

# Kernel Migrator for SharePoint

Configuration Guide

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# 1. System Requirements

Before you start installing Kernel Migrator for SharePoint, make sure that your computer meets the following requirements.

## 1.1 Minimum System Requirements

- Pentium 4 Class or higher Processor
- Minimum 2 GB RAM
- 1 GB free space for the installation and data migration

## 1.2 Required Operating Systems

One of the following Windows operating systems (32/64-bit version) is required.

- Windows XP
- Windows 7
- Windows 8/8.1
- Windows 10
- Windows Server 2003
- Windows Server 2003 R2
- Windows Server 2008
- Windows Server 2008 R2
- Windows Server 2012
- Windows Server 2012 R2
- Windows Server 2016

## 1.3 Supported Virtual Environment

- Hyper-V Server 2008
- Hyper-V Server 2008 R2
- Hyper-V Server 2012
- Hyper-V Server 2012 R2
- VMware ESX Server
- VMware ESXi Server
- Microsoft Virtual PC



## 1.4 Supported SharePoint Servers

- SharePoint Foundation 2010
- SharePoint Server 2010
- SharePoint Foundation 2013
- SharePoint Server 2013
- SharePoint Server 2016
- SharePoint Online (Office 365)

## 1.5 Supported Exchange Servers

- Exchange Server 2000
- Exchange Server 2003
- Exchange Server 2007
- Exchange Server 2010
- Exchange Server 2013
- Exchange Server 2016
- Exchange Online (Office 365)

## 1.6 Supported Outlook Versions

- Outlook 2003
- Outlook 2007
- Outlook 2010
- Outlook 2013

## 1.7 Prerequisites

- .NET Framework 4.0 or later
- Microsoft Excel 2003 or any other Spreadsheet software (required only to view report)

## 1.8 Prerequisites for Exchange Server

Other required prerequisites to establish the connection with different Exchange Servers are listed herein below.

Exchange Server	Supported Outlook Versions
Exchange Server 2000	<ul style="list-style-type: none"><li>• Outlook 2003</li><li>• Outlook 2007</li></ul>
Exchange Server 2003	<ul style="list-style-type: none"><li>• Outlook 2003</li><li>• Outlook 2007</li><li>• Outlook 2010</li></ul>
Exchange Server 2007	<ul style="list-style-type: none"><li>• Outlook 2003</li><li>• Outlook 2007</li><li>• Outlook 2010</li><li>• Outlook 2013</li></ul>
Exchange Server 2010	<ul style="list-style-type: none"><li>• Outlook 2003</li><li>• Outlook 2007</li><li>• Outlook 2010</li><li>• Outlook 2013</li></ul>
Exchange Server 2013	<ul style="list-style-type: none"><li>• Outlook 2013</li><li>• Outlook 2007 Service Pack 3 with the Outlook 2007 November 2012 update (12.0.6665.5000)</li><li>• Outlook 2010 Service Pack 1 with the Outlook 2010 November 2012 update (14.0.6126.5000)</li></ul>
Exchange Server 2016	<ul style="list-style-type: none"><li>• Outlook 2010</li><li>• Outlook 2013</li></ul>
Office 365	<ul style="list-style-type: none"><li>• Outlook 2007 SP2</li><li>• Outlook 2010 SP1 for 64-bit</li></ul>

- Outlook 2010 14.0.7106.5003 for 32-bit
- Outlook 2013

**NOTE:** Connecting to Office 365 as destination requires you to select a Global Administrator User Mailbox, which has full access to all mailboxes. You can connect to Office 365 and Archive Mailboxes through Outlook Profile only.

## 2. User Rights

To install and work with Kernel Migrator for SharePoint, you need to have appropriate rights over the required file system(s), Exchange Server(s), and SharePoint Server(s).

### 2.1 Local System Rights

The user should have following permissions on the local computer on which the software is installed:

- Full access permission on the drive in which Operating System is installed
- Read/Write permissions in the registry

Steps to assign these permissions are listed here in below.

1. Go to Control Panel.
2. Select the User Account.
3. Select Change Account Type.
4. Make user as “**Administrator**”.
5. Click on **Save**.

#### **Note:**

Steps mentioned above may vary depending on the Windows version installed on the System. If the User Account does not exist on the system, create a new User Account with the Administrative rights.

### 2.2 Exchange Server Rights

**(Needed only to access Live Exchange Mailboxes)**

To access live Exchange Public Folders always use an Administrator account. Also, this account should have any of these permission levels: **Owner**, **Publishing Editor**, **Editor**, **Author**, or **Publishing Author**.

### 2.3 Office 365 Rights

To access multiple Office 365's mailboxes, the user should have the following rights:

- The user should be **Global Administrator**.
- The user should be a delegate with **Full Access** permission over all the mailboxes that you intend to access in Office 365.

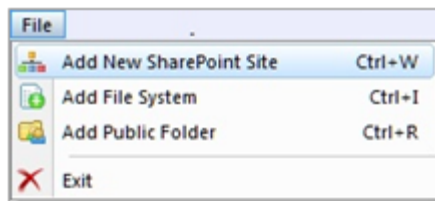
## 3. Adding Destination

You can add any SharePoint Server or Office 365 Server as the Destination.

### 3.1 Adding SharePoint Server

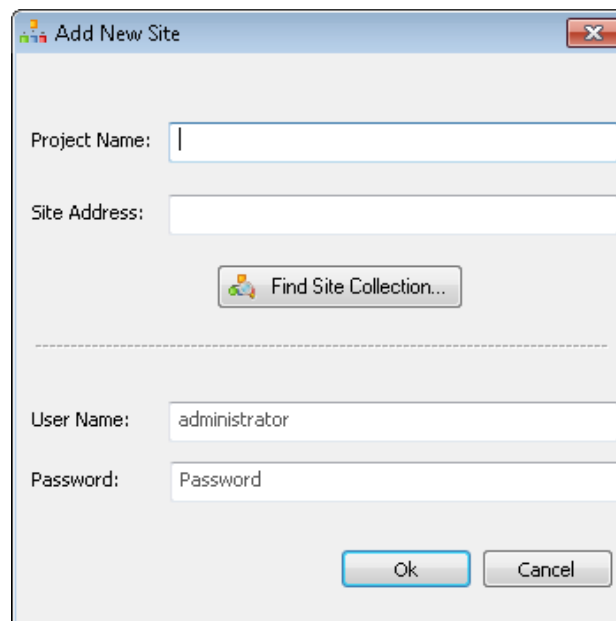
Follow the steps below to add a **SharePoint** Site. Please note that each SharePoint Site is denoted with a project name in this software.

1. Perform any of the following methods to start the process
  - i. Click "File" menu and click "Add New Site" item as shown below.



*Figure 1: File Menu Command to add a site*


- ii. Click **Add New SharePoint Site** button on the toolbar.
  - iii. Right click the parent **SharePoint Server** node in the **SharePoint** Section and click **Add New SharePoint Site**.
2. Doing any of the above steps displays the following wizard.

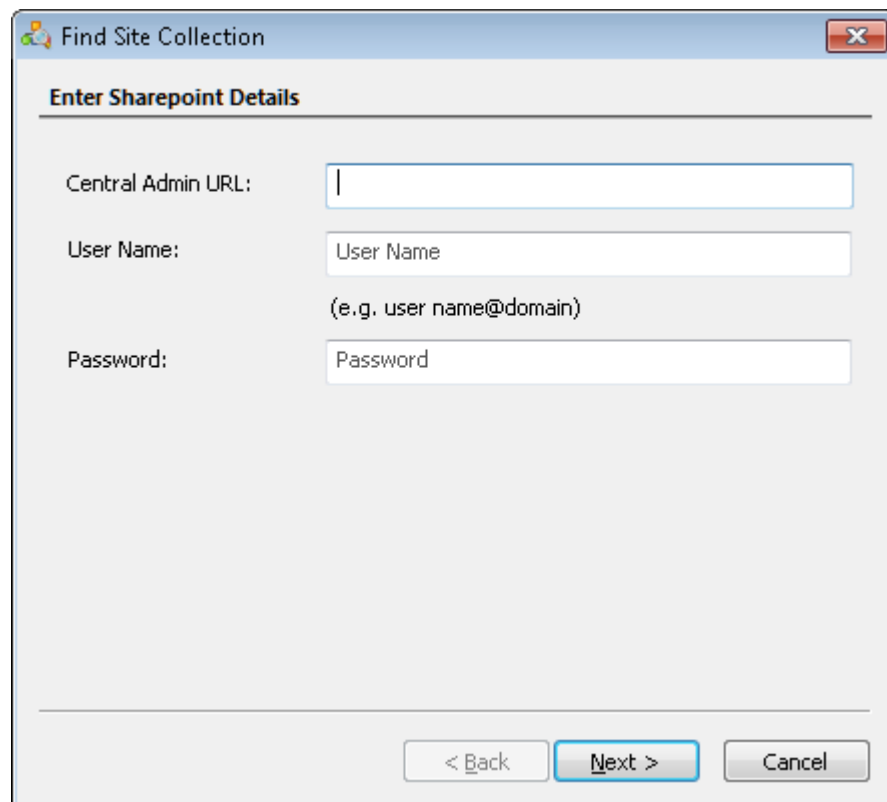


The 'Add New Site' dialog box contains the following fields and controls:

- Project Name:** A text input field.
- Site Address:** A text input field.
- Find Site Collection...:** A button with a magnifying glass icon.
- User Name:** A text input field containing the text 'administrator'.
- Password:** A text input field containing the text 'Password'.
- Ok:** A button at the bottom right.
- Cancel:** A button at the bottom right.

*Figure 2: Wizard to add a new Site*

3. If you want the software to find and enumerate the complete Site Collection, then follow the steps below.
  - i. Click  to access the following wizard.

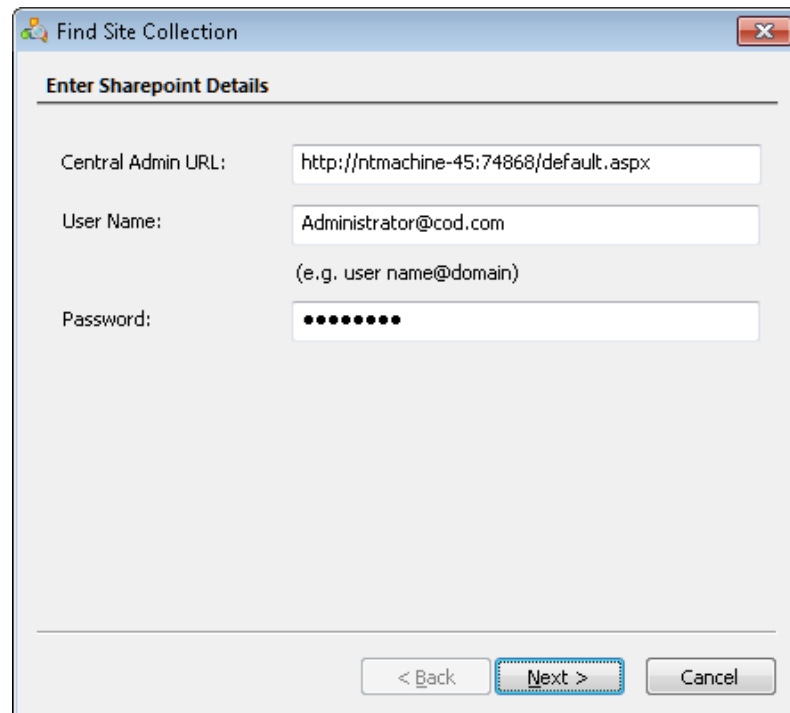


The 'Find Site Collection' wizard, titled 'Enter Sharepoint Details', contains the following fields and controls:

- Central Admin URL:** A text input field.
- User Name:** A text input field containing the text 'User Name'. Below the field is the example text '(e.g. user name@domain)'.
- Password:** A text input field containing the text 'Password'.
- < Back:** A button at the bottom left.
- Next >:** A button at the bottom center.
- Cancel:** A button at the bottom right.

*Figure 3: Wizard to find a Site Collection*

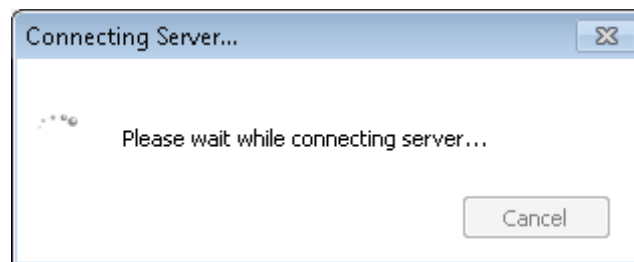
- ii. Enter the details like "Central Admin URL", "User Name", and "Password."



