicrosoftTeams MarketingGroup IT@company.com,IT Group scott@company.com,swilson@contoso.com bill@company.com,bgeorge@contoso.com If you wish to migrate one or more source accounts to a single Group library while also remapping the user account for the purpose of metadata and sharing, please use the following format in your mapping file.

user@google.com,MicrosoftTeamsGroupName(user@contoso.com)

The software will migrate the content from the source drive "user@google.com" to the Documents library in the group "MicrosoftTeamsGroupName". The metadata and shared permissions of Google user "user@google.com" will be mapped to the Office 365 user account "user@contoso.com".

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

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

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

- **NOTE:** When using the Teams Channel, keep the following in mind:
 - When adding a Teams Channel to your CSV be sure to enter the name exactly, it is case sensitive. If the name is entered improperly Essentials will assume it is a folder and will create a folder with this name on the target site collection.
 - When the channel column is missing in the mapping then the migration will use the General channel by default.
 - When the channel is missing on the target, then a folder will be created with the channel's name in the Shared Documents section of MS Teams.
 - Click Check MS Team in order to begin the validation process. This process will validate that the supplied user mapping is correct (MS Teams were located) and check to determine if each Ms Team currently has a Site provisioned. Click Next.

loogle Drive to Microsoft Teams	Site Migration		— 🗆	Х
Check for availability of target Sites				
Confirm your mapping by reviewing	g the list below			
Re-Map Users Load @ 3 t	user(s) are mapped with [C:\Users\sp:	sadmin\Desktop\csvs\CSV.csv]		
Google Drive User	Searching for MS Team	MS Team Found	MS Team Site Exis	ts
Children Briteshelmetershi	100 The 100 Percent of the	Test for the set		
- Andrew C. Brahamal, etc., also are	and the second second	Terrar and the second		
characteristic stand primations	and the second second	Territoria de la constitución de la		

If the group is not found, you may continue however no content for this mapping will be migrated. Alternatively, you may go back one page and remove the selected source Google Drive or modify your mapping file, reload the CSV and click the **Check MS Team** button again.

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

Content Options

Content Options	
2013 Copy Content	
 ✓ Include Versions ● Include All Versions ○ Include most recent Versions 	
🗌 Incremental copy 🔞 Last 🛛 days 🗸	
\Box Skip files greater than 🔞 MB \sim	
Migrate to folder: 🔞	
Skip Non-Owned Objects 🔞	
🗌 Include First Reference File Only 🛛 🔞	
🗌 Include Orphaned Files 🛛 🔞	
Apply Filter Filter	

Copy Content - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

Include Versions - The process in which Google revision history will be converted into Microsoft Teams versions. Please note that this option is only referring to the major revisions (those shown as the "less detailed revisions") and not those that are automatically generated within Google Drives (those shown as the "more detailed" revisions).

Incremental Copy - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

Skip files greater than - This provides the functionality to skip all files larger than the value specified. Unit of measure is configured for MB or GB.

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

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

NOTE: The 'Migrate to folder' option can be used when migrating to a MS Teams Channel. This option will create a new sub-folder in the channel or use an existing sub-folder by this name.

Skipped Non-Owned Objects - This addresses the possible scenario where content exists in the user's Google Drive "My Drive" area which is not owned by this user. Skipping these objects will prevent duplicate content from being migrated to the destination.

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

found. Please note that the "first" reference is defined by a list of parent folders returned from Google Drive and the first may not always be the same one on subsequent or incremental migrations. Please also note this option is only applicable to files, all referenced folders will be copied.

Include Orphaned Files - For the purpose of this option, an orphaned file is defined as a file that was created in a folder that was shared with this user and after the file was created, their permission to the shared folder was removed. The file still exists in the user's Google Drive, however it does not reside in any visible folder path and can only be located using the Google Drive Search Bar. When this option is enabled, the migration will identify these orphaned files and migrate them to the mapped Office 365 Group Site's Documents library. In this library, a new folder named "Orphaned Files" will be created which will contain all the migrated orphaned files.

NOTE: The use of this option can decrease overall migration performance.

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

If you want to exclude Google Drive Shared with Me folders, in the **Exclude Folder(s)** field, enter **Shared with Me - GDrive**.

Exclude Folder(s)	Contains	\sim	Shared with Me - GDrive
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The filter criterion you select will determine which folders will be excluded.

Separate multiple values with commas (,).

Filter Criterion	Folders to exclude
Contains Starts With Equal	All System and custom Shared with Me folders
Not Contains Not Starts With Not Equal	All System Shared with Me and and any specified custom folders

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

Format Conversion:

00	 Format Conversion 	1	
*	Documents format	Microsoft Word (OOXML) (.docx)	~
	Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)	~
	Presentations format	PowerPoint Presentation (OOXML) (.pptx)	\sim
	Drawings format	Portable Network Graphics (.png)	~

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

Advanced Options:

Advanced Options	
Enable Azure Turbo Mode 🔞	
Microsoft Provided Storage	
◯ User Provided Storage Select	
Send notification	0
Create User Specific Log File 🔞	

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

Create User Specific Log File - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included

in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

NOTE: Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

🗌 Create User Specific Log File 🛛 🔞

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
- 10. Click Finish to begin the migration process.

Please visit the following link to view the list of unsupported Google Drive objects.

Please visit the following link for an overview on how to script and schedule jobs such as Copying Google Drive to Microsoft Teams.

Copy Google Shared Drive to Microsoft Teams

This option allows administrators to move content from multiple Google Shared Drives to Microsoft Teams in a single operation.

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

This operation has the following requirements for use:

- The Google Drive pre-requisites must be configured successfully prior to the migration.
- The account used to perform the migration into Microsoft Teams needs to be a minimum of a Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each source Google Shared Drive account and their corresponding Microsoft Teams group name and Office 365 user account.
- The Microsoft Team Group must already exist.

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

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



The Google Drives to Microsoft Teams Migrator wizard opens.

2. Select the Copy Google Shared Drives option.

Select which	Google	account(s)	to	migrate
--------------	--------	------------	----	---------

O Copy Google Drives O Copy Google Shared Drives

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

Profiles	Google-Default	~
Project N	ame: Google to Microsoft Feams	

4. Provide your Google Admin login, P12 Key File and Service Account in the Google connection parameters area. You can use the Google Mapping Report to gather this information. Once the values are entered, click Connect. If you receive any message other than Successfully connected to Google Drive, double check the prerequisite steps and then entered values. If you are still experiencing issues, please contact Support for assistance.

Google connectio	n parameters		
Admin User:	resk (krank), kryteren]	
P12 Key File:	Cline/pole/Outur/udDia/HEXXY Webbadhid/Curversity (1)	Load	2
Service Account:	gserviceaccount.com	Connect	0
	Successfully connected to Google Drive		

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

SharePoint Admin URL:	admin.sharepoint.com	Connect	?
Target Site Prefix:	Not required		
	Successfully connected to Share	Point Admin URL	

- 6. Click Load from Google to load a list of available Google Drive accounts from your environment. Click Load from CSV to load users from a CSV file. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded (this CSV file can be created with the help of the Google User Mapping report).
- Select the accounts you want included in this migration. Click Next.
- **NOTE:** For a large number of Google Drives (>1000), the Load from Google option may take several minutes to complete.

Load from CSV or 👬 Load from Google Drive 🕡				
type filter text				
all followith prime do non's and followith prime do non's and followith prime do non's annumphe followith prime do nones annumphe followith prime do nones followith prime do nones annumphe folo				~
Select All Deselect All	< Back	Next >	Finish	Cancel

7. Check the **Re-Map Users** option and load your Group mapping CSV file (Please see this section for instructions on how to create a CSV Group Mapping file for Google Drive, and see this section to get a list of microsoft teams. User mapping may also be included in this CSV).
Confirm your mapping by reviewing the list below

Re-Map Users Load 🕡 3 user(s) are mapped with

The CSV for Group mapping is required so that the software can properly resolve the differences between your users' Google Shared drive account and the corresponding Microsoft Teams Group name as well as maintain content authorship. If your user accounts differ between Google Shared Drive and Microsoft Teams then you will want to add your user mapping to this same file. In the example below, lines 1 illustrates mapping a source Google Shared Drive to a Microsoft Teams Group by name while line 2 in the same file is used to map the Google user accounts to their respective Office 365 user accounts to maintain item authorship.

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

bill@company.com,bgeorge@contoso.com

i

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

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

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

- **NOTE:** When using the Teams Channel, keep the following in mind:
 - When the channel column is missing in the mapping then the migration will use the General channel by default.
 - When the channel is missing on the target, then a folder will be created with the channel's name in the Shared Documents section of MS Teams.
- 8. Click **Check MS Team** in order to begin the validation process. This process will validate that the supplied user mapping is correct (MS Teams were located) and check to determine if each MS Team currently has a Site provisioned. Click **Next**.

soogle Drive to Microsoft Teams Site Migration				×
Check for availability of target Sites				
Confirm your mapping by reviewing	the list below			
Re-Map Users Load (2) 3 t Check MS Team	user(s) are mapped with [C:\Users\s	:psadmin\Desktop\csvs\CSV.csv]		
Google Drive User Searching for MS Team MS Team Found MS Team Site Exists				
States Street, Second				
states of the product of	-			

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.

com		
Ö	 Content Options 	
2013		

Content Ontions

013	Copy Content
	✓ Include Versions
	Include All Versions
	O Include most recent Versions 10
	🗌 Incremental copy 🔞 Last 🛛 days 🗸 🗸
	Skip files greater than 🔞 MB 🗸
	🗌 Migrate to folder: 🔞
	🗌 Skip Non-Owned Objects 🛛 🔞
	🗌 Include First Reference File Only 🛛 🔞
	🗌 Include Orphaned Files 🛛 🔞
	Apply Filter 🕡

Copy Content - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

Include Versions - The process in which 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:

 Format Conversion 	1	
Documents format	Microsoft Word (OOXML) (.docx)	~
Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)	~
Presentations format	PowerPoint Presentation (OOXML) (.pptx)	~
Drawings format	Portable Network Graphics (.png)	\sim
	 Format Conversion Documents format Spreadsheets format Presentations format Drawings format 	Format Conversion Documents format Microsoft Word (OOXML) (.docx) Spreadsheets format Microsoft Excel (OOXML) (.xlsx) Presentations format PowerPoint Presentation (OOXML) (.pptx) Drawings format Portable Network Graphics (.png)

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

Advanced Options:

O - Advanced Options	
Enable Azure Turbo Mode 💿	
Microsoft Provided Storage	
◯ User Provided Storage Select	
Send notification	
Create User Specific Log File 🔞	

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

Create User Specific Log File - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place

and skipped files due to lack of ownership. **NOTE:** Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

🗌 Create User Specific Log File 🛛 📀

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
- 10. Click Finish to begin the migration process.

Please visit the following link to view the list of unsupported Google Drive objects.

Please visit the following link for an overview on how to script and schedule jobs such as Copying Google Drive to Microsoft Teams.

Copy Google Drive to OneDrive for Business

This option allows administrators to move content of multiple Google Drives to OneDrive for Business in a single move.

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

This operation requires the following permissions:

- The Google Drive pre-requisites must be configured successfully prior to the migration.
- The account used to perform the upload needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each source Google Shared Drive account and their corresponding OneDrive account.
- Each user account must have either a SharePoint or OneDrive license assigned to it in Office 365.

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

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



The Google Drive to OneDrive for Business Migration wizard opens.

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

logic Drive to OneDrive for Business Migration		×
Select which Google Drives to migrate		
Profiles Google-Default		~
Project Name: Google to OneDrive		

3. Provide your Google Admin login, P12 Key File and Service Account in the Google connection parameters area. This information is gathered directly from your Google environment, so if you have not already please refer to this section for the required steps. Once the values are entered, click **Connect**. If you receive any message other than "Successfully connected to Google Drive", double check the prerequisite steps and then entered values. If you are still experiencing issues, please contact Support for assistance.

doogle connectio			
Admin User:	@classifycloud.com		
P12 Key File:	C:\Users	Load	?
Service Account:	Control of the property of the first state of the second	Connect	?
	Successfully connected to Google Drive		

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

Target Office 365 Connection Parameters

SharePoint Admin URL:	https://			Connect	?
Target Site Prefix:	Not required				
		Successfully connected to SharePoint Admin URL			

5. Click the **Load From CSV** or **Load from Google Drive** button. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded.

Select the account you wish to migrate.

Load from CSV or 🚹 Load from Google Drive @

i NOTE:

• For a large number of Google Drives, it's recommended to load them by pressing the Load from CSV button.

The CSV requires only 1 Google user per.

type filter text	
User	
	×
Select All Deselect All	Load and Apply Report

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

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

type filter text		
User	Migration Priority	^
	1	
	2	
	3	
		Y
<	>	
Select All Deselect All	Load and Apply Repor	t

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

loogle Drive to Office 365	Group Site Migration		— 🗆 X	
Check for availability of target Sites Confirm your mapping by reviewing the list below				
Re-Map Users Load	0			
Google Drive User	Searching Office 365 for Group	Office 365 Group Found	Office 365 Group S	

8. Click **Check for users personal sites** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 user accounts were located) and check to determine if each user currently has a OneDrive for Business for the site provisioned. If one or more valid users do not have a OneDrive for Business site currently provisioned, select

them and check Create personal sites for the selected users option. Click Next.

loogle Drive to OneDrive for Business Migration

Check for availability of SharePoint Personal Sites

Select which personal sites to create from list below.

Re-Map Users	Load	?	3 user(s) are mapped with	e,
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Check for users personal sites

Google Drive User	Searching SharePoint for User	SharePoint User Found	Personal Site Exists
	and the second second second	the second second	50 C
	An address Parket and	No. of South South	St
	production in the local science	(Instruction of the second sec	in the
	program the second second	the second second	50 C
	Read & dealership in a server	Descentificação	Res and a second se
	well for hereing street streets		50 C
	sector international sector	Delete the digital disease in the second	
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	with the fight of the		
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	Control State State State	the second second	
	Constraints and Constraints and	(Announced in party of	10 C
Select All Deselect All Export t	o CSV d users. 🔞		
Generate Script Schedu	le	< Back Next > Einis	h Cancel

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



 \Box \times

- **Copy Content** A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.
- Include Versions The process in which Google revision history will be converted into OneDrive for Business versions. Please note that this option is only referring to the major revisions (those shown as the "less detailed revisions") and not those that are automatically generated within Google Drives (those shown as the "more detailed" revisions). You can select whether you would like to:
 - o Include All Versions
 - $\circ\,$ Include The Most Recent Versions this option allows you to specify how many recent versions you would like to copy the content from.
- Incremental Copy When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months). To perform a Delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration.
- **i** NOTE: delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.
- Skip Files Greater Than When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.
- **Migrate to Folder** When this option is enabled, you can create, or use an existing, root folder structure in the destination library where your source content will be migrated. You will need to define the path, for example:

/My Source Content/2017

In the above example, the folder "My Source Content" and sub-folder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

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

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

- Skip Non-Owned Files This addresses the possible scenario where content exists in the user's Google Drive "My Drive" area which is not owned by this user. Skipping these objects will prevent duplicate content from being migrated into OneDrive for Business.
- Include First Reference File Only This option addresses the possible scenario where a user creates reference objects (links using Shift + Z in Google Drive) of a file in various locations throughout their Google Drive environment. Skipping these additional references will prevent duplicate files from being migrated into OneDrive for Business by migrating only the first reference found. Please note that the "first" reference is defined by a list of parent folders returned from Google Drive and the first may not always be the same one on subsequent or incremental migrations. Please also note this option is only applicable to files, all referenced folders will be copied.
- Include Orphaned Files For the purpose of this option, an orphaned file is defined as a file that was created in a folder that was shared with this user and after the file was created, their permission to the shared folder was removed. The file still exists in the user's Google Drive, however it does not reside in any visible folder path and can only be located using the Google Drive Search Bar. When enabled, the migration will identify these orphaned files and migrate them to the mapped OneDrive for Business Documents library. In this library, a new folder named "Orphaned Files" will be created which will contain all the migrated orphaned files. The use of this option can *decrease* overall migration performance.
- **Apply Filter** This feature allows the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

If you want to exclude Google Drive Shared with Me folders, in the **Exclude Folder(s)** field, enter **Shared with Me - GDrive**.

Exclude Folder(s) Contains V Shared with Me - GDrive

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

Filter Criterion	Folders to exclude
Contains Starts With Equal	All System and custom Shared with Me folders
Not Contains Not Starts With Not Equal	All System Shared with Me and and any specified custom folders

Separate multiple values with commas (,).

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

Format Conversion:

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

Microsoft compatiable content.

	Documents format	Microsoft Word (OOXML) (.docx)	\sim	
	Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)		
	Presentations format	PowerPoint Presentation (OOXML) (.pptx)		
	Drawings format	Portable Network Graphics (.png)		
Adanc 8	Advanced Options: Advanced Optio Enable Azure Microsoft P User Provid	Turbo Mode @ rovided Storage @ led Storage Select @		
	Send notification	ion		0

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

Create User Specific Log File - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

NOTE: Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

Create User Specific Log File 📀

10. Click **Finish** to begin the migration process.

Please visit the following link to view the list of unsupported Google Drive objects.

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

Copy Google Shared Drive to SharePoint Online

This option allows administrators to move content of multiple Google Shared Drives to SharePoint Online default (Documents) libraries.

NOTES:

- If you have not already performed the prerequisite steps in Google, please go to this section first. Once the prerequisite configuration is complete, return here to continue with the migration.
- Essentials will *only* copy to the default (Documents) library on the target. If the Documents library does not exist, the operation will fail.
- Google Shared Drive members are not migrated to SharePoint Online.

Pre-requisites

- The Google Drive pre-requisites must be configured successfully prior to the migration.
- The account used to perform the upload needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- A CSV file must have been created that maps each Google Shared Drive ID to the target SharePoint Online site.
- The person performing the migration will need to know the relationship (user mapping) between each source Google Shared Drive account and their corresponding SharePoint Online account.
- Each user account must have a SharePoint license assigned to it in Office 365.

To migrate content of Google Shared Drives, perform the following:
1. On the **Drives** tab click "Copy Google Drive" and select, **Copy Google Shared Drive to SharePoint Online**.



The Google Shared Drives to SharePoint Online wizard opens.

2. Enter a Project Name.

Select which Google Shared Drive(s) to migrate

Project Name:* Google Shared Drives to SPO Migration

3. Provide your Google Admin login, P12 Key File and Service Account in the Google connection parameters area. This information is gathered directly from your Google environment, so if you have not already, please refer to this section for the required steps. Once the values are entered, click **Connect**. If you receive any message other than "Successfully connected to Google Drive", double check the prerequisite steps and then entered values. If you are still experiencing issues, please contact Support for assistance.

Google connectio	n parameters		
Admin User:	@classifycloud.com]	
P12 Key File:	C:\Users	Load	0
Service Account:	Collected with a propagation of the Article Ar	Connect	?
	Successfully connected to Google Drive		

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

SharePoint Admin URL:	https://	ttps://				
Target Site Prefix:	Not required	ot required				
		Successfully connected to SharePoint Admin URL				

5. Click the **Load From CSV** or **Load from Google Drive** button. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded.

Select the account(s) you wish to migrate.

NOTE: For a large number of Google Drives, it's recommended to load them using the Load from CSV option.
 The CSV requires only 1 Google user per.

Load from CSV or H Load from Google	
User	
1SharedDrive (0AD:DECTION UK9PVA)	
2SharedDrive (0A 9PVA)	
SharedDrive (0A 9PVA)	
4SharedDrive_ (0A 9PVA)	
Filter Test (0A	
Select All Deselect All	Load and Apply Report

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

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

Soogle Shared Drives to SharePoint Online				×
Check for availability of target Sites				
Confirm your mapping by reviewing the list below				
Provide a mapping file for Google Shared Drive to SharePoint Load from CSV and Check for sites C:\Users Google Drive to 5	online site comparison SPO\Google Drive to SPO Mappings.csv			
Google Shared Drive User	SPO Site collection			
0A PVA	https://	GoogleSharedDrive	toSPOMi	gra
0A 0 C C C C C C C C C C C C C C C C C C	https:// /sites/	GoogleSharedDrive	toSPOMi	gra
0A PVA	https://	GoogleSharedDrive	toSPOMi	gra

7. Click Next.

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

Content Options:

loogle Shared Drives to SharePoint Online

Migration Configuration

Select the options to enable for this migration.

Copy Content			
Include Versions			
Include All Versions			
Include most recent Versions	10		
Incremental copy 🕑 Last	day	s v	
Skip files greater than 💿		MB	\sim
Copy Permissions 🔞			
🗌 Migrate to folder: 🔞			
Skip Non-Owned Objects 📀			
Include First Reference File Only	0		
Include Orphaned Files 🔞			
Re-Map Users Load			
Apply Filter Filter			

- **Copy Content** A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.
- Include Versions The process in which Google revision history will be converted into SharePoint versions. Please note that this option is only referring to the major revisions (those shown as the "less detailed revisions") and not those that are automatically generated within Google Drives (those shown as the "more detailed" revisions). You can select whether you would like to:
 - Include All Versions
 - $\circ\,$ Include The Most Recent Versions this option allows you to specify how many recent versions you would like to copy the content from.
- Incremental Copy When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months). To perform a Delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration.
- **i** NOTE: delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.
- Skip Files Greater Than When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.
- **Copy Permissions** When this option is selected, Google shared permissions will be converted to SharePoint Online permissions.

Google Drive Shared Permission	SharePont Online Permission
Manager	Full Control

Content manager	Contribute
Contributor\Editor	Contribute
Commenter	Read
Viewer	Read

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

/My Source Content/2017

In the above example, the folder "My Source Content" and sub-folder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

- Skipped Non-Owned Files This addresses the possible scenario where content exists in the user's Google Drive "My Drive" area which is not owned by this user. Skipping these objects will prevent duplicate content from being migrated into SharePoint Online.
- Include First Reference File Only This option addresses the possible scenario where a user creates reference objects (links using Shift + Z in Google Drive) of a file in various locations throughout their Google Drive environment. Skipping these additional references will prevent duplicate files from being migrated into the SharePooint Document library by migrating only the first reference found. Please note that the "first" reference is defined by a list of parent folders returned from Google Drive and the first may not always be the same one on subsequent or incremental migrations. Please also note this option is only applicable to files, all referenced folders will be copied.
- Include Orphaned Files For the purpose of this option, an orphaned file is defined as a file that was created in a folder that was shared with this user and after the file was created, their permission to the shared folder was removed. The file still exists in the user's Google Drive, however it does not reside in any visible folder path and can only be located using the Google Drive Search Bar. When enabled, the migration will identify these orphaned files and migrate them to the mapped Document library. In this library, a new folder named "Orphaned Files" will be created which will contain all the migrated orphaned files. The use of this option can *decrease* overall migration performance.
- **Re-Map Users** Use this option to load your user mapping CSV file (Please see this section for instructions on how to create a CSV User Mapping file for Google Drive).
- **Apply Filter** This feature allows the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.
- **NOTE:** The Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively

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

NOTES:

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

"Size" filter should have a whole number without decimals. It is recommended that users not use the operators "Equal" and "Not Equal" to avoid difficulties with accurate file size, if the file size is greater than 1 MB.

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



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

Advanced Options:

00	 Advanced Options 			
Ť	🗌 Enable Azure Turbo Mode 🔞			
	O Microsoft Provided Storage	0		
	User Provided Storage	Select	0	
	Send notification			0

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha 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.

Shari	ing settings			
Link to	o share			
	NAME AND ADDRESS OF ADDRESS OF ADDRESS OF ADDRESS ADDRES	1.1.1.1.1.1.1		
Who h	as access			
*	Tim	Can edit 🔻	×	^
*	karthik.	Can edit 🔻	×	
15	Stacey	Can edit ▼	×	ł.
71	Angie	Can edit ▼	×	
<u></u>	EDI edi@ .com	Can edit 🔻	×	~
Invi	ite people:			
E	nter names or email addresses			
Editors	will be allowed to add people and change the permissions.			
Do	ne			

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

2. Find the Group that you want to map this Google Drive group into. On this screen, copy the Account for the group that you want to map into.

Personal Settings	x +
(*) III) A	_lyoutr/Sutradip.asp/10=30 🗸 C 🗟 + 🖨 S 🖸 🗮
🙆 Most Visited 😻 Getting Started	
Allow metavistech.sharepoint.c	Continue Blocking Johns X
Office 365	🚆 Outlook Calendar People Yammer OneDrive Sites Tasks Delve Admin 🔍 📿 🌣 ?
	0 эни флоном [5]
	Matthe
5	People and Groups - User Information
10000	Cow
100 (100) 1000	Account c:0-fpolemanagerip-1-5-21:
1000 and 1000 and 1000 and	Name Developers
	Work email
-	About me
Rend Trouverty	Picture
	SIP Address
	Crated at 7/7/2014 1313 Mb /> Matthee Giove Giov
No. of Concession, Name	
100000000	
1000000000	
10000000000	
Special Constitution	
111111-0011-0011-001	
10.000.000	
A set of the segment of the second	
Reads of the same first states	

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

 A
 B

 1
 EDI At
 com
 c:0-.f|rolemanager|s-1-5-21

As you can see, use the information from the Google side on the leftmost column and use the information from your SharePoint side on the rightmost column. When you use this mapping file, your group should map from Google Drive to an existing group in Office 365.

NOTE: When creating your mapping you can use full group names and domains (edi@domainname.com,groupname) or you can simply set it up using the group name without the domain (edi,groupname)

Google User Mapping

When migrating from Google Drive to Office 365, it may be necessary to re-map your Google based user accounts into their target user accounts.

NOTE: For Google Shared Drives, Essentials adds the Google Service account as a member and will migrate it as a user with permissions on the target. Therefore, permissions for this account should not be mapped.

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

A migration example that may not require user mapping:

	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.

Soogle Drive to OneDrive for Business Migration
Migration Configuration
Select the options to enable for this migration.
2019 Copy Content
Include Versions
Include All Versions
O Include most recent Versions 10
🗌 Incremental copy 🕡 Last 🔤 days 🗠
Skip files greater than 🔞 MB 🗸
Migrate to folder:
Copy Permissions 🔞
Skip Non-Owned Objects 🕡
🗌 Include First Reference File Only 🛛 🔞
🗌 Include Orphaned Files 🛛 🕢
Apply Filter Filter

Copy File Share

Copy File Share to OneDrive for Business

When licensed, Essentials File Manager provides the ability to bulk upload user's networked file system drives into their respective OneDrive for Business Document library in your Office 365 tenant. This operation has the following requirements for use:

- The account used to perform the upload needs to have access and at least Read permissions from this computer to all the user's networked file system drives.
- The account used to perform the upload needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the upload will need to know the relationship (mapping) between each user's networked file system drive and their corresponding Office 365 user account.

• Each user account must have either a SharePoint or OneDrive license assigned to it in Office 365.

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

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

	Home	Migratio	n Analysis		View Mi	grator	File Man	ager	Drives Security Mana	ger Term	Store Manager	Administrator	Ba	skup Help	>>		
	Office 365	SharePoint	Google	bax Box	Dropbex	Copy	Paste	Select All	Copy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Turbo
		Co	nnect To				Clipboar	d		Copy File S	hare to OneDrive						View
	终 Navigator					e 🕏	C	🛛 🛜 Mig	ration 📑 Contents =	Copy File S	hare to SharePoi	nt					
	> 😂 OneDriv	/e						< 1 -	2 >	Copy File S	hare to Office 36	5 Groups					
									-	Copy File S	hare to Microsof	t Teams					
3.	Give y	OUC p	oroje ^{eDrive fo}	ect a	a nar ess Migra	ne.								×			
	Configure	your File	Systen	n to O	neDrive	for Bus	iness	migratio	on								
	😣 Load Fil	e System D)rives to	migrate	2												

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

Office 365 Connection Param	eters	
SharePoint Admin URL:	. Tradicional colorization point per	Connect 📀
	Successfully connected to SharePoint Admin URL	

- 5. In the Map File System to Users section, load the CSV file that maps the relationship between the networked file system drives and the corresponding Office 365 user account. During the upload, all the content, files, and sub-folders (if configured), will be migrated from within the root of this network path and uploaded into the user's OneDrive for Business Documents library.
- **NOTE:** Click here to download an example mapping file.

Project Name:

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.

Mappeu rile System ratiis			
Map File System to Users: C:	CSV		Load 📀
Check for users personal sites			
File System Path	User Email	OneDrive Exists	
	processing on the standard stand	Yes	

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

- **Yes** The user account has been found in this Office 365 Tenant and this user's OneDrive for Business has already been provisioned.
- **No** The user account has been found in this Office 365 Tenant, but this user's OneDrive for Business has not yet been provisioned.
- **Invalid User** The user account was not found in this Office 365 Tenant and therefore cannot be included with this operation as currently mapped.
- 7. After the validation process, select all the valid users from the list which you wish to include in this operation and click **Next** to continue.
- 8. On the following page of the wizard, you are presented with a few choices dealing with the content that is to be uploaded. Select the options required, as described below.

Summ	lary
Conte	ent total summary
Targe	et Content Location
Centr	ral Admin URL: https://metavistech-admin.sharepoint.com
List:	Documents
00	Advanced Options
.0	Overwrite if file exists 🔞
	🗌 Incremental copy 🔞 Last 🛛 days 🗸
	Copy Permissions 🔞
	Migrate to folder: 🔞
	Apply Filter 💿
	Re-Map Users Load
	Enable Azure Turbo Mode 🔞
	O Microsoft Provided Storage 🛛 🔞
	User Provided Storage Select
	Send notification Admins, Owner, Current

Overwrite if files exist: If a file of the same name already exists in the OneDrive's Documents library, this option will overwrite that file with the current one from the file system.

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

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

NOTE: When running the tool as an Administrator, you may not be able to see your network drives or mapped drives in the connections section. This may occur because the connections were set up

while in regular user mode, so when the tool is launched as an admin, the admin user does not have access to the connections.

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

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



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

Computer\HKEY_L	OCA	L_MACHINE\SOFTWARE\Microsoft	\Win	dows\CurrentVersion\Policies\System		
	>	Management Infrastructure	^	Name	Туре	Data
	>	Media Center		ab (Default)	REG SZ	(value not set)
	-	MicrosoftEdge		ConsentPromptBehaviorAdmin	REG DWORD	0x00000000 (0)
	>	MMDevices		ConsentPromptBehaviorLiser	REG DWORD	0x0000003 (3)
	>	Mrt		W dontdisnlavlastusername	REG DWORD	0x00000000 (0)
	2	NcdAutoSetup		W DSCAutomationHortEnabled	REG DWORD	0-00000002 (2)
	>	NetCache		W EnableCurrerSuppression	REG_DWORD	0x0000002 (2)
	>	NetworkServiceTriggers		Charles Construction Suppression	REG_DWORD	0.00000001(1)
	2	Notifications		Enabler ull Trust Startup Tasks	REG_DWORD	0.00000001 (1)
		OEMInformation		Lie EnableinstallerDetection	REG_DWORD	0x0000001(1)
		OneDriveRamps			REG_DWORD	0x0000001(1)
	2	OOBE		CiterableLUA	REG_DWORD	0x0000001 (1)
		OpenWith		EnableSecureUIAPaths	REG_DWORD	0x0000001 (1)
		OptimalLayout		EnableUIADesktopToggle	REG_DWORD	0x0000000 (0)
	2	Parental Controls		EnableUwpStartupTasks	REG_DWORD	0x0000002 (2)
		PerceptionSimulationExtensions		100 EnableVirtualization	REG_DWORD	0x00000001 (1)
		Personalization		ab legalnoticecaption	REG_SZ	
	2	PhotoPropertyHandler		ab legalnoticetext	REG_SZ	
	Y	Policies		100 PromptOnSecureDesktop	REG_DWORD	0x00000000 (0)
		ActiveDesktop		3 scforceoption	REG_DWORD	0x00000000 (0)
	ŀ	Attachments		shutdownwithoutlogon	REG DWORD	0x00000001 (1)
	Y	DataCollection		SupportFullTrustStartupTasks	REG DWORD	0x00000001 (1)
		L. Users		SupportUwpStartupTasks	REG DWORD	0x00000001 (1)
		Explorer		100 undockwithoutlogon	REG DWORD	0x00000001 (1)
	ŀ	NonEnum		W Validate Admin Code Signatures	REG DWORD	0x0000000 (0)
		Servicing		tere in the second seco	120_0110110	0.00000000 (0)
	>	System				
	-	PowerEfficiencyDiagnostics				
	2	PrecisionTouchPad				
		PreviewHandlers				
		Privacv				

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

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

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

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



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



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

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

Incremental Copy: There are multiple scenarios where an ability to re-copy changes (from the source environment to the target) rather than re-copying all the content is preferable and necessary. This function allows user's to continue working on their networked drives or in their OneDrives while the migration is performed and then at a later date, the tool can be used to identify and migrate newly created or modified content. Incremental Copy uses a 'Last <N> Days/Weeks/Months' method to identify and migrate this content starting at the time of execution. Click here for additional information about Incremental Copy.

Copy Permissions: This setting copies NTFS File System folder permissions when copying file system content to SharePoint libraries or when importing files from the file system using CSV Spreadsheet for metadata.

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

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

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

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

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

"Size" filter should have a whole number without decimals. It is recommended that users not use the operators "Equal" and "Not Equal" to avoid difficulties with accurate file size, if the file size is greater than 1 MB.

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

🥵 Filter				×
Created At	Equal	~	<empty date=""></empty>	\checkmark
	Less Than \leq		<empty date=""></empty>	~
Exclude Folder(s)	Contains	~		
File Extension	Equal	~		
File Name	Contains	~		
File Owner	Contains	~		
Last Accessed	Equal	~	<empty date=""></empty>	\checkmark
	Less Than \leq		<empty date=""></empty>	~
Modified At	Equal	~	<empty date=""></empty>	>
	Less Than \vee		<empty date=""></empty>	~
Size (KB)	Equal	~		
Skip hidden files	Equal	\sim		
Save Filter Load F	ilter			Clear All Filter

Re-map Users: If the user accounts within your local file system differ from those in Office 365, this option provides the ability to map the differences so the tool can properly retain the Created/Modified By authorship information and permissions. Please note that source file shares account are read in the following format and this should be used when creating your user mapping file. *domain\user01,user01@contoso.com*. You should also add any necessary Groups to this mapping file too. *domain\ADMarketingGroup,Marketing*

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

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

cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding. Note:
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

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

Copy File Share to SharePoint Online

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

This operation has the following requirements for use:

- The account used to perform the migration from the File Shares needs to have at least Read permissions to every object in the source path.
- The account used to perform the migration into SharePoint Online needs to have at minimuim Designer permissions to the destination Site Collection. Full Control or Site Collection Administrator are recommended to avoid potential permission related issues during migration.
- The person performing the migration will need to know the relationship (user mapping) between each user's local user account and their corresponding Office 365 user account.
- The destination sites and libraries must exist in SharePoint Online prior to migration.

Once the requirements above are satisified, you can proceed with your File Share to SharePoint Online migration.

- 1. To access the wizard, first switch to the Drives tab in the Essentials for Office 365 application.
- 2. Click the "Copy File Shares" drop down and then select the Copy File Shares to SharePoint option. This will open the wizard.

	Home	Migratio	n Analysis	1	View N	figrator	File Man	ager	Drives	Security Manag	jer Term	Store Manager	Administrator	Ba	skup Help	>		
		5>	8	bax	÷		ŕ.	- 14		<u>6</u>	2	₽2	2		2	×	1	
	Office 365	SharePoint	Google	Box	Dropbox	Сору	Paste	Select All	Coj	y Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Turbo
		Co	nnect To				Clipboar	d			Copy File S	hare to OneDrive	e					View
	s Navigator					🖻 🕏		🧧 🔀 Mig	ration [🕈 Contents 🗧	Copy File S	hare to SharePoi	nt					
	> 😂 OneDriv	/e						< 1-	2 >		Copy File S	hare to Office 36	5 Groups					
											Copy File S	hare to Microsof	t Teams					
3.	Give y	our p	Point Si	ect a	a nai	me.									×			
	File Share	to Share	Point S	ite Mi	gration													
	Project Nar	me:																

4. Enter the URL for the SharePoint Site you wish to copy your File Share to. Click the Connect button. If prompted, enter the Username and Password credentials for the SharePoint site.spsadmin.

SharePoint conn	ection parameters		
SharePoint Site	No. in giving a Children	Conversion 1	 ✓ Connect
		Successfully connected to SharePoint Site	

- 5. Load the Map file share to sharepoint CSV file. This option is required in order to map which folders from your local or network drives are migrated into which specific document library in your SharePoint Online site(s). Create and load a CSV formatted to include the following 4 headers and is specific to a single target SharePoint Online root location as defined in the SharePoint Site field above.
 - **NOTE:** When connecting to a SharePoint Online Site in this step, please be aware that you may migrate content into any library within this site or any sub-site beneath it. If you want to migrate content to a different site collection, then you will need to configure a second migration.
 - **Source Path** This column defines the path to the root folder (including **all** its child content) from the local or network drive that you wish to migrate.
 - Target SharePoint Site This column defines the site or sub-site you wish to use as your destination location. If you want to migrate to the root site as defined in the SharePoint Site URL, then simply enter a forward slash (/) in this column. If you wish to migrate to a sub-site of the root, then enter the relative path to your sub-site starting at the root level (i.e. /subsite1/subsite2). Please note that each defined target site or sub-site must already exist in SharePoint Online as this process will not create this new site. This will then result in an error during migration.

- Target SharePoint List This column defines the document library you wish to use as your destination list. Please enter the library's Display Name into this column. Please note that each defined target library must already exist in SharePoint Online as this process will not create this new library. This will then result in an error during migration.
- Target folder path This column defines the folder that you would like to use as your destination location. If you want to migrate to the root of the library defined in the Target SharePoint List column, then simply enter a forward slash (/) in this column. If you wish to migrate to a sub-folder of the root, then enter the relative path to your sub-folder starting at the root level (i.e. /folder1/folder2).
 - **NOTE:** A sample CSV file can be downloaded from here and used as an example template. Please do not modify the first row (headers) of the CSV file, but do modify the remaining values starting in the second row to meet your needs.
- 6. Once you have Loaded a CSV file, the table in the wizard will be populated. Select **Validate CSV** to map which folders from your local or network drives are migrated into specific document libraries on your SharePoint online site.

Project Name:	FileShare to SPO				
SharePoint conn	ection parameters				
SharePoint Site	https://metavistech-admin.sharepoint.com			~	
	Connected adm	ins: jtrosman@metavi	stech.com		
Mapped File Sha	are Paths				
Map File Share t	to SharePoint: C:\Users\JTrosman\OneDrive	 Quest\Desktop\CSV 	for Essentials\Essentials	s Test Files\csvs\csv	files
Validate CSV 🔞					
Validate CSV					
Validate CSV @). KN111 Icerst snsadmint Desktonty-svstbonk?	Target SharePoint Site	Target SharePoint List	Target folder path	
Validate CSV @ Source Path)-JK01\Users\spsadmin\Desktop\csvs\book2	Target SharePoint Site /Corporate2016	Target SharePoint List SharedDocuments	Target folder path	
Validate CSV @ Source Path) J-JK01\Users\spsadmin\Desktop\csvs\book2	Target SharePoint Site /Corporate2016	Target SharePoint List SharedDocuments	Target folder path	
Validate CSV @ Source Path	J-JK01\Users\spsadmin\Desktop\csvs\book2	Target SharePoint Site /Corporate2016	Target SharePoint List SharedDocuments	Target folder path	
Validate CSV @)-JK01\Users\spsadmin\Desktop\csvs\book2	Target SharePoint Site /Corporate2016	Target SharePoint List SharedDocuments	Target folder path	
Validate CSV @) J-JK01\Users\spsadmin\Desktop\csvs\book2	Target SharePoint Site /Corporate2016	Target SharePoint List SharedDocuments	Target folder path	

- 8. 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.
- 9. 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.

🤌 Filter				×
Created At	Equal	~	<empty date=""></empty>	×
	Less Than \vee		<empty date=""></empty>	~
Exclude Folder(s)	Contains	~		
File Extension	Equal	~		
File Name	Contains	~		
File Owner	Contains	~		
Last Accessed	Equal	~	<empty date=""></empty>	\vee
	Less Than \vee		<empty date=""></empty>	\sim
Modified At	Equal	~	<empty date=""></empty>	~
	Less Than 🖂		<empty date=""></empty>	~
Size (KB)	Equal	~		
Skip hidden files	Equal	\sim		
Save Filter Load F	ilter			Clear All Filter

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:

 Advanced Options 			
🗹 Enable Azure Turbo Mode 🔞			
Microsoft Provided Storage	0		
O User Provided Storage	Select	0	
Send notification			0

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha 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.



 Enter the URL to the SharePoint Admin Center in your Office 365 tenant. Click the Connect button and then enter the Username and Password of your Administrator to authenticate. The SharePoint Admin Center URL will look similar to this: https://YourTenantadmin sharepoint com

Office 365 Connection Param	eters	
SharePoint Admin URL:	control and a strategy strate	Connect 😢
	Successfully connected to SharePoint Admin URL	

4. In the Map File System to Groups section, load the file that maps the relationship between the networked file system drives and the corresponding Office 365 Group Name. During upload all the content, files, and sub-folders (if configured), will be migrated from within the root of this network path and uploaded into the Office 365 Group Site's Documents library. Click here to download an example mapping file.

Mapped File System Paths			
Map File System to MS Teams:	С:\ с5у	Load	?

- After the mapping file is loaded, click the Check for Office 365 Groups button to run a validation test. This option is designed to validate the existence of the mapped user in Office 365 and also to check for the availability of each Office 365 Group and its Site.
- **NOTE:** If the Group does not exist on the target it will be created using the migration administrator as the owner.

Check for Microsoft Teams 🕡				
File System Path	MS Team	MS Team Exists		
 NO WARK ADDRESS qualministration. 	https://www.elected.com/.http://insp.	ing address of		
Select All Deselect All Export to CSV			Remove invalid teams	0

i

The following results can be displayed in the "Group Site Exists" column:

- Yes The Group has been found in this Office 365 Tenant and this Group's Site has already been provisioned.
- No The Group has been found in this Office 365 Tenant, but this Group's Site has not yet been provisioned.
- Invalid Group The Group was not found in this Office 365 Tenant and therefore cannot be included with this operation as currently mapped.

After the validation process, select from the all the valid mappings from the list to include in this operation and click **Next** to continue.

6. If required, modify your Content Option settings as described below.

Targe	et Content Location
Centr	al Admin URL: https://metavistech-admin.sharepoint.com
List:	Documents
0Ö	 Advanced Options
0	🗹 Include sub-folders 🛛 🔞
	Overwrite if file exists 🔞
	Incremental copy 🕡 Last 🛛 days 🗸
	Remove Folder Structure 🔞
	Migrate to folder: 🕡
	Apply Filter Filter
	Re-Map Users Load
	🗌 Enable Azure Turbo Mode 🛛 🔞
	O Microsoft Provided Storage
	User Provided Storage Select
	Send notification

Include sub-folders - When enabled, this option will include the root folder and all sub-folders in the defined source path. When disabled, only the root folder will be included in the migration.

Overwrite if file exists - If the content already exists in the destination location, this option determines whether the operation will overwrite this content in the destination or to skip it.

Incremental Copy - When enabled, the migration process will identify and migrate only that content which was created or modified within the defined interval (days, weeks or months).

Remove Folder Structure - Enable this option to exclude all source folder structure. All folder content will be migrated into the destination location without their parent folders.

Migrate to Folder - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

Apply Filter - Optionally, select from a series of filterable parameters to include or exclude specific content during migration.

NOTE: the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It is recommended that users not use the operators "Equal" and "Not Equal" to avoid difficulties with accurate file size, if the file size is greater than 1 MB.

Use the "Save Filter" option to save filter settings to a file and load them in different wizards or the Profile Manager.

🥵 Filter				×
Created At	Equal	~	<empty date=""></empty>	\diamond
	Less Than 🖂		<empty date=""></empty>	\sim
Exclude Folder(s)	Contains	~		
File Extension	Equal	~		
File Name	Contains	~		
File Owner	Contains	~		
Last Accessed	Equal	~	<empty date=""></empty>	\rightarrow
	Less Than 🖂		<empty date=""></empty>	\sim
Modified At	Equal	~	<empty date=""></empty>	\sim
	Less Than 🖂		<empty date=""></empty>	\rightarrow
Size (KB)	Equal	~		
Skip hidden files	Equal	\sim		
Save Filter Load F	ilter			Clear All Filter

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 tha 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 a 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.

									, , ,	n Heim	store manager	Hammingen			"		
Office 365	SharePoint	Google	box Box	Dropbox	Copy	Paste	Select All	G	opy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deploymer	t Log	Azure Turt
	Conr	nect To				Clipboar	d			Copy File Sl	nare to OneDrive	3					View
🤌 Navigator					🖻 🕏		🗆 🛜 Mig	ration	🗋 Contents 🗧	Copy File Sl	hare to SharePoir	nt					
> 🖂 OneDrive																	
	e							2		Copy File S	hare to Office 36	5 Groups					
Give yo	bur p	roje	ct a	na	me.		< 1 -	2 >		Copy File Sl	nare to Office 36 nare to Microsofi	5 Groups t Teams]	-			
Give yo	DUR DI	roje	ct a	na te Migr	me.		< 1-	2 >		Copy File Sl	nare to Office 36	5 Groups t Teams		- ×			
Give yo	DUC D em to Micr your File	roje rosoft Te System	Ct a cams Sit	i Na te Migr icroso	MC. ^{ation}	migra	tion	2 >		Copy File SI Copy File SI	hare to Office 36	5 Groups t Teams		× -			

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		
Office 365 Connection Parame	ters		
SharePoint Admin URL:	Table Rock and the Property of	Connect	0
	Successfully connected to SharePoint Admin URL		

4. In the Map File System to Groups section, load the file that maps the relationship between the networked file system drives and the corresponding Microsoft Teams. During upload all the content, files, and sub-folders (if configured), will be migrated from within the root of this network path and uploaded into the Microsoft Teams channel. Click here to download an example mapping file.

Mapped File System Paths			
Map File System to MS Teams:	C:\ csv	Load	?

Users can also choose to map to a MS Team Channel by adding a third column to the CSV mapping file. The format would be as follows:

\\home\users\blauer,Worldwide Sales,TeamsChannel

- **NOTE:** When using the Teams Channel, keep the following in mind:
 - When adding a Teams Channel to your CSV be sure to enter the name exactly it is case sensitive. If the name is entered improperly Essentials will assume it is a folder and will create a folder with this name on the target site collection.
 - When the channel column is missing in the mapping then the migration will use the General channel by default.

- When the channel is missing on the target, then a folder will be created with the channel's name in the Shared Documents section of MS Teams.
- 5. After the mapping file is loaded, click the **Check for Microsoft Teams** button to run a validation test. This option is designed to validate the existence of the mapped user in Microsoft Teams and also to check for the availability of each Team.

Check for Microsoft Teams 💿					
File System Path	MS Team	MS Team C	hannel	MS Team Exis	ts
Select All Deselect All				Remov	e invalid teams 🔞
Schedule		< Back	Next >	Finish	Cancel

The following results can be displayed in the "MS Team Exists" column:

- Yes The Group has been found in this Office 365 Tenant and this Group's Site has already been provisioned.
- No The Group has been found in this Office 365 Tenant, but this Group's Site has not yet been provisioned.
- Invalid Group The Group was not found in this Office 365 Tenant and therefore cannot be included with this operation as currently mapped.

After the validation process, select from the all the valid mappings from the list to include in this operation and click **Next** to continue.

6. If required, modify your Content Option settings as described below.

Targe	et Content Location
Centr	al Admin URL: https://metavistech-admin.sharepoint.com
List:	Documents
00	 Advanced Options
Ö	Include sub-folders 🔞
	Overwrite if file exists 🔞
	Incremental copy 🕡 Last 🛛 days 🗸
	Remove Folder Structure 🔞
	Migrate to folder:
	Apply Filter Filter
	Re-Map Users
	C Microsoft Provided Storage
	User Provided Storage Select
	Send notification

Include sub-folders - When enabled, this option will include the root folder and all sub-folders in the defined source path. When disabled, only the root folder will be included in the migration.

Overwrite if file exists - If the content already exists in the destination location, this option determines whether the operation will overwrite this content in the destination or to skip it.

Incremental Copy - When enabled, the migration process will identify and migrate only that content which was created or modified within the defined interval (days, weeks or months).

Remove Folder Structure - Enable this option to exclude all source folder structure. All folder content will be migrated into the destination location without their parent folders.

Migrate to Folder - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

NOTE: The 'Migrate to folder' option can be used when migrating to a MS Teams Channel. This option will create a new sub-folder in the channel or use an existing sub-folder by this name.

Apply Filter - Optionally, select from a series of filterable parameters to include or exclude specific content during migration.

NOTE: the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It is recommended that users not use the operators "Equal" and "Not Equal" to avoid difficulties with accurate file size, if the file size is greater than 1 MB. Use the "Save Filter" option to save filter settings to a file and load them in different wizards or

the Profile Manager.

Created At	Equal	\sim	<empty date=""></empty>	\sim	
	Less Than 🖂		<empty date=""></empty>	>	
Exclude Folder(s)	Contains	\sim			
File Extension	Equal	\sim			
File Name	Contains	\sim			
File Owner	Contains	\sim			
Last Accessed	Equal	\sim	<empty date=""></empty>	~	
	Less Than \vee		<empty date=""></empty>	~	
Modified At	Equal	\sim	<empty date=""></empty>	>	
	Less Than \leq		<empty date=""></empty>	~	
Size (KB)	Equal	\sim			
Skip hidden files	Equal	\sim			

Re-Map Users - If necessary, create and load a user mapping file to be used for both permissions and metadata. User accounts as well as domain groups should be included in this CSV mapping file.

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.

NOTE: User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

7. Click **Finish** to begin the migration.

Collect Files Metadata

Users can collect a csv report of a File's metadata using Essentials. This report can be used in migrations to help users determine what mappings they would like to use when migrating file shares.

To collect file metadata do the following:

 In the Connections section, select the file for which you wish to collect metadata and right click. Select Collect Files Metadata from the drop down list.



2. Click Select to assign a name and location for the report.



3. Click Finish to complete generating the report.

Copy My Sites to OneDrive for Business

A simple, Administrator driven wizard is provided to bulk migrate the lists and content from legacy onpremise SharePoint My Sites to OneDrive for Business sites in Office 365. In order to successfully configure and run this operation, you will need to be able to authenticate against the on-premise Central Admin page with a Farm Admin account (full control to all My Sites) as well as a Global Administrator in the Office 365 tenant. A mapping file may also be needed in order to resolve the user accounts between the source and destination locations.

This operation has the following requirements for use:

- The account used to perform the migration needs to have at least Owner permissions to each users' My Site.
- The account used to perform the migration needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (mapping) between each user's My Site account and their corresponding Office 365 user account.
- Each user account must have either a SharePoint or OneDrive license assigned to it in Office 365.

Once the requirements above are satisfied, you can proceed with utilizing the bulk upload functionality.

 Switch to the Drives tab in Essentials for Office 365 and click the button Copy My Sites to OneDrive, located in the ribbon.



2. When the wizard appears, begin by entering the SharePoint Admin URL - This will be the URL to the on-premise SharePoint Central Admin page that hosts the My Sites. Once the URL is entered, click the Connect button, enter a valid Farm Admin account and click Connect. When you receive a successful connection message proceed to the next parameter.

log My Sites to OneDrive for Business Migration				×
Select which My Sites Drives to migrate				
Profiles OneDrive/MySite-Default				\sim
SharePoint connection parameters				
SharePoint Admin URL:	rana aya	C	onnect	0
	Successfully connected to SharePoint Admin URL			

 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.

Ny Sites to OneDrive for Business Migration		Х
Select which My Sites Drives to migrate		
Profiles OneDrive/MySite-Default		~
SharePoint connection parameters		
SharePoint Admin URL:	Connect	0
Successfully connected to SharePoint Admin URL		
Target Office 365 Connection Parameters		
SharePoint Admin URL:	Connect	0
Successfully connected to SharePoint Admin URL		

4. Click the **Load from SharePoint** button or **Load From CSV**. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded.

Load from SharePoint will connect to your source Farm and retrieve a list of available web applications. From this list, select the web application that hosts your My Sites and click **OK**.

Select Web Application			ЦХ
Central Admin URL:	in the second	JRL	Connect
Web Application Name Corporate 2016 SharePoint - 80 SharePoint Central Adm	URL	Server URL	*
Check All Uncheck All			
	[OK	Cancel

Load from CSV will allow you to load users from a CSV file. You can use the user mapping report option to create this CSV file.

The wizard will now load a list of available My Sites into the table. Depending on the amount of My Sites within this web application, this may be a time consuming operation.

5. Check the box next to each My Sites that you would like to include with this operation and then click **Next**.

My Sites to OneDrive for Business Migration					×
Select which My Sites Drives to migrate	9				
Profiles OneDrive/MySite-Default					\sim
SharePoint connection parameters					
SharePoint Admin URL:	6 ⁻			Connect	0
	Successfully connected to Sha	rePoint Admin URL]		
Target Office 365 Connection Parameters					
SharePoint Admin URL:	and a second		7	Connect	2
	Successfully connected to Sha	rePoint Admin URL			
Load from CSV or 🕌 Load from Tenant	0				
Sites Loading progress					
type filter text					
V mup.					
Select All Deselect All					

6. On the second page of the wizard, if a user mapping file is required, check the box next to Re-Map Users and then load the mapping file (for more information on how to create a user mapping file please see the User Mapping section).

log My Sites to OneDrive for Business Migration
Check for availability of SharePoint Personal Sites
Select which personal sites to create from list below.

- 🗹 Re-Map Users 🛛 Load 🔞
- 7. Click the **Check for users personal sites** button. This operation will verify that the user account listed in the mapping file was found in Office 365 and it will also determine if the user's OneDrive for Business site is currently provisioned.

My Sites to OneDrive for Business	Migration
-----------------------------------	-----------

Check for availability of SharePoint Personal Sites

Select which personal sites to create from list below.

Re-Map Users Load @	1 user(s) are mapped with [in destroy a service section of the	
narePoint User	Searching SharePoint for User	SharePoint User Found	Personal Site Exists
ect All Deselect All Exp	ort to CSV		
reate personal sites for the se	lected users. 🔞		
		< Back Next >	Finish Cancel

- 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.
- 8. Click Next to continue.

The final page provides a few options to configure how the content portion of the operation should be configured.



Content Options
Copy Sub-Sites 😢
Copy Permissions 💿
Deferred Group Copy 🕜
Copy Content
 Include Versions Include All Versions Include most recent Versions
🗌 Incremental copy 🕡 Last 🔤 days 🗸 🗸
Skip files greater than 🔞 MB 🗸
Migrate to folder: 🕡
Re-Map Site and List Templates Load 🕡

Copy Sub-Sites - Enable this option to include all sub-sites of the current site in this operation.

Copy Permissions - This option will enable the transfer of internally shared permissions from

the source to OneDrive for Business. For source Google Drive migrations, this will include internally shared folder and item-level permissions. For source SharePoint My Site migrations, this will include internally shared site, list and item level permissions. For source Box migratons, this will include internally shared folder collaborators. For source Dropbox migrations, this will include internally shared folder permissions.

Deferred Group Copy - Selecting Deferred Group Copy will only copy Permissions Groups that are used within the site(s) you are copying. Selecting Copy Site Groups will copy all Groups across the entire site collection.

NOTE:

- 1. Using Deferred Group Copy can be time consuming and result in slower migration performance.
- 2. Copying Permissions Groups requires elevated privileges within SharePoint.

Copy Content - enabling this option will copy all of the content from your My Sites to your OneDrive. You can further specify if you would like to include all versions of the content from your My Sites, or only the specified most recent versions.

Incremental Copy - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration. The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time. To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed. To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

NOTE: The Overwrite if File Exists parameter will be disabled if this option is selected.

Skip files greater than - When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.

Migrate to folder - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.
Re-Map Site and List Templates - This feature allows for the re-mapping of list or site templates. Download the Site and List Template Report. To do this:

- Right click on a site in the Navigation View and go to Reports > SharePoint Site and Templates(csv). Alternatively choose the Reports Menu and then choose the Site and List Templates button on the ribbon. Enter a file name and select a location to download the CSV report, then select "Save".
- 2. Open and review the template report. Choose the Source Template ID and the Target Template ID you would like to Re-Map.
- 3. Create a new CSV file and insert the Source template ID into column A, and the Target template ID into Column B. Save the new CSV file.
- 4. During a copy operation, select Re-Map Site and List Templates, and then choose "Load". Select the new CSV file containing Source Template ID and Target Template ID. Once you are satisfied with your settings, press the "Next" button located at the bottom of the window to continue to the Summary window. Review your migration settings one more time and press the "Finish" button to initiate the operation.

Advanced Options



Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding 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.

- **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 tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.
- 9. 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.

Source Office 365 Conn	ection Parameters		
SharePoint Admin URL:		+ Admin	?
	Successfully connected to SharePoint Admin URL		
	Connected admins: itrosman@metavistech.com		

When you receive a successful connection message proceed to the next parameter. You may also choose to add additional Admin accounts by selecting the "**+Admin**" button.

4. Enter a SharePoint Admin Center URL for the **target** Office 365. Once the URL is entered, click the **Connect** button, enter a valid Admin account and click Connect.

NOTE: that the Claims option is not supported for this operation.

Target Office 365 Connection Parameters

SharePoint Admin URL: https://metavistech-ad	min.sharepoint.com	+ A(dmin	0
	Successfully connected to SharePoint Admin URL			
	Connected admins: jtrosman@metavistech.com			

When you receive a successful connection message proceed to the next step. You may also choose to add additional Admin accounts by selecting the "**+Admin**" button.

5. Click the **Load from Tenant** button or **Load From CSV**. Note that Load from CSV will allow you to load users from a CSV file (see user mapping for more information on user mapping report), which is the faster option as only the listed users are loaded.

If you've selected Load from Tenant, then the table will be populated with a list of currently provisioned OneDrive for Business sites.

Load from CSV or 🚻 Load from Tenant 🕡

- You can also choose the Load and Apply report option, which allows you to load and apply an Analyze OneDrive report, which then sets the Migration Priority for each user mentioned in the report. Click Next to continue.
- **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

type filter text	
User	Migration Priority
	1
	2
	3
	~
<	>
Select All Deselect All	Load and Apply Report

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).

OneDrive for Business to OneDrive for Business Migration
heck for availability of OneDrives on Target Tenancy
Select which OneDrives to create from list below.
Re-Map Users Load 🕢

8. Click the **Check for users personal** sites button. This operation will verify that the user account listed in the mapping file was found in the target Office 365 and it will also determine if the user's OneDrive for Business site is currently provisioned.



If the user is valid in Office 365 but does not currently have a OneDrive for Business site, please check the option labeled "Create personal sites for the selected users" which will instruct the software to provision the necessary sites.

- 9. Click Next to continue.
- 10. The final page provides a few options to configure how the content portion of the operation should be configured.

Content Options

Content Options
2013 Copy Permissions
Copy Content
Include Versions
Include All Versions
O Include most recent Versions 10
Overwrite if file exists Incremental copy Cast days
Skip files greater than 🔞 MB 🧹
Migrate to folder: 🔞
Apply Filter Filter

Copy Permissions - This option will enable the transfer of internally shared permissions from the source to OneDrive for Business. For source Google Drive migrations, this will include internally shared folder and item-level permissions. For source SharePoint My Site migrations, this will include internally shared site, list and item level permissions. For source Box migratons, this will include internally shared folder collaborators. For source Dropbox migrations, this will include internally shared folder permissions.

Copy Content - Enabling this option will copy all of the content from your Source to your Target. You can further specify if you would like to include all versions of the content from your source, or only the specified most recent versions.

Overwrite if file exists - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

Incremental Copy - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration. The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time. To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed. To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

NOTE: The Overwrite if File Exists parameter will be disabled if this option is selected.

Skip files greater than - When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.

Migrate to Folder - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

Apply Filter - This feature allows the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

NOTE: the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It is recommended that users not use the operators "Equal" and "Not Equal" to avoid difficulties with accurate file size, if the file size is greater than 1 MB.

Use the "Save Filter" option to save filter settings to a file and load them in different wizards or the Profile Manager.

Created At	Equal 🗸		<set by="" sharepoint=""></set>	\vee	
	Less Than 🛛 🗸		<set by="" sharepoint=""></set>	\sim	
File Extension	Equal 🗸	.txt			
Modified At	Equal 🗸		<set by="" sharepoint=""></set>	\sim	
	Less Than \neg		<set by="" sharepoint=""></set>	\sim	
Size (KB)	Equal 🗸				
Save Filter	oad Filter				Clear All Filter

Advanced Options

00	 Advanced Options 		
	🗌 Enable Azure Turbo Mode 🛛 🕢 💿		
	O Microsoft Provided Storage	0	
	User Provided Storage	Select 🕡	
	Send notification Admins,Ow	ner,Current	0

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha 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**.

Home	Migration An	atysis Kon	View	Migrator	File Manag	per Drives	s Security Mana	ger Term	Store Manager	Administrator	Back	ip Help	» X		Ð
Office 365	SharePoint	Google Box	Dropbo	ок Сору	Paste	Select All	Copy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Tur
	Connec	t To		- 4-	Clipboard				A	Copy One	Drive to On	eDrive			View
Navigator				E 4		12 Migration	Contents	Progress		Copy Offi	ce 365 Grou	ps to Office 3	65 Groups		
> 🗃 OneDriv	e					< 1 - 2 >				Copy Sha	rePoint Onli	ne to SharePo	int Online		
Select	a Pro	file a	nd g	give yo	our p	project	t a nam	ie.							
🤌 Office	365 Group	os to Offi	ce 365 G	Groups											×
Connect,	Load an	d then S	Select v	which Of	fice 36	5 Group s	ites to mig	jrate							
Profiles	OneDrive	/MySite-[Default												~
. Tollies															
Project N	ame:														

3. Enter a SharePoint Admin Center URL for the **source** Office 365. Once the URL is entered, click the **Connect** (or **Claims**) button, enter a valid Admin account and click Connect.

Source Office 365 Conr	ection Parameters			
SharePoint Admin URL:	https://	~	+ Admin	0
Target Site Prefix:	Not required			
	Connected admines			

When you receive a successful connection message proceed to the next parameter. You may also choose to add additional Admin account by selecting the "+Admin" button.

4. Enter a SharePoint Admin Center URL for the **target** Office 365. Once the URL is entered, click the **Connect** button, enter a valid Admin account and click Connect.



When you receive a successful connection message proceed to the next step. You may also choose to add additional Admin account by selecting the "**+Admin**" button.

5. Click the **Load from SharePoint** button or **Load From CSV**. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded. (You can also choose to load from CSV and use a user mapping report)



.....

6. In the table, a list of currently provisioned domain users will be loaded. Check the box next to each user that will be included with this operation. Click **Next** to continue.

Load from CSV or 🚹 Load from Office 365 Group	۶ (V)
type filter text	
User	^
N N	
	v
<	>
Select All Deselect All	

- 7. On the second page of the wizard, if a user mapping file is required, check the box next to Re-Map Users and then load the mapping file (For an overview on how to create a CSV mapping file for your users, please see the User Mapping section).
 - **NOTE:** In order to migrate users, you must have them mapped in the same CSV mapping file with the groups mapping.

Office 365 Group	s to Offic	e 365 Groups
Check for availabi	lity of t	arget Sites
Confirm your mapp	oing by re	viewing the list below

- 8. Click the **Check Office 365 Group** button. This operation will verify that the user accounts listed in the mapping file were found in the target Office 365.
- **NOTE:** If a Group does not exist on the target then it will be created based on the original group membership from source to target. If the list of users is empty Essentials will use the migration administrator as the owner.

It office 365 Groups to Office 365 Groups

— 🗆 X

Check for availability of target Sites

Confirm your mapping by reviewing the list below

heck Office 365 Group					
ieck Office 365 Group	Searching Office 365 Group copysitepagetest@appdevsite.onmicrosoft exampleteam@appdevsite.onmicrosoft.com testgroupdiffname@appdevsite.onmicrosof	Office 365 Group copysitepagetest ExampleTeam Group not found	Found	Office Yes Yes No	365 Group S

- 9. You can choose to remap your source Office 365 Groups to specified target 0365 Groups by selecting **Remap**. This will allow you to use a saved CSV file for remapping. Once your CSV has uploaded and your mapping is visible, click **Next** to continue.
- 10. The final page provides a few options to configure how the content portion of the operation should be configured.

Content Options

Content Options
Copy Content
Include Versions
Include All Versions
O Include most recent Versions 10
Overwrite if file exists
🗌 Incremental copy 🔞 Last 🔤 days 🛛 🗸
🗌 Skip files greater than 🔞 📃 MB 🗸

Copy Content - Enabling this option will copy all of the content from your Source to your Target. You can further specify if you would like to include all versions of the content from your

source, or only the specified most recent versions.

Overwrite if file exists - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

Incremental Copy - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration. The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time. To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed. To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

NOTE: The Overwrite if File Exists parameter will be disabled if this option is selected.

Skip files greater than - When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.

Advanced Options

Advanced Options	
🗹 Enable Azure Turbo Mode 🛛 🐵	
Microsoft Provided Storage	
Ouser Provided Storage Select	
Send notification	0

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or

contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha 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 doingan Office 365 Group to Office 365 Group Migration:

- Functionality works only for modern pages (Inherits="Microsoft.SharePoint.WebControls.ClientSidePage")
- Pages should be published on source.
- Works only through CSOM. If migration was started with azure -pages migration would go in to CSOM and can be done only in sync mode.
- Functionality works only for out-of-box Pages, library automatically created when group site is created or team site is created.
- Overwrite of pages is not supported. Overwrite and Incremental/Delta works the same Target pages would be deleted and new pages with web-parts would be created.
- Pages history for modern pages is not supported and will not be preserved.
- Core properties for modern pages should be preserved for last page version.
- Web part ID should be updated after it was created on the target page.
- Link inside web part referencing on lists should be updated after it was created on the target page.
- If reference object is missing on target (was not copied because of errors, was excluded from migration, deleted from target before migration) the web part is copied as close as it can be. There will be no errors logged for the web part or for the page migration in post migration log.

• app.log in job log must have the line :

"Create modern page :: :: page name.aspx has web parts: updated: list- webpart id , list - webpart id , image - id and not updated: map id". For example : Create modern page :: :: page Home.aspx has web parts: updated: Image-edbf790c-7047-4f81-9893-c90e35eaf3db List-9d86e730-a1ff-4631-aeb2-6f52a097e339 List-e6158eca-b230-42d3-a5a8-7ca7840e44c3 DocumentEmbed-459d5426-ed40-4031-accb-d33f59006f98 and not updated: ContentRollup-66046009-2f07-40e0b3da-28d4196f956b LinkPreview-e6195746-3090-46c2-8c94-ff31fc009d9f. This info will give an explanation about supported web parts and not supported web parts. Web parts next to not updated were not modified by the tool and will not work on the page.

- Section layout should be the same as on the source. List of supported layouts: one column, two column, thee columns, one-third left column, one-third right column. Section background is not supported
- Web part should be placed on the same section and same zone as on the source page.
- Tool will create a .txt file with original page history just to save this information somewhere and share it with end-users.

List of supported Web Parts

- Text (Supported properties: simple text without formatting)
- Image (Supported properties: link to image; only for current site sub sites and other site are not supported)
- Highlighted content (Supported properties: Source this site , Type documents , Document Type any)
- Document Library (Supported properties: Document lib link reference)
- List (Supported properties: List link reference)
- File Viewer (Supported properties: File link reference)
- Link (link reference)
- Tasks
- Picture Library
- Survey

Copy SharePoint Online to SharePoint Online

A simple Administrator driven wizard is provided to bulk migrate the Documents library content from the Source SharePoint Online into the appropriate Target SharePoint Online Documents library. In order to successfully configure and run this operation, you will need to be able to authenticate against both SharePoint Admin Center portals in Office 365 using a Global Administrator login. A mapping file may also be needed in order to resolve the user accounts between the source and destination tenants.

This operation has the following requirements for use:

- The account used to perform the migration needs to be at minimum a SharePoint Admin for the source Office 365 tenant.
- The account used to perform the migration needs to be at minimum a SharePoint Admin for the target Office 365 tenant.

- The person performing the migration will need to know the relationship (user mapping) between the user accounts in the source and target Office 365 tenants.
- Each user account must have either a SharePoint Online license assigned to it in Office 365.

Once the requirements above are satisfied, you can proceed with utilizing the bulk upload functionality.

1. Switch to the Drives tab in the Essentials console and click the button "Copy Tenant" located in the ribbon, and select **Copy SharePoint Online to SharePoint Online**.

Home	Migration	n Analysis	Vi	ew M	igrator	File Mana	ger	Drives	Security Manag	er Term St	ore Manager	Administra	tor Bac	kup Help	39		
0	5>	8	bax	\$		Ê.			<u>A</u> 2	2	D 🤉	2	tox 🤈	*	×		
Office 365	SharePoint	Google	Box	Dropbox	Сору	Paste	Select All	Сору	Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Turbo
	Cor	nnect To				Clipboard					A	Copy C	neDrive to O	neDrive			View
Navigator					🖻 😫		🔀 Migr	ation 📑	Contents 🔫	Progress		Copy C	ffice 365 Gro	ups to Office 36	5 Groups		
> 😕 OneDrive	e						< 1-	>				Copy S	harePoint On	line to SharePoi	nt Online		

2. When the wizard appears, select a Profile and give your project a name.

SharePoint Online to SharePoint Online Migration					×
Migration Configuration Select the actions to enable for this misoriton.					
Migration Mode Migration Mode Oplete and Replace Content Options Content Options					
Copy Survivas M Copy Connect Include Related Al Venions Onducts model recent Tensions 10					
Copy Premissions Control Copy of Los days Control Copy Control Los days Stip Res greater than Control Los Control Re-Map Ubers Los Control					
🚺 Schedule	< Back	Not >	Finish	Cancel	

3. Enter a SharePoint Admin Center URL for the **source** Office 365. Once the URL is entered, click the **Connect** (or **Claims**) button, enter a valid Admin account and click Connect.

Source Office 365 Connect	tion Parameters			
SharePoint Admin URL: htt	tps://	- +	Admin	?
	Connected admins:			

When you receive a successful connection message proceed to the next parameter. You may also choose to add Admin account by selecting the "**+Admin**" button.

4. Enter a SharePoint Admin Center URL for the **target** Office 365. Once the URL is entered, click the **Connect** button, enter a valid Admin account and click Connect.

Target Office 365 Cor	nection Paramete	ers			
SharePoint Admin URI	.: https://	tech adminuhampoint.com			🗸 + Admin 🕝
		Connected admins:	an) wateriste h.com		

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.

SharePoint Online to SharePoint Online Migration	n						٥	×					
Check for availability of SharePoint Online	sites												
Select which site collections to create from list below.													
Re-Map Sites Load 💿 and/or Check for site	es												
Source URL	Target URL	Language Conflict No No No											
[] Schedule			< Back	Next >	Finish		Cancel						

7. You can choose to remap your source site collections to specified target site collections by selecting **Remap**. This will allow you to use a saved CSV file for remapping to a specific site on the target. The following is a CSV example:

https://source.sharepoint.com/sites/old site URL,https://target.sharepoint.com/sites/new site URL

Once your CSV has uploaded you can select **Check for Sites** to recheck whether target sites exist based on your mapping csv - once your mapping is visible, click **Next** to continue.

8. The final page provides a few options to configure how the content portion of the operation should be configured.

Content Options

ø	Content Options
3	Convert to Modern Site Template 💿
	Copy Sub-Sites 💿
	Copy Content
	Include Versions
	Include All Versions
	O Include most recent Versions 10
	Copy Permissions 💿
	Copy Features 🔞
	Copy Workflows Convert Workflows to 2013 Style 🔞
	Copy Forms 🔞
	Copy Navigation 💿
	✓ Overwrite if file exists
	Incremental copy 🕖 Last days
	Skip files greater than 💿 MB
	Re-Map Users Load 💿
	Apply Filter Filter

Convert to Modern Site Template - Enable this option if you are migrating a classic Team Site (STS#0) that you want to be converted to a modern Team Site (STS#3) on the target. If you do not check this box, the site will retain the classic Team Site template.

Copy Sub-Sites - Enable this option to include all sub-sites of the current site in this operation.

Include Content Versions - This option allows you to select whether versioning is enabled. you can choose to include all versions in the migration, or the most recent (specified) number of versions.

Copy Permissions - This option will enable the transfer of internally shared permissions from the source to OneDrive for Business. For source Google Drive migrations, this will include internally shared folder and item-level permissions. For source SharePoint My Site migrations, this will include internally shared site, list and item level permissions. For source Box migratons, this will include internally shared folder collaborators. For source Dropbox migrations, this will include internally shared folder permissions.

NOTE: If a new item or a new version of an item with unique permissions is being migrated and the **Overwrite if file exists** option is selected, this option must also be selected if you want to retain unique permissions on the target. Otherwise, permissions will be inherited from the parent. **Copy Features**- This option will transfer site level feature settings from the source to the target site.

Copy Workflows - This option allows you to copy SharePoint Out-of-Box Workflows, SharePoint Designer Workflows, and Nintex Workflow .

NOTE:

Workflows may have a reference on images, columns, files, lists, sites, etc. These objects should be copied with Workflows or be created/copied before Workflow migration.
The Nintex Workflow must be installed before the migration

Copy Forms - this option allows you to copy Classic Nintex Forms. **NOTE:**

- The Nintex App must be installed before the migration
- Domains must be updated during the migration
- Rules must be preserved
- Collection to columns must be preserved
- The form must be published after migration

Copy Navigation - selecting this option will copy quick launch settings and top link bar settings from your source site to your target site, both for new and existing sites, for Modern and Classic team sites. Note, that when enabled this setting works in 'replace mode', meaning it will delete all quick launch and top link bar settings on the target, and replace them entirely with the settings from the source - this means that if you have custom settings or libraries that do not exist on the source, these settings will be lost on the target.

Overwrite if file exists - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

NOTE: If a new item or a new version of an item with unique permissions is being migrated and this option is selected, the **Copy Permissions** option must also be selected if you want to retain unique permissions on the target. Otherwise, permissions will be inherited from the parent.

Incremental Copy - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration. The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time. To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed. To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration. **NOTE:** The Overwrite if File Exists and Copy Navigation parameters will be disabled if this option is selected.

i

Skip files greater than - When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.

Re-Map Users - This option will allow you to map users between different domains or to change the user account in the target environment during copy.

Apply Filter - This feature allows the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

NOTE: the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It is recommended that users not use the operators "Equal" and "Not Equal" to avoid difficulties with accurate file size, if the file size is greater than 1 MB.

Use the "Save Filter" option to save filter settings to a file and load them in different wizards or the Profile Manager.

Created At	Equal	v [<set by="" sharepoint=""></set>	~		
	Less Than 🗸 🗸	[<set by="" sharepoint=""></set>	~		
File Extension	Equal	¥	.txt				
Modified At	Equal	۷ [<set by="" sharepoint=""></set>	~		
	Less Than 🗸 🗸	[<set by="" sharepoint=""></set>	~		
Size (KB)	Equal	¥					
Save Filter	ad Filter					Clear All	Filter

Advanced Options

00	Advanced Options	
1	🗌 Enable Azure Turbo Mode 🛛 🕢	
	O Microsoft Provided Storage	
	User Provided Storage	
	Send notification Admins, Owner, Current	0

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

11. Click **Finish** to begin the migration.

Сору Вох

Copy Box to OneDrive for Business

This option allows Box and Office 365 administrators to copy content from within multiple Box Drives to their respective OneDrive for Business sites in a single migration.

NOTE: If you attempt to connect or open a Box drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

- The account used to perform the migration from Box needs to have Full Enterprise Admin access to the Box tenant.
- The account used to perform the migration into OneDrive for Business needs to be a minimum of Site Collection Administrator Role in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each user's Box user account and their corresponding Office 365 user account.
- Each user account must have either a SharePoint or OneDrive license assigned to it in Office 365 and can not be in a 'Blocked' state.

Once the requirements above are satisfied, you can proceed with your Box to OneDrive for Business migration.

 Switch to the Drives tab and click the "Copy Box" option and select the Copy Box to OneDrive button.

Home	Migratio	on Analysis	Vie	w Mi	grator	File Manag	er	Drives Security Ma	nager Tern	n Store Manager	Administrator	Bac	kup Help	>>		
	5>	8	Ьах	\$	1	ŕ.		<u>A</u> 2		D 🤉	<u> </u>	100 7	*	×		٠
Office 365	SharePoint	Google	Box	Dropbox	Сору	Paste	Select All	Copy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box *	Copy Dropbox	Nintex Deployment	Logs	Azure Turbo
	Co	onnect To				Clipboard					Actions	Copy E	Box to OneDrive	1		View
Navigator					🖻 😫	D	🔀 Migi	ration 📑 Contents	- Progress			Copy E	Box to SharePoi	nt		
OneDriv	/e							2				Copy E	Box to Office 36	5 Groups		
								د ۲				Copy E	Box to Microsof	t Teams		

2. Give your project a name.

log Box to OneDrive for Business Migration				
Select which Box to migrate				
Project Name:				

3. Enter the username of your Box Administrator and click Connect.

Box connection parameters						
Admin User: mklinchin@metavistech.com		Connect	2			
	Press Connect button to connect to Box					

4. When the popup appears, enter this Admin account's password and click **Connect**. Then "Grant access to Box" and you will return back to the migration configuration where a "Successfully connected to Box" message will appear.

			0		
Sconnect	to Box			_	
Connecting	to [https://	www.box.con	n]		
User 🚺	a second state of a second state of a second				
Password •	•••••	••			
Domain					
		Use Pro	×y nfiguration		
	Connect			Cancel	

- **NOTE:** If you attempt to connect or open a Box drive through the software and it does not respond, you may require an alternate framework. Please review the section Alternate Framework for instructions on how to install the alternate framework.
- 5. In the Target Office 365 Connection Parameters section, specify your tenant SharePoint Administration Center URL and then click **Connect** (i.e. https://tenant-admin.sharepoint.com). When prompted, enter your Office 365 Global Administrator or SharePoint Administrator login and password. Click **Connect**. If you receive any message other than Successfully connected to SharePoint Admin, double check the URL and make sure you are supplying a Global Administrator or SharePoint Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance. Box connection parameters

Admin User: mklinchin	@metavistech.com		Connect		
		Successfully connected to Box			
Target Office 365 Connection Parameters					
SharePoint Admin URL: https://metavistech-admin.sharepoint.com + Admin 🌘					
		Successfully connected to SharePoint Admin URL			
		Connected admins: itrosman@metavistech.com			

6. Click the "Load from Box" button to load in a list of available Box drives to include with this migration. For performance reasons, if you have a large number of Box drives in your tenant you may wish to create a single column CSV file with the user accounts and choose the option

"Load from CSV" instead.

Box connection parameters									
Admin User:	(Industry)							Connect	0
		9	Successfully	/ connected t	o Box				
Target Office 365 Connection Parameters									
SharePoint Admin URL:	high the state of the second	*****						Connect	0
Target Site Prefix:	Not required								
		Successfu	ully connect	ed to SharePo	oint Admin URL				
Load from CSV	or 📕 Load from Box	0							
type filter text									
Select All Decelect A							Landa	ad Analy Da	
Deselect All Deselect A	AII						Load a	na Apply Re	port

7. Select the Box drives that you wish to include with this migration, or select the Load and Apply Report button, which allows you to load and apply an Analyze Box report, which then sets the Migration Priority for each user mentioned in the report. Click Next to continue.

NOTE: Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

type filter text	
User	Migration Priority ^
	1
	2
	3
	v
<	>
Select All Deselect All	Load and Apply Report

 Select Re-Map Users option and load a user mapping CSV file. User mapping is required so the software can properly resolve the differences between your users' Box and Office 365 accounts. Please see the User Mapping section if you require further instructions on creating a CSV file for user mapping.

	sox to OneDrive for Business Migration					
Check for availability of SharePoint Personal Sites						
Select which personal sites to create from list below.						

9. Click **Check for users personal sites** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 user accounts were located) and

check to determine if each user currently has a OneDrive for Business for site provisioned. If any of the valid users do not have a OneDrive for Business site currently provisioned, you can select them and check **Create personal sites for the selected users** option.

Re-Map Users Load 🕢	1 user(s) are mapped with	and ball of the state of the state	
x User	Searching SharePoint for User	SharePoint User Found	Personal Site Exists
	Journal Collection Conc.	difference provide the	and the first second se

- 10. Click Next to continue.
- 11. The final page provides a few options to configure how the content portion of the operation should be configured.

Content Options

Content Options
ria ✓ Copy Content
Include Versions
Include All Versions Include most recent Versions 10
🗌 Incremental copy 🔞 Last 🔤 days 💛
Copy Permissions 🔞
Skip Non-Owned folders 🛛 🔞
Skip files greater than 🔞 MB 🗸
🗌 Migrate to folder: 🔞
Apply Filter Filter

Copy Content - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

Include Versions - The process in which Box version history will be converted into OneDrive for Business versions.

Incremental Copy - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

Copy Permissions - Will convert Box permissions (known as Collaborators) into OneDrive for Business permissions.

Skip Non-Owned Folders - This option addresses the scenario where folders appear in a user's Box account which are not owned by this user; meaning the user is a folder collaborator and not the folder "Owner". Skipping these folders will prevent duplicates from being migrated into OneDrive for Business because the folder will be migrated only once when the folder "Owner" is migrated. Please refer to the in-application Help button for additional details.

Skip Files Greater Than - When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.

Migrate to Folder - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

Apply Filter: Creates and assign any number of filter parameters to be used to include or exclude content from the upload process, including but not limited to file extensions, size and dates.

Advanced Options



Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Create User Specific Log File - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

NOTE: Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

🗌 Create User Specific Log File 🛛 📀

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- **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 a Microsoft Entra ID 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.

box	Search Files and Folders					
 C All Files C Recents ☆ Favorites ⊘ Synced to Desktop ☑ Trash 	All Files Name Box Group Collaboratio					
Messages 3 Collaborators	Image: Share Image: Share Image: Share					
10 Admin Console	library Ibrary Ibrary Ibrary Image: Manage Collaborators					

2. As is displayed in the following image, the group for this example is "Box Dev".

box	Search Files and Folders	ist ≠ Q				8
🗈 All Files	Box Group Collaboration > Collaborators				Filter Collaborators Q Mail All Invite Collabora	tors
 Recents Favorites 	Name	Email Address	Permissions	Date Added	Added To	
 Synced to Desktop Trash 	🤱 Hard Kitesine	million in given by bind or any	incer.	No. 16.2017	Here Design Coldstancestore	
💬 Messages (3)	🔊 innerenderstatugis ser:	(menerged) metalligis.com	heating a	Res 16.2017	Barr Druge Coldstantion	
② Collaborators	BD Box Dev	has designational and	She's	10.000	The long little state	

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 a Microsoft Entra ID Group, we first need to locate the "Account" name of the Microsoft Entra ID 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 Microsoft Entra ID group for which you wish to find the Account ID for user mapping.



4. The Microsoft Entra account ID will be the set of numbers and characters listed beside "Account". Copy this sequence.

	Office 365	SharePoint	
9	>	props redit People a	and Groups → User Information
Hom	5		Close
Notel Docu	pook ments	📴 Edit Item 🗙 Del	ete User from Site Collection
Pages	5	Account	c:0f]rolemanager]s-1-5
Site c	ontents	Name	Risk Management Group
🥒 El	DIT LINKS	Work email	
		About me	
		Picture	
		SIP Address	
		Created at 07/10/2012 (Last modified at 07/10/	08:10 by □ Chris Kolodziejski 2012 08:10 by □ Chris Kolodziejski

Make a new entry in your User Mapping file for the Group



As you can see, use the information from the Box side on the leftmost column and use the information from your SharePoint side on the rightmost column. When you use this mapping file, your group should map from Box group to your existing group in OneDrive for Business.

Box- Unsupported Objects

The following Box objects are not supported when migrating to OneDrive for Business or SharePoint Online.

- Box Notes
- Box Bookmarks
- Comments
- Custom Terms of Service
 - If the Box tenant has a Custom Terms of Service configured and a user has not Accepted the Terms of Service, then their Box account cannot be accessed and therefore their content cannot be migrated.
- External users (permissions and metadata)
- File and Folder descriptions
- Google Documents
- Google Spreadsheets
- Objects in the "Trash"
- Office documents created in Box with a size of 0 KB cannot be migrated using Azure Turbo
- "Tags" and Favorite labels
 - $\,\circ\,$ The item can still be migrated, however these labels will not be retained.
- Version history when a more recent version has a created date earlier than a previous version cannot be migrated using Azure Turbo.
- Mass migration from Box to Office 365 preserves file information available in the Version history section only, the original information from file shares gathered in the File Information section is not supported during migration.

Copy Box to SharePoint Online

This option allows Box and Office 365 administrators to migrate folders (and their subfolders and files) from within multiple Box Drives to one or more document libraries in a SharePoint Online Site Collection.

NOTE: If you attempt to connect or open a Box drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

- The account used to perform the migration from Box needs to have Full Admin access to the Box tenant.
- The account used to perform the migration into SharePoint Online needs to have at minimuim Designer permissions to the destination Site Collection. Full Control or Site Collection Administrator are recommended to avoid potential permission related issues during migration.
- The person performing the migration will need to know the relationship between each user's Box user account and their corresponding Office 365 user account. Please see the User Mapping section for an overview on how to create a CSV User Mapping file.
- The destination sites and libraries must exist in SharePoint Online prior to migration.

Once the requirements above are satisfied, you can proceed with your Box to SharePoint Online migration.

1. On the Drives tab, Click the Copy Box button, and select "Copy Box to SharePoint".

	Home	Migration	Analysis	View	Mig	rator	File Manag	ger	Drives	Security Man	iger Ter	m Store Manager	Administrator	Bac	kup Help	>		
	Office 365	SharePoint	Google	Box E	Dropbox	Copy	Paste	Select All	G	iopy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Turbo
		Con	nect To				Clipboard		1	P.C. I. I.			Actions	Copy E	Box to OneDri	/e	-	View
	Navigator								ration	Contents	9 Progress			Copy E	Sox to SharePo	int 65 Groups	_	
	OneDriv	/e						< 1 -	2 >					Copy I	Box to Microso	oft Teams		
2.	 Give your project a name. Box to Sharepoint Site Migration - □ × 										×							
	Select w	hich Box 1	o migra	te														
	Project N	lame:																
3.	Enter	the u	usern	ame	e of	γοι	ır Bo	ox A	dm	inistra	tor an	d click (Connec	t.				
	Box co	nnection	paramet	ters														

- Admin User: Connect O Box
- 4. When the Connect to Box popup appears. enter the Admin account's password and click Connect. If your Box authentication requires additional security steps (i.e. single sign-on) then click the "Claims" button and enter your Box Admin and Password credentials into the browser popup to continue.

Connectir	ng to [https://	www.box.con	ן]			
User	1000					
Password	•••••	••				
Domain						
		Use Pro	xy			
		Use Pro	xy nfiguration			
	Connect	Use Pro	xy nfiguration	Can	cel	

5.

7.

- **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.
- 6. 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.

Admin User: 📗	and the second second		Connect
		Successfully connected to Box	
harePoint conn	ection parameters		
harePoint conn SharePoint Site	ection parameters		✓ Conner

- **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.
- 8. Your next step is to click the **Load from CSV** button. This option is required in order to map which folders from Box are migrated into which specific document library in your SharePoint Online site(s).

Box connection parameters									
Admin User:	A come				Connec	t 🕜			
Successfully connected to Box									
SharePoint connection parameters									
SharePoint Site Connect									
	Succ	essfully conn	ected to SharePoint Site						
Load from CSV Check Box Users									
Source User	Source Path		Target SharePoint Site	Target SharePoint List	Target folder path				
	Strength of the		Part .	Rinks Redding for					
	Sec. 2	1000	Summittee Codet	Test from					
	The last strend with	and the second	The share with	State State					
	Website Descent	dist first		Epiteria (Contractor)					
			Support Sectors	Report Reports					
Select All Decelect All Lice Char	set for Encoding file	indows-1252							
Jelect All Deselect All Use Char	set for Encoding file	1110003 1252	· ·						

The CSV format includes the following 5 headers and is specific to a single target SharePoint Online root location as defined in the SharePoint Site field.

- 1. **Source User** This column defines the source Box user account which contains the folder that should be migrated. Your CSV file may contain one or more source Box user accounts.
- 2. **Source Path** This column defines the path to the root folder (including **all** its child content) from Box that you wish to migrate. If you want to migrate all folders and root content from a Box user, simply enter a forward slash (/) in this column. Your CSV file may contain one or more source folder paths for each source Box user.
- 3. Target SharePoint Site This column defines the site or sub-site you wish to use as your destination location. If you want to migrate to the root site as defined in the SharePoint Site URL, then simply enter a forward slash (/) in this column. If you wish to migrate to a sub-site of the root, then enter the relative path to your sub-site starting at the root level (i.e. /subsite1/subsite2). Please note that each defined target site or sub-site must already exist in SharePoint Online as this process will not create this new site. This will then result in an error during migration.
- 4. **Target SharePoint List** Target SharePoint List This column defines the document library you wish to use as your destination list. Please enter the library's Internal Name into this column. Please note that each defined target library must already exist in SharePoint Online as this process will not create this new library, if you do not do this, it will result in an error during migration.
- 5. Target folder path This column defines the folder that you would like to use as your destination location. If you want to migrate to the root of the library defined in the Target SharePoint List column, then simply enter a forward slash (/) in this column. If you wish to migrate to a sub-folder of the root, then enter the relative path to your sub-folder starting at the root level (i.e. /folder1/folder2). For an example CSV file downloaded from here. Please do not modify the first row (headers) of the CSV file, but do modify the remaining values starting in the second row to meet your needs.

- 7. Click the Check Box Users button in order to verify that the source users, as defined in the loaded CSV file, are found within your Box tenant. After the function is complete, all source users not found will be displayed in red font while users successfully located will remain in the default black font. This acts as a warning that you may have entered an invalid user or there is an issue locating the defined user(s). You may still proceed with the migration, however you should expect errors when trying to migrate from these users.
- **NOTE:** Check Box Users only verifies if the source Box user account was located. It does not validate the existence or accuracy of any other value in the CSV file, so please be sure to visually confirm before proceeding.

Load from CSV Check Box Users				
Source User	Source Path	Target SharePoint Site	Target SharePoint List	Target folder path
swilliams@contoso.com not found	/2015 Marketing Plan	/Plans	Product Marketing Plans	2015
✓ swilliams@contoso.com	/2016 Marketing Plan	/Plans	Product Marketing Plans	2016
CorpMarketing@contoso.com not four	/Marketing Documentation/Draft	/Documentation/Content		
 CorpMarketing@contoso.com 	/Marketing Documentation/Review	/Documentation/Content	Review Docs	
 CorpMarketing@contoso.com 	/Marketing Documentation/Final	/	Content	
blauer@contoso.com not found	1	/LegacyContent	BLauer Documents	

Select All Deselect All

- Select the Box drives that you wish to include with this migration, or select the Load and Apply Report button, which allows you to load and apply an Analyze Box report, which then sets the Migration Priority for each user mentioned in the report. Click Next to continue.
- **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

type filter text	
User	Migration Priority
	1
	2
	3
	×
<	>
Select All Deselect All	Load and Apply Report

9. The final page provides a few options to configure how the content portion of the operation should be configured.

Content Options:

Content Options
2013 Copy Content
 Include Versions Include All Versions Include most recent Versions
🗌 Incremental copy 🕡 Last 👘 days 🗸 🗸
Copy Permissions 🕡
Skip Non-Owned folders 🛛 🔞
Re-Map Users Load
Skip files greater than 🔞 MB 🗸

Copy Content - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

Include Versions - The process in which Box version history will be converted into SharePoint Online. You can specify whether All Versions or the specified most recent versions are included.

Incremental Copy - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

Copy Permissions - Will convert Box folder permissions (known as Collaborators) into SharePoint Online folder permissions.

Skip Non-Owned Folders - This option addresses the scenario where folders appear in a user's Box account which are not owned by this user; meaning the user is a folder collaborator and not the folder "Owner". Skipping these folders will prevent duplicates from being migrated into SharePoint Online because the folder will be migrated only once when the folder "Owner" is migrated. Please refer to the in-application Help button for additional details.

Re-Map Users - Will allow both permissions (if included) and user metadata like Created and Modified By to be properly mapped from Box to Office 365. Please refer to the following page for additional information: User Mapping. Please note that this mapping file can also contain Box Groups to SharePoint Groups or federated Active Directory groups in Office 365. Please refer to the following page for additional information: Box - Group Mapping

Skip Files Greater Than - When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.

·			
🗹 Enable Azure Turbo Mode 🛛 🔞			
Microsoft Provided Storage	0		
O User Provided Storage	Select	2	

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

10. Click Finish to begin the migration.

Box- Unsupported Objects

The following Box objects are not supported when migrating to OneDrive for Business or SharePoint Online.

- Box Notes
- Box Bookmarks
- Comments
- Custom Terms of Service
 - If the Box tenant has a Custom Terms of Service configured and a user has not Accepted the Terms of Service, then their Box account cannot be accessed and therefore their content cannot be migrated.

- External users (permissions and metadata)
- File and Folder descriptions
- Google Documents
- Google Spreadsheets
- Objects in the "Trash"
- Office documents created in Box with a size of 0 KB cannot be migrated using Azure Turbo
- "Tags" and Favorite labels
 - $\,\circ\,$ The item can still be migrated, however these labels will not be retained.
- Version history when a more recent version has a created date earlier than a previous version cannot be migrated using Azure Turbo.
- Mass migration from Box to Office 365 preserves file information available in the Version history section only, the original information from file shares gathered in the File Information section is not supported during migration.

Copy Box to an Office 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".

	Home	Migratio	on Analysis	Vi	ew 1	Migrator	File Manag	per	Drives	Security Manage	er Term	Store Manager	Administrator	Bac	kup Help	32		
	Office 365	SharePoint	Google	Box	Dropbox	Copy	Paste	Select All	Cop	y Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Turbo
		0	onnect To				Clipboard		1	• •	-		Actions	Copy E	Sox to OneDrive		-	View
	Navigator					E \$		🔀 Mig	ration	Contents 3	Progress			Copy Box to SharePoint				
	Some Direction of the second secon									Copy	1							
۷.	 Select a Profile and give your p Box to Office 365 Group Site Migration Select which Box to migrate 															— 🗆	>	<
	Project	Name:																
3.	Enter	the	user	nam	ne o	f you	ır Bo	ox A	dmi	nistrat	or and	d click C	Connec	t.				