The screenshot shows a Windows-style dialog box titled "Find Site Collection" with a close button (X) in the top right corner. Below the title bar is a section header "Enter Sharepoint Details". There are three input fields: "Central Admin URL:" with the text "http://ntmachine-45:74868/default.aspx", "User Name:" with the text "Administrator@cod.com" and a hint "(e.g. user name@domain)" below it, and "Password:" with a masked password "••••••••". At the bottom of the dialog are three buttons: "< Back", "Next >" (which is highlighted with a blue border), and "Cancel".

*Figure 4: Inserting the details to find Site Collection*

- iii. Click **Next**. The software tries to connect to the server.



*Figure 5: Attempting to connect to the server*

- iv. Once it is connected to SharePoint, the software displays the list of detected Web Applications.

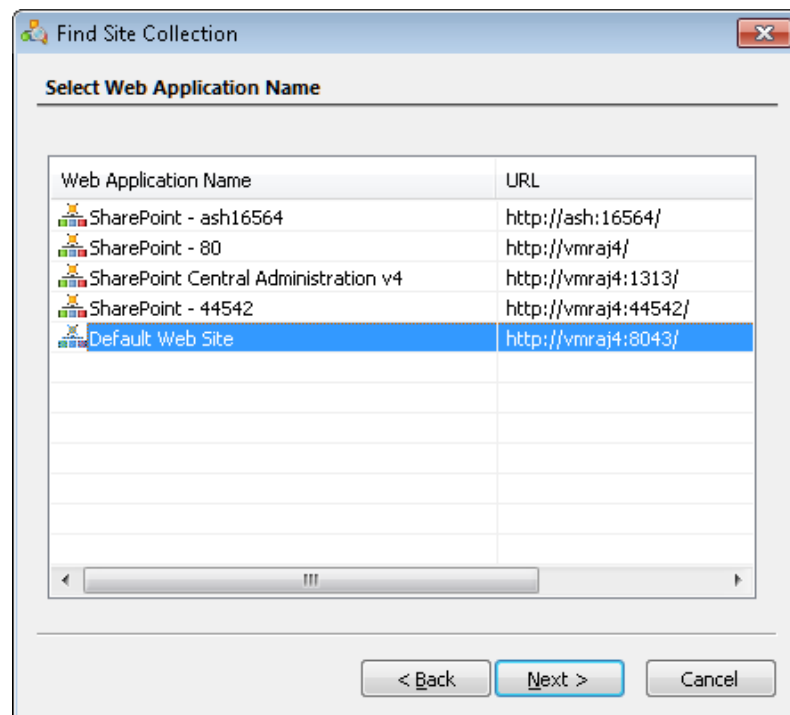


Figure 6: Displaying the detected Web Applications

- v. Select a required Web Application
- vi. Click "Next" to show the list of all available sites.

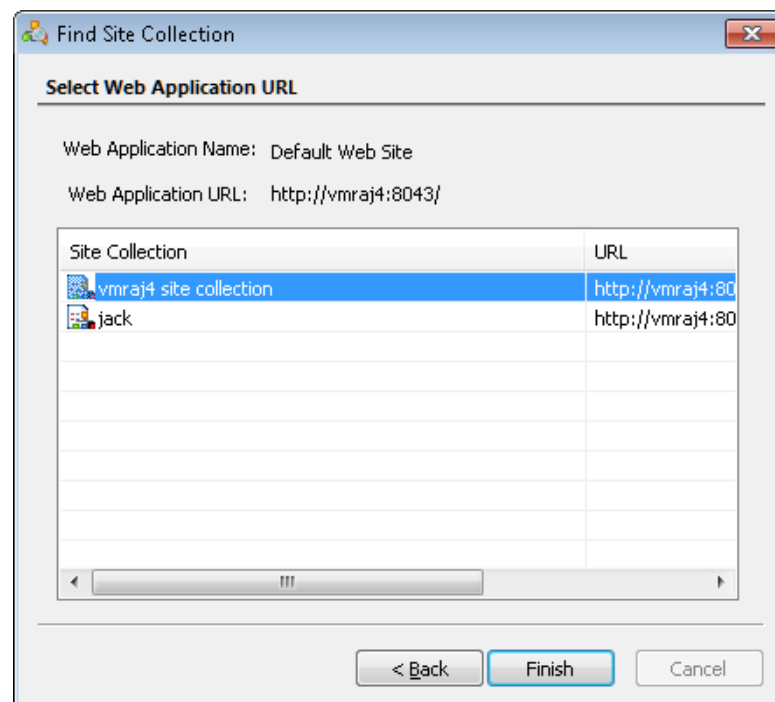
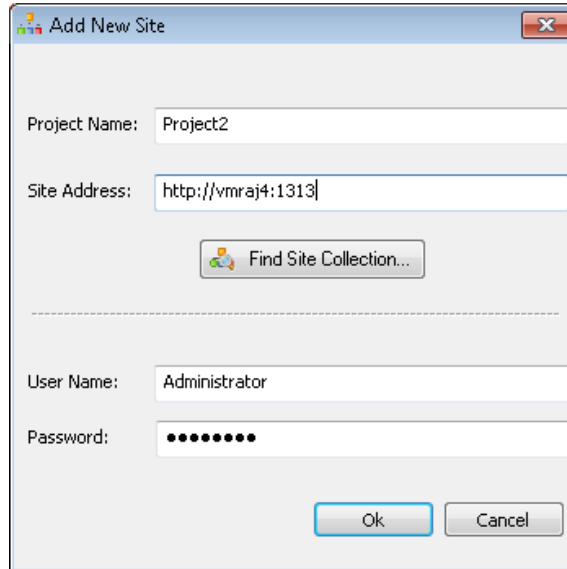


Figure 7: Displaying the list of the available sites

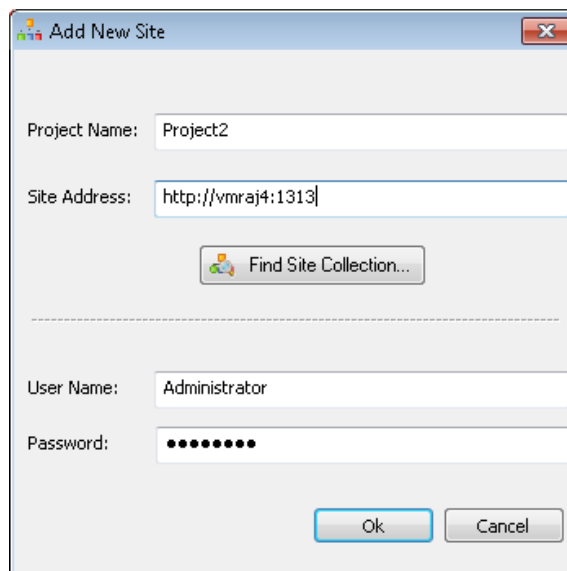
- vii. Select a Site and click "Finish". The software takes you back to the following wizard.
- viii. Here, you have to enter the Project Name.



*Figure 8: "Add New Site" wizard with the selected site*

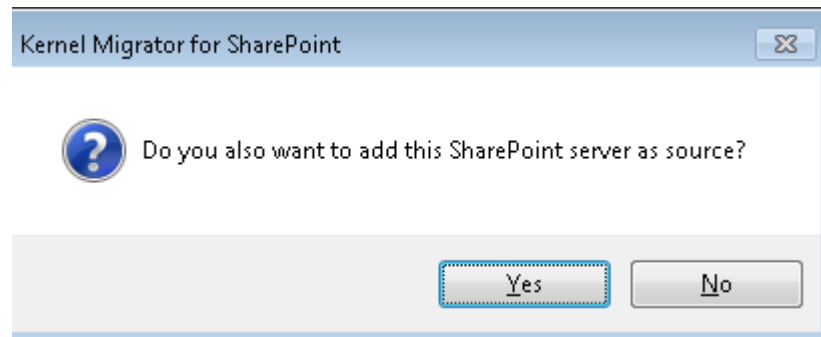
**NOTE:** We are providing the inputs directly without using "Find Site Collection" method in this test case.

- 4. Enter the desired name of the project in the first text box titled "Project Name".
- 5. Provide the URL of the SharePoint Site in the next text box titled "Site Address".
- 6. Enter the username and password of Administrator



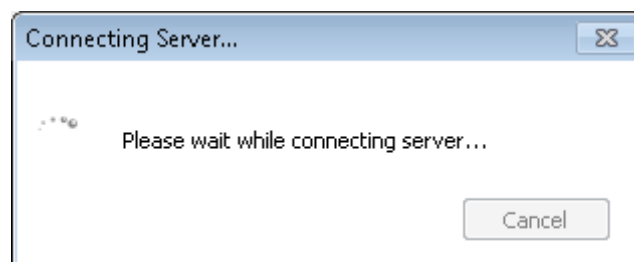
*Figure 9: "Add New Site" wizard with the selected site*

7. Click "OK".
8. The following message appears.



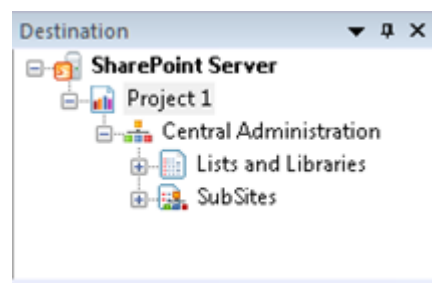
*Figure 10: Message to add the SharePoint Server also as Source.*

9. Click "Yes" to add this SharePoint site also as Source else click "No".
10. Clicking any button let software add the SharePoint Site.



*Figure 11: Attempting to connect to the server*

11. The provided SharePoint Site is added and displayed with the entered Project name in the Destination Section in the Left Hand Panel. For example, project1 is the newly added node in the Destination Section as per the following image.

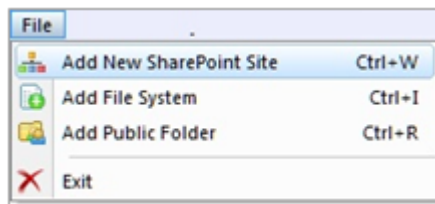


*Figure 12: Newly added Project 1 site*

## 3.2 Adding Office 365

Follow the steps below to add an Office 365 Site as a destination. Please note that each Office 365 Site is denoted with a project name in this software.

1. Perform any of the following methods to start the process
  - i. Click "File" menu and click "Add New Site" item as shown below.

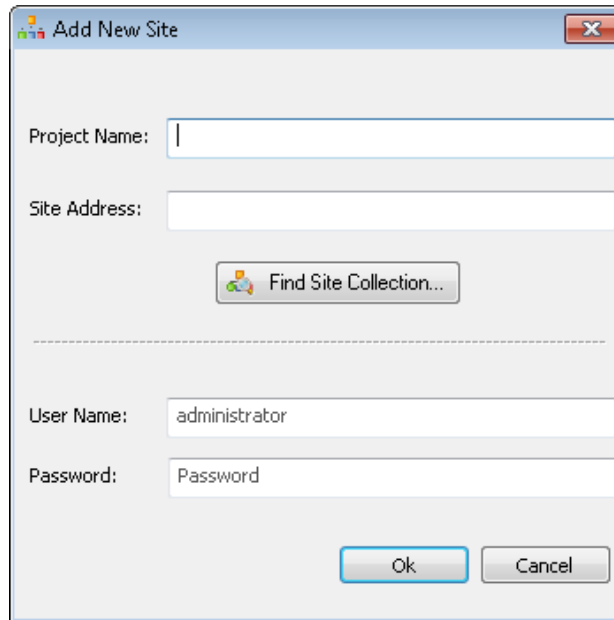


*Figure 13: File Menu Command to add a site*

- ii. Click **Add New SharePoint Site** button on the toolbar.
  - iii. Right click the parent **SharePoint Server** node in the **SharePoint** Section and click

**Add New SharePoint Site.**


2. Doing any of the above steps displays the following wizard.

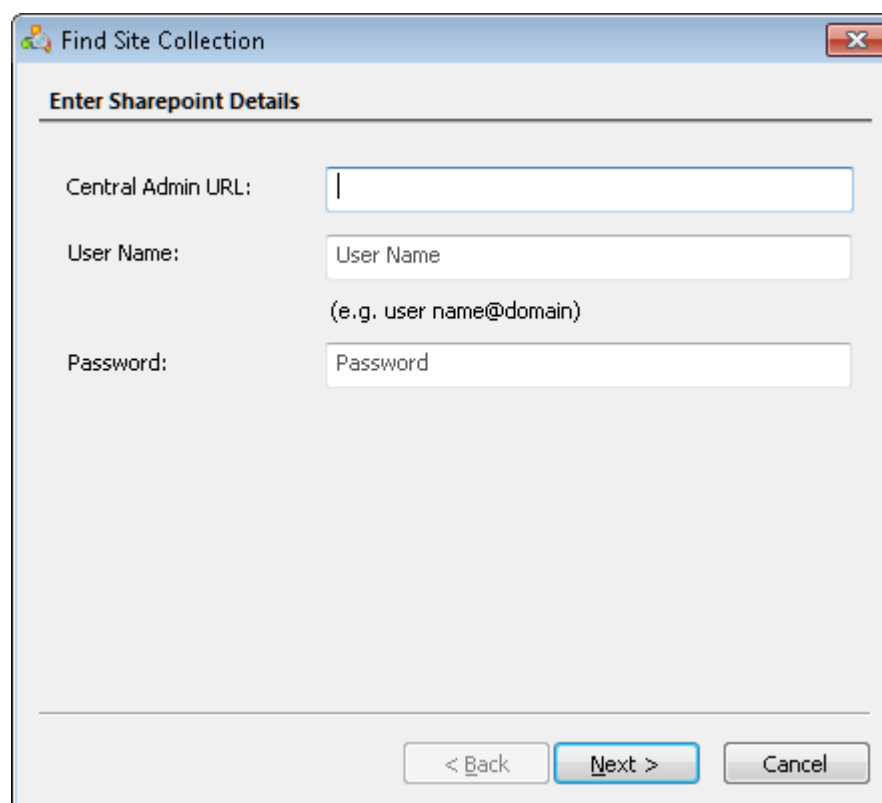


The screenshot shows a Windows-style dialog box titled "Add New Site". It contains the following fields and controls:

- Project Name:** A text input field with a cursor.
- Site Address:** A text input field.
- Find Site Collection...:** A button with a magnifying glass icon.
- User Name:** A text input field containing the text "administrator".
- Password:** A text input field containing the text "Password".
- Ok:** A button at the bottom right.
- Cancel:** A button at the bottom right, next to the Ok button.

**Figure 14: Wizard to add a new Site**

3. If you want the software to find and enumerate the complete Site Collection, then follow the steps below.
  - i. Click  to display the following wizard.



Find Site Collection

**Enter Sharepoint Details**

Central Admin URL:

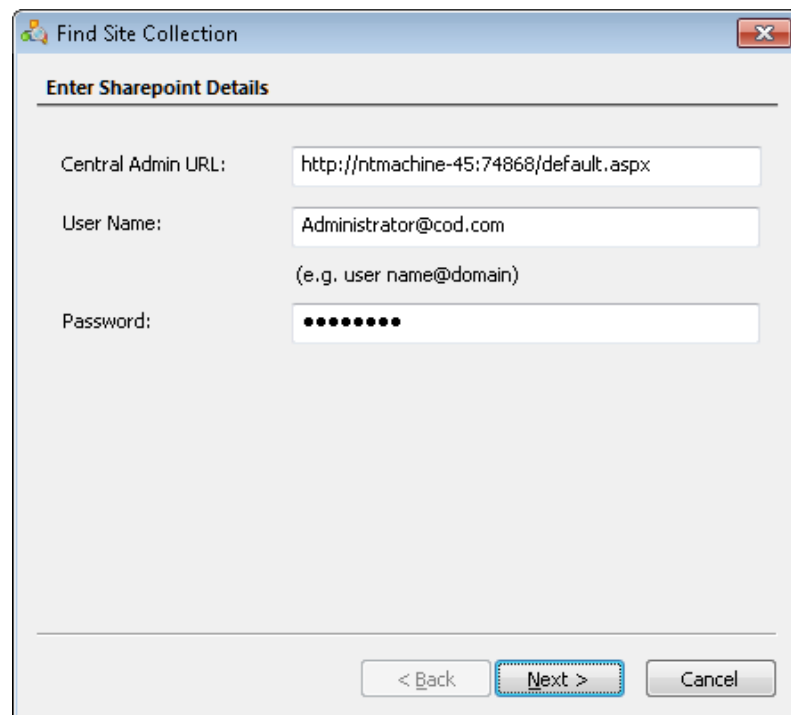
User Name:   
(e.g. user name@domain)

Password:

< Back   Next >   Cancel

*Figure 15: Wizard to find a Site Collection*

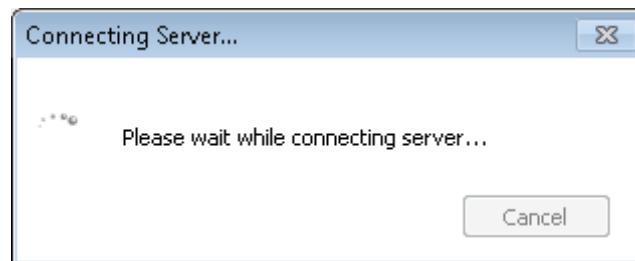
- ii. Enter the details like "Central Admin URL", "User Name", and "Password."



The image shows a Windows-style dialog box titled "Find Site Collection". It has a standard Windows window frame with a title bar, a close button (X), and a maximize button. The dialog is divided into two sections. The top section is titled "Enter Sharepoint Details" and contains three input fields: "Central Admin URL:" with the value "http://ntmachine-45:74868/default.aspx", "User Name:" with the value "Administrator@cod.com", and "Password:" with a masked password "••••••••". Below the "User Name:" field is a hint "(e.g. user name@domain)". At the bottom of the dialog, there are three buttons: "< Back", "Next >" (which is highlighted with a blue border), and "Cancel".

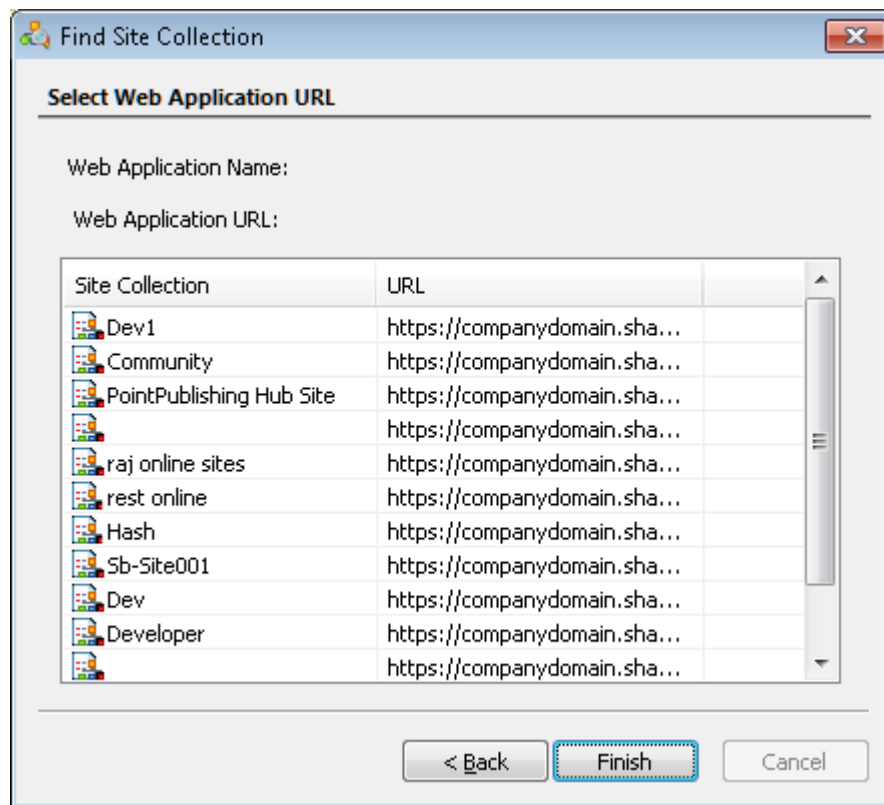
*Figure 16: Inserting the details to find Site Collection*

- iii. Click **Next** to proceed further. The next step displays the following screen saying to connect to the server.



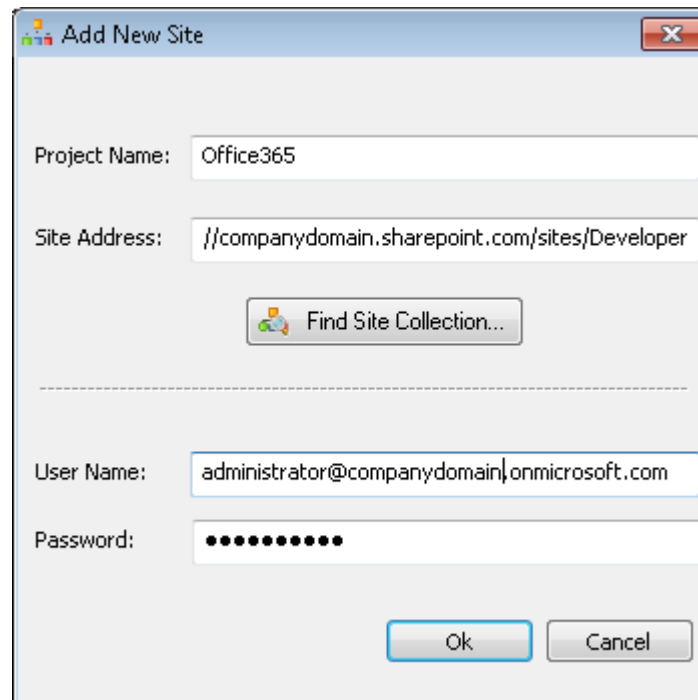
**Figure 17: Attempting to connect to the server**

- iv. Once it connects to Office 365, the software shows the list of Web Applications.



**Figure 18: Displaying the detected Web Applications**

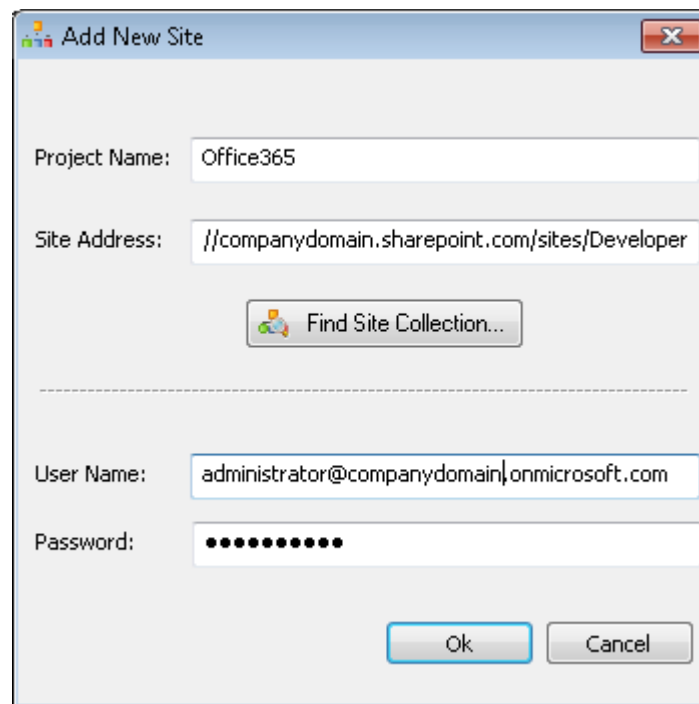
- v. Select a Site and click "Finish". The software shows the following step.
- vi. Enter the Project Name.



*Figure 19: "Add New Site" wizard displays Office 365 site*

**NOTE:** We are providing the inputs directly without using "Find Site Collection" method in this test case.

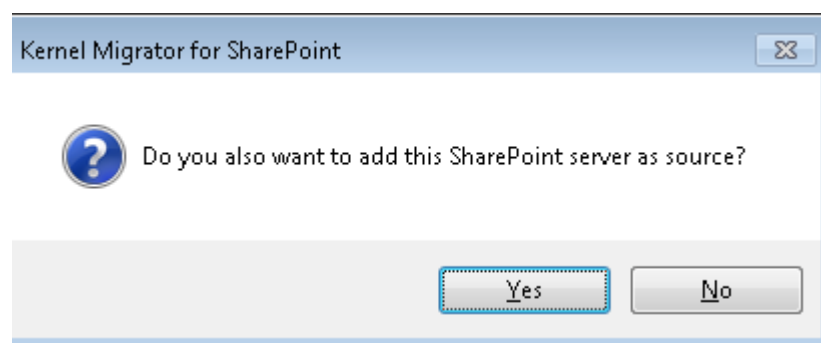
4. Enter the desired name of the project in the first text box titled "Project Name".
5. Provide the URL of the SharePoint Site in the next text box titled "Site Address".
6. Enter the username and password of Administrator.