Box connection	n parameters	
Admin User:		onnect
	Enter a valid Box Administration URL and then press Connect	

 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.

🔈 Connec	t to Box					×	
Connectin	ig to [https://	/www.box.con	ן [
User							
Password							
Domain							
		Use Pro	xy nfiguration				
	Connect			Cancel	I		

- **NOTE:** If you attempt to connect or open a Box drive through the software and it does not respond, you may require an alternate framework. Please review the section Alternate Framework for instructions on how to install the alternate framework.
- In the Target Office 365 Connection Parameter section, enter your tenant SharePoint Administration Center URL, and then click **Connect** (i.e. https://tenant-admin.sharepoint.com).

Box connection parameters							
Admin User:	Connect 🥑						
	Successfully connected to Box						
Target Office 365 Connection Parameters							
SharePoint Admin URL:							
Target Site Prefix: Not required							

?
6. When prompted, enter your Administrator login and password. Click **Connect**. If you receive any message other than "Successfully connected to SharePoint Admin", double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance.



 Click the Load from Box button to load in a list of available Box drives to include with this migration. For performance reasons, if you have a large number of Box drives in your tenant you may wish to create a single column CSV file with the user accounts and choose the option Load from CSV instead.

Box connection parame	eters		
Admin User:	der mit der Aussel		Connect 🕡
		Successfully connected to Box	
Target Office 365 Conr	ection Parameters		
SharePoint Admin URL:	the strategy and state	designing and	Connect 🕢
Target Site Prefix:	Not required		
		Successfully connected to SharePoint Admin URL	
Load from CSV or	H Load from Box 🕡		

- Select the Box drives that you wish to include with this migration, or select the Load and Apply Report button, which allows you to load and apply an Analyze Box report, which then sets the Migration Priority for each user mentioned in the report. Click Next to continue.
- **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

User	Migration Priority	^
	1	
	2	
	3	
		~
<		>

9. Select **Re-Map Users** option and load your mapping CSV file. Group mapping is required (user mapping may also be included) so the software can properly resolve the differences between your users' Box account and the corresponding Office 365 Group name as well as maintain

content authorship. If your user accounts differ between Box and Office 365 then you will want to add your user mapping to this same file.

In the example below, lines 1-3 illustrate mapping a source Box toan 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.

Box to Office 365 Group Site	Migration		- 🗆 X
heck for availability of t	arget Sites		
Confirm your mapping by revi	ewing the list below		
Re-Map Users Load @	1 user(s) are mapped with [and the state of the	
Check Office 365 Group			
Box User	Searching Office 365 for Group	Office 365 Group Found	Office 365 Group S
And the Property of the Armon	Dispersion in the later.	DO-Decar	Yes
Export to CSV			

11. The final page provides a few options to configure how the content portion of the operation should be configured.

Content Options:

Content Options
2813 Copy Content
✓ Include Versions
Include All Versions
O Include most recent Versions 10
🗌 Incremental copy 🕡 Last 🔢 days 🗸 🗸
Skip Non-Owned folders 🔞
Skip files greater than 🔞 MB 🗸
Migrate to folder: 🔞

Copy Content - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

Include Versions - The process in which Box version history will be converted into 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:

Advanced Options	
Enable Azure Turbo Mode 🔞	
Microsoft Provided Storage 🥑	
Ouser Provided Storage Select	
✓ Send notification ✓ Create User Specific Log File ⑧	0

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires

that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.

NOTE: User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

Create User Specific Log File - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

NOTE: Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

🗌 Create User Specific Log File 🛛 📀

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
- 12. Click Finish to begin the migration.

Copy Box to Microsoft Teams

This option allows Box and Microsoft Teams administrators to copy content from within multiple Box Drives to their respective Microsoft Teams sites in a single migration.

NOTE: if you attempt to connect or open a Box drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

- The account used to perform the migration from Box needs to have Full Enterprise Admin access to the Box tenant.
- The account used to perform the migration into Microsoft Teams needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each user's Box user account and their corresponding Microsoft Teams user account.

• Each user account must have either a Microsoft Teams license assigned to it in Office 365 and can not be in 'Blocked' status.

Once the requirements above are satisfied, you can proceed with your Box to Microsoft Teams Site migration.

1. On the Drives tab, Click the Copy Box button, and select "Copy Box to Microsoft Teams".

Home	Migration Analysis	View	Migrator	File Manag	er Drives	Security Man	lager Term S	itore Manager	Administrator	Baci	up Help	22		
Office 365	SharePoint Societ	Box Dropbe	х Сору	Paste	Select All	Copy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Turb
	Connect To			Clipboard					Actions	Copy B	ox to OneDrive			View
Navigator			E 2	÷ • 0	12 Migration	Contents	Rogress			Copy B	ox to SharePoin	t		
• 🗁 One Driv	/e				< 1-2 >					Copy B	ox to Office 365	Groups		
Select w	to Microsoft Tean	ms Site Migr nigrate	ation										×	
Project N	Name:]
Enter	the user	name o	of you	ır Bo	ox Adm	ninistra	itor and	click (onnec	t.				
Box con	nection parame	ters												
Admin U	Jser:	d-state	diam'									Conn	ect	2
					Press C	onnect but	ton to connec	ct to Box						

4. When the Connect to Box popup appears, enter the Admin account's password and click Connect. You will return back to the migration configuration where a "Successfully connected to Box" message will appear.

	messag	c	ppcan				
烙 Conne	😓 Connect to Box — 🗆 🗙						
Connectir	Connecting to [https://www.box.com]						
User	Jser						
Password	•••••	•••••					
Domain							
		Use Prox	×y nfiguration				
	Connect			Cancel			
	Claims		0				

i

NOTE: If you attempt to connect or open a Box drive through the software and it does not respond, you may require an alternate framework. Please review the section Alternate Framework for instructions on how to install the alternate framework.

5. In the Target Office 365 Connection Parameter section, enter your tenant SharePoint Administration Center URL, and then click **Connect** (i.e. https://tenant-admin.sharepoint.com).

Box connection parame	ters	
Admin User:	(Josefan Stanfor, port	Connect 🥑
	Successfully connected to Box	
Target Office 365 Conn	ection Parameters	
SharePoint Admin URL:	New Trade Mail and Article and Articles	Connect 🥑
Target Site Prefix:	Not required	

6. When prompted, enter your Administrator login and password. Click **Connect**. If you receive any message other than "Successfully connected to SharePoint Admin", double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance.

слрене		sucs, p	icuse e	ontact	Jup	port
Connec	ct to SharePoir	nt				×
Connectin	ng to [https://r	metavistech-a	admin.sharej	point.com]		
User						₽
Password	Password ••••••					
Domain						
		Use Pro	xy nfiguration			
	Connect			Cancel		
	Claims		0			

7. Click the **Load from Box** button to load in a list of available Box drives to include with this migration. For performance reasons, if you have a large number of Box drives in your tenant you may wish to create a single column CSV file with the user accounts and choose the option **Load from CSV** instead.

Box connection parame	eters		
Admin User:	distant data da com		Connect 😢
		Successfully connected to Box	
Target Office 365 Conr	ection Parameters		
SharePoint Admin URL:	https://www.com/wite/	ang si shi san	Connect 📀
Target Site Prefix:	Not required		
	Su	ccessfully connected to SharePoint Admin URL	
Load from CSV or	H Load from Box		

- Select the Box drives that you wish to include with this migration, or select the Load and Apply Report button, which allows you to load and apply an Analyze Box report, which then sets the Migration Priority for each user mentioned in the report. Click Next to continue.
- **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

type filter text	
User	Migration Priority ^
	1
	2
	3
	~
<	>
Select All Deselect All	Load and Apply Report

9. Select Re-Map Users option and load your mapping CSV file. Group mapping is required (user mapping may also be included) so the software can properly resolve the differences between your users' Box account and the corresponding Microsoft Team name as well as maintain content authorship. If your user accounts differ between Box and Microsoft Teams then you will want to add your user mapping to this same file.

In the example below, lines 1-3 illustrate mapping a source Box to a Microsoft Team by name while lines 4-5 in the same file are used to map the Box user accounts to their respective Microsoft Team user accounts to maintain item authorship.

sales@company.com,MicrosoftTeams Name marketing@company.com,MicrosoftTeams MarketingGroup IT@company.com,IT Group scott@company.com,swilson@contoso.com bill@company.com,bgeorge@contoso.com

If you would like to migrate source accounts to a target Teams channel, use the following mapping.

scott@company.com,swilson@contoso.com,ChannelName

The third column in this CSV will map the users to the specific target channel.

NOTE: When using the Teams Channel, keep the following in mind:

- When adding a Teams Channel to your CSV be sure to enter the name exactly, it is case sensitive. If the name is entered improperly Essentials will assume it is a folder and will create a folder with this name on the target site collection.
- When the channel column is missing in the mapping then the migration will use the General channel by default.
- When the channel is missing on the target, then a folder will be created with the channel's name in the Shared Documents section of MS Teams.
- 10. Click **Check MS Team** in order to begin the validation process. This process will validate that the supplied user mapping is correct (MS Teams were located) and check to determine if each Team currently has a Site provisioned. Click **Next**.
- **NOTE:** If the group is not found, you may continue however no content for this mapping will be migrated. Alternatively, you may go back one page and remove the selected source Box account or modify your mapping file, reload the CSV and click the Check button again.

Box to Microsoft Teams Site	Migration		- □ ;
eck for availability of t			
onfirm your mapping by revi			
Re-Man Users Load @	1 user(s) are manned with		
beck MS Team	- aser(s) are mapped with		
ox User	Searching for MS Team	MS Team Found	MS Team Site Exists
tere des productions and	The second second second		Yes
when the CSV			

11. The final page provides a few options to configure how the content portion of the operation should be configured.

Content Options:

O	 Content Options
2013	Copy Content
	Include Versions
	Include All Versions
	O Include most recent Versions 10
	🗌 Incremental copy 🔞 Last 🔢 days 🗸 🗸
	Skip Non-Owned folders 🛛 🔞
	Skip files greater than 🔞 MB 🗸
	Migrate to folder: 🔞

Copy Content - A flag to determine if content is or is not included with this operation. When

not included the remainder of the options will become disabled.

Include Versions - The process in which Box version history will be converted into Microsoft Team versions. You can specify whether All Versions or the specified most recent versions are included.

Incremental Copy - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

Skipped Non-Owned Folders - This option addresses the scenario where folders appear in a user's Box account which are not owned by this user; meaning the user is a folder collaborator and not the folder "Owner". Skipping these folders will prevent duplicates from being migrated

into Microsoft Teams because the folder will be migrated only once when the folder "Owner" is migrated. Please refer to the in-application Help button for additional details.

Skip files greater than - This provides the functionality to skip all files larger than the value specified. Unit of measure is configured for MB or GB.

Migrate to Folder - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

NOTE: The 'Migrate to folder' option can be used when migrating to a MS Teams Channel. This option will create a new sub-folder in the channel or use an existing sub-folder by this name.

Adva	nced Options:	
00	Advanced Options	
	🗹 Enable Azure Turbo Mode 🔞	
	Microsoft Provided Storage	
	O User Provided Storage Select	
	Send notification	0
	Create User Specific Log File 🔞	

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.

- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

Create User Specific Log File - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

NOTE: Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

🗌 Create User Specific Log File 🛛 😨

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
 - 12. Click Finish to begin the migration.

Copy Dropbox

Copy Dropbox Business to OneDrive for Business

This option allows Dropbox Business and Office 365 administrators to copy content from within multiple Dropbox Business drives to their respective OneDrive for Business sites in a single migration.

NOTE: If you attempt to connect or open a Dropbox drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

- The account used to perform the migration from Dropbox Business needs to have Team Admin access to the Dropbox Business tenant.
- The account used to perform the migration into OneDrive for Business needs to be a Global Administrator or SharePoint Administrator Role in this Office 365 tenant.

- The person performing the migration will need to know the relationship (user mapping) between each user's Dropbox user account and their corresponding Office 365 user account.
- Each user account must have either a SharePoint or OneDrive license assigned to it in Office 365 and can not be in 'Blocked' status.

Once the requirements above are satisfied, you can proceed with your Dropbox Business to OneDrive for Business migration.

 Switch to the Drives tab and click the Copy Dropbox button, then select "Copy Dropbox to OneDrive".

Home	Migration	n Analysis		View	Migrator	File Manager	Drive	s Sec	urity Manager	Term Store Manager	Administrator	Backup	Help				
1	5>	8	box	-			ĥ		<u>A</u> 2	2	D 🤉	<u></u>	1 20	*	×	1	
Office 365	SharePoint	Google	Box	Dropbox	OneDrive Provisioning	Copy	Paste	Select All	Copy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Turbo
Connect To Clipb			Clipboard	i .	E 🛠 🕴 🗖 🖬	57 Migration	Contents = P	roaress 🛙		Copy Dr	opbox to OneD	ive					
> 🗁 One	Drive									No operations t	o display at this	time.		Copy Dropbox to Microsoft Teams			ips is

2. Give your project a name.

Select which Dropbox to migrate

Project Name:*	Dropbox

- 3. Enter the username of your Dropbox Administrator.
- 4. Make sure Dropbox Business Connection Requirements are met.
- 5. Use the information in the following table to determine the appropriate action to take.

lf	Then	
you have long-term Access Token obtained prior to Essentials version 2.10	 a) Provide the token in the Access Token field. b) Click Connect. Project Name* Dropbox to OneDrive Dropbox connection parameters Admin Use: secondimetedLzam App Key App Secret Access Token Get Code @ Access Token Get Code @ Connect @	
you do not have a long-term Access Token obtained prior to 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 Dropber 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. 	5 5

If	Then	
	e) Click Connect. The Access Token field will be populated automatically and will refreshed as needed during the course of a migration to prever from expiring.	l be nt the token
	Project Name* Dropbox to OneDrive Dropbox connection parameters	
	Admin User: spportilimetavia.com App Key 2ntratintrial App Secret	
	Access Code tumiwitist/AdvAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA	Get Code 😟 Connect 💿
	Successfully connected to Dropbox	

If you receive any message other than Successfully connected to Dropbox, double check your supplied information and try again. If you are still experiencing issues, please contact Support for further assistance.

- **NOTE:** If you attempt to connect or open a Dropbox drive through the software and it does not respond, please contact support for a updated version of the required framework.
- 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.

Target Office 365 Conn	ection Parameters	
SharePoint Admin URL:	Ellips - and a share of any solid states	Connect 📀
Target Site Prefix:	Not required	
	Successfully connected to SharePoint Admin URL	

7. Click the Load from Dropbox button to load in a list of available Dropbox Business drives to include with this migration. For performance reasons, if you have a large number of Dropbox Business drives in your tenant you may wish to CSV file with the user accounts and choose the option to "Load from CSV" instead. Select the Dropbox Business drives that you wish to include with this migration

Load from CSV or 🚹 Load from Dropbox 🔞	
Report loaded and applied from [C:\Users\spsadmin\Desktop\csv	s\1.xlsx]
type filter text	
User	Migration Priority
	1
<	· · · · · · · · · · · · · · · · · · ·
Select All Deselect All	Load and Apply Report

- 8. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Dropbox report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.
 - **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

Load from CSV or 📕 Load from Dropbox 🔞	
Report loaded and applied from [C:\Users\spsadmin\Desktop\csvs\1.xlsx]	
type filter text	
User	Migration Priority
	1
	Y
<	>
Select All Deselect All	Load and Apply Report

 Select the Re-Map Users option then click the Load button in order to load user mapping CSV file. User mapping is required so the software can properly resolve the differences between your users' Dropbox Business and Office 365 accounts.

Dropbox to OneDrive for Business Migration							
heck for availability of SharePoint Personal Sites							
Select which personal sites to create from list below.							
✓ Re-Map Users Load ② 1 user(s) are mapped with [

10. Click **Check for users personal sites** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 user accounts were located) and check to determine if each user currently has a OneDrive for Business site provisioned. If one or more valid users do not have a OneDrive for Business site currently provisioned, select them and check **Create personal sites for the selected users** option. Click **Next**.

烙 Dropbox to OneDrive fo	r Business Migration		— 🗆 X
Check for availability	of SharePoint Personal Sites		
Select which personal sites	to create from list below.		
Re-Man Users Load	1 user(s) are manned with [
Check for users personal sit			
Dropbox User	Searching SharePoint for User	SharePoint User Found	Personal Site Exists
		and the standard sector and the standard sector secto	
Select All Deselect All	Export to CSV		
Create personal sites for t	he selected users. 🔞		

11. If required, modify your Content Option settings as described below.

Content Options:

Content Options
2013 Copy Content
✓ Include Versions
Include All Versions
O Include most recent Versions 10
🗌 Incremental copy 🔞 Last 🛛 days 🗸
Copy Permissions 🕡
Skip Non-Owned folders 🔞
Migrate to folder: 🔞
Apply Filter 🕡

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.

O - Advanced Options	
Enable Azure Turbo Mode	
Microsoft Provided Storage	
OUser Provided Storage Select	
Send notification	0
Create User Specific Log File 🛛 🥹	

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you

cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

Create User Specific Log File - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

NOTE: Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

🗌 Create User Specific Log File 🛛 🔞

NOTE: Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).

12. Click Finish to begin the migration.

Dropbox Business - Group Mapping

This may be necessary when you have a Dropbox Business team group assigned to a shared folder that you want to translate into a Microsoft Entra ID group in your Office 365 environment.





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 Microsoft Entra ID group, we first need to locate the "Account" name of this Microsoft Entra ID 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.

		Close
🗊 Edit Item 🗙 Delete	e User from Site Collection	
Account	c:0f rolemanager s-1-5-21-1663699147-	
Name	Developers	
Work email		
About me		
Picture		
SIP Address		
Created at 10/1/2012 1:01 Last modified at 4/5/2016 1	PM by 7:09 AM by	Close

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.

 A
 B

 1
 TestGroup
 c:0-.f|rolemanager|s-1-5-21-1663699147-53941919

As you can see, use the information from the Dropbox Business side on the leftmost column and use the information from your SharePoint side on the rightmost column. When you use this mapping file, your group should map from the Dropbox Business group to your existing AD group in OneDrive for Business.

Dropbox Business - Content Permissions and Mapping

Due to the differences between permissions in Dropbox Business versus those in OneDrive for Business, the following permission mapping is performed during the migration. If you wish to not include permissions, simply uncheck the "Copy Permissions" option during configuration.

Dropbox Business Shared Folder Permission Level	OneDrive for Business Permission Level
Viewer	Read
Editor	Contribute
Owner	Full Control

The "Copy Permissions" option migrates shared permissions assigned to Dropbox Business folders and files. By default files permissions is not enabled. Turning this option on will allow you to copy file level permissions from the source account to Office 365 Locations. In order to do this, you must enable the Copy Permissions checkbox, as well as enable the Copy Permissions options in the Copy Wizard.

NOTE: The Copy Permissions option will not work, even if it is enabled in the Profile Manager, if the Copy Permissions option is disabled in the copy wizard.

In order to enable the Copy Permissions option, do the following:

1. Navigate to the Help tab within Essentials and select Profile Manager.

	Home	View	Architect	Migr	ator File M	Manager D	Drives	Public Folders	Security Manager	Term Store Manager
Activati	on About	Profile	F Manager	Support	O User Manual	Check for Upd	dates	🔝 Debug Mode 也 Reset "Do not Show 🔂 Log Manager 🔹	r	

2. Within the Profile Manager, select the General Tab, and then check the Copy Permissions option.

Settings	-		
General	• Your Settings will be saved for future operations.		
Connection	Copy Permissions: Without Version	Azure Migration Mode:	 Asynchronous Synchronous
Migration	Incremental Copy: 10 Days	Azure Turbo:	 Disable Enable (Microsoft provided)
Email Notification	1 Overwrite if file exist:	•	Enable (User provided)
Advanced	For Drives Tab Only	Storage Account Information	mation:
	Skip Non Owned Objects:	Account:	
	Include First Reference File Only:	Key:	💋 Validate
	1 Include Orphaned Files:	Pofresh Azura Logs Po	lia
	1 Skip Files Greater Than:	First Daily Refresh:	6:00 PM
	Migrate to Folder:	Second Daily Refresh:	5:54 PM
	For Backup Only		
	Amazon S3 Service Point: s3.amazonaws.com		
Reset to Defaults			

3. Once you are done making your changes, exiting the wizard will prompt you to confirm you want to save your changes. Click **yes**.

Backup Help

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 toan Office 365 Group's Site(s) in a single migration.

NOTE: If you attempt to connect or open a Dropbox drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

• The account used to perform the migration from Dropbox Business needs to have Team Admin

access to the Dropbox Business tenant.

- The account used to perform the migration into Office 365 Group Sites needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each user's Dropbox user account and their corresponding Office 365 Group name and Office 365 user account.
- The Office 365 Group and its Site must already exist.

To migrate content of a Dropbox Business Account(s) to Office 365 Groups, perform the following:

 On the Drives tab click Copy Dropox and select the "Copy Dropbox to Office 365 Groups" option.



2. Give your project a name. Select which Dropbox to migrate

Project Name:* Dropbox

- 3. Enter the username of your Dropbox Administrator.
- 4. Make sure Dropbox Business Connection Requirements are met.
- 5. Use the information in the following table to determine the appropriate action to take.

If	Then
you have long-term Access Token obtained prior to Essentials version 2.10	 a) Provide the token in the Access Token field. b) Click Connect. Project Name* Dropbox to OneDrive Dropbox connection parameters Admin Use: moontifientaria sam App Secret Access Token Connect One One Connect One One Connect One One Connect One Conne
you do not have a long-term Access Token obtained prior to 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

If	Then	
	field.	I be It the token
	Access Token Successfully connected to Dropbex	Connect 🥹

If you receive any message other than Successfully connected to Dropbox, double check your supplied information and try again. If you are still experiencing issues, please contact Support for further assistance.

- **NOTE:** If you attempt to connect or open a Dropbox drive through the software and it does not respond, please contact support for a updated version of the required framework.
- In the Target Office 365 Connection Parameters section, specify your tenant SharePoint Administration Center URL and then click **Connect** (i.e. https://tenantadmin.sharepoint.com). When prompted, enter your Administrator login and password. Click **Connect**. If you receive any message other than Successfully connected to Admin, double check the URL and make sure you are supplying an Administrator login for this tenant.

If you are still experiencing issues, please contact Support for further assistance. Target Office 365 Connection Parameters

SharePoint Admin URL:	Nuclearized and	change in the second	Connect	?
Target Site Prefix:	Not required			
		Successfully connected to SharePoint Admin URL		

7. Click the Load from Dropbox button to load in a list of available Dropbox Business drives to include with this migration. For performance reasons, if you have a large number of Dropbox Business drives in your tenant you may wish to CSV file with the user accounts and choose the option to "Load from CSV" instead. Select the Dropbox Business drives that you wish to include

with this migration.

Report loaded and applied from [C:\Users\spsadmin\Desktop\csvs\	1.xlsx]	
type filter text		
User	Migration Priority	^
	1	
		× *

8. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Dropbox report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.

NOTE: Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

Load from CSV or 💾 Load from Dropbox 🔞	
Report loaded and applied from [C:\Users\spsadmin\Desktop\csvs\1.xlsx]	
type filter text	
User	Migration Priority
	1
	¥
<	>
Select All Deselect All	Load and Apply Report

9. Select Re-Map Users option and load your mapping CSV file. Group mapping is required (user mapping may also be included) so the software can properly resolve the differences between your users' Dropbox account and the corresponding 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.

Dropbox to Office 365 Group Site Migration		×
Check for availability of target Sites Confirm your mapping by reviewing the list below		
Re-Map Users Load		

In the example below, lines 1-3 illustrate mapping a source Dropbox toan Office 365 Group by name while lines 4-5 in the same file are used to map the Dropbox user accounts to their respective Office 365 user accounts to maintain item authorship.

sales@company.com,Office365 Group Name marketing@company.com,Office365 MarketingGroup IT@company.com,IT Group scott@company.com,swilson@contoso.com bill@company.com,bgeorge@contoso.com If you wish to migrate one or more source accounts to a single Group library while also remapping the user account for the purpose of metadata and sharing, please use the following format in your mapping file.

user@dropbox.com,Office 365 GroupName(user@contoso.com)

The software will migrate the content from the source drive "user@dropbox.com" to the Documents libary in the group "Office 365 GroupName". The metadata and shared permissions of Dropbox user "user@dropbox.com" will be mapped to the Office 365 user account "user@contoso.com".

- 10. Click **Check Office 365 Group** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 Groups were located) and check to determine if each Group currently has a Site provisioned. Click **Next**.
 - **NOTE:** If the Group does not exist on the target it will be created using the migration administrator as the owner.

loopbox to Office 365 Gro	up Site Migration		- 🗆 X
Check for availability of	f target Sites		
Confirm your mapping by re	viewing the list below		
Re-Map Users Load	1 user(s) are mapped with [C	in the property of the second s	
Check Office 365 Group			
Dropbox User	Searching Office 365 for Group	Office 365 Group Found	Office 365 Group S
participation and a second	The set of the balance	100 B 100	
Export to CSV			

If the group is not found you may continue, however no content for this mapping will be migrated. Alternatively, you may go back one page and remove the selected source Dropbox account or modify your mapping file, reload the CSV and click the Check button again.

11. If necessary, change content and file format conversion options as described below.

Content Options

Content Options
2019 Copy Content
Include Versions
Include All Versions
O Include most recent Versions 10
🗌 Incremental copy 🕡 Last 👘 days 🗸 🗸
Skip Non-Owned folders 🔞
🗌 Migrate to folder: 🛛 🔞
Apply Filter 🕼

Copy Content - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

Include Versions - The process in which Dropbox revision history will be converted into Office 365 Group versions. Please note that this option is only referring to the major revisions (those shown as the "less detailed revisions") and not those that are automatically generated within Dropbox (those shown as the "more detailed" revisions).

Incremental Copy - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

Skipped Non-Owned Folders - This option addresses the scenario where folders appear in a user's Dropbox account which are not owned by this user; meaning the user is a folder collaborator and not the folder "Owner". Skipping these folders will prevent duplicates from being migrated into Office 365 Groups because the folder will be migrated only once when the folder "Owner" is migrated. Please refer to the in-application Help button for additional details.

Migrate to Folder - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

Apply Filter - Optionally, select from a series of filterable parameters to include or exclude specific content during migration.

Advar	nced Options:	
08	Advanced Options	
	🗹 Enable Azure Turbo Mode 🔞	
	Microsoft Provided Storage 🥑	
	Ouser Provided Storage Select	
	Send notification	0
	Create User Specific Log File	

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

Create User Specific Log File - If you would like a user specific log file (.txt format) created for each migrated Google Drive that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the

migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

NOTE: Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

Create User Specific Log File 📀

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
- 12. Click **Finish** to begin the migration.

Copy Dropbox to Microsoft Teams

This option allows Dropbox Business and Office 365 administrators to copy content from within Dropbox Business drives to a Microsoft Teams site in a single migration.

NOTE: If you attempt to connect or open a Dropbox drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

- The account used to perform the migration from Dropbox Business needs to have Team Admin access to the Dropbox Business tenant.
- The account used to perform the migration into Microsoft Teams needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each user's Dropbox user account and their corresponding Microsoft Teams name and account.
- The Microsoft Team must already exist.

To migrate content of a Dropbox Business Account(s) to Microsoft Teams, perform the following:

 On the Drives tab click Copy Dropox and select the "Copy Dropbox to Microsoft Teams" option.



2. Give your project a name. Select which Dropbox to migrate

Project Name:* Dropbox

3. Enter the username of your Dropbox Administrator.

- 4. Make sure Dropbox Business Connection Requirements are met.
- 5. Use the information in the following table to determine the appropriate action to take.

If	Then
you have long-term Access Token obtained prior to Essentials version 2.10	 a) Provide the token in the Access Token field. b) Click Connect. Project Name* Dropbox to OneDrive Dropbox connection parameters Admin Use: eportilimatelizem App Secret Access Token Get Code @ Access Token Connect @ Successfully connected to Dropbox
you do not have a long-term Access Token obtained prior to 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. c) Click Connect. c) 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.

larger office 505 com			
SharePoint Admin URL:	Mps./mwanach.ukuu akupath.uku	Connect	0
Target Site Prefix:	Not required		
	Successfully connected to SharePoint Admin URL		

Target Office 365 Connection Parameters

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.

Load from CSV or 🚻 Load from Dropbox 🥥	
Report loaded and applied from [C:\Users\spsadmin\Desktop\csvs\1.xl	5X]
type filter text	
User	Migration Priority
	1
<	>
Select All Deselect All	Load and Apply Report

- 8. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Dropbox report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.
 - **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

Load from CSV	or 🚺	Load from Dropbox	0		
Report loaded and	applied	from [C:\Users\spsadn	in\Desktop\csvs\1.xlsx]		
type filter text					
User				Migration Priority	^
				1	
	-				~
<					>
Select All De	select Al	I		Load and A	pply Report

9. Select **Re-Map Users** option and load your mapping CSV file. Group mapping is required *(user mapping may also be included)* so the software can properly resolve the differences between your users' Dropbox account and the corresponding Microsoft Teams name as well as maintain content authorship. If your user accounts differ between Dropbox and Microsoft Team then you will want to add your user mapping to this same file.

Dropbox to Microsoft Teams Site Migration
Check for availability of target Sites
Confirm your mapping by reviewing the list below

Re-Map Users Load 💿 1 user(s) are mapped with [C

In the example below, lines 1-3 illustrate mapping a source Dropbox to a 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. Cl	ick Next .	
loropbox to Microsoft Te	ams Site Migration		- 🗆 X
Check for availability Confirm your mapping by	of target Sites reviewing the list below		
Re-Map Users Load	1 user(s) are mapped with [C:	an tain a part of the second	
Dropbox User	Searching for MS Team	MS Team Found	MS Team Site Exists
indicate the locate	KO and statistic re-	N-beau	÷

Export to CSV

If the group is not found you may continue, however no content for this mapping will be migrated. Alternatively, you may go back one page and remove the selected source Dropbox account or modify your mapping file, reload the CSV and click the Check button again.

11. If necessary, change content and file format conversion options as described below.

Content Options

Ö	 Content Options
2019	Copy Content
	✓ Include Versions
	Include All Versions
	O Include most recent Versions 10
	🗌 Incremental copy 🕜 Last 🛛 days 🗸 🗸
	Skip Non-Owned folders 🕡
	🗌 Migrate to folder: 🔞
	Apply Filter 🕡

Copy Content - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

Include Versions - The process in which Dropbox revision history will be converted into 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:

Advanced Options	
Enable Azure Turbo Mode 💿	
Microsoft Provided Storage O	
OUser Provided Storage Select	
✓ Send notification ☐ Create User Specific Log File] @

Enable Azure Turbo Mode: When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

NOTE: this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any

additional functionality that is not available when this option is disabled.

- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time tha Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

Send Notification: When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

Create User Specific Log File - If you would like a user specific log file (.txt format) created for each migrated Microsoft Team that will be saved directly to that Team's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

🗌 Create User Specific Log File 🛛 😨

- **NOTE:** Content permissions are not migrated because Microsoft Teams permissions are maintained and enforced by the team membership and its roles (Owners, Members and Guests).
- 12. Click Finish to begin the migration.

Nintex Deployment

The following steps will allow you to deploy your Nintex Workflow and Nintex Forms applications from within Essentials.

1. Select Nintex Deployment from the Drives tab.



 $2. \ \ \, In the Nintex Deployment window, enter a valid SharePoint URL, and click {\bf Connect}. \\$

https://	entert atris despeid and		Conne
			Cancel
Provide you	r user credentials to conn	ect to SharePoint. Cli	ick Connect.
- Connectir User	ig to [https://		P
Password Domain	•••••		
	Using Proxy	Using OAuth	

4. This will open the SharePoint Application Catalog. You must switch to classic view in order to perform the deployment, as deployment cannot be done in modern view.

≡	SharePoint	Q	Search		
Ap	ps for SharePoint				
Ap	ps for Office				
Ap	p Requests				
Re	cycle bin				
Ed	it				
Ho	me			-	
				-	T
Retur	n to classic SharePoint	1			C

- 5. If you do not have Nintex Workflows or Nintex Forms as part of your Site Contents, then select **Add an App** and install the nintex workflows/nintex forms application.
- 6. On the Site Contents page, Select the ellipses (...) next to the installed Nintex application, and click on **Deployment**.



7. On the Manage App Deployments page, enter the site collection URL or select one from the list available, select and **add** the managed paths to deploy to, and select and **add** the templates to

deploy to.

::: SharePoint			
5	Manage App	Deployments + Nintex Workflow for Office	365 ∞
Record Workflow Taskx Nintes Workflow for Office 325 Apps for SharePolet Apps for Office App Requests Site contents	Select the oble collections, managed part Sele Collections Use this section to specify what oble collections should have this app available.	this, or site templates where you want this app to appear. It may take up to 20 minutes for wates to see these-changes on the Enter a site collection to display to: 	And And
	Managed Paths. Lies this section to specify what managed paths should have this app available.	Auslikilde reanuged pathic bidensged pathic to deploy it percond dearch debug network and a set of the set	2
	Site Tempintor, Like this section to specify what she trengthese chaid have this app available.	Available site semplates: Site semplates: Site semplates: to deploy to Bade Search Center Big Badiese lettiligence Center Conversion and Con	

- 8. Click **Ok** to apply your selections.
- 9. When asked whether you trust workflow0365.nintex.com click **Trust It**. This will start the actual deployment.

NOTE: Microsoft is now deploying the Nintex app to your tenant. It may take from a minute to hour(s) depending on the complexity of your site collection structure. Please verify your site collection for Nintex apps before starting a migration.
Post Migration Compare

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.

🤌 Post Migratio	n Compare —		×
Post Migration	Compare		
Project Name:*	Google Drive to One Drive Post Migration Compare		
Location and nan	ne for report: C:\Users\docon\OneDrive - Quest\Essentials\Google Drive to SPO\Google Drive to One Drive Post Migration Comparison.xlsx	Select	0
Source Location			
Choose location:	Google Drive ~		
Google connection	on parameters		
Admin User:	1.com		
P12 Key File:	C:\Users	Load	(?)
Service Account:	@developer.gserviceaccount.com	Connect	(?)
	Successfully connected to Google Drive		
Target Location			
Choose location:	One Drive v		
Target Office 365	5 Connection Parameters		
SharePoint Admi	n URL: https:// -admin.sharepoint.com	+ Admin	0
	Connected admins:		
Schedule	Next >	Cancel	

- 5. Click Next to display the Check for availability of sites dialog.
- 6. Click the Load from CSV button.

Essentials loads the mappings from the CSV file.

Post Migration Compare				$ \Box$ >
Check for availability of	sites			
Provide a mapping file for sit	e comparision			
Load from CSV 💿 and C	heck for users personal sites	0		
:\Users\docon\Downloads\@	GD_OD_mapping (1).csv			
Google Account	One Drive Account	Target Lib Documents	Target Folder Path	Status
☐ Schedule		< Back	Nevt > Fini	the Cancel

7. Click the Check for sites button.

Essentials retrieves the content for the mapped source and target users.

8. Click Next to display the Configuration of live compare dialog.

Configuration of live compare Select options
Content Options
Group By Item 🗸 🔞
Show difference only 🔞
Ignore target excess
Include Orphaned Files
Skip Non-Owned Objects 💿
🗌 Include Shared Files 🔞
Skip non supported objects 🔞

- 9. Select the Content Options for the report:
 - Group By either List or Item.
 - Show differences only: When this box is checked, the report will only show objects for which the count is different between the source and target. If you leave this box unchecked, the report will include all objects, regardless of whether the count is different. Count differences will be highlighted in red.
 - Ignore target excess: When this box is checked, only objects for which the source count is higher than the target count will be highlighted in red. If you leave this box unchecked, objects for which the target count is higher than the source count will also display in red.
 - Include Orphaned Files When this box is checked, the report will include files that were created in a folder that was shared with a user and after the file was created, but their permission to the shared folder was removed. Including orphaned files will increase the time it takes for the report to run.
 - Skip Non-Owned Files When this box is checked, the report will exclude any content that exists in the user's Google Drive "My Drive" area that is not owned by the user.
 - Include Shared Files When this box is checked, the report will include files that have been shared with the user.
 - Skip non supported objects When this box is checked, any files that are not supported in Office 365 will be skipped.

10. Select the Formatting options that were used for the migration.

 Format Conversion 		
Documents format	Microsoft Word (OOXML) (.docx)	~
Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)	~
Presentations format	PowerPoint Presentation (OOXML) (.pptx)	~
Drawings format	Portable Network Graphics (.png)	~

Now you can either:

• generate the report immediately (by clicking the **Next** button).

OR

• schedule the report to run at a specified time.

The report lists the count comparison between source and target for each object. If you are comparing content for multiple 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	@ in the incom				
2 Target	https://i-my.sharepoint.com/personal/icom/	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.txt	Informs.txt	1	Informs.txt	1	0
14 Automation525762/forms/forms/forms.txt	forms.txt	1		0	-1
15 Automation525762/formsIN/formsIN.txt	formsIN.txt	1	formsIN.txt	1	0
16 BOTLAND B. DERKACZ SPÓŁKA JAWNA/Faktura końcowa/końcowa.docz	końcowa.docx	1	końcowa.docx	1	0
17 Chaitu/Quest/Meeting notes.docx	Meeting notes.docx	1	Meeting notes.docx	1	0
18 Chaitu2/Invoice.xlsx	Invoice.xlsx	1	Invoice.xlsx	1	0
19 ExportPic.pptx	ExportPic.pptx	1	ExportPic.pptx	1	0
20 Folder for foms check/INformsIN/INformsIN/INformsIN_1.0.txt	INformsIN_1.0.txt	1	INformsIN_1.0.txt	1	0
21 Folder for foms check/Informs/Informs/Informs_1.0.txt	Informs_1.0.txt	1	Informs_1.0.txt	1	0
22 Folder for foms check/forms/forms/forms_1.0.txt	forms_1.0.txt	1		0	-1
23 Folder for foms check/formsIN/formsIN/formsIN_1.0.txt	formsIN_1.0.txt	1	formsIN_1.0.txt	1	0
24 GdriveVersions.docx	GdriveVersions.docx	1	GdriveVersions.docx	1	0
25 LinkSharing/Content Matrix Change Log 8.3.0.3.pdf	Content Matrix Change Log 8.3.0.3.pdf	1	Content Matrix Chang	1	0
26 Newsletter.docx	Newsletter.docx	1	Newsletter.docx	1	0
27 Passworded Files/Testy test.docx	Testy test.docx	1		0	-1

If you chose to **Show differences only**, objects with 0 Difference in Count are excluded from the report.

	A	В	С	D	E	F	
1	Source	@(com					
2	Target	https:// my.sharepoint.com/personal/com/	Documents				
3							
4	Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count	1
5	Automation525762/forms/forms/forms.txt	forms.txt	1		0	-1	
5	Folder for foms check/forms/forms/forms_1.0.txt	forms_1.0.txt	1		0	-1	
7	Passworded Files/Testy test.docx	Testy test.docx	1		0	-1	
В	Sept17BuildTest/Content Matrix Change Log 8.5.0.1.pdf	Content Matrix Change Log 8.5.0.1.pdf	1		0	-1	
Э							
.0							

If you chose to **Ignore target excess**, only objects for which the count is higher on the source are highlighted in red.

Google 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.

A	В	С	D	E	F	G	Н	1
0A JPVA	https://	https://						gration
0A PVA	https://	https://						gration
0A PVA	https://	https://					gration	

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.

S Post Migration Compare			×
Post Migration Compare			
Project Name: Google Drive to SPO Post Migration Compare			
Location and name for report: C:\Users\docon\OneDrive - Quest\Essentials\Google Drive to SPO\Google Drive to SPO Post Migration Compare.xl	SX	Selec	t 💿
Source Location			
Choose location: Google Drive V			
Google connection parameters			
Admin User: @L			
P12 Key File: C:\Users\docon\Downloads\1ea63990ed840839c0d11ff6d6db2ae9f04e8f65-privatekey (1).p12		Load	0
Service Account: 52150061400-d7kqvgo0pqtq4k50sgl3jlt7ukfflc7c@developer.gserviceaccount.com		Connec	t 📀
Successfully connected to Google Drive			
Target Location			
Choose location: SharePoint Online 🗸			
Target Office 365 Connection Parameters			
SharePoint Admin URL: https://		🗸 + Admii	a 💿
Connected admins: apool1@com			
L [®] Schedule	Next >	Cancel	

- 5. Click Next to display the Check for availability of sites dialog.
- 6. Click the Load from CSV button.

Essentials loads the mappings from the CSV file.

Post Migration Compare			- 0	×			
Check for availability of s	ites						
Provide a mapping file for site	comparision						
Load from CSV 🥑 and Ch	Load from CSV @ and Check for sites @						
C:\Users\docon\Downloads\G	D_SPO.csv						
Google Account @	Target Site collection https://hsharepoint.com/sites/MaksTest	Target Lib Documents	Target Folder Path				

7. Click the Check for sites button.

Essentials retrieves the content for the mapped source and target users.

8. Click Next to display the Configuration of live compare dialog.

Configuration of live compare Select options
Content Options
Group By Item \checkmark 🔞
Show difference only 🙆
Ignore target excess
Include Orphaned Files
Skip Non-Owned Objects 🐵
Include Shared Files
Skip non supported objects 🔞

- 9. Select the Content Options for the report:
 - Group By either List or Item.
 - Show differences only: When this box is checked, the report will only show objects for which the count is different between the source and target. If you leave this box unchecked, the report will include all objects, regardless of whether the count is different. Count differences will be highlighted in red.
 - Ignore target excess: When this box is checked, only objects for which the source count is higher than the target count will be highlighted in red. If you leave this box unchecked, objects for which the target count is higher than the source count will also display in red.
 - Include Orphaned Files When this box is checked, the report will include files that were created in a folder that was shared with a user and after the file was created, but their permission to the shared folder was removed. Including orphaned files will increase the time it takes for the report to run.
 - Skip Non-Owned Files When this box is checked, the report will exclude any content that exists in the user's Google Drive "My Drive" area that is not owned by the user.

- Include Shared Files When this box is checked, the report will include files that have been shared with the user.
- Skip non supported objects When this box is checked, any files that are not supported in Office 365 will be skipped.
- 10. Select the Formatting options that were used for the migration.

00	 Format Conversion 		
1	Documents format	Microsoft Word (OOXML) (.docx)	~
	Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)	~
	Presentations format	PowerPoint Presentation (OOXML) (.pptx)	~
	Drawings format	Portable Network Graphics (.png)	~

Now you can either:

• generate the report immediately (by clicking the **Next** button).

OR

• schedule the report to run at a specified time.

The report lists the count comparison between source and target for each object. If you are comparing content for multiple 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	@				
2	Target	https://sharepoint.com/sites/MaksTest	Documents			
3						
4	Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count
5	1/2.rar	2.rar	1	2.rar	1	C
6	1/ 8239.txt.csv	8239.txt.csv	1	8239.txt.csv	1	C
7	1/ 8287.txt.csv	8287.txt.csv	1	8287.txt.csv	1	C
8	1/ 12288.txt.csv	12288.txt.csv	1	12288.txt.csv	1	C
9	170239.txt	170239.txt	1	170239.txt	1	C
10	654.pdf	654.pdf	1	654.pdf	1	C
11	@Personal/Some doc.docx	Some doc.docx	1	Some doc.docx	1	C
12	Automation525762/INformsIN/INformsIN/INformsIN.txt	INformsIN.txt	1	INformsIN.txt	1	C
13	Automation525762/Informs/Informs/Informs.txt	Informs.txt	1	Informs.txt	1	C
14	Automation525762/forms/forms/forms.txt	forms.txt	1		0	-1
15	Automation525762/formsIN/formsIN/formsIN.txt	formsIN.txt	1	formsIN.txt	1	C
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	C
18	Chaitu2/Invoice.xlsx	Invoice.xlsx	1	Invoice.xlsx	1	0
19	ExportPic.pptx	ExportPic.pptx	1	ExportPic.pptx	1	C
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	C
22	Folder for foms check/forms/forms/forms_1.0.txt	forms_1.0.txt	1		0	-1
23	Folder for foms check/formsIN/formsIN/formsIN_1.0.txt	formsIN_1.0.txt	1	formsIN_1.0.txt	1	C
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	C
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.

	А	В	с	D	E	F	
1	Source	@(com					
2	Target	https:// .sharepoint.com/sites/MaksTest	Documents				
3							
4	Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count	
5	Automation525762/forms/forms/forms.txt	forms.txt	1		0	-1	
5	Folder for foms check/forms/forms/forms_1.0.txt	forms_1.0.txt	1		0	-1	
7	Passworded Files/Testy test.docx	Testy test.docx	1		0	-1	
В	Sept17BuildTest/Content Matrix Change Log 8.5.0.1.pdf	Content Matrix Change Log 8.5.0.1.pdf	1		0	-1	
Э							
.0							

If you chose to **Ignore target excess**, only objects for which the count is higher on the source are highlighted in red.

Google Shared Drive to SharePoint Online Post Migration Compare

Creating a CSV with Mappings

Before a Google Shared Drive to SharePoint Online Post Migration Compare report can be run, a CSV file must be created that maps each source Shared Drive and target site you want to compare. You can run a mapping report and modify it to contain only the source Google Shared Drive ID, target SPO site, and target library, as shown in the example below.

А			В	С
0A	/A	https://	sharepoint.com/sites/MaksTest	Documents
Source			Target	Target
Google Share	d Drive ID		SPO Site	Library

NOTE: If the mappings are incorrect or in the wrong format for the report, when you load the CSV file the message *Mapping is incorrect* will display in the UI.

To perform a Google Drive to SharePoint Online Post Migration Compare:

- 1. Once you have initiated a Post Migration Compare, enter a Project Name.
- 2. For **Location and name for report**, click the **Select** button, then select the name and location for the Excel output. (Essentials automatically adds the xlsx extension).
- 3. For **Source Location**, select Google Shared Drive and connect to Google Drive.
- 4. For Target Location, select SharePoint Online and connect to the Office 365 tenant.

S Post Migration Compare			\times
Post Migration Compare			
Project Name:* Google Shared Drive to SPO Post Migration Compare			
Location and name for report: C:\Users\docon\OneDrive - Quest\Essentials\Google Drive to SPO\Googe Shared Drive to SPO Post Migration Compare.xlsx		Select	0
Source Location			
Choose location: Google Shared Drive $$			
Google connection parameters			
Admin User: @ com			
P12 Key File: C:\Users\docon\Downloads\1ea63990ed840839c0d11ff6d6db2ae9f04e8f65-privatekey (1).p12	L	oad	0
Service Account:	C	Connect	0
Successfully connected to Google Drive			
Target Location			
Choose location: SharePoint Online 🗸			
Target Office 365 Connection Parameters			
SharePoint Admin URL: https:// -admin.sharepoint.com	~ +	Admin	0
Connected admins:	_		
Schedule Next >		Cancel	
l			

5. Click **Next** to display the Check for availability of sites dialog.

6. Click the Load from CSV button.

Essentials loads the mappings from the CSV file.

lost Migration Compare			— 🗆	×
Theck for availability of sites				
Provide a mapping file for site	comparision			
Load from CSV (2) and Che	eck for sites 🔞			
C:\Users\docon\Downloads\Sh	aredDRIVEtoSPO (2) (1) (1).csv			
Google Shared Drive Acco	Target Site collection	Target Lib	Target Folder Path	
0A VA	https:// .sharepoint.com/sites/MaksTest	Documents		
Google Shared Drive Acco 0A VA	Target Site collection https:// .sharepoint.com/sites/MaksTest	Target Lib Documents	Target Folder Path	

7. Click the Check for sites button.

Essentials retrieves the content for the mapped source and target site.