*Figure 20: "Add New Site" wizard with the selected site*

7. Click "OK".

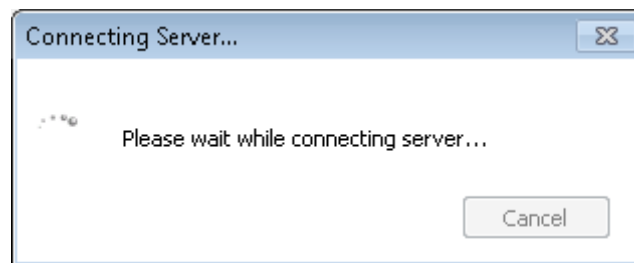
8. The following message appears.



*Figure 21: Message to add the SharePoint Server also as Source.*

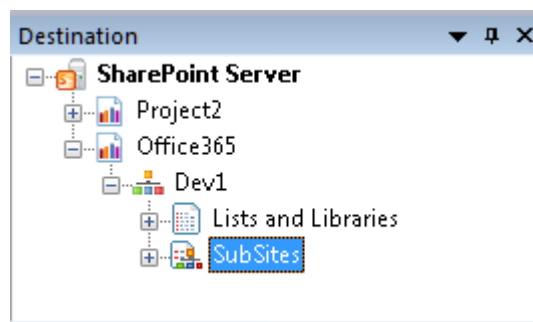
9. Click "Yes" to add same Office 365 site as Source. You can click "No" to keep this site as Destination only.

10. Clicking any button let software process the addition of Office 365 site.



*Figure 22: Attempting to connect to the server*

11. The provided SharePoint Site is added and displayed with the entered Project name in the Destination Section in the Left Hand Panel. For example, Office 365 is the newly added node in the Destination Section as per the following image.



*Figure 23: Newly added Office 365 site*

## 4. Adding Source

Remote File System, Public Folders of Exchange Server, and SharePoint Site can be added as the source.

### 4.1 Local File System

The Local File System, where the software is installed, is added as the default file system. All its local drives and folders can be used as a source to transfer the content to the destination.

### 4.2 Remote File System

Follow the steps below to add a remote file system,

1. Perform any of the following methods to start the process.
  - a. Click "File" menu and click "Add File System" as shown below

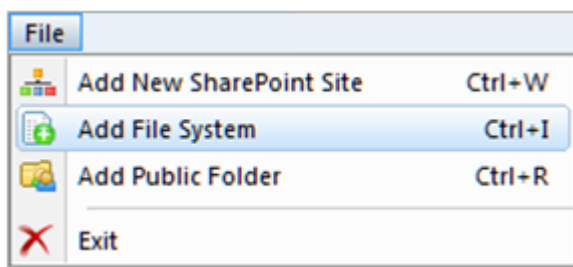


Figure 24: File Menu Command to add a file system

- b. Click **Add New Source** and select the option **File System** in its menu.
  - c. Right click the parent **Windows File System** node in **Source** pane and select **Add New Drive**.
  - d. Right click the **Remote Computer** node and click **Add New Drive**.
2. Doing any of the above steps displays the following wizard.

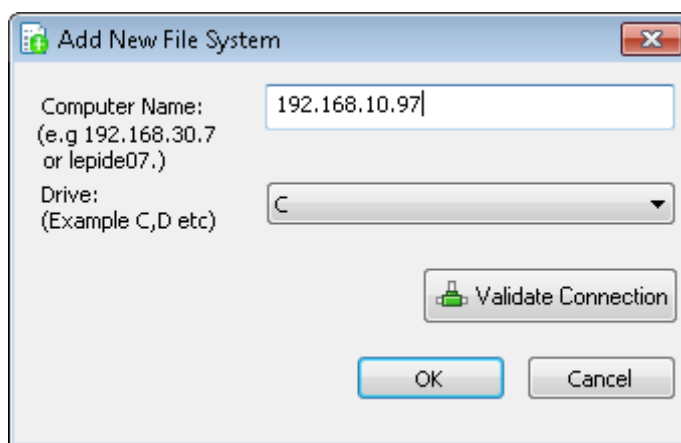


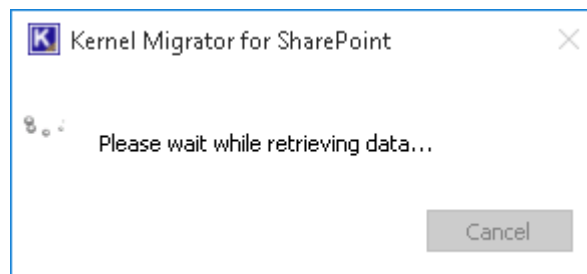
Figure 25: Wizard to add a networked computer as a File System

3. Enter the Computer Name or IP Address in the text box titled "Computer Name"

4. Select a drive that has to be connected as a File System for the software using the drop-down box titled "Drive".
5. (Optional) Follow below steps to validate the connection with the remote computer

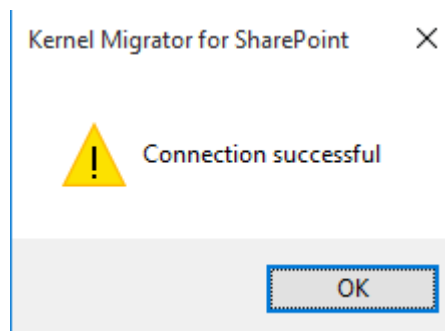
6. Click  to validate the connection.

7. It displays the following dialog box.



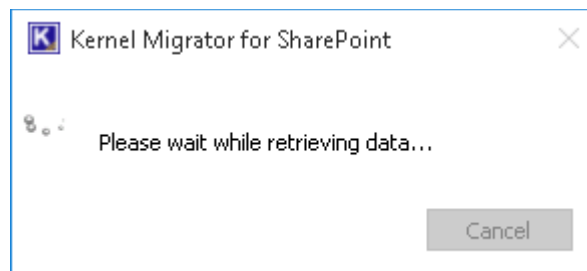
*Figure 26: Retrieving Data dialog box*

8. If the connection is successful, the following message box appears.



*Figure 27: Connection is successful.*

9. Click "OK" to process the addition of remote file system.



*Figure 28: Retrieving Data dialog box*

10. After establishing the connection, the software may ask for the login credentials to login on the remote computer. The networked storage will be added as a Remote File System to the software. It is displayed with the provided computer name under the "Remote Computer" node in the Source Section. For example, "sp13-ex10" is the newly added node in the Source section in the following image.

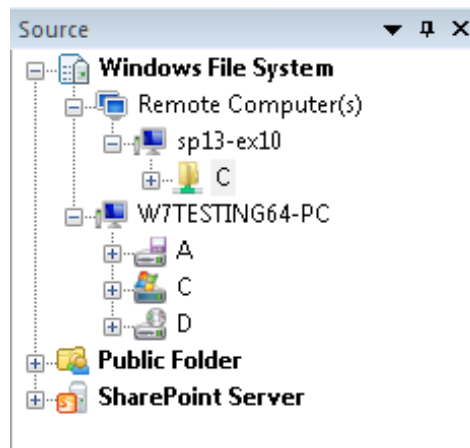


Figure 29: Newly added File System - test-computer

## 4.3 Add Public Folders

you have to connect to an Exchange Server to add its Public Folders as the source. You can connect to an Exchange Server using the following methods.

1. Live Exchange (Direct Connection)
2. Through an Existing/New Outlook Profile
3. Manually Configure Outlook Profile

### 4.3.1 Connect to Live Exchange

Follow the steps below to add a Live Exchange Server.

1. Perform any of the following methods to start the process.
  - a. Click "File" menu and click "Add Public Folder" as shown below.

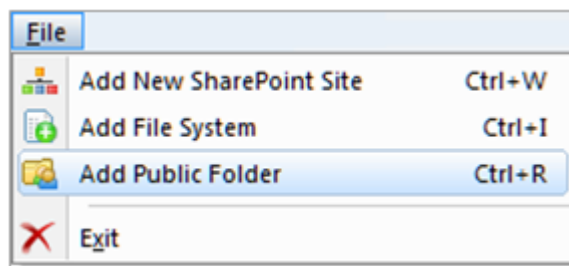
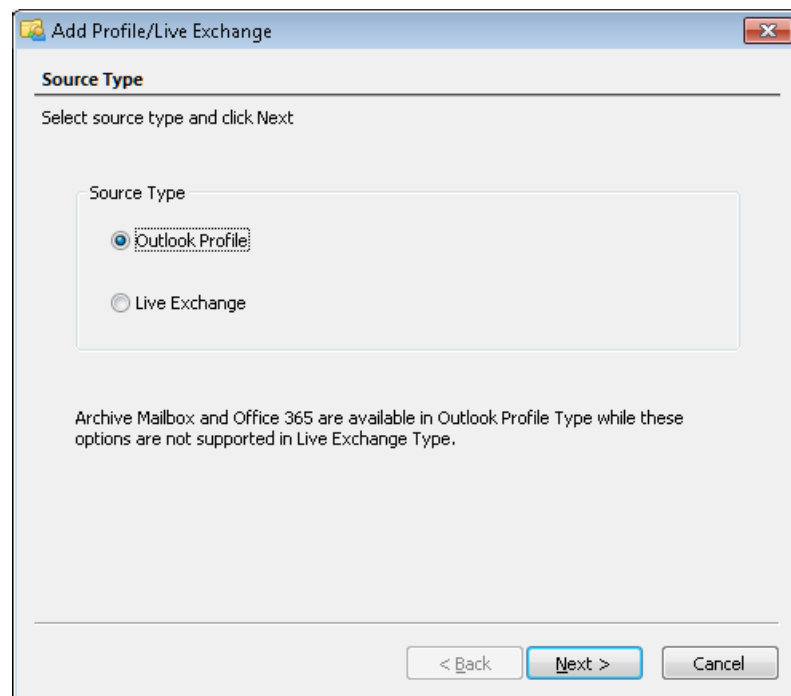


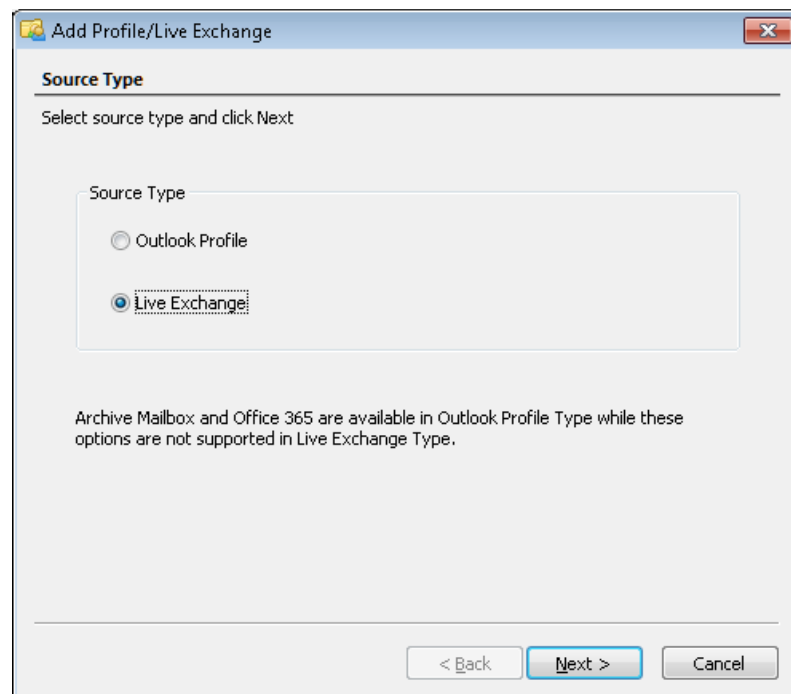
Figure 30: File Menu Command to add an Exchange Server

- b. Click **Add New Source** and select the option **Public Folder** in its menu.
  - c. Right click the parent **Public Folder** node in **Source** pane and click **Add Public Folder**.
2. Doing any of the above steps displays the following wizard.



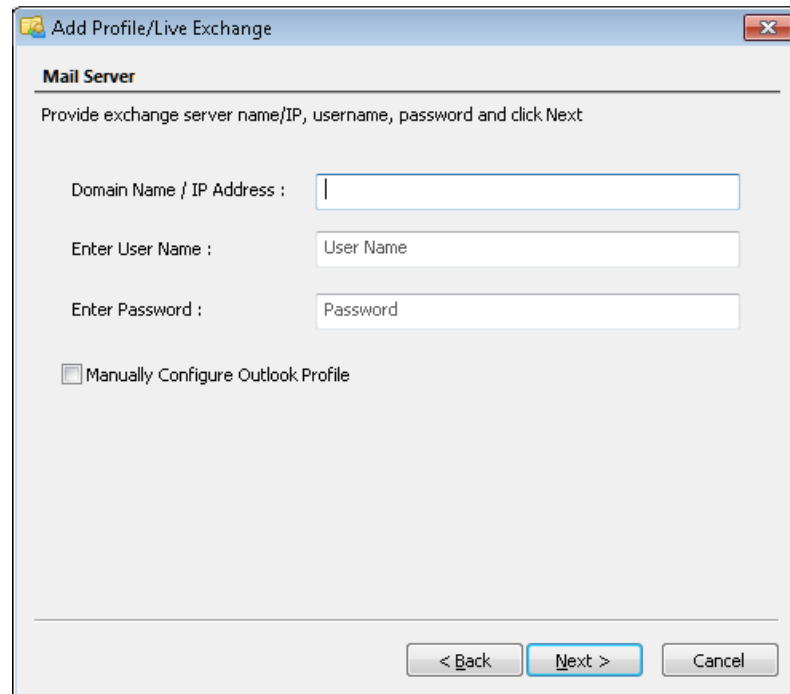
*Figure 31: Wizard to add a local/networked Exchange Server*

3. Select the option named "Live Exchange".



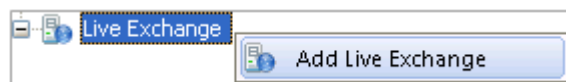
*Figure 32: Selected the option to add Live Exchange*

4. Click "Next".



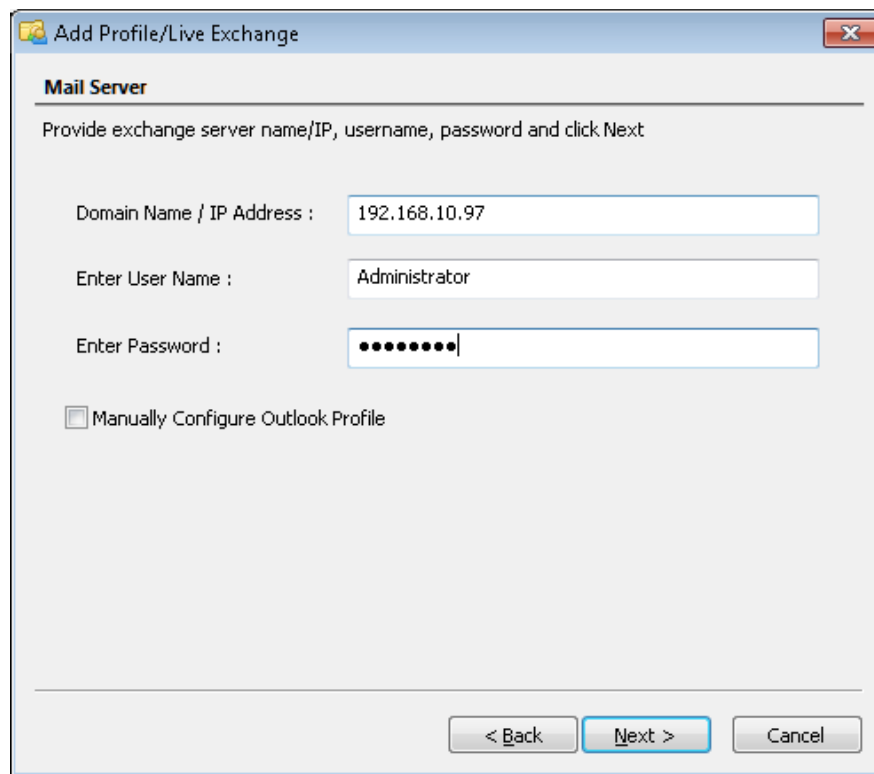
*Figure 33: Add Exchange Server*

**NOTE:** You can right click on the node "Live Exchange" and select "Add Live Exchange" option to reach directly at this step.



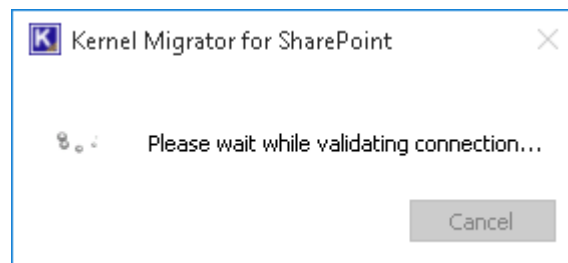
*Figure 34: Direct option to add Live Exchange*

5. You have to provide the inputs like IP Address or the Domain Name of the server where Exchange Server is installed and the login credentials of an Administrator user.



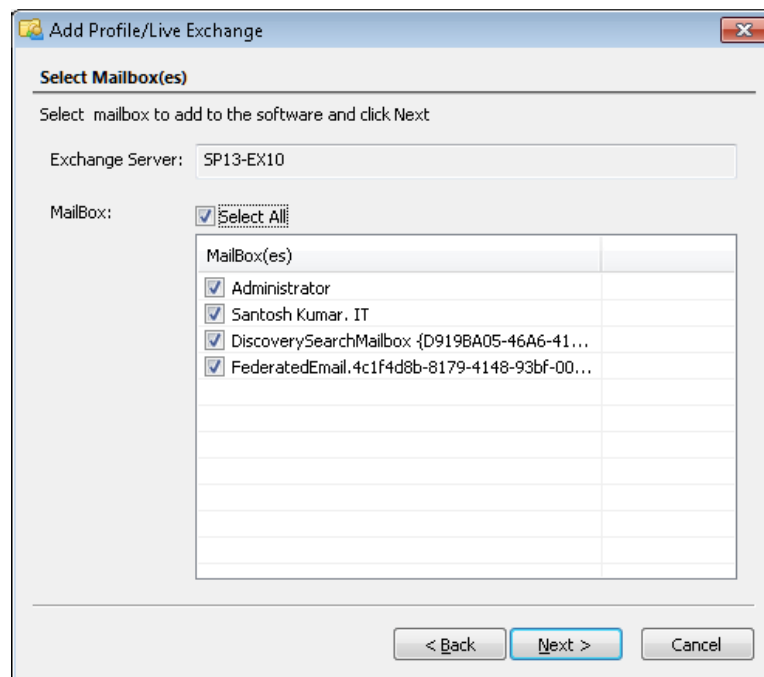
*Figure 35: Sample details to add Exchange Server*

6. Click "Next". You may receive the following dialog box, which tries to validate the connection.



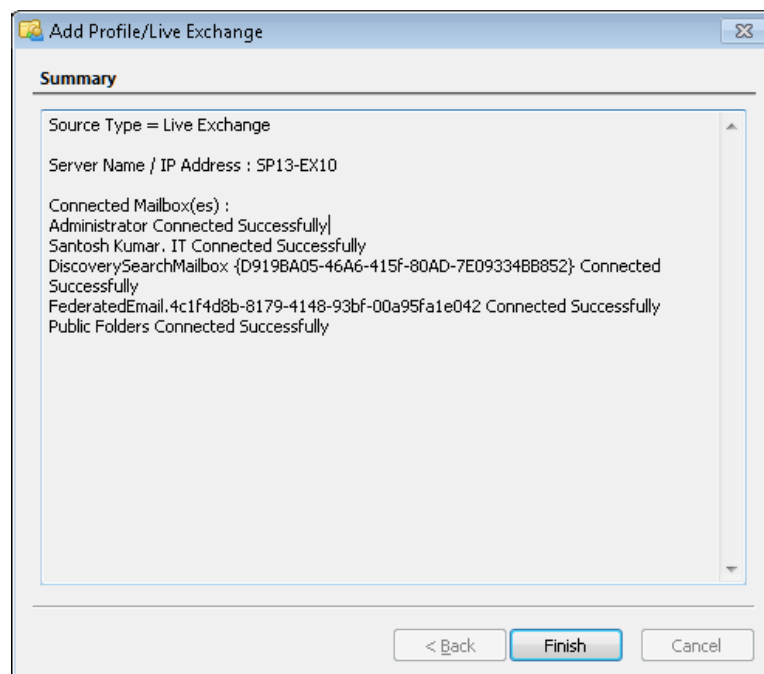
*Figure 36: Dialog box to validate the connection*

7. Once the connection is validated, you reach the following step.



**Figure 37: Select Mailboxes**

8. All mailboxes are listed in this step. Select the mailboxes, with which you want to connect.
9. Click "Next", once you are done. The next step displays the summary of this connection.



**Figure 38: Summary of the connection**

10. Read the summary and click "Finish" to add the Exchange Server.

11. Now, the Source pane displays the added live Exchange Server under the node "Live Exchange".

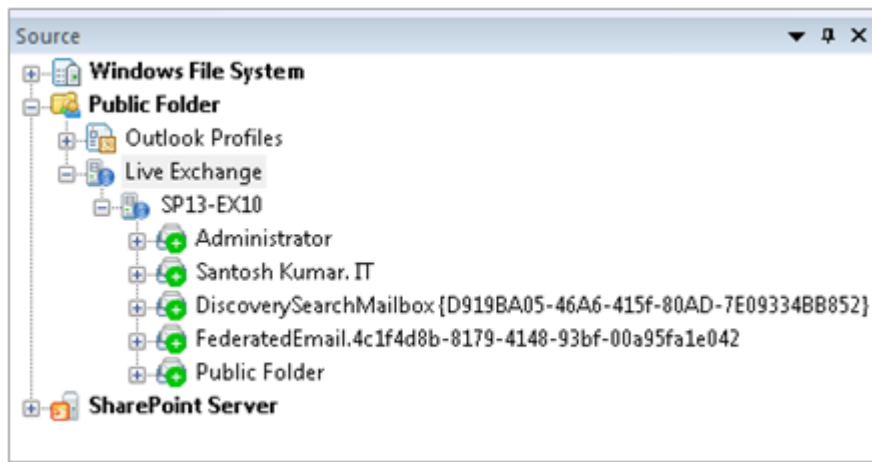


Figure 39: Added Live Exchange Server

12. The Exchange Server now lists all of its mailboxes.

### 4.3.2 Connect to Exchange via Existing/New Outlook Profile

You can connect to an Exchange Server directly through an existing Outlook profile on the computer where Kernel Migrator for SharePoint is installed. You can use this method to connect to Office 365 or Archive Mailbox of any Exchange Server. You can add only one mailbox, for which the selected Outlook profile is configured. You cannot add other mailboxes in the same Exchange Server using this method.

Follow the steps below,

1. Perform any of the following methods to start the process.
  - i. Click "File" menu and click "Add Public Folder" as shown below.