8. Click Next to display the Configuration of live compare dialog.

Section Compare	Ī
Configuration of live compare	
Select options	
Content Options	
Group By Item 🗸 💿	
Show difference only 🔞	
Ignore target excess 🔞	
Include Orphaned Files 🔞	
Skip non supported objects 🔞	

- 9. Select the Content Options for the report:
 - Group By either List or Item.
 - Show differences only: When this box is checked, the report will only show objects for which the count is different between the source and target. If you leave this box unchecked, the report will include all objects, regardless of whether the count is different. Count differences will be highlighted in red.
 - Include Orphaned Files -When this box is checked, the report will include files that were created in a folder that was shared with a user and after the file was created, but their permission to the shared folder was removed. Including orphaned files will increase the time it takes for the report to run.
 - Skip Non-Owned Files When this box is checked, the report will exclude any content that exists in the user's Google Drive "My Drive" area that is not owned by the user.
 - Skip non supported objects When this box is checked, any files that are not supported in Office 365 will be skipped.

10. Select the Formatting options that were used for the migration.

<mark>08</mark> -	 Format Conversion 		
×.	Documents format	Microsoft Word (OOXML) (.docx)	~
	Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)	~
	Presentations format	PowerPoint Presentation (OOXML) (.pptx)	\sim
	Drawings format	Portable Network Graphics (.png)	~

Now you can either:

• generate the report immediately (by clicking the **Next** button).

OR

• schedule the report to run at a specified time.

The report lists the count comparison between source and target for each object. If you are comparing content for multiple Shared Drives, each will display in a separate tab.

If you accepted the default configuration options, all source and target objects will be included in the report. All differences in count between source and target are highlighted in red.

1	A	в	С	D	E	F
	Source	0/ VA				
	Target	https:// .sharepoint.com/sites/MaksTest	Documents			
	Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count
	Folder/Metalogix_Essentials_for_Office_365_2.11_Release_Notes_en.pd	Metalogix_Essentials_for_Office_365_2.11_Release_Notes_en.pdf	2	Metalogix_Essentials_for_Office_365_2.11_Release_Notes_en.pdf	1	-1
	Folder/Metalogix_Essentials_for_Office_365_2.11_Telemetry_Overview.	Metalogix_Essentials_for_Office_365_2.11_Telemetry_Overview.p	1	Metalogix_Essentials_for_Office_365_2.11_Telemetry_Overview.pdf	1	0
	Folder/SharedDRIVEtoSPO (2).csv	SharedDRIVEtoSPO (2).csv	1	SharedDRIVEtoSPO (2).csv	1	. 0
	Test DOC.docx	Test DOC.docx	1	Test DOC.docx	1	. 0
	Test Sheet.xlsx	Test Sheet.xlsx	2	P Test Sheet.xlsx	1	-1
D	Test1/Google Shared Drive.mp4	Google Shared Drive.mp4	1	Google Shared Drive.mp4	1	. 0
1	Test1/Post Migration Compare Demo.pptx	Post Migration Compare Demo.pptx	1	Post Migration Compare Demo.pptx	1	0
2	Test1/Post Migration Compare Test.xlsx	Post Migration Compare Test.xlsx	1	Post Migration Compare Test.xlsx	1	0
3	Test1/Post Migration Compare.mp4	Post Migration Compare.mp4	1	Post Migration Compare.mp4	1	0
4	Test1/Release Demo 2.11.pptx	Release Demo 2.11.pptx	1	Release Demo 2.11.pptx	1	0
5	Test1/SharedDRIVEtoSPO (2).csv	SharedDRIVEtoSPO (2).csv	1	SharedDRIVEtoSPO (2).csv	1	. 0
5	Test1/SharedDRIVEtoSPO (2).csv.bak	SharedDRIVEtoSPO (2).csv.bak	1	SharedDRIVEtoSPO (2).csv.bak	1	0
7	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.

	А	В	С	D	E	F	
1	Source	@(com					
2	Target	https:// my.sharepoint.com/personal/com/	Documents				
3							
4	Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count	
5	Automation525762/forms/forms/forms/forms.txt	forms.txt	1		0	-1	
5	Folder for foms check/forms/forms/forms_1.0.txt	forms_1.0.txt	1		0	-1	
7	Passworded Files/Testy test.docx	Testy test.docx	1		0	-1	
В	Sept17BuildTest/Content Matrix Change Log 8.5.0.1.pdf	Content Matrix Change Log 8.5.0.1.pdf	1		0	-1	
Э							
0							

If you chose to **Ignore target excess**, only objects for which the count is higher on the source are highlighted in red.

SharePoint Online to SharePoint Online Post Migration Compare

Creating a CSV with URL Mappings

Before the Post-Migration Compare report can be run, a CSV file with source and target URL mappings must be created. The URLs can be at the site collection, site, or list/library level. The example below shows the proper CSV formatting for both a site-level and document library-level compare.

https://sharepoint.com/sites/Saleshttps://sharepoint.com/sites/Sales	

NOTE: If the mappings are incorrect or in the wrong format for the report, when you load the CSV file the message *Mapping is incorrect* will display in the UI.

To perform a SharePoint Online to SharePoint Online Post-Migration Compare:

- 1. Once you have initiated a Post Migration Compare, enter a **Project Name**.
- 2. For **Location and name for report**, click the **Select** button, then select the name and location for the Excel output. (Essentials automatically adds the xlsx extension).
- 3. For **Source Location**, select SharePoint Online and connect to the Office 365 source tenant.
- 4. For Target Location, select SharePoint Online and connect to the Office 365 target tenant.

Source Office 365 Conr	ection Parameters	
SharePoint Admin URL:	https://	🗸 + Admin 🙆
	Connected admins: apool1@metavistech.com	
Target Office 365 Conn	ection Parameters	
SharePoint Admin URL:	https://	🗸 + Admin 📀
	Connected	

If the URL and credentials are valid, a successful connection message displays. You may also choose to add additional Admin account by selecting the "+Admin" button.

5. For **Location and name for report**, click the **Select** button, then select the name and location for the Excel output. (Essentials automatically adds the xlsx extension).

Location and name for report:	C:\ Post Migration Compare.xlsx	Select	?
-------------------------------	---------------------------------	--------	---

- 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.

Post Migration Compare						×
Check for availability of s	ites					
Provide a mapping file for site	comparision eck for sites					
C:\\Po Source Site collection https://sharep https://sharep	st Compare Two urls.csv Target Site collection https:// .sharepo https://c .sharepo	Source List Documents	Target List Documents	Status		
					_	

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.

soft Migration Compare					×
Configuration of live compare					
Select options					
Content Options					
Group By Item V					
Show difference only 🔞					
Include subsites					
Ignore target excess					
∃ Schedule	< Back	Next >	Finish	Cance	el

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://				
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://	1	1		
Target	https://sharepoint.com				
Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count
/Automation_DocLib	Automation_DocLib	1	Automation_DocLib	1	0
/CT Tests	CT Tests	6	CT Tests	6	0
/Cache Profiles	Cache Profiles	4		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/Publis	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.

Security Manager Tab

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.

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.

Home View Migrator File Manager Drives	Security Manager Term Store Manager Administrator Backup Help »	
SharePoint ConnectTo Chipboard	Image: Second	Logs View
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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.

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OPERATIONS MENU:

Right-clicking on an item(s) will display a menu of available operations. These may also be available through buttons in the top right corner of the window. The list of available activities will depend on what is selected or not selected in the window.

BREADCRUMB TRAIL:

Located in the top left-hand corner is a breadcrumb pointer to the source of the content shown.

FUNCTION MENU:

Located in the top right-hand corner are a set of buttons that supply specific functionality for the contents of this area.

Reports and Analysis

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.

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Permission Inheritance

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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.

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Permission Inventory

This window generates a CSV report that contains a complete inventory of all permissions in site or a site collection combining data from other visual reports into a single export. It may be accessed by selecting a site, list or library from the Navigation Pane or an item from a Content Pane and then

pressing the Permission Inventory in the Security Analysis section of the ribbon.

8	-		\times
Permission Inventory Report			
Site Location			- 1
Site URL: https://metalogixsoftware622.sharepoint.com		~ Con	nect
Site Title: Metalogix Software Team Site			- 1
			- 1
Include Sub-site level permissions			- 1
Include List level permissions			- 1
Include Item level permissions (this may be a time consuming operation)			- 1
Include Inherited Permissions			- 1
Include Group Membership			- 1
Limit Group Membership to total users			- 1
✓ Limited Access			
Save to File System		Rrower	
Generate Script	Finish	Canc	el

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

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DocTest	Use CSV to	>	ofiles	4 Inheritance Broken,
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> 🖻 Lib1	Administrator	>	Show Groups	
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> 🖻 LibWith	Objects	>		3
> 🖻 LibWith	Reports	>	Remove Permissions	
> 🗉 List1 🤕	Pre-migration Analysis			
> 🖻 Major N 💆	The migration Analysis			🞝 Inherited, all items
> 🖻 Major N 🕤	Properties		1 .	🔒 Inherited, all items
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4. The list of Site Collection Administrator usernames, login and email will be displayed in the report section. If you wish to export this list, click the CSV Report button in the report's toolbar.

Users with Permissions to Object

This window displays a listing of all users with access to the selected object. It may be invoked by selecting a farm/tenant, site, list or library from the Navigation Pane or an item from a Content Pane and then pressing the Users with permissions to Object button in the Security Analysis section of the ribbon.

This window features drill-down capabilities to reveal how access was granted. Additional capabilities can also be exposed using the right-click menu or the ribbon.



NOTE: This report may be exported in its entirety to a .csv format.

Orphaned Users

This window displays all users that no longer have an active account but still have permissions in SharePoint.

Home	Migration Analysis	View	Migrator	File Manager	Drives	Security Ma	anager	Term Store Manager	Administrator	Backup Help	
SharePoint Connect To	Copy Paste Clipboard	View Contents	Object Permissions Show	Permission Levels	Groups	Create/Grant	Edit	User Permissions	 Permissions given to User/Grout Users with permissions to Object Orphaned Users 	ip 🍌 Perm :t 🔯 Perm 🛠 Com Seci	nission Inheritance nission Inventory upare Object Permissions urity Analysis
ዾ Navigator		🖻 🕏 🕴	<u>-</u> (*	Contents 🔫 P	rogress 퉓 🤇	Orphaned U	sers 🛛 👪 F	Permissions given	to User/Group 🚨 Permi	issions	
✓ (⇒ 623 Conne ✓ S Tenant	ection Administration		Or	phaned Users	Report for S	Site: "Tenant	Administrati	on" (https://web	logissoftware522-admin.	(most into quark to	
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				👤 CP-04	David (clift)	membership	(conservation)	() metalogika oftw	anali22.com/crossR.com/	1	Deleted
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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

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Orphaned Users Report for Site: "Tenant Administration" (https://metal

User login
🗸 🗱 "Tenant Administration" 🖬 👘 🖓 🖬 🖉
1971,036971 (08.5newbendig)70t, x363h@wetalagisa0h
Antenan Test (294.f/membership)pashman, test@metalogika
Adam (IOP for embership) adam@metalagikaobware622.anm
LALDAN HALL ROP . Show Parmissions for User/Group
1 Internations
Child Line Child X Remove User Permissions
A Remove oser remissions

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.

>				×
ummary				
Profiles Per	mission-Default			~
4 Permission	(s) will be copied to the site: steve	ер		
Target Site 1	ïtle: stevep			
User/group:	MR/schrink			
Permission(i): Conideal Access			
User/group:	Mil/yratalia			
Permission(i): Fail Carthui			
User/group:	MM/ggeorge			
Permission(i): Cimitad Accass			
User/group:	Milguenescu			
Permission(i): Limited Access			
Re-Map	Jsers Load 😰			
Deferred	Group Copy			
Delete all	permissions from target			
		Finish	Ca	ncel

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.

Users/Groups		Туре						
> 🥂 Excel Services Viewers				Х				
> 🐴 Team Site Owners								
> 🐴 Team Site Visitors	Edit Permission							
> 🐴 Team Site Members								
> 🐴 Viewers								
Test Admin (i:0#.f membership testadmir								
Akash Test (i:0#.f membership akashtest@	Full Control - Has full control.			1.1				
dtspadmin1 (i:0#.f membership dtspadm	Contribute - Can view, add, update, and delete	list items and d	ocuments	s				
	Read - Can view pages and list items and down	load document	s.					
	View Only - Can view pages, list items, and doce	uments. Docum	ent types	wit				
	Design - Can view, add, update, delete, approve, and customize.							
	Edit - Can add, edit and delete lists; can view, add, update and delete list it							
	Restricted View - Can view pages, list items, and	d documents. D	ocuments	са				
	Limited Access - Can view specific lists, docume	ent libraries, list	items. fol	der				
	Web-Only Limited Access - Can only view the w	eb when given	permissic	ons.				
	System Limited View -							
	Approve - Can edit and approve pages, list items, and documents.							
	Manage Hierarchy - Can create sites and edit pa	ages, list items,	and docu	me				
	Restricted Read - Can view pages and documer	its, but cannot v	lew histo	rica				
	F	inish	Cance	I				
	·							

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.

\$					×
Grant Permis	sion				
Users/Groups:	id#.w(mv)aherep			4	B
⊖ Add users t	a SharePoint group				
Excel Servio	es Viewers 👒				
Grant users	permission directly				
 Full Con Design - Edit - Ca Contribu Read - C Limited J View On 	rol - Has full control. Can view, add, update, delete, a n add, edit and delete lists; can v te - Can view, add, update, and an view pages and list items and access - Can view specific lists, a y - Can view pages, list items, a	approve, and custo view, add, update delete list items a d download docur document librarie nd documents. Do	omize. and delete list item nd documents. nents. s, list items, folders ocument types with	is and docum , or documen i server-side f	ients. its when <u>c</u> ïile handle
Add to Sub	Objects				
			Finish	Ca	ancel

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.

•			_		נ	×
Clone/Transfer Permissions						
Enter Source and Target User login	n names					
Site Address https://	hare Di	in a specific	lany bit			~
O Transfer Permissions						
Source User					20	
Target User					20	
O Mass Transfer User Permissions						
User-Mapping File Load 📀						
Include Subsite-level Permission	IS					
Include List-level Permissions						
Include item-level Permissions (This may b	oe a time o	onsuming	operatio	on)	
Include site collection administr	ators					
Remove all source user permissi	ions					
🖬 Generate Script 📑 Schedu	le	Fin	iish	С	ancel	

- 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.
- 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.

0			\times
Remove Permissions			
Enter User login name			
• Single Site			
https://			
O Multiple Sites			
Sites Load 🕡			
 Remove Permissions User i:0#.f[membership]akashtest@ Mass Remove User Permissions Users Load 			
✓ Include Subsite-level Permissions			
Include List-level Permissions			
Include item-level Permissions (This may be a time con 	suming opera	ation)	
Generate Script	ish	Cance	el

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.

- 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.

	Live	Compare
Site URL: List/Library:	http://doc.metavidech.com/9026/sites/ider	Site URL: http://doc.metavidte/incom/00271/inco/new v
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🔺 📆 stevep		5₽ stevep
b 7 Lis	ts	📊 Lists
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	Millistevep (Limited Access)	
	MP administrator (Full Control)	
	Viewers [Mew Chils]	
88	MM developers (Full Control)	
8	MW chrisk (Limited Access)	
8	MM matalia (Full Control)	
8	MM appearage (Limited Access)	
8	MM goenescu (Limited Access)	
8	MM denies (Full Control)	
8	SHAREPOINT/system (Limited Access)	
		Excel Services Viewers [View Only]
🔺 🗟 Pe	rmission Levels	😫 Permission Levels
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🔺 👫 Gr	oups	🥵 Groups
88	Viewers	
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> 🔂 Su	bsites	😇 Subsites
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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.

🥵 Metalogix	Essentials for Office	365 v.2.13.0.4									
Home	Migration Analysis	View	Migrator	File Manager	Drives	Security Manager	Т	erm Store Manager	r Administrator	Backup Help	
SharePoint Connect To	Copy Paste	View Contents	Object Permissions Show	Permission Levels	Groups Cr	eate/Grant	e User	Permissions	 Permissions given to User/Group Users with permissions to Object Orphaned Users 	 Permission Inhertance Permission Inventory Compare Object Permissions Security Analysis 	Sectornal Users
Navigator	E	9 😫 🕴 🗆 🗆	Content	s 🖷 Progres	ss 🥵 Permissi	ons 🥵 Users/Gro	oups 🛙				
✓ ⊯ 622 Ter ✓ S Met	nant alogix Software Tear	n Site	https://m	etalogixsoftv	vare622.share	point.com/Sales	Departme	ent			
> 📶 L	ists		Group N	ame		Owner Name			Description		
- 🖬 S	ubsites		A 20	10BlogSite N	/lembers	2010BlogSite	Owners		Use this group to grant p	eople contribute permissions to the	SharePoint site: 2010BlogSite
	Adam		A 20	10BlogSite C	Owners	2010BlogSite	Owners		Use this group to grant p	eople full control permissions to the	SharePoint site: 2010BlogSite
~	AMER		A 20	10BlogSite V	lisitors	2010BlogSite	Owners		Use this group to grant p	eople read permissions to the Share	Point site: 2010BlogSite
	Eists		🐴 AN	AER Member	rs	amer Owners			Use this group to grant p	eople contribute permissions to the	SharePoint site: <a href="</td">
	Subsites		🐴 an	ner Owners		amer Owners			Use this group to grant p	eople full control permissions to the	SharePoint site: <a href<="" td="">
	Blog Site		🛛 🐴 an	ner Visitors	- C	amor Ownord	Chill C		Use this group to grant p	eople read permissions to the Share	Point site: <a href="/ame</td>
	Bratislava lest		🐴 An	dyATest Me	ору		Ctri+C	hip test.	Use this group to grant p	eople contribute permissions to the	SharePoint site: AndyATest
	ControlPoint Config	guration Site	🐴 Ap	provers	Paste		Ctrl+V		Members of this group ca	an edit and approve pages, list items	, and documents.
	ControlPoint QA		🐴 Au	thors	🥂 Add Use	rs to Group			Author for Academic Libr	rary	
	Corporate		🐴 Bri	atislavaTest	S. Edit				Use this group to grant p	eople contribute permissions to the	SharePoint site: BratislavaTest
	DCSubsite		🐣 Bra	atislavaTest	V Dalata				Use this group to grant p	eople full control permissions to the	SharePoint site: BratislavaTest
	Delete Site Test		🐴 Bri	atislavaTest	Delete		Der		Use this group to grant p	eople read permissions to the Share	Point site: BratislavaTest
	Metalogix Projects		🐣 Co	ntrolPoint (😰 Create N	ew Group			Use this group to grant p	eople contribute permissions to the	SharePoint site: ControlPoint QA
	NewAbdulSite		🐴 Co	ntrolPoint (Use this group to grant p	eople full control permissions to the	SharePoint site: ControlPoint
	NewAbdulSite2		🐴 Co	ntrolPoint (Ø Refresh				Use this group to grant p	eople read permissions to the Share	Point site: ControlPoint QA
	Path Based SC2		🐴 CC	OPS	Niow In F	rowcor		lt.c tena			
	Perf Tests		🐴 Co	rporate Tra	 Viewing Transfer 	Dowsei		Site Ow.	Use this group to give pe	ople contribute permissions to the S	harePoint site: Corporate
~	Pub Site		🐴 Co	rporate Tra	ranster	Permissions		lt.c tena	Use this group to give pe	ople full control permissions to the S	SharePoint site: Corporat
	Lists		🐴 De	elete Site Te	× Remove	User Permissions			Use this group to grant p	eople contribute permissions to the	SharePoint site: Delete Site Test
`	🗸 🛅 Subsites		🐴 De	elete Site Tes	t Owners	Delete Site Te	est Owners	s	Use this group to grant p	eople full control permissions to the	SharePoint site: Delete Site Test
	S RSVP and Gu	iest book	👫 De	elete Site Tes	t Visitors	Delete Site Te	est Owners	5	Use this group to grant p	eople read permissions to the Share	Point site: Delete Site Test
>	Sales		🐴 De	esigners		Primary Porta	I Owners		Members of this group ca	an edit lists, document libraries, and	pages in the site. Designers ca
~ [Sales Department		🕴 💆 Do	ocuments Me	mbers	Documents O	wners		Use this group to grant p	eople contribute permissions to the	SharePoint site: Documents
	🖉 Lists		👫 Do	ocuments Ow	ners	Documents O	wners		Use this group to grant p	eople full control permissions to the	SharePoint site: Documents
	Subsites		🕴 🏪 Do	ocuments Vis	itors	Documents O	wners		Use this group to grant p	eople read permissions to the Share	Point site: Documents

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.

arget Site Title: Sales Department Group Name: amer Visitors Re-Map Users Load	will be equied to the site. Cales D		
Group Name: amer Visitors	e Title: Sales Department	epartment	
Re-Map Users Load	me: amer Visitors		
	p Users Load 🔞		
	p Users Load 🥘		

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.

\$		_		\times
Create new	User Group			
Please defin	e name, Owner and Description			
Name:	Sales Reps			
Owner:	i:0#.f membership aa-akanaujia@metalogixsc	ftware62	2.on 🤱	
Description:				
	Finish		Cance	I

- 4. Press Finish to create the group.
- **NOTE:** An existing Group may be removed selecting it in the Users/Groups window and then pressing the Delete button in the ribbon.

Remove SharePoint Group

Security Manager allows administrators to remove SharePoint Group using a single operation.

- 1. Select a site from the Navigation area where the group is located.
- 2. Press the **Groups** button to view a list of available groups.
- 3. Select the group(s) that need to be removed
- 4. Press the **Del** key (or from the right-click menu select the Delete option.
- 5. In the provided window, confirm the delete operation.
- 6. Press **OK** to begin the operation.

Add Users to Group

Security Manager allows administrators to add users (or groups) to a one or more SharePoint groups using a single operation.

- 1. Select a site from the Navigation area where the group(s) is located.
- 2. Press the Groups button to view a list of available groups.
- 3. Select on or more groups where user(s) need to be added.
- 4. Press the **Create/Grant** button and select the "Add Users to Group" option to activate the window.

Create/Grant	Edit Delete User Permissions						
Grant Permission							
Create Permission Level							
Create Group							
Add Us	ser to Group						

5. In the provided window, select the user(s) that will be added.

\$			_		×
Add Users to a Grou	р				
Provide Users which w	ill be added to a selec	ted Group			
• Add User to Group					
User Login Names:	Adam i:0#.f member	rship aa-afisher@	metalo	gixs 🕹	
O Bulk Add Users to G	roup				
File Location:					
		Finish		Cance	

- 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.

Select the Permissions that apply from the provided list.

\$					×
Create new	Permission Level				
Name:	Auditors				
Description:					
Select Al	1				
List Permissi Manage Override Add Item Edit Item Delete Ite View Iter	ons Lists - Create and delete lists, add or remove columns in a list, and add or rer Check Out - Discard or check in a document which is checked out to another Is - Add items to lists, add documents to document libraries, and add Web di Is - Edit items in lists, edit documents in document libraries, edit Web discussi ems - Delete items from a list, documents from a document library, and Web ms - View items in lists, documents in document libraries, and view Web discu Items - Aporove a minor version of a list item or document.	nove p user. iscussion discus ssion o	oublic on co mmer ssion o	mments mments nts in do commer nents.	f a cui nts
Open Iter View Vers Delete Ve Create Al	ms - View the source of documents with server-side file handlers. sions - View past versions of a list item or document. ersions - Delete past versions of a list item or document. lerts - Create e-mail alerts.				
View App Site Permiss	plication Pages - View forms, views, and application pages. Enumerate lists.				
Manage View Usa	Permissions - Create and change permission levels on the Web site and assigninge Data - View reports on Web site usage. Univisites - Create subsites such as team sites. Meeting Workspace sites, and Do	n perm	nission t Wor	ns to use	ers site
Manage Add and Apply Th Apply Sty	Web Site - Grants the ability to perform all administration tasks for the Web s Customize Pages - Add, change, or delete HTML pages or Web Part Pages, an iemes and Borders - Apply a theme or borders to the entire Web site. yle Sheets - Apply a style sheet (.CSS file) to the Web site.	site as nd edit	well a	as mana Web site	ge us
Create Gi Browse D View Pag	roups - Create a group of users that can be used anywhere within the site coll Directories - Enumerate files and folders in a Web site using SharePoint Desig jes - View pages in a Web site.	lection	d Wel	b DAV ir	itei
Browse U	te vermissions - Enumerate permissions on the Web site, list, folder, documer Jser Information - View information about users of the Web site. Alerts - Manage alerts for all users of the Web site.	ιτ, or li	st iter	n.	
	Finish			Cancel	

5. 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.

🕆 Contents 🔫 Progress 🥵	Permissions 🗟 Permission Levels 🛛 🥵 Users/O					Groups	
https://metalogixsoftware622.sharepoint.com/Corporate							
Permission Level Name			Description				
Approve			Can edit and	арр	rove pages	s, list items, an	
Contribute			Can view, ad	d, up	date, and	delete list ite	
Create new subsites		Conv	-		Ctrl+C		
Design	- 12.	Dacto Licor/G	roup(s)	R	CtrLuV	, approve, a	
Edit		Paste User/G	noup(s)		Ctri+v	can view, a	
Full Control	鄃	Edit					
Limited Access	X	Delete			Del	ent libraries,	
Manage Hierarchy						es, list items,	
Read	il.	Create New	Permission Le	vel		and downl	
Restricted Interfaces fo	2	Permission L	evel Access			d use remot	
Restricted Read						nts, but cann	
Restricted View	Ø	Refresh				document	
System.LimitedEdit	ő	View In Brov	vcer				
System.LimitedView	-						
View Only			Can view page	ges, I	ist items, a	nd document	
Web-Only Limited Acce	SS		Can only view	w the	web wher	n given permis	

- 4. Similar to the procedure in Step 1 and 2 above select the target object.
- 5. Click the **Paste** button from the ribbon.
- 6. In the provide window, confirm that information and select the appropriate options.

7. Click Finish to begin the operation

Summary
Profiles Permission-Default
5 Permission Level(s) will be copied to the site: Dev
Target Site Title: Dev
Permission Level Name: Administrator
Permission Level Name: Role for Group - CK2SiteGroup01
Permission Level Name: Role for Group - CK2SiteGroup02
Permission Level Name: Role for Group - Guest
Permission Level Name: Role for Group - My custom group
Finish Cancel

Remove Permission Level

Security Manager allows administrators to remove Permission Level(s) using a single operation.

- 1. Select a site from the Navigation area where the group(s) is located.
- 2. Press the Permission Levels button to view a list of available levels.
- 3. Select the level(s) that need to be removed
- 4. Press the **Del** key (or from the right-click menu select the Delete option).
- 5. In the provided window, confirm the delete operation.
- 6. Press **OK** to begin the operation.
Transfer Permissions

Transferring permissions can be down by right clicking on a SharePoint site or user and selecting Permissions and then Transfer Permissions.

Home	1	Сору	Ctrl+C	Mar	nager T	erm St	tore Manager	Admin
S In SharePoint	Ĩ.	Paste	Ctrl+V	Colu	ımn Groups		🔎 Permissions	1
Contents	Ð	Create Backup		Inhe	rited Colum	ns	Permission Lev	/el
🕖 Refresh	Ø	Collect Statistics Data		Hido	den Columns		🦺 Permission Gr	oups
View	×	Delete From SharePoint		L .				
烙 Navigator	(Update site properties		=0	Progress			
🗸 🗁 SharePoint	₽	Connect to Site						
✓ S Tenant Admi > m Lists > Tenant Admi Lists > Tenant Admi	Ø 0	Refresh View In Browser Save site to XML		Star NO	ted T STARTED	Sou jtros	rce User sman@metavistech	.com (
	B	Audit Object		NO	T START	jtro	sman@metavisted	:h.com
		Use CSV to	>					
		Permissions	>	۶	Show Perm	nissio	ns	
		Create	>		Show Perm	nissio	n Levels	
		Analysis	>	1	Show Grou	ips		
		Objects	>	1	Show Site	Collec	tion Administrator	s
		View in Diagram	>	2	Transfer Pe	rmiss	ions	
• · · · · · · · · · · · · · · · ·		-		X	Remove Pe	rmiss	lons	

- 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.

sions

Source User	i:0#.f membership jtrosman@metavistech.com	20	
Target User		20	
O Mass Transfer	User Permissions		
User-Mappin	g File Load 🕖		

3. If you chose to manually enter users, be sure to select the Check Names button next to both source and target fields, to confirm that they are valid users.



- 4. Select which which permission options you would like to include in the transfer.
 - Include Subsite-level Permissions

✓ Include List-level Permissions

- Include item-level Permissions (This may be a time consuming operation)
- Include site collection administrators
- Remove all source user permissions
- 5. Select **Finish** to start the transfer.

Term Store Manager Tab

Term Store Manager is a feature of Essentials for Office 365 Architect. It delivers full control of SharePoint term stores from the convenience of a client interface. Users can granularly or in bulk create, edit, delete, copy and merge Term Groups, Term Sets, and Terms. Term Sets Manager also allows users to export the Term Sets into a CSV file. This CSV file can then be used to duplicate Managed Metadata in other SharePoint applications.

Connect and View Term Store

The following steps will allow you to connect to, and view, the term store:

- 1. To access a site's Term Store, right click on a site and select Objects > Show Term Store. In the product's Architect ribbon an icon is also enabled when a site is selected. The Term Store content will then appear in the content pane.
- 2. Expand the term store hierarchy to view Term Groups, Term Sets, and Terms.

	1			
Term Name	Term Type		Term Synonyms	Description
 ^A Taxonomy_IthaDc4yUFr9N9c3odPQKg= 	Term Store			
> FontrolPointQA	Term Group			
> 📙 Cybage	Term Group			
> 📙 Emp_Details	Term Group			
> 📙 Instruments	Term Group			Musical instrum
> 🔚 Linux	Term Group			
> 📂 Metalogix	Term Group			
> 📙 NekGroup	Term Group			NekGroup
🗸 📂 People	Term Group			
✓ ☐ Department	Term Set			
AM	Term			
> 🗉 DEV	Term			
Engineering	Term			
Guest Migrated By Sharepoint	Term	1	Сору	Ctrl+C
InfoDev	Term		Paste Term(s)	Ctrl+V
QA	Term	i.	Paste As Reference	
TechSupport	Term	a	Move	
∽ 🗇 Job Title	Term Set		Create Term	Insert
QA	Term	(China)	Bulk Create Terms	
SSE	Term	400	Edit Targa	
Test User	Term		Edit ferm	
✓ ☐ Location	Term Set	Ľø	Deprecate Term	
Beni	Term	, C	Delete Term(s)	
Cochabamba	Term		Enable/Disable Tagging	
La Paz	Term	0	Defresh	
Oruro	Term		Refresh	
Pando	Term	676	Import from CSV	
Potosi	Term	-> GY	Export to CSV	
> 愕 Search Dictionaries	Term Group	-	Import from SKOS	
> 愕 Software League	Term Group		Export to SKOS	
> 愕 Sports	Term Group			
> 🔚 TestStore	Term Group			TestStore
> 🔚 System	Term Group			These term set

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'.

> 🖸 DEV	Term			
Engineering	Term	-	C	Chillio C
Guest Migrated By Sharepoint	Term		Сору	Ctri+C
InfoDev	Term		Paste Term(s)	Ctrl+V
QA	Term		Paste As Reference	
 TechSupport 	Term	a	Move	
🗸 🗇 Job Title	Term Set		Create Term	Insert
OA	Term	P	Pulk Croate Terms	

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)'.

🗸 📂 Cybage		Term (Group
🗸 🗇 Depart		Term S	Set
> 😤 Adm 📑	Сору		Ctrl+C
> 🖸 Finar 📋	Paste Term(s)	N	Ctrl+V
🔍 HR 👔	Paste As Reference	e	
📼 Sale: 🚑	Move		
> 🗇 Role 🚽	Create Term		Incort
> 肟 Emp_Detai 📃			msert

5. Once 'Paste Term(s)' is selected a copy confirmation window will appear.

•			_		×
Summary					
1 Term(s) will be cop	ied to the term: Corporate				
Target Term Set Title:	Depart				
Term Name	Engineering				
Copy With Childrer	1				
🗌 Merge 🔞					
🗌 Retain GUID 🛛 😰					
Re-Map Users Loa	ad 💿				
		Finish		Cancel	

- 6. Checkbox options are available before clicking 'Finish'. The 'Copy With Children' checkbox will copy any child terms along with your selected item. The "Merge" checkbox will merge term store objects (the source object will overwrite the target in the event of a conflict).
- 7. Once appropriate options are selected, click 'Finish".

Unsupported Objects for Migration

Due to limitations in the Microsoft API, the following parameters cannot be retained during migration nor while using the Edit function in Term Store Manager

- Term Group "Group Managers"
- Term Group "Contributors"
- Term Set "Stakeholders"

Create/Edit/Delete Term Store Objects

Terms store manager offers the ability to manipulate term store object individually or in bulk. Specific functionality is available via the right-click menu or in the upper right-hand corner of the pane.

Create Term Store Objects

- 1. Select the parent object from the term store. The type of objects that can be created depends on the parent object selected.
- 2. From the right-click or pane menu select the Create option.
- 3. A window will be displayed with the appropriate fields for the object being created.
- 4. Press the Finish button to complete the operation.

m Name	Term Ty	pe	Term Synonyms	Description	
Taxonomy_IthaDc4yUFr9N9c3c	odPQKg= Term St	ore			
> KantrolPointQA	Term Gr	oup			
> ៅ Cybage	Term Gr	oup			
Emp_Details	Term Gr	oup			
> 🛃 Instruments					– o x
> 🔁 Linux	•				
> 🛃 Metalogix	Create New Te	rm Set			
> NekGroup					
🗸 📂 People					
✓					
I AM	General Custor	n Propertie:	s		
> 🖸 DEV	Term Set				
Engineering					
Guest Migrated By S	Term Set Nam	e Specia	al Skills		
InfoDev	Description	Areas	of expertise		
⊂ QA		1000			(22) .
TechSupport	Owner	1:0#.t r	mempersnipjaa-akanal	ijia@metalogixsoftwai	re622.oni 🔩 📖
> 🗇 Job Title	Submission Po	licy 🔘 Clos	ed 🔘 Open		
> 🗇 Location	Available f	or Tagging			
> 愕 Search Dictionaries	_				
> not software League					
> 🛃 Sports					
> TestStore					
> 🛃 System					

(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.

eneral Custom Properties				
Ferm Set(s)				
Term Set Names (separated with new line)	Title Reports to Email			4
Descriptions (separated with new line)	Job title Manager Email address			
Available for Tagging				

(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.

- 🕓					×
Edit Term					
General Cust	tom Properties				
Term(s)					
Term Name (separated	s with new line)	DEV Engineering Guest Migrated By Sharepoint			I
Description (separated	s with new line)				I
🗹 Available	e for Tagging				
			Finish	Cancel	

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

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.

6					×
Edit Term Set					
Constal Custom Properties	Sustom Sort			 	
General Custom Properties C	ustom som				
Use custom sort order	ording to cu	rent langua	ige	_	
Term name					- 1
AM					- 1
DEV					- 1
Engineering					- 1
QA					- 1
Guest Migrated By Sharepoi	int				
InfoDev					
			Finish	Cance	el

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

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.

😓 Live Compare		×
Site URL: List/Library:	* *	Site URL: v List/Libray: v
Copy from Left to Rig	ght	Copy from Right to Left Legend @
✓ S Corporate 2016 Column Groups G Content Types G Permission Levels A Groups Groups Groups Content Types Content Types		2fauth 2fauth Column Groups Content Types Lists Permission Levels Groups Workflows Correction Subsites
Image:		III Quick Compare 💿 3

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**.

6	_		×
Select site			
Parent Site/Site Collection URL (e.g. http://www.yoursharepoint.	.com/sites	s/yoursite	e):
http:// Corporate2016		~ Con	nect

3. Select the site or sub-site that you want to compare and press the Finish button.

\$				×
Select site				
Parent Site/Site Collection URL (e.g. h	ttp://www.your	sharepoint.com/si	tes/yoursi	te):
http:// . Corp	orate2016		∼ Co	nnect
> S Corporate 2016				
		Finish	Can	cel
		Eman	Can	cer

4. Select Full Compare from the bottom of the Live Compare screen.

live Compa	are				×
Site URL: List/Library:	http://: /Corporate2016	* *	Site URL: List/Library:	https:// com	* *
	Copy from Left to Ri	ight	Copy from I	Right to Left	Legend 🔞
0% - Estimation	n				
Full Com	npare 💿 Load Compare Report 💿		11	Quick Compare	Close

5. Select the properties you would like to apply to your Full Compare and click **Run**.

8	×
Full Compare Properties	
Use enhanced content compare 🔞	
Include Item Level Permissions 🕡	
Include Groups Membership	
User Mapping Load 🕖	
☑ Include Subsites 🕡	
Generate Script Schedule Cancel Run	

Use Enhanced Content Compare: This option will use the last modified date to identify differences in content that exists in both sites (lists and libraries). Normally the comparison is limited to identifying differences in content that exists in one site but not the other.

i NOTE: Depending on the amount of content this comparison may require extended periods of time.

Include Item Level Permissions: The differences in Item Level Permissions between the selected sites or lists will be analyzed as part of the compare.

NOTE: Permission comparison may require extended periods of time depending on the amount of content and permissions

Include Group Membership: The differences in the Group Memberships between the selected sites or lists will be analyzed as part of the compare.

User Mapping: This option should be used in the event that a mapping file was used during the initial copy from source to target. This is especially useful if you have mapped accounts from source to target.

Include Subsites: Any subsites for the selected sites will be analyzed as part of the compare.

- **NOTE:** Depending on the amount of subsites this comparison may require extended periods of time.
- 6. When prompted save the Full Compare file to a location on your computer.

Quick Compare

This option will generate a listing of SharePoint objects within the Live Compare window. Users can navigate and drill down into each object to see and copy the differences from one site to another. This option is limited to the currently selected sites. See Full Compare for additional capabilities.

To perform a Quick Compare with Live Compare, do the following:

1. In the Migrator tab, select Live Compare from the Sites section.

Hom	ie View	Architect	Migrator	File Manager	Drives Pu	blic Folders	Security M	lanager	Term Store Manager	Informa	nt Administrator	Backup	Help
SharePoint	Copy Pa	iste	Copy Site *	Ev + - Ev Live Compare!	Promote to Site Collection	Copy	Select All	Tag	Copy To	F ilter	File Share SharePoint	S In ShareP Contents Refresh	oint 🗾 Logs
Connect To	Clipboard	d Delete		Sites		List/Library			Documents/Items		Migration Analysis	Vi	ew

2. Once the Live Compare window opens, select your two Site URL's for comparison by clicking the downward arrow 🛛 of each. This will open the Select Site screen. Select the site you wish to connect to and click **Connect**.

\$		_		×
Select site				
Parent Site/Site Col	lection URL (e.g. http://www.yoursharep	oint.com/site	s/yoursite	e):
http://	Corporate2016		~ Con	inect

3. Select the site or sub-site that you want to compare and press the Finish button.

)			
lect site			
arent Site/Site Collection	URL (e.g. http://www.yoursha	repoint.com/sites/y	oursite):
http://	Corporate2016	~	Connect
> 🚯 Corporate 2016			
	_	Place in the	Contract
		Finish	Cancel

4. Select **Quick Compare** from the bottom of the Live Compare screen.

te URL: http://: /Corporate2016	¥	Site URL: https:// com	
st/Library:	¥	List/Library:	
	Copy from Left to Right	Copy from Right to Left	Legend 🌘
Estimation			

5. Select the properties you would like to apply to your Full Compare and click **Run**.

	×
Quick Compare Properties	
Use enhanced content compare 🔞	
🗹 Include Item Level Permissions 🛛 🔞	
🗹 Include Groups Membership	
User Mapping Load	
Cancel	Run

Use Enhanced Content Compare: This option will use the last modified date to identify differences in content that exists in both sites (lists and libraries). Normally the comparison is limited to identifying differences in content that exists in one site but not the other.

i NOTE: Depending on the amount of content this comparison may require extended periods of time.

Include Item Level Permissions: The differences in Item Level Permissions between the selected sites or lists will be analyzed as part of the compare.

NOTE: Permission comparison may require extended periods of time depending on the amount of content and permissions

Include Group Membership: The differences in the Group Memberships between the selected sites or lists will be analyzed as part of the compare.

User Mapping: This option should be used in the event that a mapping file was used during the initial copy from source to target. This is especially useful if you have mapped accounts from

source to target.

6. The Live Compare results will be loaded in the Live Compare window, where you can now copy items from left to right and vice versa.

Load Compare Report

The Load Compare Report option allows users to select a completed Full Compare report and display its results in the Live Compare viewer where a user can drill down into any object type to compare or re-compare that object against its counterpart on the other side. The "Copy from..." buttons can be used to initiate a copy operation from one side to the other.

To load a compare report do the following:

1. In the Migrator tab, select Live Compare from the Sites section.



2. At the bottom of the Live Compare window select **Load Compare Report**. This will open your computer's explorer.

live Compare	•				×
Site URL: List/Library:		> >	Site URL: List/Library:		> >
	Copy from Left to Rig	jht	Copy from Right to Left	Legend	0
0% - Estimation					
II Full Compa	are 🔞 Load Compare Report		1 Quick Compare	C	ose

3. Locate the Live Compare .csv file you wish to load. Click **Open**.

Open									×
\leftarrow \rightarrow \checkmark \uparrow \blacksquare \rightarrow This PC	> Desktop >					√ Č	Search Desktop		Q,
Organize 🔻 New folder								•	?
 ✓ Quick access Desktop ✓ Downloads ✓ Documents ✓ Documents ✓ Pictures ✓ Csvs ✓ Music ✓ Videos ✓ OneDrive ✓ This PC ✓ Network 	corporateb ackup2016	framework 1.8_65-x64- aj	Create-Clo udUsers-Te mplate	full compare	MapFileSys temToOffic e365UsersE xample	Run Custom Action - Load fro			
File name:	full compare					~	*.csv	Cance	~

4. This will open the Select Site screen. Select one of the sites from the original full compare .csv file and click **Connect**.

\$		_		\times
Select site				
Parent Site/Site Coll	ection URL (e.g. http://www.voursharepo	int.com/site	s/voursit	e):
http://	Corporate2016		~ Cor	nect

 	> 🚯 Corporate 2016

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.

Administrator Tab

This section provides an overview of the Administrator tab.

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 Essentials Administrator, start here.

Service Manager

Administrator with Service Manager provides Administrators with a global understanding of their Office 365 tenants, including user profiles, license distribution, Exchange Online, OneDrive for Business, SharePoint Online and more. It provides detailed and actionable reporting across many Office 365 Services and the ability to create and run custom rules with consistent, repeatable actions.

- **Cross Service Identity Management:** Perform complex, user-focused administrative tasks across multiple systems in the environment from a single interface.
- License Management/Optimization: See what licenses are in your environment, to whom they are deployed, and which ones are in use. Take action by allocating or re-allocating licenses with the click of a button.
- **On-boarding/Transferring:** Use automated templates to ensure that the proper licenses are allocated, quotas assigned, permissions granted, oversight access is granted, and the users profile is properly filled out all from a single, unified, administration interface.
- **Off-boarding:** Set out of office messages, remove access, forward mail to the proper users, and backup a users' content across all systems with the click of a button.

To begin using Service Manager, start by Connecting to your Office 365 Tenant.

The application consists of three primary panes 1. Navigator, 2. Report Selection Menu, 3. Dashboard, Report and Analysis Display Area.



Navigator Pane

The Navigator may contain a series of previously loaded or generated projects with each project representing a separate data collection. The projects specific to Essentials Administrator are defined

by a bar graph icon and contain the data from all previously run data collections. Inside these projects will be the locations that were included with this scan, be it multiple site collections, OneDrives, sites, and lists.



Report Selections Menu

The Available Reports menu displays a graphical list of all currently available reports. These are broken down into several, logical sections grouping together the purpose of the each report. The sections can be opened or closed by clicking on the section header. The reports are selected through a series of radio buttons which allows only one report to be loaded at a time.

👔 Administrator 🙋 Progress	
Reports	
Dashboard	*
 Content Utilization Site Activity OneDrive for Business 	
Content	×
Activity	×
Settings	¥
Correlation	¥

Please note that some reports may be disabled based on the Admin project being loaded. Refer to the Reports section for more information.

Reports Area

The Reports area is the large section of the interface where the various dashboards, reports, and analysis is displayed. You may select one specific report from the main report screen (section 3 found on the Interface Overview page) by double clicking on it. This allows you to view the contents of each individual report in detail.



Along the top toolbar are buttons to allow the configuration of the output



The middle portion is the visual representation of the data



The bottom displays the analytical results.

User	License
Contraction of the second s	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of
1 March 10 M	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of
2 Chief Contractor States	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of
	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of
	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of
2 Paul Brilling Armsteiner	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of
Particular Million Characterization	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of
	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of

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.

		User		License
♣ � ♣ ▲ ⊠	Permissions given Users with permis Orphaned Users Permission Inherit Permission Invent	a to User/Group sions to Object tance tory Paul.Kelaita@MET/ testNEWuser@met	Analysis > Audit Users Edit Licenses tech.com wISTECH.onmicrosoft.com avistech.com	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile
	1	/		

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 Global Administrator of the Office 365 tenant to which you wish to connect.

NOTE: The Password field will be disabled as Microsoft no longer allows direct sign in.

3. Click Finish.

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.

Service Manager Project	MetaVis Enterprise Connection
Tenant Level	@metavistech.com)
Default View	Active Directory Users
	Diffice 365 Users
	Groups
	Diffice 365 Licenses
	a 📃 Exchange Online Mailboxes
	Automatic Replies
	Mailbox Permissions
Custom View	🔐 Item Count
	OneDrive for Business

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 <a>[1]. This will display the name of the Office 365 Tenant, with the Global Admin account that was provided during

connection appearing in brackets to the right of it. There are a number of menu options that are available at this level, but there are currently no views or reports that can be displayed.

Default Views

The next level is the Default Views and those are shown with this icon . Default views cannot be deleted nor modified, and they offer a "top to bottom" view of all users and attributes associated to this service.