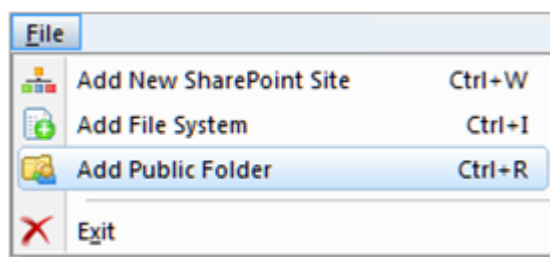
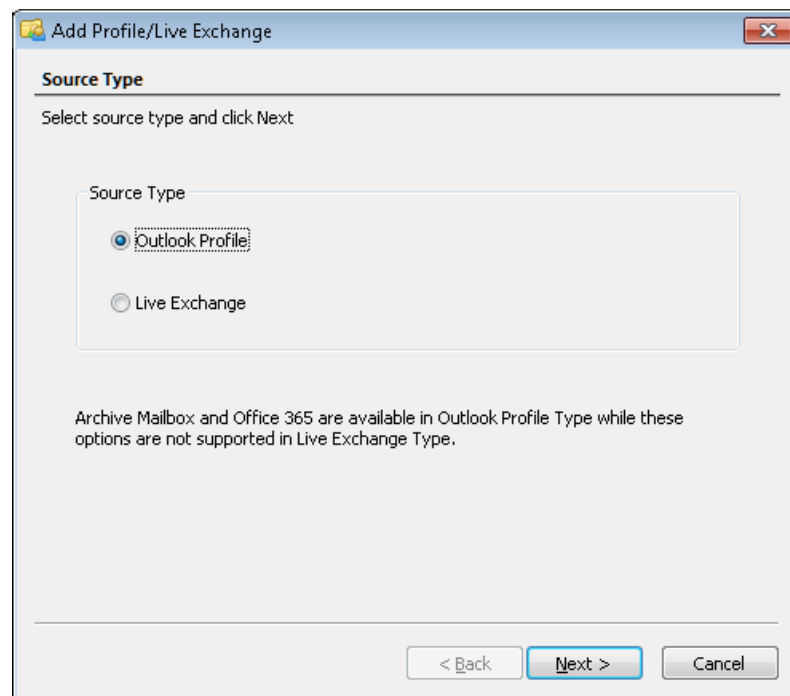


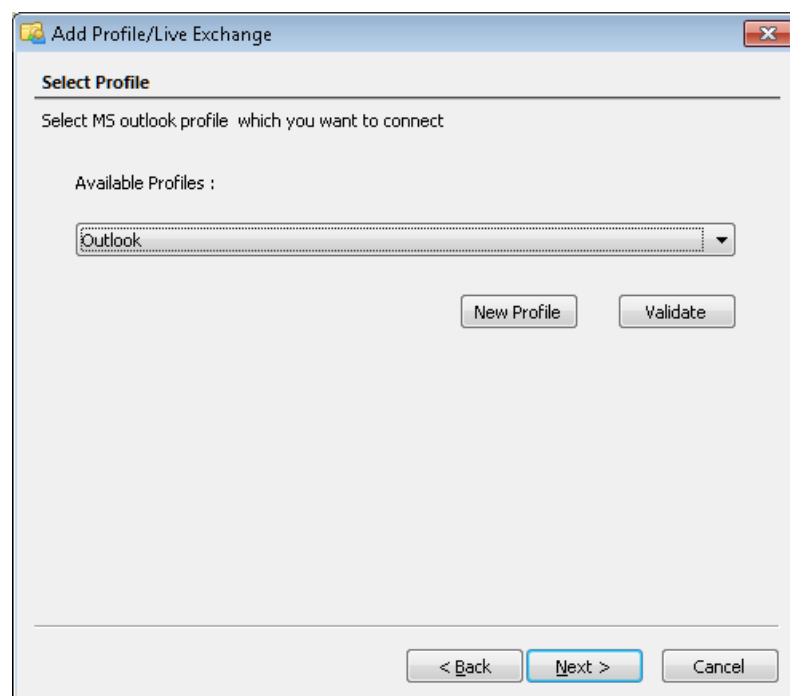
Figure 40: File Menu Command to add an Exchange Server

- ii. Click **Add New Source** button on Toolbar and select the option **Public Folder** in its menu.
  - iii. Right click the parent **Public Folder** node in the "Source" Pane and click **Add Public Folder**
2. Doing any of the above steps displays the following wizard.



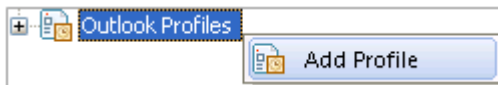
**Figure 41: Wizard to add a local/networked Exchange Server**

3. Select the option named "Outlook Profile".
4. Click "Next" to reach the following step.



**Figure 42: Select an Outlook Profile**

**NOTE:** You can right click on the node "Outlook Profiles" and select "Add Profile" option to reach directly at this step.



**Figure 43: Direct option to add Exchange Server through profile**

5. Select the Outlook profile from the drop-down menu.
6. You can click on "New Profile" to create a new Outlook profile right away to connect to an Exchange Mailbox. It displays the following dialog box.

A screenshot of a 'Create New Profile' dialog box. It has three text input fields: 'Enter Server Name:', 'Enter MailBox Name:', and 'Enter Profile Name:'. Below these are three checkboxes: 'Is It Exchange 2013', 'Office 365', and 'Manually Configure Outlook Profile'. At the bottom right are 'Create' and 'Close' buttons.

**Figure 44: Create a new Outlook Profile**

Follow the steps below to create a new Outlook profile,

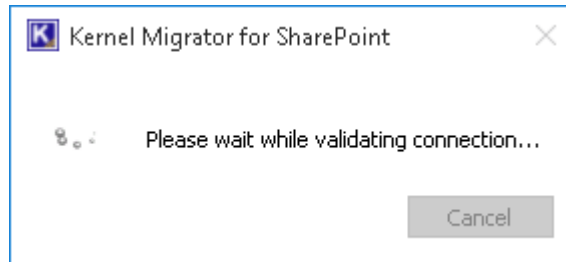
- i. You have to provide the inputs like the IP Address or domain name of the Exchange Server, mailbox name, and the desired name of the new Outlook Profile.

A screenshot of the 'Create New Profile' dialog box with sample data entered. The 'Enter Server Name:' field contains 'SP13-EX10', the 'Enter MailBox Name:' field contains 'TestUser2@www.vdoc.com', and the 'Enter Profile Name:' field contains 'TestUser2'. The checkboxes for 'Is It Exchange 2013', 'Office 365', and 'Manually Configure Outlook Profile' are all unchecked. The 'Create' and 'Close' buttons are at the bottom right.

**Figure 45: Sample details to create a new Outlook Profile**

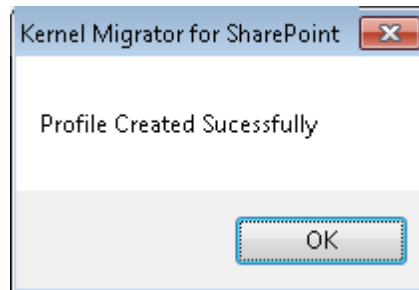
- ii. Check the option "Is it Exchange 2013" if you are connecting to Exchange Server 2013.
- iii. Check the option "Office 365" if you are connecting to Office 365.

- iv. Check the option "Manually Configure Outlook Profile" if you want to configure the profile manually to connect to an Exchange Server.
- v. Click "OK" to validate the connection.



*Figure 46: Dialog box to validate the connection*

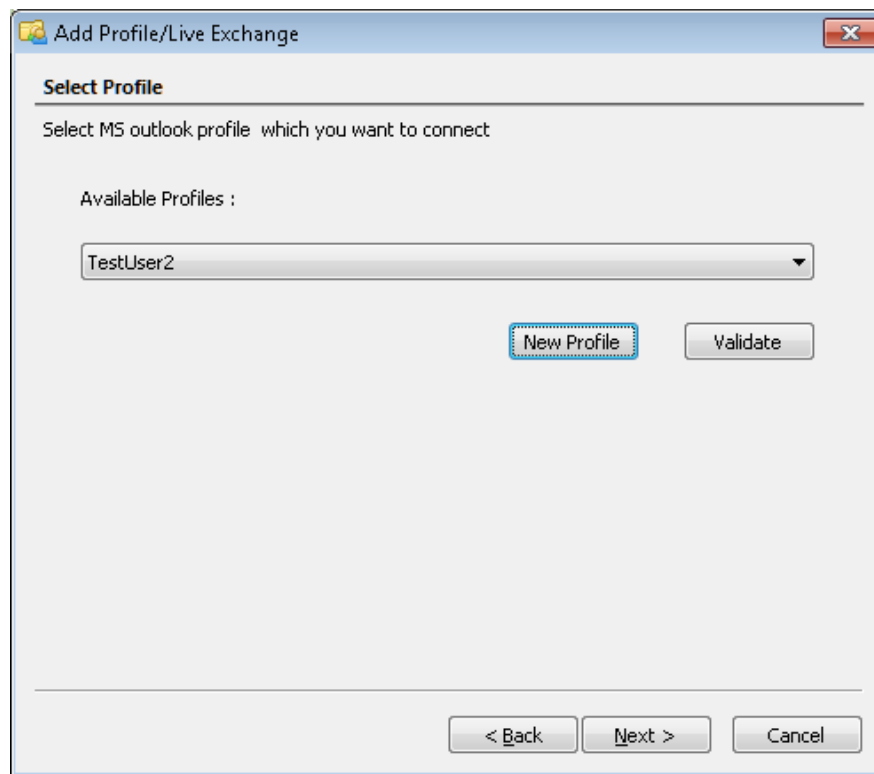
- vi. Once the connection is validated, the profile is created. You receive the following dialog box confirming the success.



*Figure 47: New profile is created.*

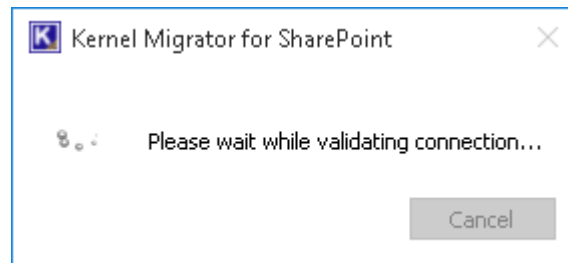
- vii. Click "OK" to go back to the main wizard.

The main wizard now displays the newly created profile.



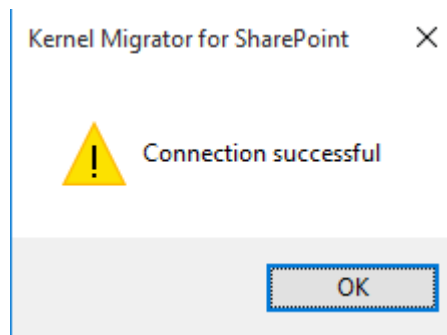
**Figure 48: Select an Outlook Profile**

- Click "Validate" to validate the connection. The software tries to validate the connection to Exchange Server via selected profile.



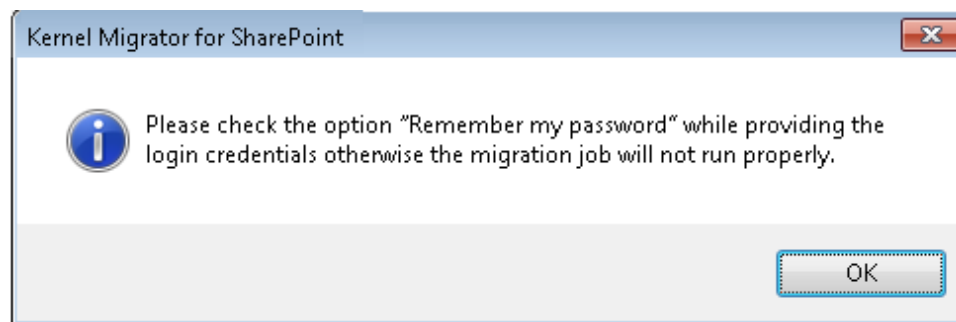
**Figure 49: Dialog box to validate the connection**

- Once the connection to Exchange Server via selected profile is successful, the software displays the following message.



*Figure 50: Connection to Exchange Server is successful.*

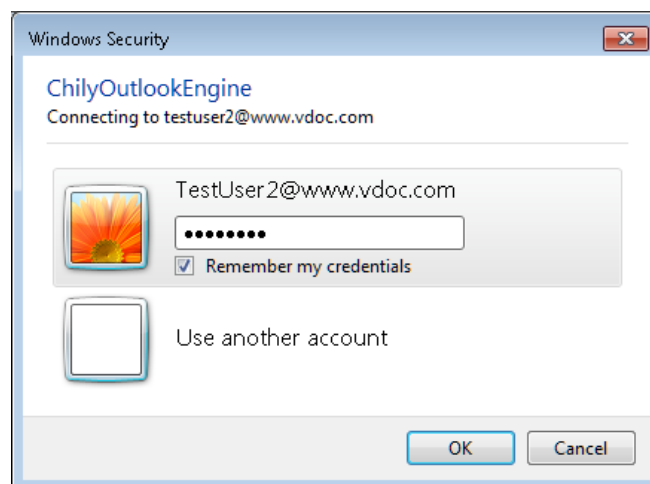
9. Click "Next". You may receive the following dialog box, which tells you to check "Remember my password" or "Remember my credentials" option while providing the login credentials for Exchange.



*Figure 51: Message box saying to check the option "Remember Password"*

Enabling "Remember my password" or "Remember my credentials" option, while providing the login credentials for adding an Exchange Server, let the software use saved credentials to run the scheduled migration jobs.