To open a default view do the following:

1. Double click on the View name in the Navigator pane, or right click on the name and select **Open**.



2. The view will load in the larger section to the right of the Navigator pane.

group(s) were loaded			
splay Name	Group Type	Description	mail
😨 111	Global Security Group		
12345	Global Security Group		
Account Operators	BuiltIn Group	Members can administer domain user and group acc	
🙅 AD Group A1	Global Security Group		
Administrators	BuiltIn Group	Administrators have complete and unrestricted acces	
😨 all-accounting	Global Security Group		
Allowed RODC Password Replication Group	Local Security Group	Members in this group can have their passwords repli	
😨 Backup Operators	BuiltIn Group	Backup Operators can override security restrictions fo	
😨 Cert Publishers	Local Security Group	Members of this group are permitted to publish certif	
Certificate Service DCOM Access	BuiltIn Group	Members of this group are allowed to connect to Cert	
ବ ChildAD	Global Security Group		
Cryptographic Operators	BuiltIn Group	Members are authorized to perform cryptographic op	
🧙 Delegated Setup	Universal Security Group	Members of this management role group have permi	
😨 Denied RODC Password Replication Group	Local Security Group	Members in this group cannot have their passwords r	
😨 Developers	Global Security Group		
DHCP Administrators	Local Security Group	Members who have administrative access to the DHC	
🛧 DHCP Users	Local Security Group	Members who have view-only access to the DHCP ser	
😨 Discovery Management	Universal Security Group	Members of this management role group can perfor	
Distributed COM Users	BuiltIn Group	Members are allowed to launch, activate and use Dist	
😨 DnsAdmins	Local Security Group	DNS Administrators Group	
nsUpdateProxy	Global Security Group	DNS clients who are permitted to perform dynamic u	
🧙 Domain Admins	Global Security Group	Designated administrators of the domain	

- **NOTE:** Depending on the location of the user and attributes needed to generate this view, you may be asked to provide additional credentials needed to authenticate.
- 3. From the view results, you can select one or more users and perform a number of actions using either the buttons in the application's ribbon

Office 365	Collect Data	Update Data	Run Action	Open	Create	Edit	Run	D elete	Export to PDF	→ csv Export to CSV	→X Export to Excel	Logs
Manage	Rep	oorts	Quick Actions		Cu	stom Acti	ons			Export		View
the too	lbar											
👔 Administrator 🧯	🖸 Progress 📃 Active I	Directory Users 📃 Act	ive Directory Groups 📃 C	Office 365 Users	🔲 SharePoint	t Online Sites	23					🌡 🔁 🔍 Ø

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 **1**. 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.

	Naviga	ator				
ł	b Bo	x				
	b Bo	ox1				
,	el Co	orpo	rate Office	e		
	~ 🚺	Me	etaVis Tecl	hnolo	gies (0
			Active Di			-
			Active		New	
		=	Office 3	\sim	TYCH .	
	~		Groups		Open	
			Activ	12.	Pasto	Ctrl+V
			🔲 Azur	1	Paste	Cuity
			Exch	Ð	Import	
			Contraction Office	Ξ.		
		_			Export	
			SharePo			
			Office 3		Manage Conferencing Policies	
			Evebanov	Opt	ine Mailbover	

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.

🤌 Create View	,		_		×
View Name:	Custom Active Direct	tory Users View			
Section Name:	Active Directory User	5			\sim
Columns Filter	r				
Active Dire	ectory Users				^
Office 365	Users				
Office 365	Licenses				
Exchange (Online Mailboxes				
- Automatic	Replies				
State State Start Ti End Tir Interna Reply E Externa OneDrive 1	me ne I Message ixternally il Message for Business				~
Reset			ОК	Cancel	
T Charle Co			2.4	Juncer	

4. Switch over to the Filters tab if you wish to apply any filters to the results.

🤌 Create View	,			_		×
View Name:	Custom Active	e Directory User	s Vi	ew		
Section Name:	Active Director	y Users				\sim
Columns Filter	1					
User Account	t:	Contains	\sim	<any value=""></any>		\sim
State:		Equal	\sim	Enabled		\sim
Start Time:		Equal	\sim	Empty Date>	\sim	
End Time:		Equal	\sim	☑ 3/26/2018 ♀ 11:14:34 AM	*	
ATA:		Equal	\sim	True		\sim
RMS_S_PREMI	UM:	Equal	\sim	True		\sim
AAD_PREMIUN	/I_P2:	Equal	\sim	True		\sim
Owners:		Contains	\sim	<any value=""></any>		\sim
Last Modified:		Equal	\sim	8/26/2018 11:14:34 AM	¥	
Reset				OK	Cancel	

Filters are configured with conditions (Equal, Not Equal, Contains, Does not Contain), drop down selections and text entry fields. If you wish to rearrange the order of the columns, simply click and drag/drop the column to the new position you wish it to appear in. If you wish to remove a column, simply switch back to the Columns tab and deselect this attribute.

5. Once you have configured the view to your liking click **Ok**. You will be asked if you would like to open the created view - you an select yes or no. Selecting Yes will display the custom view immediately, selecting no will simply add the custom view to the Navigator section of the page where it can be accessed later.

Menu Options

Depending on the selected level, you will have a number of options available in the right click menu. Below are the icons and descriptions for each option within each section.

Tenant Level

(
) Import External List (CSV) - Imports a CSV file containing a list of users and their attributes.

- (1) Import Imports all custom views from another Service Manager project.
- (**Export** Exports all custom views.

(2) **Refresh** - Manually refreshes this project or view. To enable Automatic View Refresh, please visit the Refresh section of this topic.

(S) Manage Custom Actions - Opens the Manage Custom Actions menu. This can also be accessed through the Custom Actions buttons in the ribbon.

Default Views

- (
) New Creates a new custom view beneath this location.
- (**b**) **Open** Open this selected default view.
- (1) Paste Paste a copied custom view(s) as a child to this location.
- (1) Import Select a group of exported views to import to this location.
- () **Export** Export all custom views from this location.

(**B**) **Manage Conferencing Policies** - Allows users to create new or modify existing conferencing policies for this location.

Custom Views

- (**b**) **Open** Load the selected custom view.
- (\blacksquare) Edit Edit the columns or filters of the selected custom view.
- (**b**) **Copy** Copy the selected custom view(s).
- (**Export** Export the selected custom view(s).
- (**X**) **Delete** Delete the selected custom view(s).
- NOTE: There is no way to undo the deletion of a custom view.

Edit Quick and Custom Actions

From any Default or Custom View, you may select one or more entries from the View's contents to perform an action against by using the right click menu. The right click menu will provide you with a basic Edit or Update option most appropriate for the currently open view, a Quick Action which

performs a single operation regardless of the view, or a Custom Action which is a pre-configured series of actions to be performed in order. The descriptions and their use are detailed in the following sections.

Edit or Update Action	0	Edit Licenses	
	B	Audit User	
Quick Action menu	3	Quick Actions	>
Custom Action menu		Custom Actions	>
	Ø	Refresh	

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.

Edit Licenses	
Audit User	
Quick Actions	>
Custom Actions	>
Refresh	
	Edit Licenses Audit User Quick Actions Custom Actions Refresh

• Click the Refresh toggle button in the application's toolbar to enable automatic refreshes. When

toggled is on (1997), the View will refresh automatically at the completion of the action update.

When the refresh is toggled off (\bigcirc), the View will not update automatically and you will need to revert to manually refreshing using the right click menu in order to see the results in the application.



Basic Edit or Update Actions

When a Default View is open, you may select one or more entries, right click and have access to a view specific Edit or Update action. For example, if you open the default "Office 365 Licenses" view, select one or more users and right click, the basic edit operation here will be to "Edit Licenses". This action will allow you to edit the licenses associated to the selected users only. A similar operation performed in another Default View will present a different Edit action.



In a Custom View, this basic edit action becomes a generic "Edit User" and provides access to all available services and attributes that can be updated.



Quick Actions

Select any Default or Custom View. When the view is open, you may select one or more entries, right click and have access to a menu of Quick Actions. Quick Actions, unlike the basic Edit or Update, are not specific to the current view and are configured to perform a single operation against the selected entries. Using the previous example, if you opened the Default View "Office 365 Licenses", select a few entries, right click and hover over Quick Actions, this will open a list of quick action options - such as the Enable/Disable Account option, which allows you to disable the entries you selected. The advantage to these Quick Actions is that you can perform an action without having to load the view that specifically contains these attributes.

		0	Edit Licenses	
		B	Audit User	
0	Enable/Disable Account	3	Quick Actions	>
0	Update Profile		Custom Actions	>
- <u>o</u>	Add to Group(s)			
0	Remove from Group(s)	୭	Kefresh	
0	Reset Password			
0	Update License(s)	L		
0	Update Mailbox Settings	-		
- i	Update Mailbox Automatic Replies	-		
0	Edit Mailbox Permissions			
0	Assign Skype Conferencing Policy			
	Contact User	-		

Custom Actions

Unlike the Basic and Quick Actions, Custom Actions are a series of actions that are user created, upon execution of a custom action each action is performed in the sequence defined, from top to bottom. Custom Actions can be run from any Default or Custom View and are not specific to the one currently open.

In order to run a Custom Action, you must first create one. To create a new custom action do the following:

1. Select the Tenant Level node within your Service Manager project and either double click on the Tenant Level node, right click the tenant level node and select Manage Custom Actions, or choose the "Open" option in the Custom Actions section of the top ribbon. This will open the

Manage Custom Actions viewer.

	Home	View	Archited	t Migrator	File Mana	ger D	rives	Public Fo	Iders
		Q	Ð						\bigotimes
Office 36	5 Co	llect Data	Update Da	ata Run Action	n Open	Create	Edit	Run	Delete
Manage	•	Rep	orts	Quick Actio	ins	Cu	stom Actio	ons	
🙆 Naviga	tor			⊑ 🕏 ▽	A	dministrat	or 🙋 P	rogress	
⊿ 📲 M0	DD Tenar	nt			^				
⊿ 🚺	Contos	o (admin@	MOD	Import External	List (CSV)		s		
	🔲 Acti	ve Director	y User 🗖						
⊳	📄 Offic	ce 365 User	s 🔁	Import			d		
⊳	🔲 Grou	ups	G ↓	Export			Utilizatio		
	📄 Offic	ce 365 Lice	nses 📕				Ounzauc	m	
⊳	Exch	nange Onlir	ne Ma 🥝	Refresh			vity		
⊳	📄 Offic	ce 365 Sites		Manage Custor	n Actions		e for Bus	iness	
	🔲 One	Drive for B	usine	manage Custor	n Actions		c ioi bus		

2. From within the Custom Action view, either right click and select the menu "Create Custom Action" option, or choose the "Create" button in the Custom Action section of the top ribbon. This will open the Create New Custom Action window.



3. Enter a name and an appropriate description for the new custom action.

Name:	Create Active Directory Users and Sync	
Description:	Create active directory users and then run Active Directory Sync.	

- 4. Select one or more actions from the left side Available Actions menu and either double click on it or click the Add button in the middle. This Available Action will now be moved to the Selected Actions menu on the right side.
 - At any time you can choose a Selected Action and either double click or click Remove to move it back to the Available Action menu.

 You may also choose a Selected Action and Move Up or Move Down to adjust the order of operations.

Available Actions:			Selected Actions:		
Active Directory Users	*		Active Directory Users: Cre	eate AD User(s)	
Update AD User(s) Delete AD User(s) Change AD User(s) Login Status Reset AD User(s) Password Pause	<	Add > Remove	Active Directory Users: Ri	un AD Sync	Move Up Move Down
Office 365 Users	*				
Groups	×				
Office 365 Licenses	*				
Exchange Online Mailboxes	≽				
OneDrive for Business	≽				
SharePoint	*				
Skype for Business	≽				

5. Certain actions will include a placeholder which **must** be configured to your specifications. For example, the Office 365 Licenses action "Assign License(s)" has a placeholder where you must define which licenses to be assigned during the execution of this Custom Action. You access the configuration by double clicking on the placeholder next to the selected action. This opens a configuration menu for that specific action.

Selected Actions:				
Office 365 Licenses:	Assign License(s)			

6. Complete the configuration for any placeholders that belong to the Selected Actions.

搀 Edit User Licenses			
 Office 365 Licenses 		^	
 M. Borner and M. Markellin, S. M. August (C., (The Bins, S. M. Bins, L., Status, S. M. Bins, L., Status, S. M. Bins, S. M.			
Report Olice (His Ren) 1993 - Linger Co Manual Association (His Manual Network) 1994 - 1995 - 1995	ОК	Cancel	

7. Once your custom action has been built to your requirements, click **Finish** to save the configuration and return to the Custom Action list.

lame:	Create Active Directory User	rs and Sync				
escription:	Create active directory users	s and then run A	ctive Directory Sync.			
Available /	Actions:			Selected Actions	5	
Active Dire	ectory Users	*		Active Directory Users:	Create AD User(s)	
Update AD	User(s)		Add >	Active Directory Users:	Run AD Sync	Move Up
Delete AD U	Jser(s)					
Change AD	User(s) Login Status		< Remove			Move Down
Reset AD U Pause	iser(s) Password					
Office 365	Users	*				
Groups		*				
Office 365	Licenses	*				
Assign Licer Revoke Lice	nse(s) ense(s)					
Exchange (Online Mailboxes	*				
OneDrive f	for Business	*				
SharePoint	t	*				
Skype for I	Business	*				

Once one or more Custom Actions have been created, you can run them in one of a few ways:

You can run a Custom Action from the right click menu after entries have been selected from any View.

	0	Edit Licenses	
	B	Audit User	
	2	Quick Actions	
🔀 Create a new custom action	3	Custom Actions \rightarrow	
Create Active Directory Users and Sync	Ø	Refresh	
a once 505 cicense assignment			

Or you can run a Custom Action from the "Manage Custom Actions" view. The benefit of this approach is that you can specify which users to run the action against either by loading a static CSV file or dynamically by selecting an existing View. In order to use this method do the following:

1. Open the "Manage Custom Actions" view by clicking the "Open" button in the Custom Actions section of the top ribbon or by selecting "Manage Custom Actions" from the tenant node's

right click menu.



2. From the Manage Custom Actions view, select the Custom Action that you would like to run and either click the "Run" button in the Custom Actions section of the top ribbon, or right click on the custom actions and select "Run Custom Action" from the right click menu.



3. The Run Custom Action dialog box will now appear. Select from the option to Load from CSV or Load from View.

\$				×
Run Custom Actio				
🔕 Please load a CSV f	e or select an existing view to continue			
Load from CSV				
O Load from View				
	Delta 🕡			
Generate Script	T Schedule	Finish	Cano	el

- Load from CSV: This option provides you with the ability to load a specific list of users for which to run the custom action against. The CSV file should be formatted as a single column which contains the Office 365 User(s) accounts to be processed. For example, user01@contoso.com. Load from CSV example file.
- Load from View: This option allows you to select an existing view (default or custom) for which to run the custom action against. The users which are displayed in the view are the only users for which this custom action will be. Please note that this can be a dynamic list of users. For example, if you create a simple custom view where "Sign-in Status equals Blocked" the list of users in this view on Monday may not be the same list of users on Friday, so the custom action may be run against a different set of users every time.
You may preview which users will be processed by the use of your custom view by simply selecting the view from the Load from View option and then clicking the **Preview Results** button.

烙 Select Exi	sting View		×
View Name:	Custom Active Directory Users View		
	aVis Technologies (įtrosman@metavistech.com) Active Directory Users ⊈ Custom Active Directory Users View Office 365 Users Diffice 365 Licenses Exchange Online Mailboxes SharePoint Online Sites OneDrive for Business Skype for Business Contacts		
Preview	Results	ОК	Cancel

This will open the preview results window, providing an overview of the users that were loaded.

Preview Results		>
ew Name: Custom Active Directory Users View	V	
User(s) were loaded		
User Account	Display Name	
😨 DBtoOD4@metavistech.com	DBtoOD4 DBtoOD4	
😨 DBtoOD5@metavistech.com	DBtoOD5 DBtoOD5	
PtoOD1@metavistech.com	DPtoOD1 DPtoOD1	
PtoOD2@metavistech.com	DPtoOD2 DPtoOD2	
😨 DPtoOD6@metavistech.com	DPtoOD6	
FStoOD1@metavistech.com	FStoOD1 FStoOD1	
Paul.Kelaita@METAVISTECH.onmicrosoft.c	Paul Kelaita	
😨 testNEWuser@metavistech.com	testNEWuser	

- Delta: The Delta option is only available when the Load from View option is selected and this action has already been run at least one time in the past against this specifically named view. When enabled, this execution of the Custom Action will not process any objects in the current view results that were previously processed in an earlier run. Using the previous example of a view which returns a list of users whose Sign-in Status is Blocked, if this view returns a total list of 4 users on Monday when the action is first run, then the next run on Friday this view may return the same 4 from Monday, plus an additional 2 users that have since been Blocked. With Delta, the custom action will know that the original 4 users were already processed and therefore it will only process the additional 2 users that were added since the last time the action was run.
 - You may preview which users will be processed by the use of your custom view by simply selecting the view from the Load from View option and then clicking the **Preview Results**

button. If this custom action has already been processed against this view at least once in the past, then you may also preview the Delta results by clicking the **Enable Delta** option. With Delta enabled, the Office 365 User accounts listed in red are the ones that would not have been processed during the next delta operation, while those listed in green would have been processed.

6 User(s) were load User Account Allie8@MOD2 AzizH@MOD2 DavidL@MOD FabriceC@MOD Voltan@MOD2 RobY@MOD26	ted 68945.onmicrosoft.com 68945.onmicrosoft.com 268945.onmicrosoft.com 268945.onmicrosoft.com 88945.onmicrosoft.com	Display Name Alie Bellew Aziz Hassouneh David Longmuir Fabrice Canel Julian Isla Rob Young	
User Account	68945.onmicrosoft.com 68945.onmicrosoft.com 268945.onmicrosoft.com D268945.onmicrosoft.com 88945.onmicrosoft.com	Display Name Allie Bellew Aziz Hassouneh David Longmuir Fabrice Canel Julian Isla Rob Young	
Aliie8@MOD2 AzizH@MOD2 DavidL@MOD FabriceC@MO Julian1@MOD2 RobY@MOD20	68945.onmicrosoft.com 68945.onmicrosoft.com 268945.onmicrosoft.com ID268945.onmicrosoft.com 88945.onmicrosoft.com 68945.onmicrosoft.com	Allie Bellew Aziz Hassouneh David Longmuir Fabrice Canel Julian Isla Rob Young	
AzizH@MOD2 DavidL@MOD. FabriceC@MO Julianl@MOD2 RobY@MOD26	68945.onmicrosoft.com 268945.onmicrosoft.com ID268945.onmicrosoft.com 268945.onmicrosoft.com 58945.onmicrosoft.com	Aziz Hassouneh David Longmuir Fabrice Canel Julian Isla Rob Young	
DavidL@MOD. PabriceC@MO Dulianl@MOD2 RobY@MOD2	268945.onmicrosoft.com ID268945.onmicrosoft.com 268945.onmicrosoft.com 58945.onmicrosoft.com	David Longmuir Fabrice Canel Julian Isla Rob Young	
PabriceC@MO Pulianl@MOD2 PobY@MOD2 PobY@NOD2 POBY P POBYP POBYP	ID268945.onmicrosoft.com 268945.onmicrosoft.com 58945.onmicrosoft.com	Fabrice Canel Julian Isla Rob Young	
	268945.onmicrosoft.com 58945.onmicrosoft.com	Julian Isla Rob Young	
ProbY@MOD26	58945.onmicrosoft.com	Rob Young	
		1	
	-		

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.

\$	—	<
Run Custom Actio	n	
O Load from CSV		
Load from View	Corporate Office/Active Directory Users/Custom Active Directory Users View	
	🗌 Delta 🔞	
📑 Generate Script	Schedule Finish Cancel	

5. Once the Custom Action has finished running, you can select the View Logs option from the pop-up window notifying you of the completion of the process, or you can select to view Logs later by selecting "logs" from the View section of the top banner.



Import Certificate

When working with an on-premises LDAP server, certain operations like AD password resets are required to take place over a secure connection (SSL). Due to this requirement, our actions will need access to your LDAP certificate. If LDAPS is not already configured in your environment, please talk with your Active Directory Administrator or consider reading the following Wiki article for guidance: http://social.technet.microsoft.com/wiki/contents/articles/2980.ldap-over-ssl-ldaps-certificate.aspx.

Note: Without LDAPS, you will be able to perform all AD operations with the exception of creating users or updating user passwords.

Administrator will support the detection and import of LDAP certificates. When you attempt to perform the first operation that requires a valid certificate, you will receive a message in the log indicating that a certificate is required and has been located. At this point, restart the software and attempt this operation again.

Import External List (CSV)

Import External List will allow you to pre-create a CSV file containing a list of users and associated attributes. Once imported, you can then perform either a Quick or Custom Action against a selected set of these users.

To use this option:

1. Right click on the Tenant level Office 365 node in the Navigator. Choose the "Import External

List (CSV)" option.



- 2. Locate and then select your CSV file and click **OK** to open it within a new Service Manager view.
- 3. You may now select the users from this view and perform quick or custom actions against

them.

🖺 Progress 📝 Create-Cloud/Jear-Template.cov 🕄											
5 user(s) were loaded											
User Account	First Name	Last Name	Display Name	Job Title	Department	Office	Office phone	Mobile phone	Fax number	Street address	City
😤 matana indiana any indiana any indiana amin'ny fisiana amin	Mario	Miller	Mario Miller	Accounting Clerk	Sales	Region South R	202-986-7864	719-867-0652	218-525-7785	2745 School Str	Baltimore
A subject with the subject of the	Evelyn	Adams	Evelyn Adams	Account Execut	Sales	Corporate Hea	757-627-8703	913-908-9703	979-314-1334	4269 Derek Drive	Stone Creek
Provident and the second se	Ronald	Shutt	Ronald Shutt	Account Execut	Sales	Corporate Hea	757-627-8703	503-399-4811	979-314-1334	4269 Derek Drive	Stone Creek
	Charles	Baron	Charles Baron	IT Support	Operations	Corporate Hea	757-627-8703	925-205-3101	979-314-1334	4269 Derek Drive	Stone Creek
😤 ins interdigit unservers	Jeannie	Handley	Jeannie Handley	Help Desk Agent	Operations	Region West Re	253-474-8705	407-365-3592	305-949-5557	1817 Hillcrest D	Tacoma

Below you will find example templates that can be used to Create new Active Directory Users or Create new Office 365 Cloud Users. If you would like to create your own CSV file, you can do so simply by selecting one or more users from your Active Directory Users or Office 365 Users View and choosing the Export to CSV option.

Download the new Active Directory User example template: Active Directory User Template Download the new Office 365 Cloud User example template: Office 365 Cloud User Template

Reports

This section provides an overview of the available reports.

Collect Data

The first step to using 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 Administrator ribbon. This will load

the Create New Report project configuration.



2. Enter a project name where your Administrator data will reside.

6	—	n x
Create New Reports Project		
8 Please select at least one Service to load		
Project Name: * Corporate Reports Project		

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.

• On premise Services		
🗌 Include SharePoint 🛛 🔞		
Central Admin URL: *	Enter your Central Admin URL	Connect 🕡
	Load from CSV or Browse <type file="" or="" select=""></type>	
	Please load CSV file or browse objects Include sub-site data	

 \circ Office 365 Services - If you wish to include one or more Office 365 Services, please populate

the required values in this section. Global Administrator is required.

Login: *	Enter your	Enter your Global Administrator user name and click Connect						
Services								
🗌 Include T	enant Data (U	sers and Gro	oups, Mailboxes, Licenses) 🛛 🔞					
Include S	harePoint Onl	ine 🔞						
Load fr	om CSV or	Browse	<type file="" or="" select=""></type>					
Please lo Inc	ad CSV file or ude sub-site o	browse obj data	iects					
Include (neDrive for B	usiness 🤇	0					

- Login Enter your Global Administrator user name and click Connect to authenticate with the password.
- Include Tenant Data Enable this option to include User Profile, Group, License and Exchange Online data
- Include SharePoint Online Enable this option to include one or more SharePoint Online Site Collections.
- Include OneDrive for Business Enable this option to include one or more OneDrive for Business sites.

\circ Advanced Options

Ð	 Advanced Options 			
	Send notification	Admins, Owner, Current		0
	Save to SharePoint:		Select	Library

- 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.

		\times
Create New Reports Project		
Configure the settings below to create your first set of reports		
Project Name: * Corporate Reports Project		0
Configuration		^
* On premise Services		
Include SharePoint 🕡		
Central Admin URL: * 1 Web Applications Connect	0	
Load from CSV or Browse C:\Users\spsadmin\Desktop\Collec You've selected 1 sites ☑ Include sub-site data		1
Office 365 Services		
Login: * Connect	0	
Services		
🗹 Include Tenant Data (Users and Groups, Mailboxes, Licenses) 🛛 🔞		~
Generate Script Schedule Finish	Cance	el –

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**

s Navigator		👔 Administrator 🔫 Progress
Corporate Si Alexander Dorofeev		Reports
> iiii Lists		Dashboard
✓ S Janna Trosman > m Lists		Content
 Subsites ✓ S Joe Fedorkov 		Activity
> 📶 Lists > 📅 Subsites		Correlation
 S Tenant Administration Lists 		
 Subsites Corporate London 		
Corporate Reports Project		
5 1 Site Collections	😨 Create Backup	
	😨 Update Data	
	Analysis	>

• Press the Update Data button in the Reports section of the ribbon.

	Hom	e View	Architect	Migrator	File Manage	r Drives	Public F	olders	Security Manag	er Term Stor	e Manager	Informant	Administrator
	Office 365	Collect Data	Update Data	Run Action	Open	Create Edit	Run	Delete	Export to PDF	→ csv Export to CSV	→X Export to Exce	el Logs	
	Manage	Rep	oorts	Quick Action	s	Custom A	tions			Export		View	
Choos	se Finis	h to rı	ın it no	w.									
\$							_		×				
Collect	LDAP cre	dentials f	or domain	: Contoso									
Domain	Controller:	BAMPLES-	ĸ										
Login:		(monand)	matavistach	com.									
Passwor	d:	•••••	•••••										
🗌 Do N	lot Show Aga	iin											
						<u>F</u> inish		Cance	ł				

Load Data

3.

After the data collection process has been completed, the Administrator Reports area should automatically populate with the first report. If you wish to load any other data into the reports area do the following:

1. In the Navigator pane, expand the Administrator project that you wish to load.



- 2. Select and then double click the specific location you wish to load. This could be the first level folder (if the collection included multiple site collections or OneDrives) or you could navigate lower to any site, list or OneDrive beneath that first level.
- 3. The first report will load into the Reports Area.
 - **NOTE:** this may take a few seconds or longer depending on the amount of data that was collected.



To configure how the data is displayed, there is a menu of options on the right hand side of the top toolbar.

NOTE: not all views are available for each report. Refer to the Reports section below for additional information and availability.

👔 Administrator 🖷 Progress	╘╘схү⊓⊓

Sub-site data: A toggle used to include or exclude the sub-site data from the reports.

Let All Data Points: This generates a bar graph visualization that includes all data points.

Top 10 Data Points: This generates a pie chart visualization that includes the Top 10 data points.

Trending Data: This generates a line graph used for displaying trending data.

The Analysis section can also be tailored to the specific data that you wish to display. For example, if you are viewing the Documents Extensions report and wish to see the breakdown of all *.doc files, select this portion from the graph and the Analysis will update to show only the information about those documents.

Analysis	Site	List/Library	Count (doc)
URL/Path: https:// .sharepoint.com/sit	Corporate	Documents	41
Created At: 2014-04-03 01:59 PM	Corporate	III Pipeline	7
Total Size: 300.74 MB	Corporate	Project Documents	17
Total Number of Documents: 264	Corporate	Projects	3
Average Item Size: 1.14 MB			
< >			

Export Data

The ability to export data is available within the Export section of the ribbon. Reports that contain a visual graph and an analysis list are exported to PDF format, while reports that contain just an analysis list are exported to a CSV file. The Export to Excel function can export all reports into a multiple worksheet Excel file with sub and trending data.



Exporting to PDF

To export a visual report to a PDF file do the following:

- 1. First select and load the report.
- 2. Press the Export to PDF button located in the ribbon.
- **NOTE:** "Export to PDF" is not an available option for any of the Dashboard reports.

	Home	View	Architect	Migrator	File Manage	r Drive	s Pu	ublic Folde	ers S	ecurity Manager	Term Store	Manager	Informant	Administrator	Backup	Help
	265 0			Run Action						→ Evenent to RDE	→ csv					
Once	505 C		opuale Dala	KUN ACTION	Open	Create t	cuit	KUN D	Pelete	Export to PDF	Export to CSV	Export to Excer	Logs			
Manag	ge	Repo	orts	Quick Actions		Custor	m Actions	5			Export		View			

Export to CSV

To export an analysis only report to a CSV file do the following:

- 1. Select and load the report you wish to export.
- 2. Press the Export to CSV button located in the reports section of the ribbon.



Export to Excel

To export all the analysis data into a single, multi-worksheet Excel file (*.xlsx) do the following:

1. Click the the Export to Excel option located in the ribbon.

Ho	ne View	Architect	Migrator	File Manage	er Drives	Public Fo	olders	Security Manager	Term Store	Manager	Informant	Administrator	Backup	Help
Office 365	Collect Data	Update Data	Run Action	Open	Create Ed	iit Run	Delete	Export to PDF	Export to CSV	Export to Excel	Logs			
manage	Kep	iona -	Quick Actions		Custom	Actions			export		VICVV			

 In the Export to Excel window, select whether you want to export to a local location, or save to SharePoint - and then select the respective location or library.
 Export to Excel

Export to:	C:\Users\spsadmin\Desktop\export data to excel.xlsx	Browse
Save to SharePoint:		Select Library

3. Configure the options for which data to include within the reports.

Diotisein
Select Library

4. Click **Finish** to begin the export process.

Actions

Beyond just reporting and visualizing the data, Administrator provides a full assortment of real-time actions. Some actions are performed against your selected location (i.e. change version settings) while others may be used to trigger a separate operation within Essentials, like scheduling a Backup job.

The list of available Actions is determined by the license key, so some of the Actions described below may not be included in your version. For example, if you want to run a deeper security report, then Essentials Security Manager needs to be included in your license.

Actions can be run from either the Analysis portion of any report or by simply right clicking on that location in the Administrator project. Some Actions also support multi-select so you can run it once against several objects or locations.

Administrator's list of Actions include:



- View in Browser: This will open your default Internet Browser and load your selected location.
- **Create Backup** (*when licensed*): Essentials Backup will open and pre-populate the URL with the site selected. See the Backup section for additional information.

- Change Content Approval: Select one or more lists and change the Content Approval setting to either Yes or No.
- Change Checkout Required: Select one or more lists and change the Checkout Required setting to either Yes or No.
- Change Versioning: Select one or more lists and change the Versioning setting to either No Versions, Create Major Versions, or Create Major and Minor Versions.
- Inherit Permissions (when licensed): Select one or more lists and set inheritance to "Inherit Permissions" or "Stop Inheriting Permissions" from the parent. If you select "Stop Inheriting Permissions" this will remove any unique permissions from the selected lists. See the Essentials Security Manager section for additional information.
- Grant Permissions (when licensed): Select one or more lists and the Grant Permissions window will open. From here, you can grant choose to Add users to a SharePoint group, or Grant users permissions directly to users or groups across the selected locations. This will make permissions unique on any location that currently inherits from their parent. See the Essentials Security Manager section for additional information.
- Site Content Reports (*when licensed*): The Site Content Report dialog will open, pre-populate with the selected Site URL and allow for the creation of a content inventory report.





 Permissions given to User/Group (when licensed): A real-time security report is run against the defined user or group. See the Essentials Security Manager section for additional information.

- Users with permissions to Object (when licensed): A real-time security report is run detailing all users who have access to this selected object. See the Essentials Security Manager section for additional information.
- Orphaned Users (when licensed): A real-time security report is generated detailing the list of all orphaned users in this location. See the Essentials Security Manager section for additional information.
- Permission Inheritance (when licensed): A real-time security report is run displaying a list of all inherited or unique permissions within this location. See the Essentials Security Manager section for additional information.
- Permission Invenotry (when licensed): A real-time secrutiy report that details permissions related to the selected site collection, site or OneDrive for Business. Permission options include site, list and item permissions, inherited objects as well as group membership.
- Audit Users: Allows you to audit your list of users for a specified site within a specified date range.
- Administrator

a 👔 Corporate HQ	2	0	Jser Ac	tivity
A Sp Corp	Create Backup			
🖌 📻 Š 🗐	Update Data		gs	
⊳ <mark>s</mark> ss	View In Browser			
⊳ 5	Analysis		·]	
⊳ 5	Administrator			Create Subsite
👂 👔 Corporaterna	ong			Create List/Library
🕞 👔 Corporate Site	2			create clob clotaly

- 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, Entra ID, Exchange Distribution, and Office 365 Groups.
- **Groups by Members**: Displays the total number of discovered members and type of each group found during the latest collection.
- **Groups Accepting External Email**: Displays the list of Exchange Distribution groups that are configured to receive both Internal and External emails or just Internal emails.

Exchange Online Reports

Each section displays the current list of available reports that you can view by selecting the radio button next to the dashboard or report that you wish to load. A description of each report can be found below.

- Mailbox Size: Displays the list of users with mailboxes and their total size. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.
 - **NOTE:** Service Manager license required for Quick Actions.
- Mailbox Items Count: Displays the list of users with mailboxes and their total item count. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.
 - **NOTE:** Service Manager license required for Quick Actions.
- Mailbox Quota: Displays the list of users with mailboxes, their mailbox quota size, used size and the ratio expressed in percentage. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.
 - NOTE: Service Manager license required for Quick Actions.
- Audit Status: Displays the list of users with mailboxes and whether Auditing is enabled or disabled. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.
 - **NOTE:** Service Manager license required for Quick Actions.
- Archive Status: Displays the list of users with mailboxes and whether Archiving is enabled or disabled. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.

NOTE: Service Manager license required for Quick Actions.

- On Hold Status: Displays the list of users with mailboxes and whether their mailbox is configured for an In-place hold, litigation hold, both or neither. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.
 - **NOTE:** Service Manager license required for Quick Actions.

- Mailbox Forwarding: Displays the list of users with mailboxes and whether their mailbox is configured for forwarding. If it is enabled, the mail contact that is configured will be displayed. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.
 - **NOTE:** Service Manager license required for Quick Actions.
- Send On Behalf: Displays the list of users with mailboxes and whether 'Send on Behalf' is configured. If it is enabled, the user(s) with whom you can send on behalf of this mailbox will be displayed. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.
 - **NOTE:** Service Manager license required for Quick Actions.

SharePoint and OneDrive for Business Reports

Each section displays the current list of available reports that you can view by selecting the radio button next to the dashboard or report that you wish to load. A description of each report can be found below.

Available Reports

Dashboard	*
Content Utilization	
○ Site Activity	
○ OneDrive for Business	
Content	*
Activity	*
Settings	*
Correlation	¥

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:
 - $\,\circ\,$ Collection Statistics specific to the location.
 - $\,\circ\,$ 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.
 - $\,\circ\,$ Total Document Count between sites and lists (Top 10).

- \circ Total Document Size between sites and lists (Top 10).
- \odot 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:
 - $\,\circ\,$ Collection Statistics specific to the location.
 - $\,\circ\,$ Site Distribution changes between the most recent and prior data collection.
 - $\circ\,$ Content Growth represented in a trending report. Each data point in the trend line represents a prior collection.
 - \circ Documents Size displaying the Top 10 largest OneDrives based on storage consumption.
 - \circ Documents Extensions displaying the Top 10 file extensions by file count.
 - Shared With Users providing a view of the Top 10 email domains with which some sharing has been established (internal or external).
- Site Activity: A dashboard designed to provide a high level overview of Site Views (Microsoft refers to these as "Hits") for SharePoint Sites in Office 365. Please note that at least 2 data collections need to be completed before some of the information can be visualized. The panels represent:
 - $\,\circ\,$ Collection Statistics specific to the location.
 - $\,\circ\,$ Activity Distribution changes between the most recent and prior data collection.
 - Total Site Views displays the trending of the total number of site views. Each data point representing the aggregated total number of views during that collection time.
 - \circ Trending Site Views shows the number of views specific to that collection period.
 - \circ Most Viewed Sites is an aggregated report of the Top 10 most viewed sites from this location.
 - $\circ\,$ Most Recently Viewed Sites is the Top 10 most viewed sites during this specific collection period.

Content

The Content section contains a series of reports specific to the content within this location.

- **Checked Out Document Count**: Displays the number of checked out files (at the time of collection) per location. Analysis displays the site, library and checked out file count.
- **Content Distribution**: Displays the ratio between the total size of all most recent documents vs the total size of all previous documents versions. Trending view and analysis is not available for this report.
- **Content Growth**: Displays the trending view of the content growth for all data collections. The analysis lists the size per location during the last data collection. All data points and Top 10 data points views are not available for this report.
- **Documents Count**: Displays the total number of documents per library.

- **Documents Extensions (by Count)**: Displays the total number of documents with a given file extension by location. Select a portion of the graph to display the analysis specific to that extension. Trending view is not available for this report.
- **Documents Extensions (by Size)**: Displays the total combined size of all documents of each found file extension by location. Select a portion of the graph to display the analysis specific to that extension. Trending view is not available for this report.
- **Documents Size**: Displays the total size of each site or list in both the visual and analysis views.
- **Documents Size Ranges**: Displays the total number of files per size range. Size ranges are automatically generated based on the information gathered during the process. Trending and analysis views are not available for this report.
- **Hierarchy Report**: Generates a report of the site collection(s), sites or OneDrives for Business composition including number of sites, lists, items, size and more. This report does not contain a visual component, only Analysis and therefore can only be exported to a CSV file.
- **Size Distribution**: Displays the distribution of content based on size between lists. Trending view is not available for this report.

Activity

The Activity section contains reports specific to the activity of the users, content or structure of this location.

- Site Views (Total): Displays the total number of views per site (Microsoft refers to these as "Hits"). Please note this report is only supported for Office 365 data collections.
- Site Views (per Collection): Displays the number of views per site (Microsoft refers to these as "Hits") for only this data collection period. Please note this report is only supported for Office 365 data collections.
- **Content Activity**: Displays the days since last activity for each site or list throughout the location where the larger bar represents longer time since the last activity. Activity in this report is defined as either the creation or modification of content. Trending view is not available for this report.
- **Content Type Usage**: Displays a list of all used Content Types in this location and the number of items that have that type applied. Trending view and analysis are not available for this report.
- User Activity: Displays a list of all users who have activity in this location and the number of items they modified. Activity in this report is defined as either the creation or modification of content. Trending view and analysis are not available in this report.

Settings

The Settings section contains reports detailing the settings or configuration of a number of objects located within this location.

- **Content Approval**: Displays the number and names of lists that have Content Approval set to Yes or No. Trending view is not available for this report.
 - Essentials for Office 365 User Guide 458 Administrator Tab

- **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 Essentials 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.



Start recording user and admin activities

- As of March 2016, Microsoft only stores 90 days worth of audit logs so any search performed through our software will only go back that far.
- As of March 2016, Microsoft only returns up to 5000 events per search. If more than 5000 events exist, the report will display the first 5000 starting with the most recent event.
- Our search retrieves information from the system-provided Microsoft audit logs so there is no way for the software to update, edit, remove or verify the actual events themselves.

Converting Old Admin Projects

Due to a significant update made in the both the data collection and presentation process, the format in which the data is stored needs to be changed as well. Any Admin projects created prior to the Februrary 23, 2015 version will need to be converted. This is a one time operation and any project already converted or any new project created after this point will be stored in the newer format and therefore the conversion will not be necessary.

The conversion process is fully automated and very simple to accomplish following the steps below:

1. When accessing an older format that needs to be converted the tool will prompt you with the dialog below.



2. Click Yes to proceed.

- 3. The conversion process will begin, depending on the amount of data it may take anywhere from a few seconds to a few minutes to complete.
- 4. When the conversion is complete, you will receive a confirmation message and you can now load the project as usual.

User Impressions

User Impressions is a view in the Service Manager application (license required) that displays information about a specific user's consumption and usage across various services within their Office 365 tenant. More than just a view, some parameters can be edited and all information can be exported to an Excel file or generated using a script.

To generate a User Impression, please follow these steps:

- 1. Open any view that contains the user whose impression needs to be generated (for example, Office 365 Users)
- 2. Select the user, right click and select User Impressions.



3. Enter your Global Admin user and password in the browser popup when it appears and click **Sign In.**

4. After a few moments, the User Impression should appear populated with this selected user's information.



You may also generate the User Impression report using a Script or Schedule by clicking the appropriate button at the bottom of the dialog. Due to the APIs that are used, it is recommended that you use the **Generate Script** function on this dialog first, so the required refresh token can be made available. Once the refresh token is available, it can be used for all other User Impression scripts until it expires (approximately 6 months).

Essentials -cmd impressions -userLogin user@contoso.com -refreshToken

AQABAAAAAADRNYRQ3dhRSrm-8K-adpCJnUq4kfSrydu9vNSAg6gs6fbCYFr5RKd776shS5nlLxbJAGHKAv-06UIfkH0qY1vNVIRSnyDtl7i3QHoZhe2CunEBIAy85-BfdiobXEKL6pTxzoZ1FW049-dkvdvXc0gJG0N-

eqNG8FDezEMX4EL3hO3mtjl4bNhOQm2eJ41i7Cb21BhtWly12NpiipPH9x5LXqndsVvh5cRwN1AjCggyCkz NiyHKfCxo6b7QQpH0tz4Fmbo3QjLoHFPQ6zk7xkgzkMF6gv_V-

phMIa2kyqTSsxJe1lgIGuBw3MiPuHbH8g0qulDkt0liII3CHAj1-

vN0HglaUWbl3hytcI_lVK2VYKIITaBv1MALjVHut5lFpsLpLkIKPiJxz8HoNxXUKr9lEtt5MSZ9ZcYmHzyFOS3xr 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.

Backup Tab

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 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 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.

Home View File Manager Drives Security N	Aanager Term Store Manager Governance Administrator Backup Help	
SharePoint SharePoint Concert To	Image: Constraint of the sector of the se	
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The picture above represents the default arrangement for these panes.

NOTE: We have found this to be the ideal configuration, but the individual panes may be rearranged, minimized or maximized.

Navigator Pane

The objects displayed in the Navigator area are limited to sites, sub-sites, lists and libraries. Doubleclicking on any of the sites, lists or libraries will trigger the application to display the content for that object in 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.

7 Backup 📑 Contents

< 1	- 100 >							
	Project Name	Source	Target	Туре	Started	Finished	Summary Record	Duration
8	SharePoint	https://metavistech-admin	SharePoint Backup-Jul-29	Backup SPO	2020-Jul-29 11:01:29 EDT	2020-Jul-29 11:11:12 EDT	Files(0/0/0/0), Fold	9 m 43 s 147 ms
Ø	OneDrive B	111evelyneadams@metavi	OneDrive Backup-Jul-30-2	Backup OneDrive	2020-Jul-30 13:27:02 EDT	2020-Jul-30 13:27:53 EDT	Files(0/0/0/0), Fold	51 s 708 ms
0	OneDrive B	111jeannieehandley@meta	OneDrive Backup-Jul-30-2	Backup OneDrive	2020-Jul-30 13:27:54 EDT	2020-Jul-30 13:28:39 EDT	Files(0/0/0/0), Fold	44 s 442 ms
\bigcirc	OneDrive B	2test@metavistech.com (B	OneDrive Backup-Jul-30-2	Backup OneDrive	2020-Jul-30 13:29:35 EDT	2020-Jul-30 13:30:15 EDT	Files(0/0/0/0), Fold	39 s 971 ms
0	OneDrive B	Admin@metavistech.com (OneDrive Backup-Jul-30-2	Backup OneDrive	2020-Jul-30 13:30:16 EDT	2020-Jul-30 13:31:15 EDT	Files(7/0/0/0), Fold	59 s 130 ms

Column Title	Description
lcon	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.

M & U X & 700

Project Name	The Project Name. If no project name was assigned this column will be blank.
Source	The source user or path.
Target	The target user or path. Whether the backup is a Full or Incremental backup will be indicated in Brackets.
Туре	The type of Backup performed.
Started	The date and time the operation was started.
Finished	The date and time the operation was completed.
Summary Record	Is a summary of the content that was backed up - this includes the successful, warning, and failed states for migrated content, as well as size and duration information.
Duration	This is the time spent on the Backup.

Advanced Search

End users can perform an advanced search within their hyper backup of SharePoint and OneDrive projects stored on File Shares, Network Drives, Azure, and AWS S3. The advanced search option is available for single snapshots and entire backup projects.

1. You can access the advanced search by right clicking on the hyper backup project and selecting



2. This will open the Advanced Search window, which will allow you to enter your specific search criteria, click **Search** to complete the search.

Advanced Search			>
File Name			
Contains	*	File Name	Value
Created At			
Click on Date Button		No date set	Click button to set date.
		No date set	Click button to set date.
Modified At			
Click on Date Button		No date set	Click button to set date.
		No date set	Click button to set date.
Created By			
Created By Value			
Modified By			
Modified By Value			
Search			Cancel

A fast search option is also available when you select a hyper backup snapshot that has the search option available. This option searches for file names with the "contains" condition.

🕙 Backup Navigator		୍ ∣	O ⁄	9 🗗	\mathbf{X}	Ø	€	-	• [' 🗆
> 🝊 Corporate Backup										
> S Document Backup										
When the search has completed, a erm Store Project View Image: Store Project View Image: Store Project View Image: Store Project View	Search Tab appears with the	searc	h re	sults.						
Search results from backup 'asdasdasdsadas':										
Name	Path			S	nash	not				
GD_OD_mapping.csv										

Retention Policies

This section provides an overview of setting, running, and scheduling Retention Policies for backups.

Retention Policies are accessed through the Backup Navigator pane.



Set Retention Policy

Do the following in order to set a Retention Policy for a Backup:

1. Select the Retention Policy button on the Backup Navigator ribbon, and select the "Set Retention Policy" option.

Backup Navigator	<enter backup="" in="" search="" to="" value=""> \odot</enter>	💁 🔑 🔂 🏹 🖉 🕄 🔂 🕇 🗖
> 🝊 Corporate Backup		Set Retention Policies
		Run Retention Policies
		Schedule Retention Policies

2. Select the retention policies you want to apply to all your backups, and select Finish.

			Ц	X
lass Retention Policy Properties				
Changing Retention Properties for all backups				
Keep Full Backups for 60 days.				
Keep Incremental Backups for 14 da	iys.			

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.

🙆 Backup Navigator	<enter backup="" in="" search="" to="" value=""> 🥘</enter>	🛽 🔎 🗗 🗙 🥝 🕄 🔂 🗝 🗖
> 📥 Corporate Backup		Set Retention Policies
		Run Retention Policies
		Schedule Retention Policies

2. Select the outdated backups you wish to delete from this backup project, and select Finish.

•			×
Apply Retention Policy			
These backups will be deleted from project Corporate Backup			
No outdated backups found.			
	Einich	Cancel	
	FINISN	Cancel	

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**.

	pplyRetentionPolicy -projects "(Corporate Backup"	
			<u>`</u>
Copy to Clipboar	d 🙆		
Schedule Op	tions		
Corporate Ba	ckup Schedule		
Daily	Start Time: 1:58 PM 🚔	Every Day	
Weekly	Start Date: 6/19/2019 🜩	○ Weekdays	
Monthly		O Every 1 Day(s). (e.g. 1-99)	

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.

🕭 Conf	irm Backup Delete		×
	Are you sure you want to delete the Backup name	ed 'Corporate 2016	backup'?
		<u>1</u> 05	140

- 4. On the Summary pop-up, click Ok.
- 5. Restart the Essentials Console.
- 6. Go to the View tab within Essentials and Select Scheduler.

Home	View	Architect N	ligrator	File Manager	Drives	Public Folders	Security Manager	Term Store M	anager Inform	ant Administrat	or Backup	Help
S In SharePoint		📃 Lists/Librari	es 📃 Ir	herited Content Types	Colu	umn Groups	Permissions	Web Parts	Workflows	🚷 Term Store	🌠 Log Viewer	v
Contents	봄봄봄	📃 Hidden Lists	н 📃 н	idden Content Types	🔲 Inhe	rited Columns	Permission Level	Ist Views	📴 InfoPath Forms	Look and Feel	👩 New Window	- 91
🕜 Refresh	Show Site Map				📃 Hid	den Columns	Sp Permission Groups	File System	🔆 SPD Objects		🗟 Reset Panes	Scheduler
View				Architect				Mig	rator		Misc	

7. Select the Task that you are moving and choose the **Edit Script** option from the bottom menu.

						~
Operation Name	Time of Last Run	Time of Next Run	Status	Туре	Schedule	
SharePoint Backup Architect Task	1/25/2018 11:14:00 AM	1/25/2018 12:14:00 PM	Ready			
Update Backup Corporate Archite	1/25/2018 10:59:00 AM	1/25/2018 11:59:00 AM	Ready			
M Due M Deeble Disable D		Gil Defee	ь. (°й ь	lister (ii) Ch	an an Calendula	Class
Enable/Disable	an script	En Kerres	n 🔤 F	istory 🔤 Ch	inge schedule	Close

- **i** NOTE: If your Backup Job was created before July 20, 2015 Select *Script* to edit the Script. If your Backup Job was created on July 20, 2015 or after select *Edit Script* to make changes to the Script.
- A script window will appear. Within the script find the portion that refers to the project folder location (for example: "C:/Users/username/Essentials/.metadata/tasks/SharePoint-Backup.cmd"), and change the location to where you want the Backup to be saved. Close the script window once you have made your changes.
- 9. Go to the location of the original Backup and Cut and Paste the entire Archive Folder from the old location to the new location.
- 10. Restart Essentials and then use the steps for Importing Backup Archives to link the Tool to the new Backup Location.

11. Run the Backup from the Scheduler by selecting the job and clicking **Run** in order to make sure the Backup runs without error.

peration Name	Time of Last Run	Time of Next Run	Status	Туре	Schedule	
harePoint Backup Architect Task	1/25/2018 11:14:00 AM	1/25/2018 12:14:00 PM	Ready			
pdate Backup Corporate Archite	1/25/2018 10:59:00 AM	1/25/2018 11:59:00 AM	Ready			

If you do run into any errors contact Support and we will help you with any issues.

Requirements for Storage

Essentials uses the Apache Derby Database when creating a backup on File System Storage. It's an open source relational database implemented entirely in Java. No extra tools or services are required to be installed. (https://db.apache.org/derby/)

For Azure Storage, Essentials uses the Table Storage Service - a NoSQL key-value store for rapid development using massive semi-structured datasets. In order for this to work, you must have the Table Storage Service. (https://docs.microsoft.com/en-us/azure/storage/tables/table-storage-quickstart-portal)

For Amazon S3 storage, Essentials requires you to have the Amazon DynamoDB service. Amazon DynamoDB is a key-value and document database that delivers single-digit millisecond performance at any scale.

(https://aws.amazon.com/dynamodb/)

If you use Amazon S3 storage with Custom End points in Essentials with Amazon DynamoDBLocal service, then you do not require an amazon DynamoDB. This is because the DynamoDB databases are placed locally on the file system and synchronize with backup project located on Amazon S3 storage. (https://docs.aws.amazon.com/en_us/amazondynamodb/latest/developerguide/DynamoDBLocal.htm l)

Import/Export Backup Archives

This section provides an overview of importing and exporting backup archives.
Exporting Backup Archives

Essentials 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.

•		×
Export Backup to a zip archive		
Export to: C:\Users\		
Create Multi-Volume Archive		
Volume Size: MB V		
Use password		
Password:		
Confirm Password:		
📑 Generate Script 📑 Schedule Finish	Cance	el

3. Press Finish to Start the Export.

Importing Backup Archives

Essentials Backup allows users to export/import projects to/from external archives.

To Import a Backup Archive from Local storage:

1. Select "Import from Local" from the Backup Ribbon.

	Home	View	Archite	ect N	Vigrator	File Manager	Drives	Public Folders	Security Manage	r Term Store Manager
SharePo	int		To Cloud					Project Si		🧭 Refresh Backup Navigator
Sharero		Storage	Storage	opulic	Location	Local	Cloud	in Project St	initiary Logi	
Connect	То		Backup		Restore	A	rchive	Repo	ort	View

2. Select the type of Archive (ZIP would be generated using the Export Backup Archive feature) and give your project a Name.

Þ nport Backı	p Project				
() ZIP	O Unzipped Folder				
Import from:	C:\Users\spsadmin\Desktop\corporate	back	cup2(016\AR	
Project name:	Corporate 2016				
					-
	Finish			Cance	el

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.

\$				
Name your proje	ct			
Project name Corpo	ratte 2016			
(Back	Nexts	Finish	Cancel	1

- 3. In the next window select your cloud storage provider where the backup is stored.
- 4. Press the ... button and enter the appropriate information to connect to your storage location (see the Connecting to Cloud Storage section for details on how to connect to your cloud storage location).

\$					\times
Select pro	ovider				
Where you	r backup sto	red			
Location	d. See a	the second	the Coupe)
a,	Import fro	m Amazon S3		 	
<	Import fro	m Azure			
L				 	
	< <u>B</u> ack	Next >	<u>F</u> inish	Cance	

- 5. Locate and select the archive to load within the appropriate container or bucket
 - The archive to select should follow the naming pattern "ARCHIVE-projectName". Do not select its parent folder nor the archive folder that ends with _archiveData (i.e. ARCHIVEprojectName_archiveData).
- 6. Press Finish to Import.

Connecting to SharePoint and OneDrive for Business

The initial step in using the platform is to connect to your SharePoint/Office 365 environment. It supports multiple connection approaches and dozens of different authentication schemes. The steps to connecting to your SharePoint/Office 365 environment will vary depending on the Connection Type you select. See this topic's subsections for more details on the different connection types.

Connecting to SharePoint Site or Site Collections

Quest Essentials is optimized for migrations to and from Microsoft 365. While it used to be possible to migrate to/from SharePoint on premises, Quest recommends that you use Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect to SharePoint Sites and/or Site Collections then select SharePoint Site or Site Collection follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select SharePoint Site or Site Collection (On-premises or Office 365) as your Type. You have the following options when completing the URL portion of this screen, skip ahead to step 5 if you know the URL of your Central Admin site. If you choose to use the Discover Site Collections button, then continue to step 3.

۲	SharePoint Connection Wizard –		×
SharePoint Connection W	/izard		
Please Enter Project Name			
			_
Name			(2)
Type SharePoint Site or Site (Collection (On-premises or Office 365)	~	0
URL		~	0
Or Discover Site Collection	15 💿		
(Central Admin access is	s required to view and select existing site collections)		
Load Entire Sub-Site Struct	ure (Slower)		
Load Entire Sub-Site Struct	ure and Objects (Slowest) 🔞		
			_
	Finish Ca	ancel	

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.

Central Admin URL: http://s-sp16-xprod:1	1000/default.aspx	Connect
Server Farm Admin: SHAREPOINT\system	1	
Connected	to Central Admin URL	
Web Application Name	URL	
Corporate 2016	http://s-sp16-xprod:2016/	
SharePoint - 80	http://s-sp16-xprod/	
SharePoint Central Administration v4	http://s-sp16-xprod:1000/	

4. Select the Site Collection which you wish to connect to, and click **Ok**.

log Select Web Application		\times
Select Site Collection		
Server Url: http://s-sp1i ~		
URL	 	
/sites/Corporate2016		
URL Search search reset		
Getting users		
		\times
Ø Last update of cache file was on: Temporary cache file not found		
< <u>B</u> ack <u>N</u> ext > OK	Cance	ł

- 5. With this connection type you are given the option to select the following:
 - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site.
 To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
 - 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.

🦻 Share	Point Connection Wizard —		\times
ShareP	pint Connection Wizard		
🔕 Name	contains invalid character: :		
Name	No. 1 without The Makeson		0
Type S	SharePoint Site or Site Collection (On-premises or Office 365)	\sim	0
URL	April 1 april 201 March 201	\sim	0
Or I	Discover Site Collections 🕡		
((Central Admin access is required to view and select existing site collections)		
Load	Entire Sub-Site Structure (Slower)		
Load	Entire Sub-Site Structure and Objects (Slowest) 🛛 🔞		
	<u> </u>	Canc	el

- 6. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
- 7. The operation will start to run, connecting to the SharePoint Site or Site Collections which you



specified. You will be notified once it has completed, click **Ok**.

8. This connection is now available in the Navigator Pane.



Connecting to SharePoint On-Premises Farms

Quest Essentials is optimized for migrations to and from Microsoft 365. While it **used to be** possible to migrate to/from SharePoint on premises, Quest recommends that you use Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect directly to your SharePoint on-premises farm to perform a pre-migration analysis, follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you know the URL of your Central Admin site. If you choose to use the **Discover Site Collections** button, then continue to step 3.

Sha	rePoint Connection Wizard		
nare	Point Connection Wizard		
Sha	rePoint URL is invalid		
Vame	On-Prem Farm		0
ype	On-premises Farm (Central Administration required)		~ 📀
JRL			~ 🕜
Dr	Discover Site Collections		
	(Central Admin access is required to view and select existing site	collections)	
Loa	ad Entire Sub-Site Structure (Slower)		
Loa	ad Entire Sub-Site Structure and Objects (Slowest) 🛛 🔞		

3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the **Discover Site Collections** button. In the presented window enter the URL for Central Administrator portal (and if necessary the credentials, using Claims if your account requires it) and click **Connect**. Once you are successfully Connected to Central Admin URL, select the appropriate Site Collection and Click **Next** to continue.

Select Web Application —					
Select Web Application	on				
Central Admin URL: http:	//s-sp16-xprod:10	00/default.aspx		Conr	lect
Server Farm Admin: SHA	REPOINT\system]	
				_	
	Connected	to Central Admin URL			
Web Application Name		URL			
Corporate 2016		http://s-sp16-xprod:2	016/		
SharePoint - 80		http://s-sp16-xprod/			
SharePoint Central Admin	istration v4	http://s-sp16-xprod:1	000/		
				~	
	< Back	Next > 0	K	Cance	el 👘

4. Select the Site Collection which you wish to connect to, and click **Ok**.

lect Web Application	—		×
Select Site Collection			
Server Url: http://s-sp10 v			
URL			
/sites/Corporate2016			
URL Search reset			
Getting users			
			×
O Last update of cache file was on: Temporary cache file not found			
< <u>B</u> ack <u>N</u> ext > OK		Cance	1

- 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**.

	1.10.2	
Dov	nload Status	×
0	Download Completed for project	
Do	not show this message again	
	ОК	
	Run in Background Cancel Details >>	

6. This connection is now available in the Navigator Pane.



Connecting to Office 365 Tenant and OneDrive

If you wish to connect toan Office 365 temant, then follow these steps:

1. Start by selecting the Office 365 option in the Connect To section in the ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, **Office 365 Tenant (Tenant Administration Required)** is automatically selected as the Type of connection you will be making. Enter the URL of your Office 365 tenant.

🔈 Sha	rePoint Connection Wizard					×
Share	Point Connection Wizard					
🔕 Plea	ase Enter Project Name					
Name						0
Туре	Office 365 Tenant (Tenant Administration require	ed)) v	0
URL					\sim	0
Or	Discover Site Collections 📀					
	(Central Admin access is required to view and sele	ect exist	ing site coll	lections)		
Loa	ad Entire Sub-Site Structure (Slower)	0				
Loa	ad Entire Sub-Site Structure and Objects (Slowest)	?				
			<u>F</u> inish	ı	Cano	el:

- 3. You have the following two additional options on this screen:
 - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site.
 To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
 - Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.
- 4. Click **Finish.** The Essentials software will automatically detect the SharePoint authentication mechanism and your client environment. Depending on your configuration, you may be connected automatically or prompted for your credentials. Here are some of the possible scenarios:
 - **Option 1:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that <u>is logged into the same domain</u>, then no user/password information is necessary. Press the **Next** button and you will automatically log in using the credentials of the currently logged in user.
 - **Option 2:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that is <u>NOT</u> logged into the same domain then enter your user name, password and Domain in the provided fields and click **Next**.

- **Option 3:** If your SharePoint environment is using <u>Form Based Authentication</u> then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using <u>Kerberos Authentication</u> please refer to our FAQ area. Detailed configuration instructions are available there.
- **Option 5:** If your SharePoint environment is Hosted, such as (Office 365, BPOS, FPWeb, etc.) you should be able to connect by entering your user account and password, no differently than any other SharePoint environment.
- **Option 6:** Password Manager can store account credentials in protected storage to connect to SharePoint. For more information on setting up Password Manager, please refer to our FAQ area.
- NOTE:
 - The domain name may also be entered as a part of the user field in either the domain user or the user@domain syntax.
 - If you have Digest Authentication enabled, please disable it. It can interfere with the tool's ability to connect to SharePoint using Windows Authentication.

A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.

烙 Connec	t to SharePoi	nt			×
Connectin	ig to				
User					2
Password					
Domain					
		Use Pro	×y nfiguration		
	Connect			Cancel	
	Claims		0		

4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.

Select Web Application				_		×
Select Web Application	elect Web Application					
Select a Web Application						
Central Admin URL: https://me	etavistech-admin.s	harepoint.c	om		Connect	
Server Farm Admin: i:0#.f men	nbership jtrosman	@metaviste	ch.com			
	Connected to Co	entral Admi	n URL			
Web Application Name		URL				
SPO Sites						
Sites w/Group						
OneDrive Sites						
Check All Uncheck All						
			OK		Cancel	

5. The Select SPO sites, Select Sites with Groups, and/or Select OneDrive sites windows will appear, depending on the web application names you chose (if you selected more than one, they will appear in succession), select the accounts you would like to connect to for each. Click **Ok**.

\$	_		×
Select SPO Site(s)			
			^
The local state in the second conclusion. When it			
https://www.intention.in.ukarapacint.com/whee.https			
International destruction on the destruction Paintee			~
<			>
URL Search search reset Check All Uncheck All			
Getting sites			
Last update of cache file was on: 03/06/20 11:22 AM			
	Ж	Can	cel

6. The operation will start to run, connecting to the accounts you specified. You will be notified once it has completed, click **Ok**.

🕭 Download Status		×
Oownload Comple	eted for project "Office 365"	
Do not show this messa	ige again	ОК
	Run in <u>B</u> ackground Can	cel <u>D</u> etails >>

7. This connection is now available in the Navigator Pane. Here you can see the differentiation

between Classic Team sites and Modern team sites, as well as an indication of what the site's template is (ex Group#0, Blog#0, etc.)



Connecting to Cloud Storage

In order to connect to your Amazon S3 or Azure cloud storage locations, you need to do the following:

a. Under the Backup tab, in the backup section, click the "To Cloud Storage" option in order to create a new backup to Cloud Storage.



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.

©		×
Backup Properties Set backup location		
Project Name: * Corporate 2016 Site Backup		
Connection		
Service: * SharePoint Site V		
Source Url: http://s-sp16-xprod:2016/sites/Corporate2016	 ~	

OneDrive for Business - if you select this as your service type, you will be asked to input an admin username for your OneDrive for Business account, followed by clicking the **Connect** button.

\$	_		×
Backup Prope	rties nin username and click Connect to continue		
Project Name:	Corporate 2016 Site Backup		
Connection			^
Service: *	OneDrive for Business \lor 🔞		
Login: *	Connect	0	
Objects: *	Include all OneDrive for Business Sites		
	Load from CSV or Select from Office 365 Please load CSV file or browse objects	0	

Enter the password for the OneDrive admin account and click **Connect**.

烙 Connect to Of	ce 365 — 🗆 🗙
Connecting to [0	fice 365]
User	P
Password ••••	•••••
	Use Proxy
	Proxy Configuration
	·····y····g

Connect Cancel

Once you are successfully connected, you can select which objects you would like to backup.

•				×
Backup Properties				
Set backup location				
Project Name: *	Corporate 2016 Site Backup			
Connection				^
Service: * One	Drive for Business \vee 🔞			
Login: *	and advertision of	Connect	 ✓ ②)
Objects: * 🖲 In	clude all OneDrive for Business Sites 🔞			
O La Ple	aad from CSV or Select from Office 365 <type file="" or="" select=""> ase load CSV file or browse objects</type>			

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.

烙 Conne	ct to Office 36	5	_	×
Connectin	ng to [Office 3	65]		
User		and the second second		2
Password	•••••	•••••		
		Use Proxy		
		Proxy Configuration		

Γ

Connect

Once you are successfully connected, you can select which object you would like to backup.

8			\times
Backup Properties			
8 Set backup location			
Project Name: * Corporate 2016 Site Backup			
Connection			^
Service: * Office 365 Groups 🗸 🕡			
Login: * Conn	ect 🗸	2	
Objects: Coad from CSV or Select from Office 365 You've selected 1 sites	i pri sen	0	

Cancel

3. Under the Configuration options, expand the "Save Backup To Location" section. Select Cloud Storage as your location option and then click the Ellipses button directly to the right of the location field.

8			×
Backup Properties			
8 Set backup location			
Project Name: * Corporate 2016 Site Backup			
Login:	Connect	0	^
Objects: Load from CSV or Select from Office 365 You've selected 1 sites	and the second second	0	ł
Configuration			
Backup Options			
Retention Policy			
Save Backup to Location			
Save to: O Local file Share 🖲 Cloud Storage (Azure or S3 account required	2	0	
Location:		. 🕐	~
Generate Script Schedule	Finish	Cancel	

4. Select your Cloud Storage Provider (Amazon S3 or Azure) and click the ellipsis button at the end of the location field to continue.

\$	×
Select provider	
Location	
Connect to S3	
Connect to Azure	
	OK Cancel

5. Continue to the Steps to Connect to Azure Cloud Storage section, or the Steps to Connect to Amazon S3 Cloud Storage section for further instructions.

Steps to Connect to Azure Cloud Storage

1. Enter your Azure Storage account name and click the **Connect** button.

\$			×
Azure			
😣 Choose storage account to use			
Storage account			✓ Connect
	ОК	Cancel	Create Folder

2. You will be prompted for your Azure Storage primary key, enter your key and click Connect.

Account Key	••••
Line Deserv	
Use Proxy	
Proxy Configuration	

3. Once the connection is successfully established, the list of containers will display on the left side of the view. Select the container in which you wish to store the backups and its current list of available folders will appear on the right. Select the folder in which you wish to store the backups or click Create Folder to create a new folder. When finished, click OK to continue.



4. Confirm that the path displayed in the Location field is correct and then click **OK** to continue.



5. You will now be returned to the initial backup configuration. The "Save To Location" field will now be populated and you have another opportunity to modify the current settings or click **Finish** to begin the backup.



Steps to Connect to Amazon S3 Cloud Storage

1. Enter your Amazon S3 Access Key and click the Connect button.

•			×
Amazon S3			
🔇 Choose access key to use			
Access key	+++0		~ Connect
	ОК	Cancel	Create Folder

2. You will then be prompted for your Amazon S3 Secret Key, which you should enter and the click the second Connect button.



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.

Select provider		'n
Location s3://	%20backup	
Connect to S3		
Connect to Azure		
		OK Cancel

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.

	Home	View Migr	ator File	Manager I	Drives Security	Manager Te	m Store Manager	Administrator	Backup	Help	>>
Activatio	on About	Profile Mana	Jer Support	? User Manual	Check for Updates	📘 Debug Mo	de 🕛 Reset "Do noi 🗄 🗟 Log Manager	Show"			
				He	lp						

2. Under the Migration section of the profile manager, deselect the Hyper Backup option.

General	Your Settings will be saved for future operations.	
Connection	Copy Subsites: Copy Views:	Hyper Mode Settings
	Copy Features: Copy Forms:	🕚 OAuth: 🗹 🕚 Hyper Backup:
Migration		Generate Status Report:
Email Notification	Remove Folder Structure:	Delete Report Jobs: V Backup System Lists:
Advanced	Generate Failed Items File: Manual Automatic	#Parallel Threads: 35
	Content Time Load Limit: 400	#Azure Threads: 15
	Content type Load Limit: 400	0 #Retry: 10
	Custom Identity Provider:	is not responding Import did not complete
	Change Log Storage Location	Timeout waiting for connection from pool Can not create lookup fields because list(s) doesn't exists on target
	File System:	Auto Resume Rules: Parent content type does not exist
	Cloud:	
	Path Overflow Option	
	Truncate Long Path: 🗹	• Temporary Files Location:
	Max Length Before Overflow: 200	100 #Jobs per Tab:
	Overflow Folder Name Length: 5	
Reset to Defaults		

- 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 Essentials application is installed under an account that has Local Administrator rights.

- It is recommended that the computer hosting the Essentials 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 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, Creatingan

	— —
ackup Properties	
Project Name: * SPO Marketing Site	
Connection	
Service: * SharePoint Site 🗸 🍥	
Source Url: * https://	••• · ·
Backup Options Netention Policy	
Save Backup to Location	
_	

5. SharePoint site backups can be configured with the following options:

Backup Options

@`	Backup Options
	_
	Include Sub-sites
	Exclude specific Sub-sites Load
	Include Permissions
	Include List Views
	🗹 Include Content
	Include Versions
	O Include All Versions
	Include most recent versions 10
	Delete from the source 🧕
	Apply Filter Filter
	Send notification Admins, Owner, Current
	Smart Backup

Include Sub-sites - this option will include all sub-sites (including their user created lists and content) of the parent site as defined in the project's previous Site URL field.

NOTE:

i.

• Hidden lists, system lists (i.e. Galleries, Workflow History, User Information List and others not visible in the Site Contents section of SharePoint) and Apps are not included in the backup of any sites.

Backup

• 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

Ð	 Save Ba 	ckup to Location	
	Save to:	Local file Share O Cloud Storage (Azure or S3 account required)	0
	Location:	C:\Users\spsadmin\Metavis	 0

Save to - this option will determine if the backup project is stored on your local storage (local or network path) or within your cloud storage provider (Amazon S3 or Azure)

Location - this field will display the full path to the location where the backups will be stored. Click the Ellipsis button to the right to configure this location.

6. Press Finish to start the Backup.

i

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:

炵 Up	odate	_	\times
Updat Projec	te Backup: Corporate Backup ct Location:		
1	Update Options		
-0	Source https://i /		0
	Full Update		
	🔿 Incremental Backup		
	O Differential Backup		
	Send notification		

📑 Generate Script 📑 Sche	edule	Finish	Cancel	

Full Update - this will create a full snapshot of your currently configured backup project.

Incremental Backup - this will capture <u>only</u> the changes in your backup project since the last update, regardless if that update was Full or Incremental. In this scenario a user could create a series of Backups containing data changes for a specific time period.

Differential Backup - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

 Press Finish to update the Backup now or choose the Schedule button to configure a Windows Task Scheduler task to schedule the update backup (See the Scheduling Backup Jobs section for more information).

Restoring 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.
- 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.

Home	e View	Archite	ect N	/ligrator Fi	le Manager 🛛 🛛	Drives Pub	lic Folders Secu	irity Manager	Term Store Manager
SharePoint	To Local	To Cloud	(Vpdate	To Original	Import from	Import from	Project Summary		🕢 Refresh Backup Navigator
	Storage	Storage		Location	Local	Cloud			
Connect To		Backup		Restore	Arc	hive	Report		View

- When prompted, select "yes" that you do want to restore the backup to its original location.
 Then select whether you would like to send notification.
- 4. The Copy Site Properties wizard will now be generated.
- 5. In the wizard you can choose to create a new Profile or use the Site-Default profile.

\$		_		×
Copy Si	e Properties			
Profiles	Site-Default	\sim	Save	New

6. You can choose from the following configuration options:

Site Collection options

ite Collection Options
get Central Admin URL:
Collection Admin:
Collection Quota (MB):
 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

Site Copy Options
 ✓ Site Copy Options
 ✓ Include Sub-Sites
 ✓ Include Site Permissions

Include Sub-Sites - Enable this option to include all sub-sites of the current site in this operation.

Include Site Permissions - This option will copy source site permissions to the target site. If the source site permissions are inherited, then the target site permissions will also be set to inherited. If the source site permissions are unique, these unique permissions will be copied to the target site.

List Copy Options

List Copy Options
Restore content with:
Include Permissions
Include Versions
Include All Versions
O Include most recent Version 10
Include List Permissions
☑ Include List Views

i NOTE: Restore would be with all lists, list settings, content types, columns and content

Include Permissions - copy the permissions associated with the content within this list/library

Include Versions - copy the version of the content included within the list/library. You can specify if you would like to include all versions of the content, or whether you would like to include the most recent number of specified versions of the content.

Include List Permissions - select this option to copy the site permissions.

Include List Views - select this option if you would like to copy the number of views of the site.

Advanced Options

00	Advanced Options	
Q	Overwrite if file exists	
	🗌 Incremental copy 📃 🛛 days 🗸	
	🗹 Enable Azure Turbo Mode	
	Microsoft Provided Storage	
	O User Provided Storage Select	
	Send notification	

Overwrite if file exists - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

Incremental Copy - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration.

The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time.

To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modified.

To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

NOTE: The Overwrite if File Exists parameter will be disabled if this option is selected.

Enable Azure Turbo Mode - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

Send Notifications - provide an email to which notifications will be sent regarding the progress of the Backup Restore.

- 7. Once you have configured all your settings, click Finish.
- **NOTE:** By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.

Restoring a List/Library from a Specific Backup

The following are instructions for restoring a SharePoint List/Library from a specific backup:

- 1. Navigate to the backup and select a list or library to restore.
- 2. You can access the Restore wizard by either right-clicking on the selected site or list and

selecting the "Restore" option

🕙 Backup Navigator									
🗸 🜰 Corporate Backup									
🗸 🕒 Jun-18-2019 09:57:49 AM (Full)									
✓ Sp Abby Javier									
🗸 🎆 Lists									
- Docum	6	View Contents							
> 🔂 Advain	\odot	Restore							
> Sy Aamin		Restore to new place							
> Sy Apooli		Restore to new place							
> SP Apool2									
> 🛐 Bilal Mir									
🔊 🔂 Envin Umali									

Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

of the Ribbon.

Hom	e View	Archite	et M	ligrator Fil	le Manager 🛛 I	Drives Pub	olic Folders S	Security Manager	Term Store Manager
5>	Ð		€»)		F	2 ~	Ŧ	1	🕖 Refresh Backup Navigator
SharePoint	To Local Storage	To Cloud Storage	Update	To Original Location	Import from Local	Import from Cloud	Project Sumr	mary Logs	
Connect To		Backup		Restore	Arc	hive	Report		View

- 3. The Restore Backup wizard will now be generated.
- 4. You can choose from the following configuration options:

List Copy Options

List Copy Options	^
Restore content with:	
Include Permissions	
✓ Include Versions	
Include All Versions	
O Include most recent Version 10	
Include List Permissions	
☑ Include List Views	

Include Permissions - Select this option to copy the content permissions of the content within

the list/library.

Include Versions - copy the version of the content included within the list/library. You can specify if you would like to include all versions of the content, or whether you would like to include the most recent number of specified versions of the content.

Include List Permissions - select this option to copy the list/library permissions.

Include List Views - select this option if you would like to copy the number views of the list/library.

Advanced Options

00	Advanced Options
Q	Overwrite if file exists
	□ Incremental copy
	Enable Azure Turbo Mode
	Microsoft Provided Storage
	O User Provided Storage Select
	Send notification

Overwrite if file exists - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

Incremental Copy - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration.

The value entered into the "Last" field will limit the amount of content examined to the time

period specified, starting at present time.

To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed.

To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

NOTE: The Overwrite if File Exists parameter will be disabled if this option is selected.

Enable Azure Turbo Mode - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

Send Notifications - provide an email to which notifications will be sent regarding the progress of the Backup Restore.

- 7. Once you have configured all of your settings, click **Finish** to complete the restore.
- **NOTE:** By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.

Restoring a List/Library to a New Place

The following are instructions for restoring a SharePoint List/Library from a specific backup to a new place:

1. Navigate to the backup and select a list or library to restore.

2. You can access the Restore wizard by right-clicking on the selected site or list and selecting the

"Restore to new place" option

🕙 Backup Navigator									
🗸 🜰 Corporate Backup									
🗸 🕒 Jun-18-2019 09:57:49 AM (Full)									
🗸 🛐 Abby Javier									
🗸 📶 Lists									
- Docum	B	View Contents							
> 📅 Subsites	0	Pertore							
> S> Admin		Restore							
> ᡗ Apool1	Ð	Restore to new place							
> 🛐 Apool2	_								
> 🚺 Bilal Mir									
🔨 🐼 Envin Umali									

- 3. The Restore Backup wizard will now be generated.
- 4. In the wizard provide the new site url for the new place where you would like to restore the list

or library. Click Connect.

	Site URL:	Connect
5.	Enter account credentials for the site url provided above, and click Finish.	
	🔇 Authentication and Admin Pooling — 🗆 X	
	Admin Name: <u><enter user=""></enter></u>	
	Finish Cancel	

6. You can choose from the following configuration options:

List Copy Options

List Copy Options	^
Restore content with:	
Include Permissions	
✓ Include Versions	
Include All Versions	
O Include most recent Version 10	
Include List Permissions	
✓ Include List Views	

Include Permissions - Select this option to copy the content permissions of the content within the list/library.

Include Versions - copy the version of the content included within the list/library. You can

specify if you would like to include all versions of the content, or whether you would like to

include the most recent number of specified versions of the content.

Include List Permissions - select this option to copy the list/library permissions.

Include List Views - select this option if you would like to copy the number views of the list/library.

Advanced Options

00	Advanced Options	
Q	Overwrite if file exists	
	🗌 Incremental copy 🛛 🔹 🗸 🗸 🗸 🗸 days	
	Enable Azure Turbo Mode	
	Microsoft Provided Storage	
	O User Provided Storage Select	
	Send notification	

Overwrite if file exists - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

Incremental Copy - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration.

The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time.

To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed.

To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

NOTE: The Overwrite if File Exists parameter will be disabled if this option is selected.

Enable Azure Turbo Mode - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

Send Notifications - provide an email to which notifications will be sent regarding the progress of the Backup Restore.

- 7. Once you have configured all of your settings, click **Finish** to complete the restore.
- **NOTE:** By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.
Restore Specific Content

The following are instructions for restoring specific SharePoint content:

1. Navigate to the backup operation that contains the content you wish to restore. Double click on the list/library where the content resides.



2. The application will display the content in the Contents pane. Select the object(s) to restore.

Backup: Corporate 2016 > I	Documents						
Name	Туре	Title	Created	Modified	Created By	Modified By	
Important Notes.tx	Document		2017-11-30 11:05:59 AM	2017-11-30 11:05:59 AM	SHAREPOINT\system	SHAREPOINT\system	
Procedures.txt	Document		2017-11-30 11:05:59 AM	2017-11-30 11:05:59 AM	SHAREPOINT\system	SHAREPOINT\system	

3. Right-click and select the "Restore" option or choose "To Original Location" button in the Restore section of the Backup Ribbon.

н	ome Viev	v Architect	Migrator	File Manager	Drives	Public Folders	Security Manager	r Term S	Store Manager	Informa	int Administrator	Backup	Help
5>	Ð	9	<u>ا</u>	D .	£ 💽	Ŧ		Ø Refres	h Backup Navigato	r			
SharePoint	To Local Storage	To Cloud U Storage	pdate To O Loca	riginal Impor ition Loc	t from Import fr al Cloud	rom Project Sur I	nmary Logs						
Connect To		Backup	Re	store	Archive	Repor	t	Vie	ew				
🥵 Navigato	Navigator Image: State S												
Box Box1				^	< 1-2 > /	Admin /Documer	its						
S Goo	gle				Title	~	Created At		Created By	1	Modified At	Modified B	y
5 <u>7</u> N	lark@classify	loud.com			bin01		2019-06-12	2019-06-12		_h 2	2019-06-12 15:15:09	Apool1@m	etavistech
Se Drop	box				File with Ver	sions	2018-08-20	S view Co	ontents	- n 2	2018-08-20 05:40:12	Admin@m	etavistech
🗁 http-	s-sp16-xpro	d-1000-default.	aspx				1	Restore					
SP Corporate 2016								Restore	to new place				
	Lists									_			
	Docum	ents											

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 Versions	\$		
Include All Version	ions		
🔿 Include most re	cent Version 10		

Item Copy Options



Include Permissions - restore permissions for the specific content.

Include All Versions - include all versions of the specific content.

Include most recent Versions - include only the most recent specified number of versions of the specific content.

Advanced Options

00	✓ Advanced Options	
0	Enable Azure Turbo Mode Microsoft Provided Storage	
	User Provided Storage Select	
	Send notification	

Enable Azure Turbo Mode - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

Send Notifications - provide an email to which notifications will be sent regarding the progress of the Backup Restore.

7. Once you have configured all of your settings, click **Finish** to complete the restore.

Restoring Specific Content to a New Place

The following are instructions for restoring specific SharePoint content:

1. Navigate to the backup operation that contains the content you wish to restore. Double click on the list/library where the content resides.



2. The application will display the content in the Contents pane. Select the object(s) to restore.

Contents											
Backup: Corporate 2016 > Documents											
Name	Туре	Title	Created	Modified	Created By	Modified By					
Important Notes.txt	Document		2017-11-30 11:05:59 AM	2017-11-30 11:05:59 AM	SHAREPOINT\system	SHAREPOINT\system					
Procedures.txt	Document		2017-11-30 11:05:59 AM	2017-11-30 11:05:59 AM	SHAREPOINT\system	SHAREPOINT\system					

3. Right-click and select the "Restore to new place".

-															
He	one View	Migrat	or Fil	e Manager	Drives Se	curity Manager	Term Store Manage	Administrator	Backup H	elp 🕷					
SharePoint	To Local Storage	To Cloud Storage	(D) claste	To Original Location	import from Local	Import from Cloud	Project Summary	Logs Ø Refresh I	lackup Navigator						
Connect To		Backup		Restore	A	thive	Report	View							
🤩 Navigato	¢						8 🛠 🔍 🗆	🚼 Hyper Backup	🕈 Contents 🏗	Hyper Backup Doc	uments View 🔅				 Backup Navigator
v 😂 Corps								✓ Corporate Backup ✓ O Jun-18-2019 09:57:49 AM ✓ B Abby Javier							
> > > 10 > 10 Drept	DO_NOT_D DO_NOT_D Documents Style Librar Subsites box	ELETE_SPLI ELETE_SPLI S Notes Y	ST_TENAN ST_TENAN	TADMIN_AGGP TADMIN_ALL_3	IEGATED_SITEC ITTES_AGGREGA	OLLECTIONS ATED_SITECOLLE	CTIONS	File with Version	85	2019-06-12	View Contents Restore Restore to new place	 2019-06-12 15:15:09 2018-08-20 05:40:12	Apool @metavistech Admin@metavistech		Lints Documents Subsites Subsites Documents Documents Subsites

4. In the wizard provide the new site url for the new place where you would like to restore the list or library. Click **Connect**.

	Site URL:	Connect
5.	Enter account credentials for the site url provided above, and click Finish.	
	lack Authentication and Admin Pooling — 🗆 🗙	
	Admin Name:	
	Admin Name: < <u>enter user></u>	
	Finish Cancel	
5 .	Enter the name of the list where you would like to restore the item.	
	List: Documents	
7	Select the restore settings you would like to apply	
	Sciele the restore settings you would like to apply.	
-	Item Copy Options	
	Include Versions	
	Include All Version 10	
	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 num	ber of versions
:	specific content.	
4	Advanced Options	
	Advanced Options	

QY	* Advanced Options	
Q	Enable Azure Turbo Mode	
	Microsoft Provided Storage	
	User Provided Storage Select	
	Send notification	

Enable Azure Turbo Mode - When enabled, this option utilizes Microsoft's SharePoint Online

of the

Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

Send Notifications - provide an email to which notifications will be sent regarding the progress of the Backup Restore.

7. Once you have configured all of your settings, click **Finish** to complete the restore.

Restoring Documents during an Item, List, or Site Operation

Documents can be restored in-place or documents can be restored out-of-place. If a document is restored to any location where a document with the same name already exists, the restore operation will overwrite/replace the current SharePoint document. If a document with that name does not exist, then it will be restored from the backup as a new document.

Restoring Non-Document list items during an item, list or site operation

When restoring a list item, the operation will create a new item in the selected location. This means that if the item already exists in this list, a second (or more) item will be created with potentially the same metadata.

Hyper OneDrive Backup

Creating OneDrive Hyper Backup

Essentials Backup supports the ability to create a backup of any single OneDrive for Business or all OneDrives across your Office 365 tenant (when licensed).

To create a backup for OneDrive for Business sites in your Office 365 tenant:

1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.

Hom	e View	File Ma	nager	Drives	Security Manager	Term Store	Manager	Governance	Administrator	Backup	Help
S >	9			1	F	2 ~	Ŧ		🕜 Refresh Back	up Navigator	
SharePoint	To Local Storage	To Cloud Storage	Update	To Original Location	Import from Local	Import from Cloud	Project Sum	mary Logs			
Connect To		Backup		Restore	Arc	hive	Report		View		

Enter a project name for your Backup, this name will be displayed in the Backup Navigator.

Backup Propertie	S
🔕 Enter your Admin	username and click Connect to continue
Project Name: *	Backup OneDrive for Business

3. Under the Connection section of the wizard, select "OneDrive for Business" as your Service type.

0	—	Х
Backup Properties		
8 Enter your Admin username and click Connect to continue		
Project Name: * Backup OneDrive for Business		
Connection		^
Service: * OneDrive for Business 🗸 🔞		

4. Enter your Global Administrator username and click the **Connect** button.

\$		_		×
Backup Propertie	S			
🙆 Enter your Admin	username and click Connect to continue			
Project Name: *	Backup OneDrive for Business			
Connection				^
Service: * C	neDrive for Business 🗸 🔞			
Login: *	anna (halantalaina	Connect	?	

5. When prompted, enter your Global Administrator password and click Connect.

NOTE:

- To backup all OneDrive for Business sites you will need to enter your Office 365 Global Administrator login and password.
- If creating a backup of a Single OneDrive for Business Site, the account used to create the backup must already have at least Designer permissions to the OneDrive being backed up.
- 6. You can choose to "Include all OneDrive for Business Sites", which will create a backup of all of your OneDrive for Business Sites, or you can select to specify which OneDrive for Business sites you wish to backup by either loading a list from a CSV file (by clicking Load from CSV), or

selecting from a list provided by clicking Select from Office 365.

Connectio	n	
Service:*	OneDrive for Business \vee 🔞	
Login:*	Enter your Global Administrator user name and click Connect	🗸 + Admin 🙆
	Connected admins: jtrosman@metavistech.com	
Objects:*	Include all OneDrive for Business Sites	
	O Load from CSV or Select from Office 365 < <i>Type or select file</i> >	0
	Please load CSV file or browse objects	

7. Choose your desired Backup, Retention, and Location options (Note: a location must be specified in order to continue).

Backup Options

) -	Backup Options
	Include Sub-sites
	Exclude specific Sub-sites Load 🔞
	Include Permissions
	Include List Views
	🗹 Include Content
	Include Versions
	O Include All Versions
	O Include most recent versions 10
	Delete from the source 🛛 🔞
	Apply Filter 🔞
	Send notification Admins, Owner, Current
	Smart Backup

Include Sub-sites - this option will include all sub-sites (including their user created lists and content) of the parent site as defined in the project's previous Site URL field.

NOTE:

i.

- Hidden lists, system lists (i.e. Galleries, Workflow History, User Information List and others not visible in the Site Contents section of SharePoint) and Apps are not included in the backup of any sites.
- The Backup operation is only designed to backup sites, user created lists, content (versions and metadata), user created custom views and SharePoint permissions (site, list and item). All other SharePoint objects, settings and configuration are not currently supported. Be sure to thoroughly test both the backup and restore of these objects in a non-production environment before deploying to production and contact Support with any questions or issues.
- Although aspx Pages are included in Backups, there have been occasions where web parts are missing or incorrectly assigned to the wrong zone after restore. Please be sure to thoroughly test any business critical pages to

ensure they are backed up and restored properly in a non-production environment and contact Support with any questions or issues.

Exclude specific Sub-sites - this option will exclude all sub-sites that are specified in the loaded CSV file. To create this CSV file, simply enter the name of the sub-site which you wish to exclude from the backup, click the Load button and then select this file.

Include Permissions - this option will include SharePoint site, list, and item level permissions from each uniquely permissioned object.

Include List Views - this option will include any custom create list views.

NOTE: this does not include customized InfoPath Forms or views that were modified using SharePoint Designer.

Include Versions - this option will allow you to specify how many versions of each item to include with the backup. If left unchecked, no versions will be included, if "Include All Versions" is selected then all versions will be included. If "Include Most recent versions" is selected then only the number of versions specified will be included, starting with the most recent and working backwards (major and minor versions are included).

Apply Filter - this option will allow you to customize a filter to include/exclude content based on metadata.

Smart Backup - This functionality is only available for Hyper Backups, which can only be performed for OneDrive and SharePoint sites. This feature aids users in saving space on storage. It uses the MD5 algorithm to scan backup files and excludes duplicates. The MD5 message-digest algorithm is used as a checksum to verify data integrity. If the checksum for files is the same, Essentials will save only one file instead of storing two equal files. Click here for more information on Smart Backups.

Retention Policy



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

A	 Save Backup to Location 					
9						
	Save to:	Local file Share O Cloud Storage (Azure or S3 account required)		?		
	Location:	C:\Users\spsadmin\Metavis		?		

Save to - this option will determine if the backup project is stored on your local storage (local or network path) or within your cloud storage provider (Amazon S3 or Azure)

Location - this field will display the full path to the location where the backups will be stored. Click the Ellipsis button to the right to configure this location.

8. Click **Finish** to begin. For information on how to connect to Cloud storage, see the Connecting to Cloud Storage section.

Configuration	
Backup Options	
Retention Policy	
Save Backup to Location	
Save to: O Local file Share O Cloud Storage (Azure or S3 account required)	
Location: 🔐 🕡	

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.
 - Backup Navigator
 ConeDrive Hyper Backup
 - > S SharePoint Backup
- 2. From the Ribbon (or right-click menu for the selected backup) select the **Update Backup** option. This will generate the Update Backup Properties screen.



3. A user may select one of several options for the update:

炵 Up	Vpdate		\times
Updat Projec	te Backup: Corporate Backup ct Location:		
1	Update Options		
-0	Source https://i /		0
	Full Update		
	🔿 Incremental Backup		
	O Differential Backup		
	Send notification		

📑 Generate Script 📑 Sche	edule	Finish	Cancel	

Full Update - this will create a full snapshot of your currently configured backup project.

Incremental Backup - this will capture <u>only</u> the changes in your backup project since the last update, regardless if that update was Full or Incremental. In this scenario a user could create a series of Backups containing data changes for a specific time period.

Differential Backup - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

 Press Finish to update the Backup now or choose the Schedule button to configure a Windows Task Scheduler task to schedule the update backup (See the Scheduling Backup Jobs section for more information).

Restoring OneDrive Hyper Backup

There are a variety of ways to perform a restore of a OneDrive backup, based on your specific needs. This section will review the various components of a backup which can be restored and the ways in which to do so.



Restoring a List from OneDrive Backup

The following are instructions for restoring a OneDrive List/Library from a specific backup:

1. Navigate to the backup, You can access the Restore wizard by either right-clicking on the

selected username and selecting the "Restore" option



Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

of the Ribbon.



2. The Restore Backup wizard will now be generated. Enter the OneDrive Owner.

00	Site Collection Op	tions			
Q	OneDrive Owner:				

3. You can choose from the following configuration 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

00	Advanced Options	
	Overwrite if file exists	
	□ Incremental copy	
	☑ Enable Azure Turbo Mode	
	Microsoft Provided Storage	
	O User Provided Storage Select	
	Send notification	

Overwrite if file exists - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

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**.

Site URL:	[Connect
-----------	---	---------

5. Enter account credentials for the site url provided above, and click Finish.

👂 Authentication and Admin Pooling				×
Admin Name:				-
Admin Name: < <u>enter user></u>				—
	Finish		Cancel	
You can choose from the f	ollowing co	nfigu	ratior	noptio
List Copy Options	-	5		•
List Copy Options				



Include Permissions - Select this option to copy the content permissions of the content within the list/library.

Include Versions - copy the version of the content included within the list/library. You can specify if you would like to include all versions of the content, or whether you would like to include the most recent number of specified versions of the content.

<u>Adva</u>	anced Options
00	Advanced Options
	Overwrite if file exists
	□ Incremental copy
	🗹 Enable Azure Turbo Mode
	Microsoft Provided Storage
	O User Provided Storage Select
	Send notification

Overwrite if file exists - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

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.

Project Name: * Backup Office 365 Groups

3. Under the Connection section of the wizard, select "Office 365 Groups" as your Service type.

Project Name:	*	Backup Office 365 Grou	ıps				
Connection	Connection						
Service: *	Of	fice 365 Groups 🛛 🗸	0				

4. Enter your Global Administrator username and click the Connect button.

Connection

Service:*	Office 365 Groups 🧹 💿			
Login:*	Enter your Global Administrator user name and click Connect	✓	+ Admin	0
	Connected admins: jtrosman@metavistech.com			

5. When prompted, enter your Global Administrator password and click Connect.

NOTE: To backup all Office 365 Group sites you will need to enter your Office 365 Global Administrator login and password. Please note that this Admin user account must have an Exchange Online license assigned to it in order to be successful.

6. You can choose to "Include all Office 365 Groups", which will create a backup of all of your Office 365 Groups, or you can select to specify which Office 365 Groups you wish to backup by either loading a list from a CSV file (by clicking Load from CSV), or selecting from a list provided by clicking Select from Office 365.



 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	
O Include All Versions	
O Include most recent versions 10	
Include Group Mailbox	
Include only those items More recent with than:	0
◯ Date: 2020-08-17 🗘	
Range: 45 days	
Send notification	Ø
🗌 Smart Backup 🔞	

Include Versions - this option will allow you to specify how many versions of each item to include with the backup. If left unchecked, no versions will be included, if "Include All Versions" is selected then all versions will be included. If "Include Most recent versions" is selected then only the number of versions specified will be included, starting with the most recent and working backwards (major and minor versions are included).

Include Group Mailbox (This option is only available for Classic Backups)- include the group mailbox in the Office 365 group backup.

Include only those items - This "Include Only" filter allows the configuration of which items, based on creation date, should be included with this backup.

The filter provides the following four scenarios. Please note that using this filter will also dictate which items are included in updates (Full, Differential and Incremental).

Include only those items "more recent" than a specified date. When this is configured, the backup will only include items created from today back until the specified date. It will never include items that were created prior to this date since the starting point (the specified "Date") has been explicitly defined.

Include only those items "more recent" than a range. When this is configured, the backup will only include items created from today going back to the number of days, weeks, months or years configured. Both the today date and the starting point are dynamic and will vary based on the operation's start and end times.