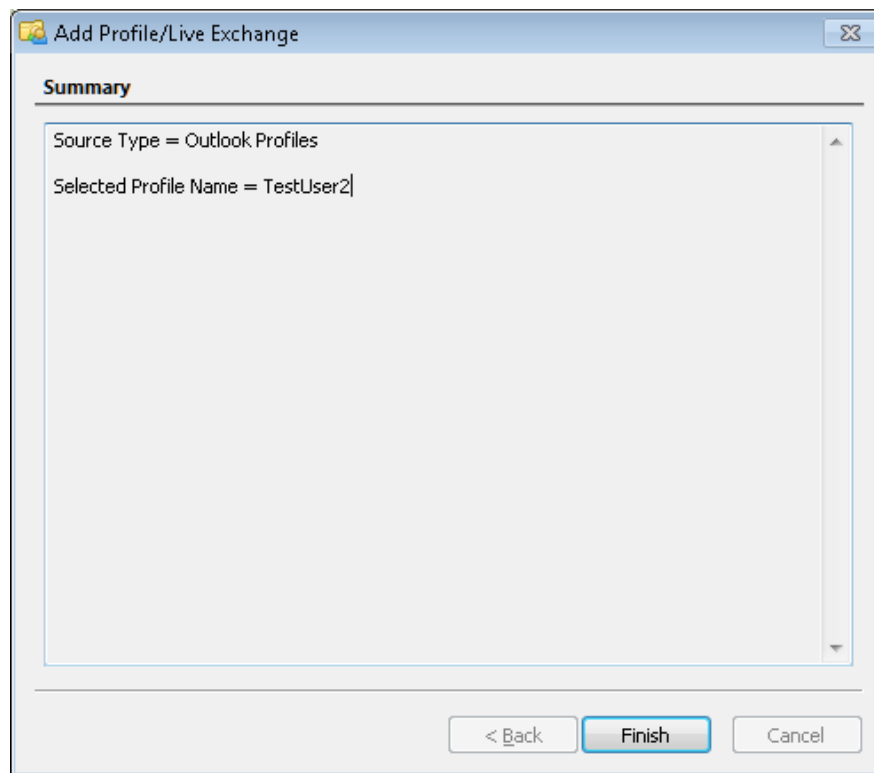
10. You may receive the following dialog box to provide the login credentials.



*Figure 52: Asking the login credentials*

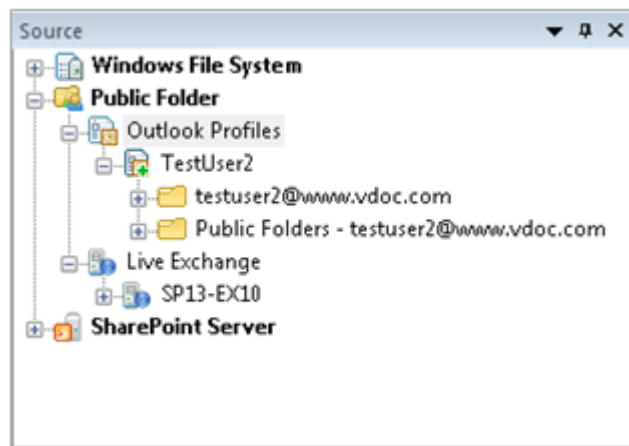
11. Provide the username and password of that user, whose mailbox you are trying to connect through the existing Outlook profile.

12. As notified above, kindly check the option "Remember my password" or "Remember my credentials". It lets the software use the same login credentials to run the scheduled migration jobs.
13. Click "OK" to let the software connect to Exchange Server.
14. Once the connection is successful, you reach the next step of the wizard. It displays the summary of this connection.



*Figure 53: Summary of the connection*

15. Read the summary and click "Finish" to add the Exchange Server.
16. Now, the source pane displays the added Exchange Server under the "Outlook Profiles" node.

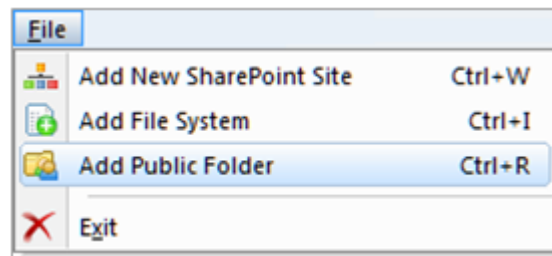


*Figure 54: Added Exchange Server through Outlook Profile*

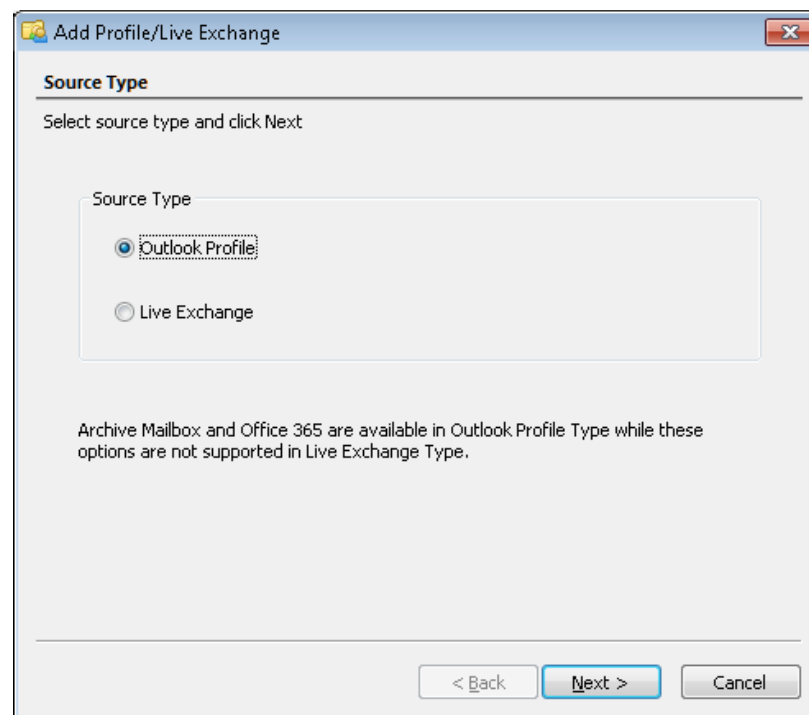
### 4.3.3 Configure Profile manually to connect to Exchange

You can configure the Outlook profile settings manually to connect to an Exchange Server. It is recommended to use this method if you are facing any problem while connecting to an Exchange Server. Follow the steps below,

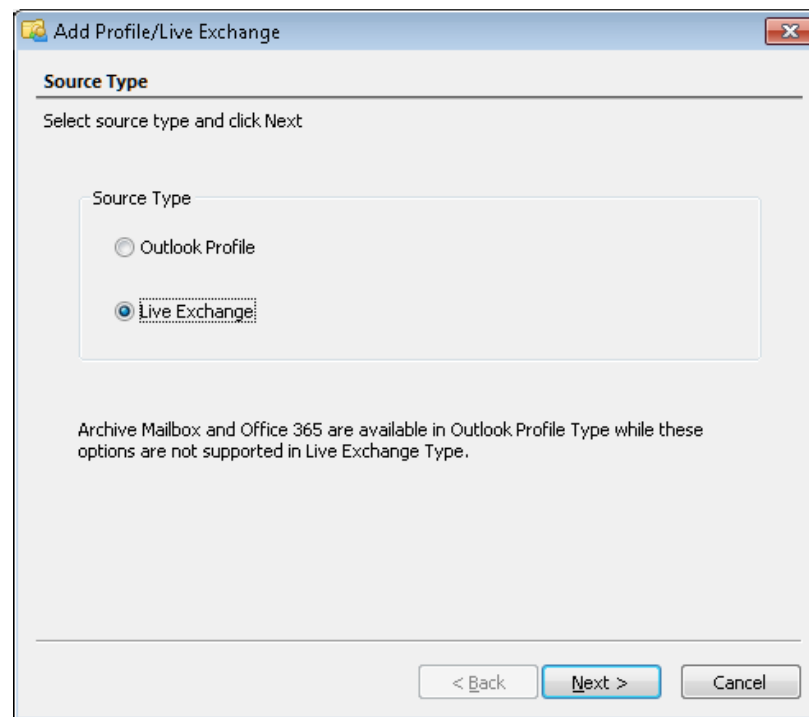
1. Perform any of the following methods to start the process.
  - i. Click "File" menu and click "Add Public Folder" as shown below.

*Figure 55: File Menu Command to add an Exchange Server*

- ii. Click **Add New Source** and select the option **Public Folder** in its menu.
  - iii. Right click the parent **Public Folder** node in the **Source** pane and click **Add Public Folder**.
2. Doing any of the above steps displays the following wizard.

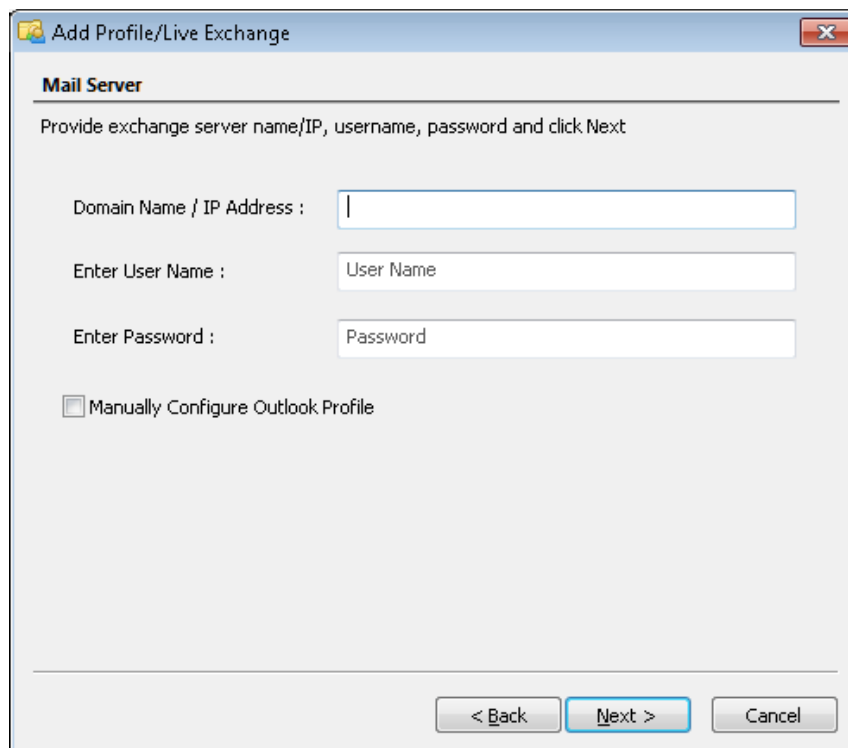
*Figure 56: Wizard to add a local/networked Exchange Server*

3. Select the option "Live Exchange".



*Figure 57: Selected the option to add Live Exchange*

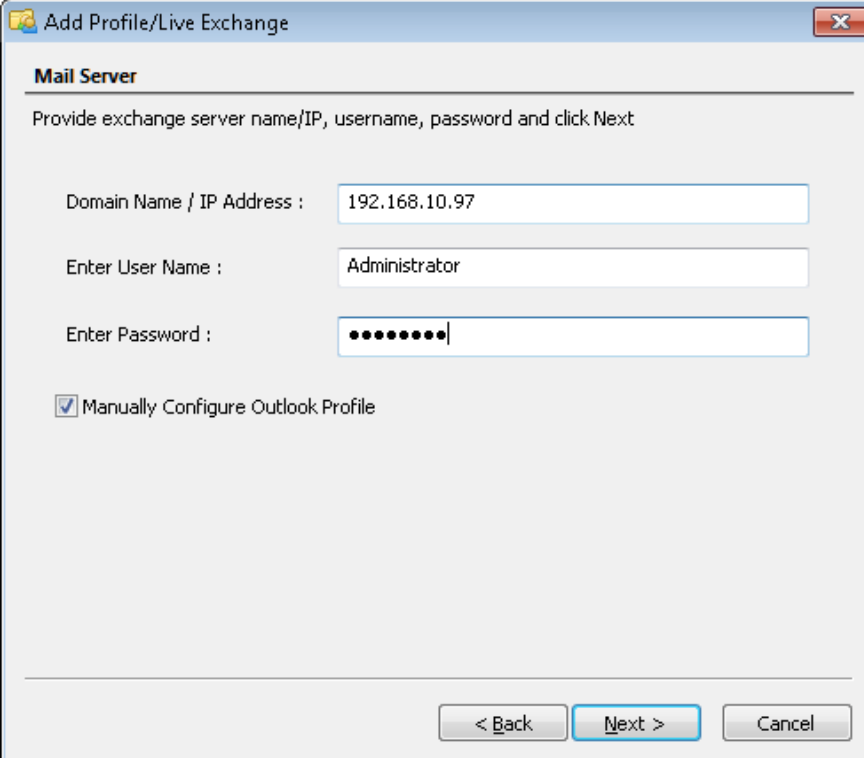
4. Click "Next".