Include only those items "older" than a specified date. When this is configured, the backup will only include items created prior to the specified date. In this configuration, since both the start and end dates are explicitly defined updates are unnecessary as the included items will never change. This option should only be used for a one-time backup operation.

Include only those items "older" than a range. When this is configured, the backup will only include items created prior to the specified date going back to the number of days, weeks, months or years configured. Both the starting date and the ending point are dynamic and will vary based on the operation's start and end times.

Send Notification -this option can be changed when updating a backup.

Smart Backup - This functionality in Hyper Backup will help you to save space on storage. It uses the MD5 algorithm to scan backup files and excludes duplicates.

Retention Policy

1	 Retention Policy 				
	Keep Full Backups for		60	days.	
	Keep Incremental Backup	s for		14 d	ays.

Keep Full Backups - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

Keep Incremental Backups - if configured, this will specify how long the software will retain any Incremental or Differential backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

Save Backup to Location

Ð		ackup to Location	
	Save to:	O Local file Share Cloud Storage (Azure or S3 account required) 	0
	Location:] 🕐

Keep Full Backups - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

Keep Incremental Backups - if configured, this will specify how long the software will retain any Incremental or Differential backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

Include Only Backup Filter

When configuring the initial backup job, you may choose to apply an Inclusion filter against the content within the selected mailbox folders. This filter is based on the modification date of each item within the group and is designed to *Include* the content within the specified time period (by Date or by Range), not *Exclude*.

Please review the following scenarios to determine which setting is best for your backup needs. Please note that the initial filter configuration will impact how Updates (Full, Incremental, and Differential) are performed, so choose wisely.

Each configuration includes a chart displaying what will be included (green bar) versus what will be excluded (red bar). The bar on the bottom represents the initial Full backup and each above it represents the updates that can be performed.

Include only those items More Recent than Date: MM/DD/YYYY

When this filter is chosen, the backup will only include items that were modified after the date specified and never items from before the date.



Include only those items More recent than Range: n Days/Weeks/Months/Years

When this filter is chosen, the backup will only include items that were modified within the specified time range from the start of the backup operation ([Today]) going back by the amount of time defined (for example, as configured with 45 days the Full backup will only include 45 days worth of items, from "Today" going back).



Include only those items Older than Date: MM/DD/YYYY

When this filter is chosen, the backup will only include items that were modified prior to the date specified and never after it. Due to this static starting Date and only including items prior, Incremental



and Differential updates do not apply to this configuration since the amount of items will not change.

Include only those items Older than Range: n Days/Weeks/Months/Years

When this filter is chosen, the backup will only include items that were modified prior to the specified time range from the start of the backup operation ([Today]) going back.



Updating 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. Selectan Office 365 Groups Backup project from the Backup Navigator panel.
 - 🕙 Backup Navigator
 - > S Classing SPO Backup
 - G Office 365 Group Backup
 - > 🧥 OneDrive Classic Backup

2. From the Ribbon (or right-click menu for the selected backup) select the **Update Backup** option. This will generate the Update Backup Properties screen.

3.

	them might		nuger Drives	Security Manager	term store manage	er Administrator Backup
s>			$ \mathbf{O} $.	Ŧ	Refresh Backup Navigator
harePoint T	o Local To Cloud	Update To	Original Impo	rt from Import from	Project Summary	Logs
onnect To	storage Storage Backup		ocation Lo Restore	cal Cloud	Report	View
onnectro	backup		Restore	Archive	Report	VIEW
user may	/ select on	e of seve	ral options	for the upd	ate:	
			·	_	□ ×	
pdate Back	cup					
	2020 01 16 14	15.00				
ast updated:	2020-01-10 14:	13:30				
-						
○ Full Upda	te			_		
Incremen	tal Backup			0		
0.000	al Backup			0		
Differenti						
O Differenti	ilter Update	Filter		0		
Custom F	filter Update	Filter Admins, Ov	wner, Current	0		
Custom F	filter Update	Filter Admins, Ov	wner, Current	0		
Custom F	filter Update fication tention Policy	Filter Admins, Ov	wner, Current	0		
Custom F Custom F Send noti	Filter Update ification tention Policy	Filter Admins, Ov	wner, Current	0		
Custom F	Filter Update	Filter Admins, Ov	wner, Current	0		
Custom F Custom F Send noti	filter Update	Filter Admins, Ov	wner,Current	0		
Custom F	Filter Update	Filter Admins, Ov	wner, Current	0		
Custom F Send noti Change Ref	tention Policy	Filter Admins, Ov	wner, Current	 Performance Performa	Cancel	

Full Update - this will create a full snapshot of your currently configured backup project.

Incremental Backup - this will capture <u>only</u> the changes in your backup project since the last update, regardless if that update was Full or Incremental. In this scenario a user could create a series of Backups containing data changes for a specific time period.

Differential Backup - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

Custom Filter Update - Selecting this option will allow you to update the filter options for the backup. Filters allow the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It recommended not to use operators "Equal" and "Not Equal" to avoid difficulties with accurate file size if it more than 1 MB.

Use "Save Filter" option to save filter settings to file and load it in different wizards or Profile Manager. Note that filter file and filter fields have to match. For example, set of fields in filter will be different if you copy file into two different libraries.

Constant At	[Faund 1 1		< Set by SharePoint>					
Created At	Equai		see by sharer onit?	×				
	Less Than 🗸		<set by="" sharepoint=""></set>	~				
Exclude Folder(s)	Contains 🗸							
File Extension	Equal \sim							
File Name	Contains \lor							
Modified At	Equal \sim		<set by="" sharepoint=""></set>	\checkmark				
	Less Than \sim		<set by="" sharepoint=""></set>	\checkmark				
Size (KB)	Equal 🗸							
Save Filter Load	Save Filter Clear All Filter							

Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

Change Retention Policy - selecting this button will open the retention policy properties window, allowing you to update the retention policy for the backup.

4. Press **Finish** to update the Backup now or choose the **Schedule** button to configure a Windows Task Scheduler task to schedule the update backup (See the <u>Scheduling Backup Jobs</u> section for more information).

Restoring Office 365 Groups Backup

The following are instructions for restoring Office 365 Groups from a specific backup:

1. Navigate to the backup, You can access the Restore wizard by either right-clicking on the

selected username and selecting the "Restore" option

🔕 Backup Navigator	-
S Classing SPO Backup	
🗸 🚭 Office 365 Group Backup	
🗸 🕒 Jan-20-2020 10:33 AM - (Full)	
> G) 10tort	
> 🜰 OneDri 🖸 Restore	

Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

of the Ribbon.

Hom	e View	Archite	ect M	igrator F	ile Manager 🛛 I	Drives Put	blic Folders	Security Manager	Term Store Manager
₫>	Ð	$\textcircled{\black}{\bullet}$	f		F	~ ~	Ŧ	1	🕖 Refresh Backup Navigator
SharePoint	To Local Storage	To Cloud Storage	Update	To Original Location	Import from Local	Import from Cloud	Project Sum	mary Logs	
Connect To		Backup		Restore	Arc	hive	Report		View

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.

•)
Backup Properties		
Project Name: * md5		_
✓ Include Versions		
Include All Versions		
O Include most recent versions		
Delete from the source 🔞		
Apply Filter Filter		
Send notification Admins,Owner,Current	0	
☑ Smart Backup		

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.

ing Security Previous Versions Custo	omize General	Sharing Security Previous Versions Customiz
HBACKUP-Smart		HBACKUP-WithoutSmart
File folder	Туре:	File folder
C:\Users\natalia.nikolaeva\EssentialsG	ANew Location	n: C:\Users\natalia.nikolaeva\EssentialsQAN
3.49 MB (3,663,064 bytes)	Size:	5.93 MB (6,222,826 bytes)
3.53 MB (3,710,976 bytes)	Size on	disk: 6.01 MB (6,307,840 bytes)
145 Files, 154 Folders	Contains	s: 158 Files, 201 Folders
	ing Security Previous Versions Cust HBACKUP-Smart File folder C:\Users\natalia.nikolaeva\EssentialsG 3.49 MB (3,663,064 bytes) 3.53 MB (3,710,976 bytes) 145 Files, 154 Folders	Ing Security Previous Versions Customize General HBACKUP-Smart Image: City of the security Type: Image: City of the security Type: File folder Type: Image: City of the security Image: City of the security Image: City of the security 3.49 MB (3,663,064 bytes) Size: 3.53 MB (3,710,976 bytes) Size on 145 Files, 154 Folders Contains Contains

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 Essentials application is installed under an account that has Local Administrator rights.
- It is recommended that the computer hosting the Essentials 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 Essentials 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.

	Hom	e View	File Ma	anager	Drives	Security Manager	Term Store	Manager	Governance	Administrator	Backup	Help
	s>	Ð		€»		F	2 4	田	1	🕢 Refresh Back	up Navigato	r
	SharePoint	To Local Storage	To Cloud Storage	Update	To Original Location	Import from Local	Import from Cloud	Project Sum	mary Logs			
Π	Connect To		Backup		Restore	Arc	hive	Report		View		

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, Creatingan Office 365 Group Backup, and Creating a OneDrive for Business Backup

>				×
ackup Properti	25			
Project Name: *	SPO Marketing Site			
Connection				
Service: *	SharePoint Site 🗸 🎯			
Source Url: *	https://		~	
 → Backup ← Backup ← Backup 	Options on Policy			
Save Ba	ckup to Location			
Generate Scrip	t 🕞 Schedule Fii	nish	Cance	

5. SharePoint site backups can be configured with the following options:

Backup Options

<u>اً</u>	Backup Options
	Include Sub-sites
	Exclude specific Sub-sites Load
	Include Permissions
	Include List Views
	🗹 Include Content
	Include Versions
	O Include All Versions
	O Include most recent versions 10
	Apply Filter Filter
	Send notification Admins, Owner, Current

Include Sub-sites - this option will include all sub-sites (including their user created lists and content) of the parent site as defined in the project's previous Site URL field.

NOTE:

- Hidden lists, system lists (i.e. Galleries, Workflow History, User Information List and others not visible in the Site Contents section of SharePoint) and Apps are not included in the backup of any sites.
- The Backup operation is only designed to backup sites, user created lists, content (versions and metadata), user created custom views and SharePoint permissions (site, list and item). All other SharePoint objects, settings and configuration are not currently supported. Be sure to thoroughly test both the backup and restore of these objects in a non-production environment before deploying to production and contact Support with any questions or issues.
- Although aspx Pages are included in Backups, there have been occasions where web
 parts are missing or incorrectly assigned to the wrong zone after restore. Please be
 sure to thoroughly test any business critical pages to ensure they are backed up and
 restored properly in a non-production environment and contact Support with any
 questions or issues.

Exclude specific Sub-sites - this option will exclude all sub-sites that are specified in the loaded CSV file. To create this CSV file, simply enter the name of the sub-site which you wish to exclude from the backup, click the Load button and then select this file.

Include Permissions - this option will include SharePoint site, list, and item level permissions from each uniquely permissioned object.

Include List Views - this option will include any custom create list views.

NOTE: this does not include customized InfoPath Forms or views that were modified using SharePoint Designer.

Include Versions - this option will allow you to specify how many versions of each item to include with the backup. If left unchecked, no versions will be included, if "Include All Versions" is selected then all versions will be included. If "Include Most recent versions" is selected then only the number of versions specified will be included, starting with the most recent and working backwards (major and minor versions are included).

Apply Filter - this option will allow you to customize a filter to include/exclude content based on metadata.

Retention Policy

Retention Policy				
Keep Full Backups for	(60	days.	
Keep Incremental Back	ups for		14	days.

Keep Full Backups - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

Keep Incremental Backups - if configured, this will specify how long the software will retain any Incremental or Differential backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

Save Backup to Location

Ð	Save Backup to Location							
	Save to:	Local file Share O Cloud Storage (Azure or S3 account required)		0				
	Location:	C:\Users\spsadmin\Metavis		?				

Save to - this option will determine if the backup project is stored on your local storage (local or network path) or within your cloud storage provider (Amazon S3 or Azure)

Location - this field will display the full path to the location where the backups will be stored. Click the Ellipsis button to the right to configure this location.

6. Press Finish to start the Backup.

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NOTE: Backups can be scripted or scheduled. Please refer to the scheduling or scripting sections for additional information.

Updating SharePoint Online Classic Backup

Once a Backup exists, users can create updates by capturing a full or incremental snapshots of their SharePoint environment. Here are the basic guidelines for this process:

1. Select a SharePoint Online Backup project from the Backup Navigator panel.



2. From the Ribbon (or right-click menu for the selected backup) select the **Update Backup** option. This will generate the Update Backup Properties screen.

	Home	View	File Ma	anager	Drives	Security Manager	Term Store	Manager (Governance	Administrator	Backup	Help
5>		Ð	$\textcircled{\ }$	$\textcircled{\black}{\black}$	1	F	A +	Ŧ	1	🕜 Refresh Back	up Navigatoi	
SharePo	oint	To Local Storage	To Cloud Storage	Update	To Origina Location	Import from Local	Import from Cloud	Project Sumn	nary Logs			
Connect	t To		Backup		Restore	Arc	hive	Report		View		

3. A user may select one of several options for the update:

9			X
odate Backup			
ast updated: 2020-01-14 13:27:35			
⊖ Full Update			
Incremental Backup	0		
🔿 Differential Backup	0		
Custom Filter Update Filter	0		
Send notification Admins, Owner, Current	0		
Change Retention Policy			

Full Update - this will create a full snapshot of your currently configured backup project.

Incremental Backup - this will capture <u>only</u> the changes in your backup project since the last update, regardless if that update was Full or Incremental. In this scenario a user could create a series of Backups containing data changes for a specific time period.

Differential Backup - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

Custom Filter Update - Selecting this option will allow you to update the filter options for the backup. Filters allow the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It recommended not to use operators "Equal" and "Not Equal" to avoid difficulties with accurate file size if it more than 1 MB.

Use "Save Filter" option to save filter settings to file and load it in different wizards or Profile Manager. Note that filter file and filter fields have to match. For example, set of fields in filter will be different if you copy file into two different libraries.

Pilter				,	
Created At	Equal 🗸	<set by="" sharepoint=""></set>	>		
	Less Than \lor	<set by="" sharepoint=""></set>	~		
Exclude Folder(s)	Contains ~]
File Extension	Equal ~]
File Name	Contains ~]
Modified At	Equal \sim	<set by="" sharepoint=""></set>	~		
	Less Than \lor	<set by="" sharepoint=""></set>	~		
Size (KB)	Equal ~]
Save Filter Load	l Filter			Clear All Filter]

() = 1

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 <u>Scheduling Backup Jobs</u> section for more information).

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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.
- 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.

Hom	e View	Archite	ect N	ligrator Fil	le Manager 🛛 I	Drives Pub	lic Folders S	ecurity Manager	Term Store Manager
5	Ð	9	1		F	A +			🥑 Refresh Backup Navigator
SharePoint	Storage	Storage	Update	Location	Local	Cloud	Project Summ	ary Logs	
Connect To		Backup		Restore	Arc	hive	Report		View

- When prompted, select "yes" that you do want to restore the backup to its original location.
 Then select whether you would like to send notification.
- 4. The Copy Site Properties wizard will now be generated.
- 5. In the wizard you can choose to create a new Profile or use the Site-Default profile.

\$		_		×
Copy Si	e Properties			
Profiles	Site-Default	~	Save	New

6. You can choose from the following configuration options:

Site Collection options

00	 Sit 	e Collection Options
× .	Targ	et Central Admin URL:
	Site (Collection Admin:
	Site (Collection Quota (MB):
i		NOTE:
		 Site Collection options would be available only if site collection does not exist. Otherwise this section would not be available.

• Enter new site collection URL is not supported.

Tenant Central Admin URL – enter the Admin Portal URL for Office 365 where site collection must be restored

Site Collection Admin- enter user name (user@contoso.com) who would be site collection admin for restored site collection

Site Collection Quota - enter quota for restored site collection.

Site Copy Options

s)	 Site Copy Options
2013 📿	Copy content types
	🗹 Copy Sub-Sites 🛛 🔞
	Copy Site Permissions 🔞
	Deferred Group Copy

Copy Content Types -For existing sites, new content types will be copied with their inheritance preserved. For new sites, all content types will be copied.

NOTE: If source content types are inherited, then all types and dependencies will be created on the target site level.

Copy Sub-Sites - Enable this option to include all sub-sites of the current site in this operation.

Copy Sub-Site Permissions - This option will copy source site permissions to the target site. If the source site permissions are inherited, then the target site permissions will also be set to inherited. If the source site permissions are unique, these unique permissions will be copied to the target site.

Deferred Group Copy - Selecting Deferred Group Copy will only copy Permissions Groups that are used within the site(s) you are copying. Selecting Copy Site Groups will copy all Groups across the entire site collection.

i NOTE:

- Using Deferred Group Copy can be time consuming and result in slower migration performance.
- Copying Permissions Groups requires elevated privileges within SharePoint.

List Copy Options



NOTE: Restore would be with all lists, list settings, content types, columns and content

Copy Lists and Libraries - copy list and libraries contained within the site backup.

Copy Content - copy the content contained within the site backup.

Copy Content Permissions - copy the permissions associated with the content within this list/library

Copy Versions - copy the version of the content included within the list/library. You can specify if you would like to include all versions of the content, or whether you would like to include the most recent number of specified versions of the content.

Copy List Permissions - select this option to copy the site permissions.

Copy Views - select this option if you would like to copy the number of views of the site.

Advanced Options

00	 Advanced Options 	
Q	Overwrite if file exists 🔞	
	Incremental copy 😢 Last	days 🗸
	🗌 Enable Azure Turbo Mode 🛛 🔞	
	O Microsoft Provided Storage	
	User Provided Storage	Select 🕡
	Convert Workflows to 2013 Style	
	Apply Filter	Filter 🕜
	Re-Map Users	Load 🕜
	Re-Map Site and List Templates	Load 🕜
	Remove WEB Elements	Load 🕜

Overwrite if file exists - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

Incremental Copy - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration.

The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time.

To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modified.

To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

NOTE: The Overwrite if File Exists parameter will be disabled if this option is selected.

Enable Azure Turbo Mode - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

Convert Workflows to 2013 Style - convert the workflows in the backup to the 2013 style.

Apply Filter - Filters allow the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It recommended not to use operators "Equal" and "Not Equal" to avoid difficulties with accurate file size if it more than 1 MB.

Use "Save Filter" option to save filter settings to file and load it in different wizards or Profile Manager. Note that filter file and filter fields have to match. For example, set of fields in filter will be different if you copy file into two different libraries.

Created At	Equal	\sim	<set by="" sharepoint=""></set>	~
	Less Than \lor		<set by="" sharepoint=""></set>	~
Exclude Folder(s)	Contains	\sim		
File Extension	Equal	\sim		
File Name	Contains	\sim		
Modified At	Equal	\sim	<set by="" sharepoint=""></set>	~
	Less Than 🖂		<set by="" sharepoint=""></set>	~
Size (KB)	Equal	\sim		
Save Filter Load	Filter			Clear All Filter

🔈 Filter

Re-Map Users - This option will allow you to map users between different domains or to change the user account in the target environment during copy.

Re-Map Site and List Templates - This feature allows for the re-mapping of list or site templates.

Remove WEB Elements - This option allows you to remove specified webparts and namespace references from all included pages during migration.

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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.

Hom	e View	Archite	ect N	Aigrator F	ile Manager	Drives Put	olic Folders S	ecurity Manager	Term Store Manager
5	9	۲	f	1	F	~		1	🥝 Refresh Backup Navigator
SharePoint	lo Local Storage	Storage	Update	Location	Import from Local	Cloud	Project Summ	ary Logs	
Connect To		Backup		Restore	Arc	hive	Report		View

- 3. The Restore Backup wizard will now be generated.
- You can choose from the following configuration options:
 List Name and Properties you can choose to change the list name and profile.

List Nam	e Documents		
Profiles	List-Default	Save N	ew
List C	opy Options		

List Copy Options
Zaiia ✓ Copy content types
Copy Content
Copy Content Permissions
Copy Versions
Include All Versions
O Include most recent Versions 10
Copy List Permissions
🗹 Deferred Group Copy 🛛 🔞
Copy Views

Copy Content Types - restore the content types contained within the list backup.

Copy Content - restore the content within the list/library backup.

Copy Content Permissions - restore the permission settings of the content within the list/library backup.

Copy Versions - copy the version of the content included within the list/library. You can specify if you would like to include all versions of the content, or whether you would like to include the most recent number of specified versions of the content.

Copy List Permissions - select this option to copy the list/library permissions.

Copy Views Views - select this option if you would like to copy the number views of the list/library.

Advanced Options

Advanced Options		
♀ ○ Overwrite if file exists		
🗌 Incremental copy 🔞 Last 🔰 days 🗸 🗸		
Apply Filter	Filter	0
Re-Map Users	Load	0
Re-Map Site and List Templates	Load	?
Remove WEB Elements	Load	?
🗌 Enable Azure Turbo Mode 🛛 🔞		
O Microsoft Provided Storage 🛛 🔞		
User Provided Storage		

Overwrite if file exists - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

Incremental Copy - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration.

The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time.

To perform an incremental migration, enter the amount of time to include and select the
appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed.

To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

NOTE: The Overwrite if File Exists parameter will be disabled if this option is selected.

Enable Azure Turbo Mode - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

Apply Filter - Filters allow the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It recommended not to use operators "Equal" and "Not Equal" to avoid difficulties with accurate file size if it more than 1 MB.

Use "Save Filter" option to save filter settings to file and load it in different wizards or Profile Manager. Note that filter file and filter fields have to match. For example, set of fields in filter

will be different if you copy file into two different libraries.

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	Eilt-	
	FILLE	

Crasted At	Faual	~	<set by="" sharepoint=""></set>					
Created At	Equa	~	See by Sharer onto	~				
	Less Than \vee		<set by="" sharepoint=""></set>	~	r			
Exclude Folder(s)	Contains	\sim						
File Extension	Equal	\sim						
File Name	Contains	\sim						
Modified At	Equal	\sim	<set by="" sharepoint=""></set>	~	p.			
	Less Than ${\scriptstyle \lor}$		<set by="" sharepoint=""></set>	~	¢.			
Size (KB)	Equal	\sim						
Save Filter Load	Filter						Clear All	Filter

Re-Map Users - This option will allow you to map users between different domains or to change the user account in the target environment during copy.

Re-Map Site and List Templates - This feature allows for the re-mapping of list or site templates.

Remove WEB Elements - This option allows you to remove specified webparts and namespace references from all included pages during migration.

The webpart and namespace references to be removed should be defined in a CSV file and then loaded with this option.

- 7. Once you have configured all of your settings, click **Finish** to complete the restore.
- **NOTE:** By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.

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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.

Ľ	Contents							🚼 😰 🖻 💙 Ø 🗆 🗖
	Backup: Corporate 2016 > D	ocuments						
	Name	Type	Title	Created	Modified	Created By	Modified By	
	Important Notes.txt	Document		2017-11-30 11:05:59 AM	2017-11-30 11:05:59 AM	SHAREPOINT\system	SHAREPOINT\system	
	Procedures.txt	Document		2017-11-30 11:05:59 AM	2017-11-30 11:05:59 AM	SHAREPOINT\system	SHAREPOINT\system	

3. Right-click and select the "Restore" option or choose "To Original Location" button in the Restore section of the Backup Ribbon.

	Home	View	Migrat	or Fil	e Manager	Drives	Secur	ity Manager	Т	erm Store I	Manager		Administ	rator	Backup	He	elp :	»		
5		Ð		f	€	Ę	₹	*					ØR	lefresh Bac	kup Na	/igator				
SharePo	pint	To Local Storage	To Cloud Storage	Update	To Original Location	Impor Lo	t from cal	Import from Cloud	P	Project Sum	mary	Log	5							
Conned	t To		Backup		Restore	T	Archi	ve		Report				View						
烙 Navig	ator								E	(⊈) ▽	- 8	1	Hyper Ba	ackup 🔯	Conte	nts				
> 🗁 Co > 😵 Dr	orporate opbox											В	ackup: T	enant Adn	ninistra	tion > Do	ocume	nts		
> 🗁 Or	neDrive											1	Name						1	Туре
													> 🔁 1						F	Folder
													📄 12	versions.d	осх				0	Docum
												1	> 🗁 1_1	.000					F	Folder
												1	> 🗁 3	.000					F	Folder
												1	> 🗁 Au	tomation_	CoreVe	rsions			F	Folder
													Co	orporate Re e with vers	pr 📩	Сору	010052	0.00.01	Ctrl+C	cum
												3	> 📂 Hn 🦳 LT	nygration Dashboard	Ø	Refresh	n			lder cum
												1	> 👝 Re	gression Ve	ers 🗈	Open				lder
													Sit	es_201911	1: 🔎	Show P	ermiss	ions		cum
													🖉 Tei	mp_CSVFil	e 🖸	Restore	2			cum
													> 🗁 Tru	uncate_cso	m					der

4. The Restore Document Options window will pop up. Select the restore settings you would like to apply and click **Finish**.

le Restore Document Options								
Include All Versions								
O Include most recent Versions								
🗌 Defer requ	uired fields							
Restore Permissions								
	ОК	Cancel						

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.

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.

Hom	e View	File Ma	nager	Drives	Security Manager	Term Store	Manager	Governance	Administrator	Backup	Help
S >	9			1	F	2 ~	Ŧ		🕜 Refresh Back	up Navigator	
SharePoint	To Local Storage	To Cloud Storage	Update	To Original Location	Import from Local	Import from Cloud	Project Sum	mary Logs			
Connect To		Backup		Restore	Arc	hive	Report		View		

Enter a project name for your Backup, this name will be displayed in the Backup Navigator.

Backup Propertie	25 username and click Connect to continue

3. Under the Connection section of the wizard, select "OneDrive for Business" as your Service type.

0	—	Х
Backup Properties		
8 Enter your Admin username and click Connect to continue		
Project Name: * Backup OneDrive for Business		
Connection		^
Service: * OneDrive for Business 🗸 🔞		

4. Enter your Global Administrator username and click the **Connect** button.

\$	_	
Backup Properties		
😣 Enter your Admin username and click Connect to continue		
Project Name: * Backup OneDrive for Business		
Connection		^
Service: * OneDrive for Business V		
Login: *	Connect	0

5. When prompted, enter your Global Administrator password and click Connect.

NOTE:

- To backup all OneDrive for Business sites you will need to enter your Office 365 Global Administrator login and password.
- If creating a backup of a Single OneDrive for Business Site, the account used to create the backup must already have at least Designer permissions to the OneDrive being backed up.
- 6. You can choose to "Include all OneDrive for Business Sites", which will create a backup of all of your OneDrive for Business Sites, or you can select to specify which OneDrive for Business sites you wish to backup by either loading a list from a CSV file (by clicking Load from CSV), or

selecting from a list provided by clicking Select from Office 365.



7. Choose your desired Backup, Retention, and Location options (Note: a location must be specified in order to continue).

Backup Options

Backup Options
Include Permissions
✓ Include Content
Include Versions
O Include All Versions
O Include most recent versions
Apply Filter Filter
Send notification Admins, Owner, Current

Include Permissions - this option will include SharePoint site, list, and item level permissions from each uniquely permissioned object.

Include Content - this option will include the content within the onedrive folders in the backup.

Include Versions - this option will allow you to specify how many versions of each item to include with the backup. If left unchecked, no versions will be included, if "Include All Versions" is selected then all versions will be included. If "Include Most recent versions" is selected then only the number of versions specified will be included, starting with the most recent and working backwards (major and minor versions are included).

Apply Filter - this option will allow you to customize a filter to include/exclude content based on metadata.

Send Notifications - Enter a specific user email address. For two or more, separate each email address with a comma.

Email(s) would be used in email notifications and in send test email option.

Retention Policy

Retention Policy	
Keep Full Backups for	60 days.
Keep Incremental Back	ups for 14 days.

Keep Full Backups - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention

policy.

Keep Incremental Backups - if configured, this will specify how long the software will retain any Incremental or Differential backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

Save Backup to Location

Ð	 Save Ba 	ickup to Location	
	Save to:	Local file Share O Cloud Storage (Azure or S3 account required)	Ć
	Location:	C:\Users\spsadmin\Metavis	🤇

Save to - this option will determine if the backup project is stored on your local storage (local or network path) or within your cloud storage provider (Amazon S3 or Azure)

Location - this field will display the full path to the location where the backups will be stored. Click the Ellipsis button to the right to configure this location.

8. Click **Finish** to begin. For information on how to connect to Cloud storage, see the Connecting to Cloud Storage section.

Updating OneDrive Classic Backup

Once a Backup exists, users can create updates by capturing a full or incremental snapshots of their OneDrive environment. Here are the basic guidelines for this process:

1. Select a OneDrive Backup project from the Backup Navigator panel.



2. From the Ribbon (or right-click menu for the selected backup) select the **Update Backup** option. This will generate the Update Backup Properties screen.



3. A user may select one of several options for the update:

s.			_		×
Update Backup					
Last updated: 2020-01-16 14:1	5:38				
○ Full Update					
Incremental Backup		0			
O Differential Backup		0			
○ Custom Filter Update	Filter	0			
Send notification	Admins, Owner, Current	: 🕡			
Change Retention Policy					
	<u></u>	F1 1 1	_	<u> </u>	
Generate Script	Schedule	Finish		Cancel	

Full Update - this will create a full snapshot of your currently configured backup project.

Incremental Backup - this will capture <u>only</u> the changes in your backup project since the last update, regardless if that update was Full or Incremental. In this scenario a user could create a series of Backups containing data changes for a specific time period.

Differential Backup - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

Custom Filter Update - Selecting this option will allow you to update the filter options for the backup. Filters allow the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It recommended not to use operators "Equal" and "Not Equal" to avoid difficulties with accurate file size if it more than 1 MB.

Use "Save Filter" option to save filter settings to file and load it in different wizards or Profile Manager. Note that filter file and filter fields have to match. For example, set of fields in filter

will be different if	you copy file	into two	different	libraries.
----------------------	---------------	----------	-----------	------------

🤌 Filter									×
Created At	Equal	\sim	<s< td=""><td>et by SharePoint</td><td>t></td><td>~</td><td></td><td></td><td></td></s<>	et by SharePoint	t>	~			
	Less Than \lor		<s< td=""><td>et by SharePoint</td><td>t></td><td>~</td><td></td><td></td><td></td></s<>	et by SharePoint	t>	~			
Exclude Folder(s)	Contains	\sim							
File Extension	Equal	\sim							
File Name	Contains	\sim							
Modified At	Equal	\sim	<s< td=""><td>et by SharePoint</td><td>Þ</td><td>\mathbf{v}</td><td></td><td></td><td></td></s<>	et by SharePoint	Þ	\mathbf{v}			
	Less Than \smallsetminus		<s< td=""><td>et by SharePoint</td><td>t></td><td>\sim</td><td></td><td></td><td></td></s<>	et by SharePoint	t>	\sim			
Size (KB)	Equal	\sim							
Save Filter Load	Filter							Clear All	Filter

Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

Change Retention Policy - selecting this button will open the retention policy properties window, allowing you to update the retention policy for the backup.

4. Press Finish to update the Backup now or choose the Schedule button to configure a Windows Task Scheduler task to schedule the update backup (See the Scheduling Backup Jobs section for more information).

Restore OneDrive Classic Backup

The following are instructions for restoring a OneDrive List/Library from a specific backup:

1. Navigate to the backup, You can access the Restore wizard by either right-clicking on the

selected username and selecting the "Restore" option

Backup Navigator	
> 📶 Lists	
📅 Subsites	
🗸 🜰 OneDrive Classic Bac	kup
🗸 🕒 Jan-16-2020 02:15	PM - (Full)
> 5> Admin for Tear	ns
🗸 🚺 Admin	
🗸 📶 Lists	
Doc	
📶 Forr 崎	View Contents
📶 Soci 🔑	Show Permissions
📶 Styl 🔃	Show List Views
📅 Subsite 🕥	Restore
V Sto Advanced	

Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

of the Ribbon.

	Home	View	Archite	ect N	ligrator Fi	le Manager	Drives Pu	blic Folders Se	ecurity Manager	Term Store Manager
Share	Point	To Local Storage	To Cloud Storage	(Update	To Original Location	Import from Local	Import from Cloud	Project Summ	ary Logs	🕜 Refresh Backup Navigator
Conne	ct To		Backup		Restore	Arc	thive	Report		View

- 2. The Restore Backup wizard will now be generated.
- You can choose from the following configuration options:
 List Name and Properties you can choose to change the list name and profile.

List Name Documents		
Profiles List-Default	∨ Save	New
List Copy Options		
List Copy Options		
Copy content types		
Copy Content		
Copy Content Permissions		
Copy Versions		
Include All Versions		
O Include most recent Versions 10		
Copy List Permissions		
🗹 Deferred Group Copy 🛛 🔞		
Copy Views		

Copy Content Types - restore the content types contained within the list backup.

Copy Content - restore the content within the list/library backup.

Copy Content Permissions - restore the permission settings of the content within the list/library backup.

Copy Versions - copy the version of the content included within the list/library. You can specify if you would like to include all versions of the content, or whether you would like to include the most recent number of specified versions of the content.

Copy List Permissions - select this option to copy the list/library permissions.

Copy Views Views - select this option if you would like to copy the number views of the list/library.

Advanced Options

Overwrite if file exists 🕢	
🗌 Incremental copy 🕡 Last 🔤 days 🗸	
Apply Filter	Filter
Re-Map Users	Load
Re-Map Site and List Templates	Load
Remove WEB Elements	Load
🗌 Enable Azure Turbo Mode 🛛 🔞	
O Microsoft Provided Storage 🛛 🕢	
User Provided Storage	

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.

Created At	Equal V Set by SharePoint>V
	Less Than V Set by SharePoint> V
Exclude Folder(s)	Contains v
File Extension	Equal V
File Name	Contains v
Modified At	Equal V Set by SharePoint>V
	Less Than V Set by SharePoint> V
Size (KB)	Equal V

🧶 Filter

Save Filter

Load Filter

Re-Map Users - This option will allow you to map users between different domains or to
change the user account in the target environment during copy.

Re-Map Site and List Templates - This feature allows for the re-mapping of list or site templates.

Remove WEB Elements - This option allows you to remove specified webparts and namespace references from all included pages during migration.

The webpart and namespace references to be removed should be defined in a CSV file and then loaded with this option.

- 7. Once you have configured all of your settings, click **Finish** to complete the restore.
- **NOTE:** By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.

 \times

Clear All

Filter

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.

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.

Hom	e View	File Ma	nager	Drives S	Security Manager	Term Store	Manager G	overnance	Administrator	Backup	Help
SharePoint	To Local	To Cloud	() Update	To Original	Import from	Import from	Project Summa	ary Logs	🕢 Refresh Back	up Navigator	
	Storage	Storage		Location	Local	Cloud					
Connect To		Backup		Restore	Arc	hive	Report		View		

2. Enter a project name for your Backup, this name will be displayed in the Backup Navigator.

Project Name: * Backup Office 365 Groups

3. Under the Connection section of the wizard, select "Office 365 Groups" as your Service type.

Project Name:	*	Backup Office 36	55 G	roups
Connection				
Service: *	Of	fice 365 Groups		~ 📀

4. Enter your Global Administrator username and click the **Connect** button.

Connection

/ice:*	Office 365 Groups 🛛 🗸 🔞	
in:*	Enter your Global Administrator user name and click Connect	🗸 🕇 + Admin 😨
	Connected admins: itrosman@metavistech.com	

5. When prompted, enter your Global Administrator password and click Connect.

NOTE: To backup all Office 365 Groups sites you will need to enter your Office 365 Global Administrator login and password. Please note that this Admin user account must have an Exchange Online license assigned to it in order to be successful.

 You can choose to "Include all Office 365 Groups", which will create a backup of all of your Office 365 Groups, or you can select to specify which Office 365 Groups you wish to backup by either loading a list from a CSV file (by clicking Load from CSV), or selecting from a list provided by clicking Select from Office 365.



 Choose your desired Backup, Retention, and Location options (NOTE: a location must be specified in order to continue) and click Finish to begin. For information on how to connect to Cloud storage, see the Connecting to Cloud Storage section.



Backup Options
Include Group Site
Include Sub-sites
Include Versions
O Include All Versions
Include most recent versions
Include Group Mailbox
Include only those items More recent v than:
◯ Date: 1/17/2020 🜩
Range: 45 days
Send notification Admins, Owner, Current

Include Group Site - include the group site in the backup of the Office 365 group.

Include Sub-sites - include sub-sites in the backup of the Office 365 group.

Include Versions - this option will allow you to specify how many versions of each item to include with the backup. If left unchecked, no versions will be included, if "Include All Versions" is selected then all versions will be included. If "Include Most recent versions" is selected then only the number of versions specified will be included, starting with the most recent and working backwards (major and minor versions are included).

Include Group Mailbox - include the group mailbox in the Office 365 group backup.

Include only those items - This "Include Only" filter allows the configuration of which items, based on creation date, should be included with this backup.

The filter provides the following four scenarios. Please note that using this filter will also dictate which items are included in updates (Full, Differential and Incremental).

Include only those items "more recent" than a specified date. When this is configured, the backup will only include items created from today back until the specified date. It will never include items that were created prior to this date since the starting point (the specified "Date") has been explicitly defined.

Include only those items "more recent" than a range. When this is configured, the backup will only include items created from today going back to the number of days, weeks, months or years configured. Both the today date and the starting point are dynamic and will vary based on the operation's start and end times.

Include only those items "older" than a specified date. When this is configured, the backup will only include items created prior to the specified date. In this configuration, since both the start and end dates are explicitly defined updates are unnecessary as the included items will never change. This option should only be used for a one-time backup operation.

Include only those items "older" than a range. When this is configured, the backup will only include items created prior to the specified date going back to the number of days, weeks,

months or years configured. Both the starting date and the ending point are dynamic and will vary based on the operation's start and end times.

Send Notification -Enter a specific user email address. For two or more, separate each email address with a comma. Email(s) would be used in email notifications and in send test email option.

Retention Policy

എ	 Retention Policy 			
<u> </u>				
	Keep Full Backups for	60	days.	
	Keep Incremental Backups	for	14	days.

Keep Full Backups - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

Keep Incremental Backups - if configured, this will specify how long the software will retain any Incremental or Differential backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

Save Backup to Location

Ð	▼ Save Ba	ickup to Location		
	Save to:	○ Local file Share		0
	Location:			?

Keep Full Backups - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

Keep Incremental Backups - if configured, this will specify how long the software will retain any Incremental or Differential backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

Include Only Backup Filter

When configuring the initial backup job, you may choose to apply an Inclusion filter against the content within the selected mailbox folders. This filter is based on the modification date of each item within the group and is designed to *Include* the content within the specified time period (by Date or by Range), not *Exclude*.

Please review the following scenarios to determine which setting is best for your backup needs. Please note that the initial filter configuration will impact how Updates (Full, Incremental, and Differential) are performed, so choose wisely.

Each configuration includes a chart displaying what will be included (green bar) versus what will be excluded (red bar). The bar on the bottom represents the initial Full backup and each above it represents the updates that can be performed.

Include only those items More Recent than Date: MM/DD/YYYY

When this filter is chosen, the backup will only include items that were modified after the date specified and never items from before the date.



Include only those items More recent than Range: n Days/Weeks/Months/Years

When this filter is chosen, the backup will only include items that were modified within the specified time range from the start of the backup operation ([Today]) going back by the amount of time defined (for example, as configured with 45 days the Full backup will only include 45 days worth of items, from "Today" going back).



Include only those items Older than Date: MM/DD/YYYY

When this filter is chosen, the backup will only include items that were modified prior to the date specified and never after it. Due to this static starting Date and only including items prior, Incremental and Differential updates do not apply to this configuration since the amount of items will not change.



Include only those items Older than Range: n Days/Weeks/Months/Years

When this filter is chosen, the backup will only include items that were modified prior to the specified time range from the start of the backup operation ([Today]) going back.



Updating Office 365 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. Selectan Office 365 Groups Backup project from the Backup Navigator panel.

🕙 Backup Navigator	
> S Classing SPO Backup	
> G> Office 365 Group Backup	
🔉 🜰 OneDrive Classic Backup	

2. From the Ribbon (or right-click menu for the selected backup) select the **Update Backup** option. This will generate the Update Backup Properties screen.

SharePoint SharePoint Storage Storage Backup To Cloud Direction Storage Backup To Cloud Direction Backup To Cloud Arthive Project Summary Report Project Summary Project Summary <		view Migrator	File Manager	Drives	Security Manager	Term Store Manage	r Administrato	r Backup H
A user may select one of several options for the update:	SharePoint Connect To	cal ge Backup	pdate To Origina Location Restore	I Import Loca	from Import from Cloud Archive	Project Summary Report	Logs Ø	sh Backup Navigator 'iew
Update Backup	A user may s	elect one c	of several o	ptions f	or the upda	te: □ ×		
Image: Send notification Admins,Owner,Current	Update Backup	,						
Image: Send notification Admins,Owner,Current	•							
Last updated: 2020-01-16 14:15:38			_					
Full Update Incremental Backup Differential Backup Custom Filter Update Filter Send notification	Last undated: 20	20.01.16.14-15-						
Full Update Incremental Backup Differential Backup Custom Filter Update Filter Send notification	cast apaated, 20							
Incremental Backup Image: Construction of the second s								
O Differential Backup Image: Custom Filter Update O Custom Filter Update Filter Send notification Admins,Owner,Current	 Incremental 	Backup		(
Custom Filter Update Filter Image: Custom Filter Send notification Admins,Owner,Current Image: Custom Filter	O Differential E	Jackup		(
Send notification Admins, Owner, Current 🔞	O Custom Filte	r Update Fi	lter	(
	0		dmins.Owner.C	urrent				
Change Retention Policy	Send notifica	ation A						
	Send notifica	ation A						
	Send notifica	ation A						
	Send notific	tion Policy						

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.

Filter				
Created At	Equal 🗸	<set by="" sharepoint=""></set>	~	
	Less Than 🗸	<set by="" sharepoint=""></set>	~	
Exclude Folder(s)	Contains ~			
File Extension	Equal ~			
File Name	Contains ~			
Modified At	Equal ~	<set by="" sharepoint=""></set>	~	
	Less Than \smallsetminus	<set by="" sharepoint=""></set>	~	
Size (KB)	Equal 🗸			
Save Filter Load	l Filter			Clear All Filter

() = 1

Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

Change Retention Policy - selecting this button will open the retention policy properties window, allowing you to update the retention policy for the backup.

 Press Finish to update the Backup now or choose the Schedule button to configure a Windows Task Scheduler task to schedule the update backup (See the Scheduling Backup Jobs section for more information).

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Restoring Office 365 Groups Classic Backup

The following are instructions for restoring Office 365 Groups from a specific backup:

1. Navigate to the backup, You can access the Restore wizard by either right-clicking on the selected username and selecting the "Restore" option

Backup Navigator
 S Classing SPO Backup
 Office 365 Group Backup
 Jan-20-2020 10:33 AM - (Full)
 G 10tect
 C OneDri Restore

Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

of the Ribbon.



2. This will start a restore membership content job.

Classic Mailbox Backup

Creating Mailbox Classic Backup

Essentials Backup supports the ability to create a backup of any single user's Exchange Online Mailbox or all users' Exchange Online Mailboxes across your Office 365 tenant (when licensed).

NOTE: Mailbox Backup is Disabled by default, please see the Enabling Mailbox Backup section for instructions on how to enable this feature.

To create a backup for all or several user Exchange Online Mailboxes in your Office 365 tenant:

1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.

	Home View File Manager Drives Security Manager Term Store Manager Governance Administrator Backup Help
	Image: System of the syste
	SharePoint To Local To Cloud Update To Original Import from Inport from Project Summary Logs Connect To Backup Performent Archive Performance View
2	Enter a project name for your Backup, this name will be displayed in the Backup Navigator
۷.	Enter a project name for your backup, this name will be displayed in the backup wavigator.
	Backup Properties
	Project Name: * Backup Exchange Online Mailbox
3.	Under the Connection section of the wizard, select "Office 365 Mailboxes" as your Service type.
	Backup Properties
	Project Name: * Backup Exchange Online Mailbox
	Connection
	Service: * Office 365 Mailboxes V
4	Enter your Global Administrator username and click the Connect button
ч.	
	Beckun Proportion
	Project Name: * Backup Exchange Online Mailbox
	Connection
	Service: * Office 365 Mailhover
	Login: *

- 5. When prompted enter your Global Administrator password and click Connect.
- **NOTE:** To backup all users' Exchange Online mailboxes you will need to enter your Office 365 Global Administrator login and password. Please note that this Admin user account must have an Exchange Online license assigned to it in order to be successful.
- **NOTE:** Claims based and multi-factor authentication is not supported for Exchange Online connections.
- You can choose to "Include all Office 365 Mailboxes", which will create a backup of all Office 365 Mailboxes, or you can select to specify which Office 365 Mailboxes you wish to backup by either loading a list from a CSV file (by clicking Load from CSV), or selecting from a list provided

by clicking Select from Office 365.

s) enen 8 e				×
Backup Proper	lies			
Project Name:	* Backup Exchange Online Mailbox			
Connection				^
Service: *	Office 365 Mailboxes 🗸 🙆			
Login: *	proceedings and the	Connect	0	
Connection		×	✓	
Objects: *	Include all Office 365 Mailboxes			
(D Load from CSV or Select from Office 365 <type file="" or="" select=""> Please load CSV file or browse objects <td< td=""><td></td><td>0</td><td></td></td<></type>		0	

7. Choose your desired Backup, Retention, and Location options (NOTE: a location must be specified in order to continue) and click Finish to begin. For more information about the Backup and Retention options available see the Creating a Full Backup section, for information on how to connect to Cloud storage, see the Connecting to Cloud Storage section.

Configu	Iration
٩	Mailbox Folders
1	Backup Options
•	Retention Policy
Ð	Save Backup to Location
	Save to: O Local file Share O Cloud Storage (Azure or S3 account required)
	Location: C:

To create a backup for a **single** user's Exchange Online Mailboxes in your Office 365 tenant:

1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.

Hom	e View	File Ma	nager	Drives	Security Manager	Term Store	Manager	Governance	Administrator	Backup	Help
S >	Ð		Ð	1	F	A (+	Ŧ		🕜 Refresh Back	up Navigator	
SharePoint	To Local Storage	To Cloud Storage	Update	To Origina Location	Import from Local	Import from Cloud	Project Sum	mary Logs			
Connect To		Backup		Restore	Arc	nive	Report		View		

2. Enter a project name for your Backup, this name will be displayed in the Backup Navigator.

6		×
Backup Properties		
Project Name: * Backup Exchange Online Mailbox		

3. Under the Connection section of the wizard, select "Office 365 Mailbox" as your Service type.

•		\times
Backup Properties		
Project Name: * Backup Exchange Online Mailbox	 	
Connection		^
Service: * Office 365 Mailbox 🗸 🕢		

4. Next, enter the email address of the mailbox you wish to backup.

×
^

- **NOTE:** To backup another user's mailbox, you will need explicit permissions to their mailbox or usean 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.

Configuration	
Mailbox Folders	
Backup Options	
Retention Policy	
Save Backup to Location	
Save to: Local file Share Cloud Storage (Azure or S3 account required) 	0
Location: C:	🕡

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.

Hon	ne V	iew Architec	t Migi	rator File I	Manager Drives	Public Folder	s Security Manager	Term Store Manager	Informant	Administrator	Backup	Help
Activation	About	Profile Manager	Support	? User Manual	Check for Updates	📄 Debug Mode 📄 Proxy Mode	U Reset "Do not Show"					
				L.	les.							

- 2. Select the Migartion tab within Profile Manager.
- 3. Navigate to the Hyper Mode Settings portion, and select the option in order to Enable the feature.

General	• Your Settings will be saved for future operations.		
Connection	Copy Subsites: Copy Views:	Hyper Mode Settings	
Migration	Copy Features: Copy Forms: Copy Heatter	● OAuth: ✓ Generate Status Report: ✓ ● CI	Hyper Backup: assic Mailbox Backup:
Email Notification	Remove Folder Structure:	Delete Report Jobs:	Backup System Lists:
Advanced	Generate Failed Items File: Manual Automatic	#Parallel Threads: 35	
	Content Type Load Limit: 400	#Azure Threads: 15	
	Regional Date Format:	#Retry: 10	
	Custom Identity Provider:	is not responding Import did not comp	olete
	Change Log Storage Location	Timeout waiting for Can not create looku target	connection from pool Ip fields because list(s) doesn't exists on
	File System:	Parent content type	does not exist
	Cloud:		U.
	Path Overflow Option	Temporary Files Location:	
	Truncate Long Path:	#Jobs per Tab: 100	
	Max Length Before Overflow: 200		
	Overflow Folder Name Length: 5		
Reset to Defaults			

4. When exiting the profile manager, make sure you confirm that you would like to save your changes when the pop-up asks.

Include Only Backup Filter

When configuring the initial backup job, you may choose to apply an Inclusion filter against the content within the selected mailbox folders. This filter is based on the modification date of each item within the mailboxes and is designed to *Include* the content within the specified time period (by Date or by Range), not *Exclude*.

Please review the following scenarios to determine which setting is best for your backup needs. Please note that the initial filter configuration will impact how Updates (Full, Incremental, and Differential) are performed, so choose wisely.

Each configuration includes a chart displaying what will be included (green bar) versus what will be excluded (red bar). The bar on the bottom represents the initial Full backup and each above it represents the updates that can be performed.

Include only those items More Recent than Date: MM/DD/YYYY



When this filter is chosen, the backup will only include items that were modified after the date specified and never items from before the date.

Include only those items More recent than Range: n Days/Weeks/Months/Years

When this filter is chosen, the backup will only include items that were modified within the specified time range from the start of the backup operation ([Today]) going back by the amount of time defined (for example, as configured with 45 days the Full backup will only include 45 days worth of items, from "Today" going back).



Include only those items Older than Date: MM/DD/YYYY

When this filter is chosen, the backup will only include items that were modified prior to the date specified and never after it. Due to this static starting Date and only including items prior, Incremental



and Differential updates do not apply to this configuration since the amount of items will not change.

Include only those items Older than Range: n Days/Weeks/Months/Years

When this filter is chosen, the backup will only include items that were modified prior to the specified time range from the start of the backup operation ([Today]) going back.



Updating Mailbox Classic Backup

Once a Backup exists, users can create updates by capturing a full or incremental snapshots of their OneDrive environment. Here are the basic guidelines for this process:

1. Selectan 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.

							🥑 Refresh Backup	o Navigatoi
SharePoint To Local To Co Storage Stor	rage	Location	Loc	al Cloud	Report	ary Logs	View	
Connectito	up	Restore		Archive	Report		VIEW	
A user may select o	one of s	everal op	otions f	for the upda	ate:			
\$						_		
Undate Backup								
opulie buckup								
						_		
hll mailhover								
pii manuoxes								
Jan manboxes	12.21.00							
Last updated: 2020-01-20	12:31:00							
Last updated: 2020-01-20) 12:31:00							
Last updated: 2020-01-20) 12:31:00							
Full Update Incremental Backup) 12:31:00			D				
Full Update Incremental Backup Differential Backup) 12:31:00		(0				
Full Update Incremental Backup Differential Backup Send notification) 12:31:00	ins,Owner,Cι	urrent	D D D				
Full Update Incremental Backup Differential Backup Send notification Change Retention Poli	Adm	ins,Owner,Cu	(urrent	0 0				
Full Update Incremental Backup Differential Backup Send notification Change Retention Police) 12:31:00 Adm	ins,Owner,Ct	urrent	0 0 0				
Full Update Incremental Backup Differential Backup Send notification Change Retention Police	0 12:31:00 Adm	ins,Owner,Cu	urrent (0 0 0				
Full Update Incremental Backup Differential Backup Send notification Change Retention Police	Adm cy	ins,Owner,Ct	(urrent	9 9 9				
Full Update Incremental Backup Differential Backup Send notification Change Retention Police	Adm	ins,Owner,Ct	urrent (0 0 0				

Full Update - this will create a full snapshot of your currently configured backup project.

Incremental Backup - this will capture <u>only</u> the changes in your backup project since the last update, regardless if that update was Full or Incremental. In this scenario a user could create a series of Backups containing data changes for a specific time period.

Differential Backup - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

Change Retention Policy - selecting this button will open the retention policy properties window, allowing you to update the retention policy for the backup.

 Press Finish to update the Backup now or choose the Schedule button to configure a Windows Task Scheduler task to schedule the update backup (See the Scheduling Backup Jobs section for more information).

Restoring Mailbox Classic Backup

The following are instructions for restoring a OneDrive List/Library from a specific backup:

 Navigate to the backup, You can access the Restore wizard by either right-clicking on the selected username and selecting the "Restore" option

🕙 Backup Navigator		
🗸 🕒 Jan-20-2020 12:3	PM - (Full)	
> 🎑 a.oskin@m 👔	Restore	
> <u> Admin@me</u>		

Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

of the Ribbon.

	Home	View	Archite	et M	ligrator Fi	le Manager	Drives F	ublic Folders	Security Manager	Term Store Manager
s	>	Ð		f	$\mathbf{\textcircled{1}}$	Œ	24	E E		🕖 Refresh Backup Navigator
Share	ePoint	To Local Storage	To Cloud Storage	Update	To Original Location	Import from Local	Import fro Cloud	m Project Su	immary Logs	
Conn	ect To		Backup		Restore	Ar	chive	Repo	ort	View

2. This will start a copy mailbox content job.

Change Properties for Backup

Users can change the properties for their backups after the backups have been configured. To do so simply right click on the backup you wish to update, and select **Change Backup Properties.**



This opens up the Change Properties for Backup window.

烙 Change Backup Properties			×
Change Properties for Backup: Corporate Backup			
Backup Location: C:\Users\spsadmin\Essentials			
List Copy Options			
Backup content with			
Include Versions			
O Include All Versions			
Include most recent Version 10			
Advanced Options			
Apply Filter Filter			
Smart Backup			
	Save	Cancel	

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	userna	me > .
-------	--------	------------------

inter username >.				
log Authentication and Admin Pooling	7	-		×
Admin Name: jtrosman@quest.com				_
Admin Name: <enter user=""></enter>				—
	Finish		Cancel	

If you choose to enter a new user, you will be asked for the username and a password.

Scheduling Backup Jobs

There are two alternative methods to schedule Backup jobs:

- 1. The application allows users to create scripts and then run them from a command line, PowerShell, or load them into Windows Task Scheduler. You can learn more about this feature here.
- 2. Alternatively the application has an integrated User Interface that allows users to schedule and control their backup jobs. You can learn more about this feature here.

How to Schedule Full Backups for SharePoint

Essentials 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. Essentials 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 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.

6		_		
ackup Properti	es			
Project Name: *	SharePoint Backup			
Connection Service: *	SharePoint Site 🗸 💿			
Source Url: *	http://s-sp16-xprod:2016/sites/Corporate2016		~	
Retent	ion Policy			
📑 Generate Scri	ot Schedule	Finish	Canc	el

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.

Settings:				
Title: SharePoin	t Backup			
Perform this tas One time onl Daily Weekly Monthly	ik: – 🔞 y			
Advanced Setting: Repeat task eve	s: ery 1 hour	~		

6. Enter the Start Time and Start Date for when you would like the Scheduled Backup to begin. Click **Next**.

•				[- X
cheduled Task					
Specify day and time	you want this t	ask to start			
Start Time: 7:14 PM					
Start Date: 1/22/20	18 🜩				
	< Back	Next >	Finish	(Cancel

7. Click **Finish** to create the Backup job. You may be asked for your windows credentials, enter them and click **Ok**.

>		×
Windows System	Credentials	
• Yes, store my cre	dentials with this task	
No, do not store	my credentials with this task	
Windows username	Carlos Constant	
Windows password	•••••	

If the backup job is failing to start at the scheduled day and time, please try the following configuration.

1. In Windows Task Scheduler, right click on the Backup Job and choose Properties.

Task Scheduler		- 🗆 ×
File Action View Help		
🗢 🄿 🔰 🖬 🚺 🖬		
Task Scheduler (Local)	Name Status Triggers Actions	
> 🛃 Task Scheduler Library	OneDrive St Ready At 4:00 AM on 5/1/199 to a very 1.00:00:00 indefinitely. Task Schedule	er Library
	Kun 💿 Create Ba	isic Task
	Dianal Binala Bina	ısk
	Event Import Ta	ask
	Properties Display A	II Running Tasks
	Delete Disable A	II Tasks History
	Run Create Bit End Disable Disable Import Till Properties Disable A Delete	isic Task isk ask II Running Tasks III Tasks History

- 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.

0								-
General Trig	gers Actions	Condition	s Settings	History				
Name:	OneDrive Star	ndalone Up	date Task-S	-1-5-21-42	21714872-3534	193616-	335397208	7-1122
Location:	۱.							
Author:	Microsoft Co	rporation						
Description:								
Security opt	ions							
When runn	ing the task, us	e the follow	ving user ac	count:				
spectrum.							Change l	Jser or Group
Run only	/ when user is I	ogged on						
Run whe	ther user is log	ged on or i	not					
Do not store password. The task will only have access to local computer resources.								
🗹 Run with	n highest privile	eges						
Hidden	Configu	re for: Wi	ndows Vista	a™, Windov	vs Server™ 200	8		~
							ОК	Cancel

OneDrive Standalone Update Task-S-1-5-21-4221714872-3534193616-3353972087-1122 Properties (Local C., X

- 3. After clicking **OK** you will be prompted for the password of the Admin account you created the backup with and click **Ok**.
 - **NOTE:** The username and password will be a Domain or Local Username and Password that you are logged into the machine as. This will not bean Office 365 email and password even if that is what you are backing up.

Task Scheduler		?	×
Enter user account inf	formation for running t	nis task.	
User name:	🖸 spsadmin	`	·
Password:	•••••		
	OK	Can	cel

How to Schedule Incremental Backups for SharePoint

Follow these steps to schedule incremental backups for SharePoint:

1. Go to the **Backup** tab in the Essentials user interface.



2. Select the Backup Project in the Backup Navigator, right click and choose Update.



3. Select the type of update you wish to schedule (Full, Incremental or Differential) and then select **Schedule** this will open the scheduled task window.

\$					×			
Update Backup								
Corporate2016								
Last updated: 2017-11-30 11:27:59								
◯ Full Update								
Incremental Backup		0						
O Differential Backup		0						
O Custom Filter Update	Filter	0						
Send notification	Admins, Owner, Current	0						
Change Retention Policy								
Generate Script	Schedule	Finish		Cancel				

- 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.
| • | | | пх | |
|----------------------------------|-------------------------------------|----------------|----------|--|
| × | | | | |
| Scheduled Ta
Schedule the rec | ISK
urrence for this operation | | | |
| Sattinger | | | | |
| Settings. | | | | |
| Perform t
One tir
Daily | his task: | | | |
| O Weekly
Month | ,
ly | | | |
| Advanced S | ettinas: | | | |
| 🗌 Repeat ta | sk every 1 hour 🗸 | | | |
| | | | | |
| | | | | |
| | < Back Next > | Finish | Cancel | |
| | | | | |
| Set the st | art time and start da | te for the up | date job | and click Next . |
| \$ | | | | |
| Scheduled 7 | ask | | | |
| Specify day an | d time you want this task to start | | | |
| Start Time: 10 | :59 PM | | | |
| Start Date: 1, | /23/2018 🛓 | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | <u> </u> | |
| | < Back Next > | Einish | Cancel | |
| On the su | mmary page review | the details of | your up | date job and click Finish to create the |
| Backup jo | b. You may be asked | l for your wir | dows cr | edentials, enter them and click Ok . |
| \$ | | × | | |
| Windows Sy | stem Credentials | | | |
| | | | | |
| Yes, store r | ny credentials with this task | | | |
| Via d | store my credentials with this task | | | |
| Windows user | name | | | |
| Windows pass | wora | | | |
| | ord Leeseeee | | | |

If the backup job is failing to start at the scheduled day and time, please try the following configuration.

OK

Cancel

1. In Windows Task Scheduler, right click on the Backup Job and choose Properties.



2. Uncheck the box for 'Do not store password' and Check the box for 'Run with highest privileges'.

NOTE: Be cautious to not have the Updates overlap each other or a Full Backup.

🕒 OneDrive Standalone Update Task-S-1-5-21-4221714872-3534193616-3353972087-1122 Properties (Local C... 🛛 🗙

General Trigg	gers Actions Co	nditions Setting	s History			
Name:	OneDrive Standal	one Update Task-	S-1-5-21-4221714	1872-3534193616	-335397208	7-1122
Location:	١					
Author:	Microsoft Corpora	ation				
Description:						
- Security opt	ions					
When runni	ng the task, use the	following user a	ccount:			
aparateria -					Change	Jser or Group
Run only	when user is logg	ed on				
Run whe	ther user is logged	on or not				
🗌 Do n	ot store password.	The task will only	/ have access to I	ocal computer re	esources.	
🗹 Run with	highest privileges					
Hidden	Configure fo	r: Windows Vist	ta™, Windows Se	rver™ 2008		~
					ОК	Cancel

- 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 bean Office 365 email and password even if that is what you are backing up.

Task Scheduler	? ×
R	GA
Enter user account inf	formation for running this task.
User name:	🔮 spsadmin 🗸 🖉
Password:	•••••

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 Propertie	s			
Project Name: *	Backup Corporate 2016			
Connection				
Service: *	SharePoint Site 🗸 🔞			
Source Url: *	http://s-sp16-xprod:2016/sites/Corporate2016		\sim	
Configuration				
👧 🕨 Backup (Options			
Retentio	n Policy			
_				
Save Bac	kup to Location			
📑 Generate Script	Fin Schedule	ish	Cancel	

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.

1	Backı	up Nav	vigator 🔍 Search Results 👘 🗖
imp	ortar	nt doci	ument 🍳
1	G	× 🤇) 🗊 🍡 🗸
>	S b	ackup	
~		neese	USA Sales
~		3	Update
>		G	Export
>	s S	1 🔍	Advanced search
		Ø	Refresh
			Change Retention Policy
			Apply Retention Policy
			Change Backup Properties
			Show Log
		$\boldsymbol{\times}$	Delete
		3	Properties
			Convert to New Version Project

3. When the Update Backup wizard appears, a message will appear if a conversion is available.

Update Backup	
This backup project is stored in an older format an View the User Manual for more information.	d can be converted.
1 mailbox is selected	
Last updated: 2015-11-11 14:08:35	
○ Full Update	
 Incremental Backup 	0
🔿 Differential Backup	0
Send notification Admins, Owner, Current	\bigcirc
Change Retention Policy	
Generate Script	Finish Cancel

- 4. (Optional but recommended) Before you convert the project, select your Backup project that you wish to convert from the Backup Navigator and choose the Export option. This will export your backup project *in its current format* to another location (for an overview on how to perform an export and import of a backup please see the Import/Export Backup Archives sections). If anything should happen during the conversion process you can Import your project back into the software and try again. If you receive any error messages during the Export process, please contact support before proceeding.
- 5. To convert your backup project, select the project in the Backup Navigator pane, right click and choose the option "Convert to New Version Project". If the option is not present, then the

project is already stored in the new format and therefore does not need conversion.

	Update
Sch	Export
🔈 🚺 Sha 🔇	Refresh
⊳ 🖸 Sha	Change Retention Policy
5 Sha	Apply Retention Policy
5 Tes	Shewler
5 Tes	Show Log
🛛 🚺 Tes 🗡	Delete
Source Ma	Properties
Filter	Convert to New Version Project

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.

🕭 Com	version	×
?	The selected backup project will be converted and cannot be undone. If you have not already done so, please consider using the Export option before proceeding. View the appropriate section of the User Manual for more information.	
	Do you wish to continue?	
	OK Cancel	

- 7. Once it is done, click **OK** on the confirmation dialog and restart the software to finish the procedure.
- 8. Repeat this process for each Backup Project that you would like to convert.

If you receive any error messages or would just like some assistance, please contact support.

Help Tab

The Help tab within Essentials, is where users find activation information, product details, settings, and the log manager.



Activation

Selecting **Activation** from the help tab, allows users to view information about the status of their product license. This is where licenses are entered, renewed, and activated.

ctivation Status	License is Valid	
lease enter your Activat	ion Code or Username/Email and then Activate b	elo
88948-5K2D7-CB225-AC	C98C-78598	
Activate Online Now	Activate Manually (Internet access is not availab	ble
icense		
LICENS	E BEGIN	^
Product License		
Activation:88948-5K2D	7-CB225-AC98C-78598	
Client:dseaman@meta	logix.com	
Seat:001008871E09 Expiration:2010-12-1/T	72,50,50	
Support Expiration:201	9-12-14T23:59:59	
Type:Term		
Product:Architect Suite	2	
Edition:Enterprise with	Migration	
Modules:Architect;Mig	jrator;Google Migrator;Archiver;Office365Only;Fil	
HUD:U		
Domains:		
Mailboxes:100		
Sites:10000000		
Size Limit:10000000		
Item Limit:-1		
Lier:2		
MCwCFG2RFzAwRPHF	YOy1mMUpspVqbfqGAhQwzcmtQVS5tjV6PkjYr/‹	~

About

Selecting **About** from the help tab, allows users to view information about the product version, access to the documentation, and support links.



© 2023 Quest Software Inc. ALL RIGHTS RESERVED. Close

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.



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.

A new update is available. Do you want to install it?		
To enable it or disable manually, please, go to Help-> Profile manager -> Global Variables -> Disable tool automatic updates.	Enable Automatio	c Updates -> True.
	Yes	No

If you choose to install the updates, a pop up will appear upon completion of the installation which will request to restart the Essentials program.

View Tab

14

The view tab provides users with options on the various components of their environment they wish to view within 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 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 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.



< Back Next > Finish Cancel

2. Alternately, in order to see the tasks that are already scheduled and perform various actions on these tasks, you can click the The "Scheduler" button in the "View" tab in the ribbon.



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.

Schedule Task		>
essentialscmd -cmd cr	ateBackup -guid e64235e7-fc43-4f73-a6b0-32c52636df96 -rela	ted -clear -keepFull LTE= -keepInc LTE= 🔸
		~
<		>
Copy to Clipboar] @	
Schedule Opt	ons	
Enter a task na	me.	
One time	Start Time: 12:29 PM	
Daily	Start Date: 3/10/2020 丈	
Monthly		
		Create Task Cancel

This screen also allows users to use scripts to schedule the task. By selecting "Copy To Clipboard", users can then Use Scripts and integration with windows task scheduler, to schedule this task.

Operation Scheduler Screen

This screen shows all of the tasks you have scheduled as well as the time they were last run, the upcoming scheduled run time, status, type, and the details of the tasks' scheduling.

Operation Name	Time of Last Run	Time of Next Run	Status	Туре	Schedule	
harePoint Backup Architect Task	1/23/2018 11:14:00 AM	1/23/2018 12:14:00 PM	Ready			
pdate Backup Corporate Archite	11/30/1999 12:00:00 AM	1/23/2018 10:59:00 PM	Ready			

It is on this screen that you can select an existing task, enable, disable, delete, refresh, or change it's schedule. You also have the option to generate a script that can be used in Powershell or the command prompt in order to run the task outside of its scheule. If you would like to run the task quickly, you can

click the "Run" button in the lower left hand corner. You can also see the history of all the tasks, active or otherwise, by clicking the "History" button.

You can also right-click on any task and bring up a context menu that allows you to take the above mentioned actions on any task.

🔐 Operation Scheduler			×			
Operation Name	Time of Last Run	Time of Next Run	Status	Туре	Schedule	
SharePoint Backup Architect Task	1/32/2010 11.14.00 AM	1/23/2018 12:14:00 PM	Ready			
Update Backup Corporate Archite	1 🖳 Run	23/2018 10:59:00 PM	Ready			
	🕮 Enable/Disable					
	🖳 Delete					
	😫 Script					
	Refresh					
	🖳 History					
	L Change Schedule					

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.

Scripts

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This section provides an overview of the ways in which Scripts can be used to manage certain product functionality for Essentials.

Using Scripts and Integration with Windows Task Scheduler

As with many of Essentials operations, users may generate a command line script (refer to Scripting Reference Guide for additional information). For repetitive operations like backups, the application has been integrated with Windows Task Scheduler (WTS). WTS allows users to run jobs on a schedule, in the background, even if no user is currently logged into the computer.

Once a script is run, the history will be available in the log viewer. Unless specified in the script all history files will have auto-generated file names as a unique string of numbers. The path to all log files is: C:\Users\[UserName]\Essentials\.metscheadata\appLog.

To create a new script and load it into Windows Task Scheduler:

1. Press the Schedule button within any of the Essentials wizards.

🛃 Schedule

< Back Next > Finish Cancel

2. The Schedule Task window will open, it will contain a command line script. Press **Copy to Clipboard**.

sentialscmd -cm	d runJob -guid 4ce20fc1-d670-4510-8b16-0af6024d86a4 -related -clear	^
		~
		>
Copy to Clipbo	rd 🔘	
•		
Schedule C	ptions	
Enter a task	name.	
One time	Start Time: 10:21 AM	
Daily	Start Date: 20- Jan -2021	
Mookly		
Weekly		
Weekly Monthly		

Open Windows Task Scheduler and select the Create Basic Task option in the Actions panel.
 Task Scheduler

File Action View Help		
🔶 🙇 📰 🛛 🖬		
Task Scheduler (Local)	Name Status Triggers Image: OneDrive St Ready At 4:00 AM on 5/1/1992 - After triggered, repeat every 1.00:00:00 indefinitely Image: Comparison of the state	Actions Task Scheduler Library Create Basic Task Create Basic Task Import Task Display All Running Tasks Disable All Tasks History New Folder View Refresh Refresh Refresh Schedate Item
	Location: Author: Microsoft Corporation Description: Security options When running the task, use the following user account: spsadmin Run only when user is logged on Run whether user is logged on or not Do not store password. The task will only have access to local resources Run with highest privileges	Run End Disable Export Properties Delete Help

4. Give your task a name and a description, click Next.

Create Basic Task Wizard		×
Create a Basic Task	(
Create a Basic Task Trigger	Use this wizar such as multi	d to quickly schedule a common task. For more advanced options or settings ple task actions or triggers, use the Create Task command in the Actions pane.
Action	Name:	updatebackup corporate 2016
Finish	Description:	Update backup for Corporate 2016 Sites.
		< Back Next > Cancel

5. Select when you would like the task to start, click Next.

Create Basic Task Wizard	X	
Task Trigger		
Create a Basic Task Trigger Action Finish	When do you want the task to start? Daily Weekly Monthly One time When the computer starts When I log on When a specific event is logged Back Next > Cancel 	

6. Set a start date and time, and how many days you would like the task to continue for. Click **Next**.

Create Basic Task Wizard		×
Daily		
Create a Basic Task Trigger Daily Action Finish	Start: 1/23/2018	
	< Back Next > Cance	el

7. Leave the Action selection as "start program" and click **Next**.

Create Basic Task Wizard	×
O Action	
Create a Basic Task Trigger Daily Action	What action do you want the task to perform?
Start a Program	
Finish	
	< Back Next > Cancel

8. In the Program/Script field, paste the script you copied to the clipboard in step 2. Click Next.

Create Basic Task Wizard		×
5tart a Program		
Create a Basic Task		
Trigger	Program/script:	
Daily	:Name "ARCHIVE-Corporate 2016 backup" -log 'output.xml' -noSplash Browse	
Action		
Start a Program	Add arguments (optional):	
Finish	Start in (optional):	
	< Back Next > Cance	el

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

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 - <i>SharePoint Site</i> SP_FARM - <i>SharePoint Farm</i>	

	OFFICE_365_TENANT - Office 365 Tenant ONE_DRIVE - OneDrive for Business	
	OFFICE_365_SITES - Office 365 Sites	
	specifies what options to include with the initial project connection.	
	Options include:	FirstLevelSubSites - list of
	sub-sites only AllSubSitesWithoutObjects - all s	sub-sites but no lists (slower)
-kindOfDownload	indOfDownload AllSubSitesAndObjects - all sub-sites and their lists (slowest)	
	SubsitesHierarchy - list of sub-site heirarchy	
	NoObjectsNoSubsites - list of sites, no subsites	s or lists
	RefreshSite - refresh the site	
	alternative mapping URL(with port) for farm w	veb application, or
-webAppMapping	"office365" for Office 365 Tenant or "onedrive	e" for OneDrive for Business
	project.	

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

-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
	linkbar - copy top link bar

The following are parameters for the -cmd CopySite command

	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

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

-mapping [template.mvmap]	mapping template file
-trgtfolder [path]	target path folder
-overwritebheavior	overwrite the items behavior on the target
	filters source items
	field - internal name of a field in SharePoint
-filter {[field][operator][value]}	operator- compare operator, such as one of the following: = equals to != does not equal to > greater than < less than ^= starts with *= contains value - criteria
	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

The following are parameters for the -cmd CopyItems command

-deferredgroupmembership	update membership of the groups during permissions migration
-includeHiddenFields	copy hidden fields
-includeDocumentID	copy document ID property

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

-path [path]	file path
-mapping [template.mvmap]	mapping template file
	filters source items
	field - internal name of a field in SharePoint
filter ([field][energter][velve])	operator- compare operator, such as one of the following:
	= equals to
	!= does not equal to
	> greater than
	< less than
	^= starts with
	*= contains
	value - <i>criteria</i>
	Use these patterns for dates:
	yyyy-MM-dd HH:mm:ss or yyyy-MM-dd
-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

The following are parameters for the -cmd ImportFiles command

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 source items
	Field - internal name of a field in SharePoint
	operator- compare operator, such as one of the
	following:
-filter {[field][operator][value]}	= equals to
	!= does not equal to
	> greater than
	< less than
	^= starts with
	*= contains

	value - <i>criteria</i>
	Use these patters for dates: yyyy-MM-dd HH:mm:ss or yyyy-MM-dd
-usermapping [path]	path to the CSV file with users mapping to the copy operation
-copyhistory	copy the history
-overwrite	overwrite google content on target

Essentials -cmd googleImport -srcResourceId

folder:0B5t8t1UBKntoNDI1NGEyNDctNTZjOC00MDJkLTlhM2YtYzk3ZGE1ZWJkNThh -trgtsite http://host/site -trgtlist "Shared Documents" -srcuser user@gmail.com -srcpass password -trgtuser DOMAIN\user -trgtpass password -overwritebehavior add_version -copyhistory -overwrite -log output.xml

GoogleExport Parameters

-trgtResourceId [type:id]	Google document resource identifier
	filter source items
	Field - internal name of a field in SharePoint
	operator- compare operator, such as one of the
	following:
	= equals to
	!= does not equal to
-filter {[field][operator][value]}	> greater than
	< less than
	^= starts with
	*= contains
	value - <i>criteria</i>
	Use these patters for dates:
	yyyy-MM-dd HH:mm:ss or yyyy-MM-dd
-usermapping [path]	path to the CSV file with user mapping to the copy
	operation
-copyhistory	copy the history
-overwrite	overwrite google content on target
-srcfolder	choose the folder to which to export

The following are parameters for the -cmd GoogleExport command

Example:

Essentials -cmd googleExport -trgtResourceId folder:0B5t8t1UBKntoNDI1NGEyNDctNTZjOC00MDJkLTlhM2YtYzk3ZGE1ZWJkNThh -srcsite http://host/site -srclist "Shared Documents" -srcfolder "Documents" -trgtuser user@gmail.com - trgtpass password -srcuser DOMAIN\user -srcpass password -overwritebehavior add_version - copyhistory -overwrite -log output.xml

NewBackup Parameters

The following are parameters for the -cmd NewBackup command

Using these commands you can create a Backup Project (save structure and data for selected site)

-projectName [project]	name for new project
-projectFolderLocation [path]	path for project location, if it is empty project will be created in workspace
-copysubsites	save site with subsites
-move	delete site after backup
-copylisthistory	save history for list items
	filter source items
	Field - internal name of a field in SharePoint
-filter {[field][operator][value]}	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 <i>n</i> is the number of days.
-KeepIncrementalBackups n	Specifies the number of days to keep incremental backups for, where <i>n</i> is the number of days.
-fileBackup [path]	Specify this parameter if you want to backup a specific file from OneDrive in tenant.

Example:

Essentials -cmd newbackup -srcsite http://host/site -srcuser DOMAIN\user -srcpass password - projectName NewProject -copysubsites -move -copylisthistory -log output.xml -noSplash

ZipBackup Parameters

The following are parameters for the -cmd ZipBackup command

Using this command you can create a Zip archive for the selected Backup Project

-projectName [project]	project name
-zePasswor [password]	zip encrypted password
-zPasswor [password]	zip password
-zPartSize [partSize]	size in byte for part of archive
-zOutFolder [path]	output folder, archive will be created in this folder

Example:

Essentials -cmd zipBackup -projectName Backup Project -zPasswor password -zPartSize 10485760 - zOutFolder C:/Temp/ -log output.xml -noSplash

ApplyPolicyGroup Paramters

The following are parameters for the -cmd applyPolicyGroup command

Using this command you can use a Policy Group with a resource

-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

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_failed_fisheres_arruives_failovi_fishers_fitzatogiak_soubory_

filer,_failid,_ficheiros,_arquivos,_fajlovi,_fichiers,_fitxategiak,_soubory,-

Dateien,_elemei,_tiedostot,_pliki,.files,_bestanden,_datoteke,_fails,_fitxers,_archivos,_bylos,_file,_file s" "FILE-SIZE 2 < 1" -log output.xml -noSplash

Given Parameters

The following are parameters for the -cmd given command

Using this command you can create a "Permissions give to User/Group" Report

-userLogin	specifies the user/group you want to use to generate the report
-csvFile	specifies the CSV file path where you want to save the report
-srcfolder	specifies the source folder

Example:

Essentials -cmd given -srcuser DOMAIN\user -srcepass passwd -userLogin DOMAIN\user -csvFile "fs path" -noSplash

Transfer Parameters

The following are parameters for the -cmd transfer command

Using this command you can perform a "Tranfer Permissions" operation

userlegin	specifies the user for which you want to transfer the permissions
	from (source user)

-targetUserLogin	specifies the user for which you want to transfer the permissions to (target user)
or	Or
-csvUsersFile	specifies the CSV file and path to the file with the user mapping
-csvFile	specifies the CSV file and path to the file which contains the Site to run this operation against
-includesubsites	specifies whether you want to transfer permissions from within sites and their sub sites
-includelists	specifies whether you want to transfer permissions from within lists
-includeItems	specifies whether you want to transfer permissions from within items (may be time consuming)
-includeSiteCollectionAdmin	specifies whether you want to remove source site collection administrator permissions
-removeSource	specifies whether you want to also remove the permissions of the source user

Essentials -cmd transfer -srcuser DOMAIN\user -srcepass passwd -userLogin DOMAIN\user - targetUserLogin DOMAIN\user -csvFile "fs path" -includeSubsites -includeLists -includeItems - removeSource -noSplash

Essentials -cmd transfer -srcuser DOMAIN\user -srcepass passwd -csvUsersFile "fs path" -csvFile "fs path" -includeSubsites -includeLists -includeItems -removeSource -noSplash

Remove Parameters

The following are parameters for the -cmd remove command

Using this command you can perform a "Remove Permissions" operation

-userLogin	specifies the user/group for which you want to remove the permissions
or	or
-csvUsersFile	specifies the CSV file and path to the file with the user mapping
-csvFile	specifies the CSV file and path to the file which contains the Site to run this operation against
-includesubsites	specifies whether you want to remove permissions from within sites and their sub sites
-includelists	specifies whether you want to remove permissions from within lists

-includeItems	specifies whether you want to remove permissions from within items (may be time consuming)
-includeSiteCollectionAdmin	specifies whether you want to remove user(s) as a Site Collection Administrator. Only applies to root site collections.
-removeSource	specifies whether you want to also remove the permissions of the source user (required for this -remove operation)

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

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/fileprivatekey.p12 -serviceId 123456@usr.company.com -trgtsite http://host/site -trgtuser user@company2.com -trgtpass passwd -users account1;account2;account3 -usermapping path/file.csv -log output.xml -noSplash

Essentials -cmd googleToOneDrive -accountId user@company1.com -p12KeyFile path/fileprivatekey.p12 -serviceId 123456@usr.company.com -trgtsite http://host/site -trgtuser user@company2.com -trgtpass passwd -users path/file1.csv -usermapping path/file2.csv -log output.xml -noSplash

OneDrivetoOneDrive Parameters

The following are parameters for the -cmd OneDrivetoOneDrive command

Using this command you can copy the Documents Library content from one OneDrive for Business site to another OneDrive for Business site.

-srcsite	specifies source SharePoint Administration Center URL	
-srcuser	specifies source SharePoint Administration Center username	
-srcepass	specifies source SharePoint Administration Center encrypted password	
-trgtsite	specifies target SharePoint Administration Center URL	
-trgtuser	specifies target SharePoint Administration Center username	
-trgtepass	specifies target Sharepoint Administration Center encrypted password	

-usermanning [nath]	Path to the CSV file with users manning to the convioneration

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
<pre>-usermapping [path\name.csv]</pre>	Location and name of the file share location of the user name mapping file

Examples:

Essentials -cmd fileSharesToOneDrive -trgtsite http://host/site -trgtuser user@company.com -trgtpass passwd -usermapping path/file.csv -log output.xml -noSplash

Essentials -cmd fileSharesToOneDrive -trgtsite http://host/site -trgtuser user@company.com -trgtpass passwd -usermapping path/file.csv -log output.xml -noSplash

ImportAlerts Parameters

The following are parameters for the -cmd ImportAlerts command

Using this command you can import user alerts from a CSV file to a destination location

-srcuser	specifies the user account that will be used to authenticate against each site in the CSV file. This user account must be at least a full owner.	
-srcpass	specifies the password of the user account that will be used to authenticate against each site.	
-trgtsite	specifies the target SharePoint Administration Center URL	
-usermapping [path]	specifies the path of the CSV file which contains the user mapping.	
-includesubsites	specifies whether you want to import alerts to sub-sites.	
-csvFile	specifies the csv file where the alerts are listed.	

Examples:

Essentials -cmd importAlerts -srcuser CONTOSO\user -srcepass encryptedPassword -includesubsites - trgtsite http://sharepoint/sites/sales -csvFile "D:\Folder\ImportAlertsFile.csv"

CustomAction Parameters

The following are parameters for the -cmd CustomAction command.

Using this command you can run saved custom actions.

-nameRule	the name of the saved custom action
-srcuser	specifies the source online user login
-srcepass	specifies the encrypted online user password
-csvFile [path]	specifies the name and location of the CSV file that contains the required
	information about the custom actions.
Or	
	Or
-viewName [project	
name/section	The absolute view path to get the input data from the view, where the section
name/view name]	name is the internal name of the default view.
-delta	specify this flag if you want to perform a delta run

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
	-newguid [guid]
Any Hyper Migration	-policy OVERWRITE
	-policy DELTA.
	-sourceuser account <sourceuser>account</sourceuser>
Office 365 Groups to Office 365 Groups	-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/XMLSchem a-instance" xsi:type="sharepointTurboContext"> <siteurl>URL</siteurl> <urlmapping> <entry> <key>URL</key></entry></urlmapping></sourcecontext

Hyper Migration Type	Commands	
	-targeturl <targetcontext xmlns:xsi="http://www.w3.org/2001/XMLSchem a-instance" xsi:type="sharepointTurboContext"> <siteurl>URL</siteurl></targetcontext 	
	<urlmapping></urlmapping>	
	<entry></entry>	
	<value>URL</value>	
Google Drive to Office 365 Groups	-sourceuser account <sourceuser>account</sourceuser>	
	-targetUser account <targetuser>account</targetuser>	
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="" li="" title<=""> <targetfolderpath>Folder</targetfolderpath> 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>	

Hyper Migration Type	Commands	
	-targetuser account <targetuser>account</targetuser>	
	-sourcelocation path <sourcelocation>path</sourcelocation>	
	-targetuser account <targetuser>account</targetuser>	
FileShare to Microsoft Teams	-targetlocation Lib title <targetlocation>Lib title</targetlocation>	
	-targetfolderpath Folder title <targetfolderpath>Folder title</targetfolderpath>	
	-sourceuser account <sourceuser>account</sourceuser>	
Box to SharePoint Online	-sourcelocation folder title <sourcelocation>Folder title</sourcelocation>	
	-targetlocation Lib title targetLocation>Lib title	
Boy to Office 265 Groups	-sourceuser account <sourceuser>account</sourceuser>	
Box to Office 303 Groups	-targetuser account <targetuser>account</targetuser>	
Boy to OpeDrive	-sourceuser account <sourceuser>account</sourceuser>	
	-targetuser account <targetuser>account</targetuser>	
	<pre>-sourceuser account <sourceuser>account</sourceuser></pre>	
Box to Microsoft Teams	<pre>-targetuser account <targetuser>account</targetuser></pre>	
	-targetlocation Lib title <targetlocation>Lib title</targetlocation>	

Hyper Migration Type	Commands	
	-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> -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="" li="" title<=""> <targetfolderpath>Folder</targetfolderpath> 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 URI -targeturl URL

Cloud Parameters

auth	authenticates to cloud service and stores the credentials file.
createJob	creates a job in the cloud
deleteJob	deletes a job from the cloud
listJobs	lists cloud jobs
runJob	runs the job

The following are parameters for the -cmd Cloud command

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 asl browser and enter code back to the application.	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

-jobld	job ID
-token	token string for accessing cloud service
-tokenFile	credentials for accessing cloud service

Example:

Essentials -cloud stopJob -tokenFile C:\user.token.json -jobId 8a59acc64e452920014e453947920000

JobHistory Parameters

The following are parameters for the JobHistory command

-jobld	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

Troubleshooting

This troubleshooting guide identifies some common issues that you may encounter when using Essentials and suggestions on how to resolve them.

Note that factors unique to your environment, such as the size, configuration, and complexity of your environment as well as interactions between Essentials, SharePoint, and other applications and processes, may also need to be taken into consideration.

Failed in choosing authentication type: Unable to find valid certificate path

Issue

When trying to connect to SharePoint on premises using SSL, the following error is logged:

!MESSAGE Failed in choosing authentication type! !STACK 0 javax.net.ssl.SSLHandshakeException: sun.security.validator.ValidatorException: PKIX path building failed: sun.security.provider.certpath.SunCertPathBuilderException: unable to find valid certification path to requested target at sun.security.ssl.Alerts.getSSLException(Alerts.java:192) at sun.security.ssl.SSLSocketImpl.fatal(SSLSocketImpl.java:1949)

Reason

This error occurs when you are trying to make an SSL connection without a valid certificate.

Resolution

Download and install a Microsoft Graph certificate into your environment.

To download the certificate:

- 1. Go to https://graph.microsoft.com/v1.0
- 2. Click the lock icon to the left of the url in the address bar, select **Connection is secure**, then choose the appropriate option, depending on your browser:
 - If using Microsoft Edge, click the certificate icon in the upper right corner.
 - If using Google Chrome, select Certificate is valid.
- 3. On the Details tab, make sure the root certificate is selected.
- 4. Click [Export].

5. Give the certificate the name of your choice and save it as file type **Base64-encoded ASCII**, certificate chain.

File name:	Digital Global Root CA cert		~
Save as type: 🤇	Base64-encoded ASCII, certificate chain		~
de Folders		Save	Cancel

To install the certificate:

Open a command window using the Run as administrator option, and install the certificate using a command like the following:

NOTE: The actual command path may vary, depending on your environment.

```
<JAVA_HOME_PATH>\keytool.exe -import -trustcacerts -alias <value> -file
"<certificate path>" -keystore "<JAVA HOME PATH>\jre\lib\security\cacerts"
```

Default password: "changeit"
"yes"

EXAMPLE PATH:

```
"C:\Program Files\Quest\Essentials\jre\bin\keytool.exe" -import -
trustcacerts -alias graphcert -file "C:\Program
Files\Quest\Essentials\certs\Digital Global Root CA Certificate.crt" -
keystore "C:\Program Files\Quest\Essentials\jre\lib\security\cacerts"
```

Migration of SPO Classic Experience site pages fail with a 401: Unauthorized error

Issue

When performing a SharePoint Online to SharePoint Online migration, the following error is logged for Classic Experience site pages:

The server sent HTTP status code 401: Unauthorized

Possible Reason

The "Allow access" option is not enabled for apps that do not use modern authentication.

Resolution

- 1. Open the SharePoint admin center.
- 2. Navigate to **Policies > Access control**.
- 3. Click Apps that don't use modern authentication and set it to Allow access.

When performing OneDrive Provisioning the message One Drive for [user name] was not created is logged

Issue

When performing OneDrive Provisioning the following message is logged for a user:



Possible Reason

The user's personal site may have been recently deleted, but the Graph API reported to Essentials the the site still exists.

Resolution

After waiting 30 to 60 minutes, on the OneDrive Provisioning - Select User window click the refresh cache icon (<a>o) and rerun the Create OneDrive operation for the user.

Appendix

17

Alternate Framework

There may be some occasions when the software itself or a Support Engineer will request you install an alternate framework. This request may be related to a certain authentication provider you are utilizing, Box connectivity or possibly even for the encryption of your data.

If requested to do so, please follow the steps below:

- 1. Exit and stop all running instances of the application on your host computer.
- Download the alternate framework. Please be sure to choose the appropriate version specific to your installation. If you are unsure, go to Help > About and after the version number it will display either 32-bit or 64-bit.
- 3. Once downloaded, extract the zip to a location of your choice on the host computer. Please do not simply "open" the zip file, be sure to Extract all of the contents to this location.
- 4. Navigate to the location where the application was installed on your host computer, locate and then delete the folder named "jre". If you do not see this folder, please enable Hidden Files and Folders in Windows.
- 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.

😓 Connect to SharePoint — 🗆 🗙								
Connectin	g to [https://meta	vistech-a	dmin.sh	arepoin	t.com]			
User							₽	
Password								
Domain								
		Use	Ргоху					
	Connect				Cancel			
	connect				CarlCel			
	Claims		0					

2. Enter your credentials, whether they be Microsoft or Box and connect.

If using OAuth Framework authentication with claims, please see the following section for more information.

CSV Column Reference Guide

The application allows users to import content into SharePoint and copy content between different SharePoint lists using CSV spreadsheets. These spreadsheets are auto generated with the necessary metadata required for the operation and may be modified using Excel or any text editing application. The following table describes the columns used within these spreadsheets.

Columns for Uploading Content using CSV

- 1. Source File Identifies the physical path to the file that will be uploaded.
- Target SharePoint Site Identifies the target site for the file listed in the source file column. The field is left blank by default but may be specified to upload content into different sites and lists using the same CSV file.

- **NOTE:** In order to take advantage of this feature the CSV file must be uploaded on a site not a list level.
- 3. Target SharePoint List Identifies the target list for the import
- 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.
- CSV ID Col This is a reserved field utilized for incremental copy functionality. Do <u>not</u> enter anything into this field.
- 9. **Modified At** Identifies the last content modification date which is extracted from the file system. If left blank the value will be set to the current date and time.
- 10. **Created By** Identifies the user who created the content. If left blank the value will be set to the user currently logged into SharePoint.
- 11. **Modified By** Identifies the user who last modified the content. If left blank the value will be set to the user currently logged into SharePoint.
- 12. **Mark Version** For versioned libraries, identifies the version level for the item being imported ("Major" or "Minor"). If a quasi-versioning system was used in the file system, this field along with the SharePoint File Name can be used to recreate the versions in SharePoint. In order to implement this functionality, use the same file name in the SharePoint File Name field and then specify the appropriate version level in this field. If left blank, the default version level will be used during import.
- 13. Version Comment Specifies the comment that will be used when importing items

Columns for Copying SharePoint Content Using CSV

- 1. Source SharePoint Site Identifies the source site for the content to be copied
- 2. Source SharePoint List Identifies the source list for the content to be copied
- 3. Source SharePoint File Identifies the source name for the content to be copied
- 4. **Target SharePoint Site** Identifies the target site for the content to be copied. This field is left blank by default but may be entered to copy content to different sites and lists using the same CSV file.
 - **NOTE:** In order to take advantage of this feature the CSV file must be copied on a site not a list level.
- 5. Target SharePoint List Identifies the target list for the content to be copied
- SharePoint File Name Identifies the target SharePoint item name for the content to be copied ("/" is used to identify folders)
- 7. Content Type Identifies the SharePoint content type for the content to be copied.
 - **NOTE:** This content type should already exist within the target SharePoint list and must be spelled exactly the same way to avoid errors. If the field is multi-value enabled and you wish to apply two or more, please separate each value with a pipe character and a trialing space. For example, if I wanted to apply the terms Apple and Orange to a managed metadata column here is how it would look in the CSV file: Apple| Orange . That is "Apple" pipe character space "Orange".
- 8. Custom Fields Any custom fields would be listed following the content type.
 - **NOTE:** These fields must already exist within the target SharePoint list (and content Type). The values entered here must also pass any SharePoint validation or restrictions for the corresponding field.
- 9. **Created At** Identifies the content creation date. If left blank the value will be set to the current date and time.
- 10. **CSV ID Col -** This is a reserved field utilized for incremental copy functionality. Do <u>not</u> enter anything into this field.
- 11. **Modified At** Identifies the last content modification date. If left blank the value will be set to the current date and time.
- 12. **Created By** Identifies the user who created the content. If left blank the value will be set to the user currently logged into SharePoint.

- 13. **Modified By** Identifies the user who last modified the content. If left blank the value will be set to the user currently logged into SharePoint.
- 14. **Mark Version** For versioned libraries, identifies the version level for the item being imported. If left blank, the default version level will be used during import.
- 15. Version Comment Specifies the comment that will be used when importing items

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 Essentials for Office 365

Importing projects into a workplace is useful if you want to move a project between installations of Essentials. This operation connects Essentials with the project folder that is generated when you connect to a site collection, farm, or tenant. It can also import collected data projects, google drives and backups.

1. Right Click in the Navigation pane and select 'Import'.

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2. Pick 'Existing Projects into Workplace'.

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- 3. Select the 'Browse' button next to 'Select root directory'.

4. Select the folder that you want to import the projects from.

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5. Select the projects that you want to import. If you check the 'Copy Projects Essentials workspace folder. Sometimes it makes sense to have a reference to an external project, such as when you have a Backup and sometimes it makes sense to copy the files into the new workplace so that you

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have all your projects in one place rather than linking back to the original location.

6. Your projects should now be imported in the Navigator pane.

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About

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Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit www.quest.com.

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- 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