*Figure 58: Add Exchange Server*

**NOTE:** You can right click on the node **Live Exchange** and select **Add Live Exchange** option to reach directly at this step.

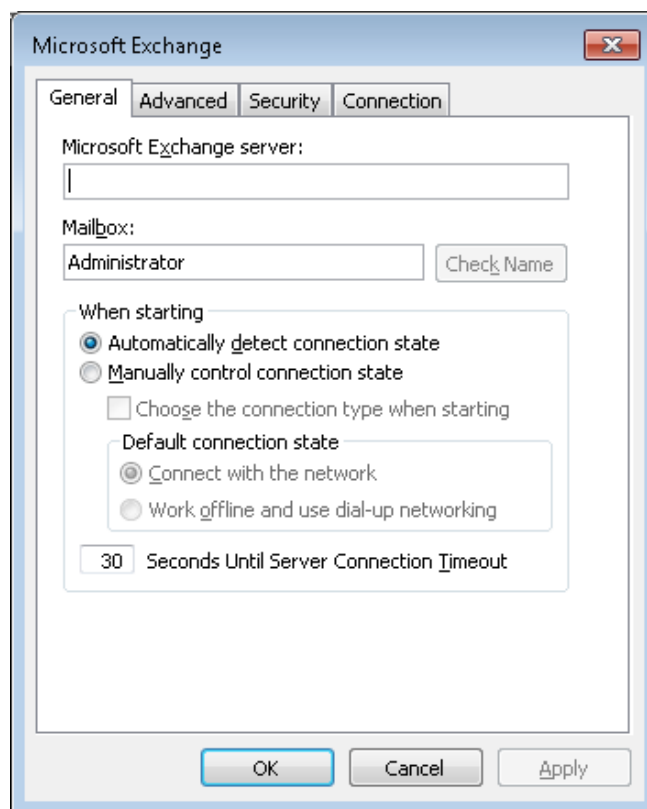
5. You have to provide the inputs like IP Address or the Domain Name of the server where Exchange Server is installed and the login credentials of an Administrator user.
6. Check the option "Manually Configure Outlook Profile", if you want to configure the profile manually to connect to an Exchange Server.



*Figure 59: Sample details to add Exchange Server*

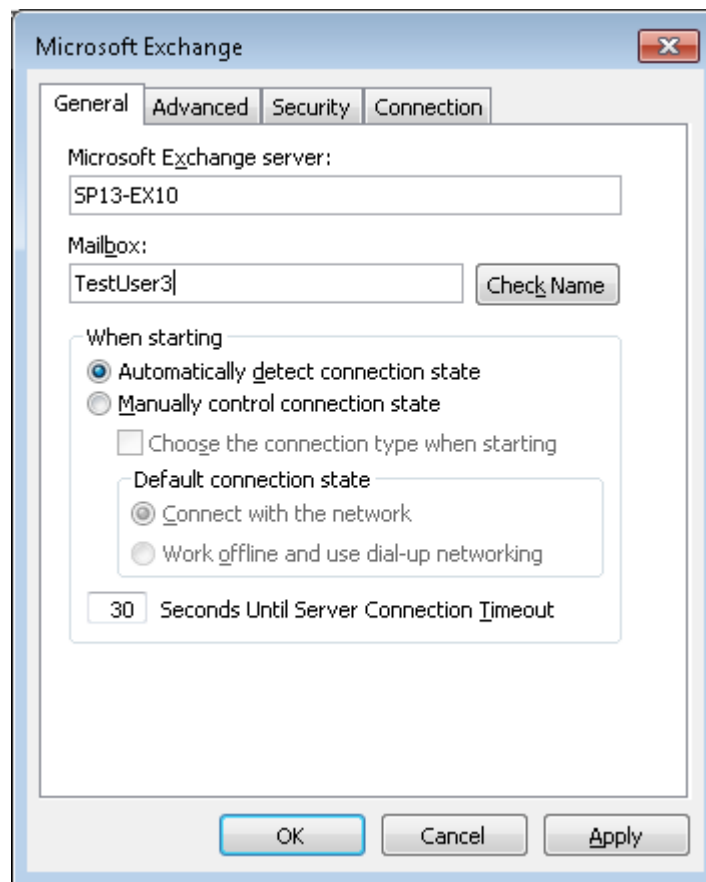
While connecting to an Exchange Server using the Outlook Profile, you get an option to create a new profile with/without manual configuration. The following steps remain applicable in this case as well.

7. Click "Next". The following wizard appears onscreen.



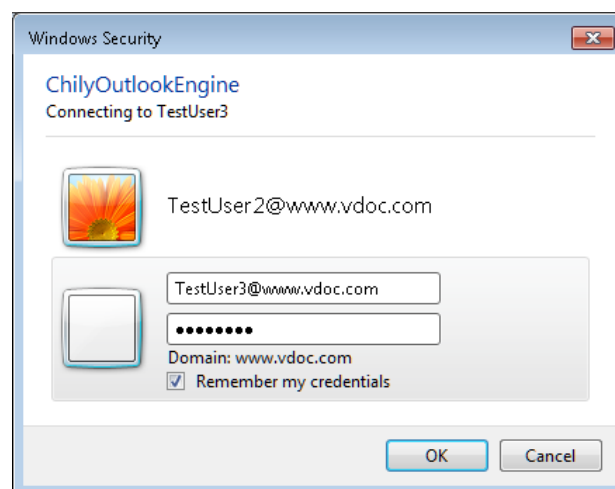
*Figure 60: Wizard to configure the profile manually*

8. Enter the correct name of Exchange Server and mailbox, if the entered values are wrong.



*Figure 103: Sample values in Microsoft Exchange Configuration*

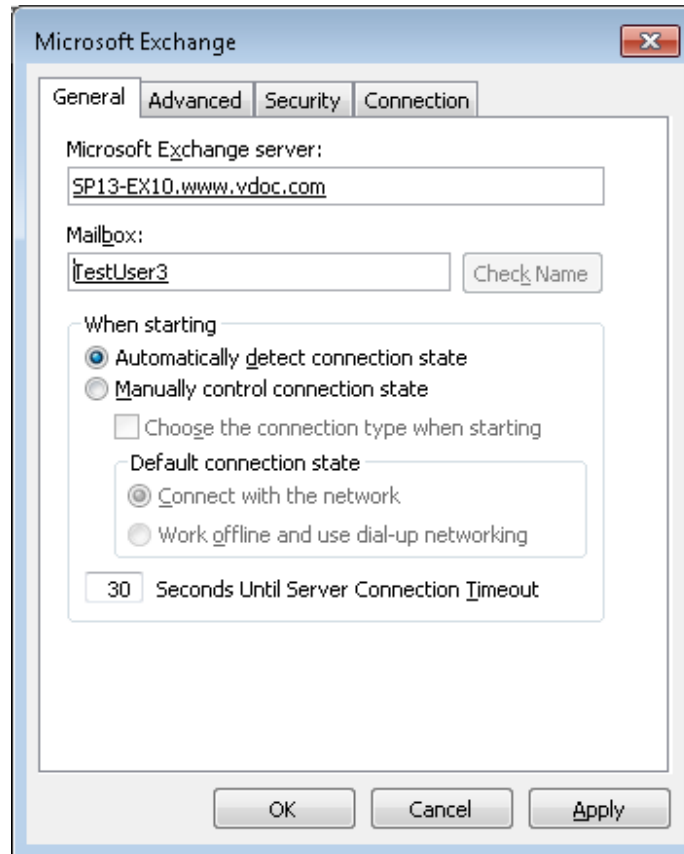
9. Click on "Check Name" in "General" tab to identify the existence of mailbox on the Exchange Server. Doing this may display the dialog box asking for login credentials.



*Figure 61: Dialog box asking for login credentials*

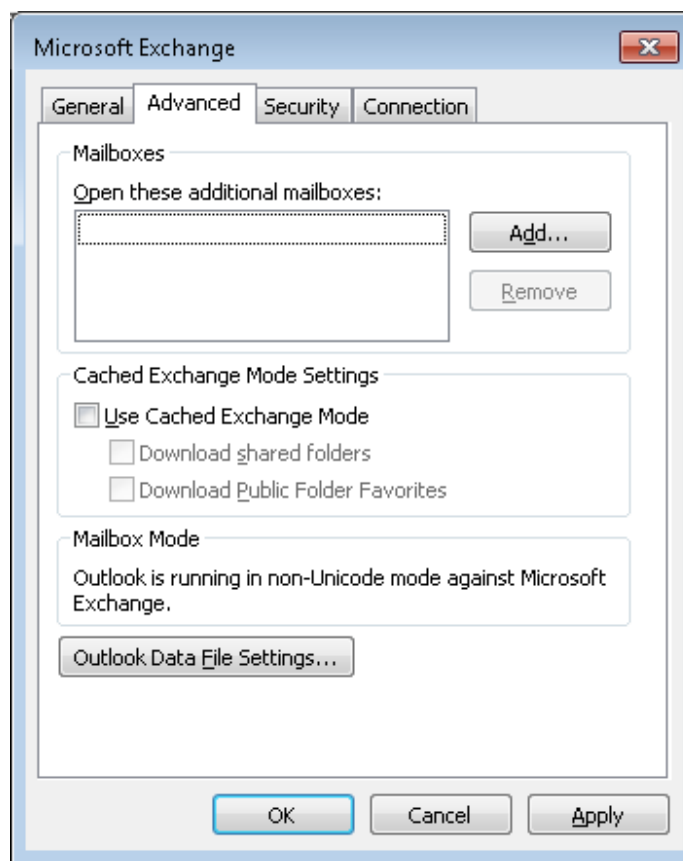
10. Provide the username in the format - (Domain\Username).

11. Enter the password.
12. Click "OK" to proceed further. After verifying the mailbox existence, the software takes you back to the same wizard. Now, it shows the identified name of the Exchange Server and its mailbox.



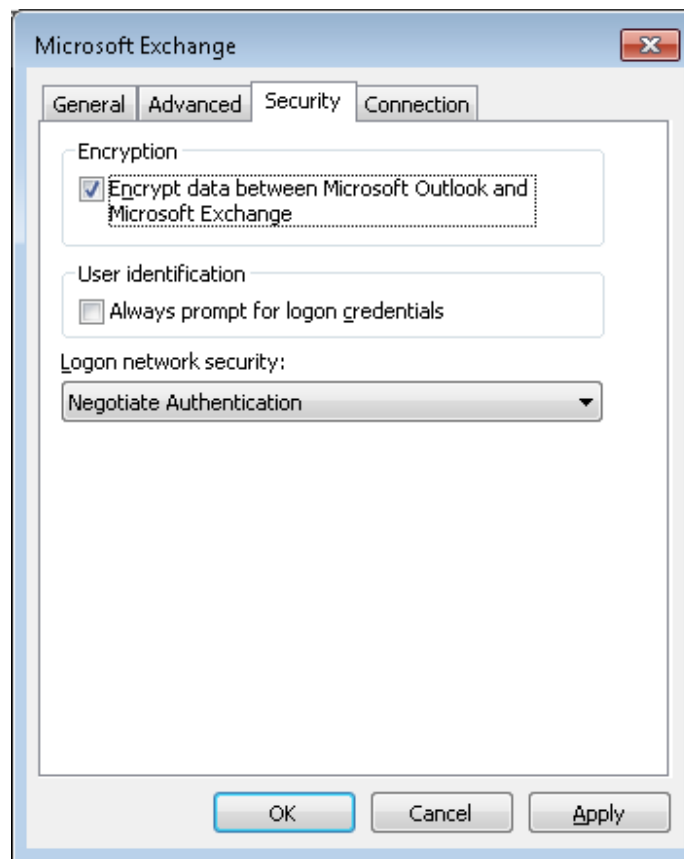
*Figure 62: Displaying the name of identified Exchange Server and Mailbox*

13. Switch to "Advanced" tab to configure the settings related to mailboxes.



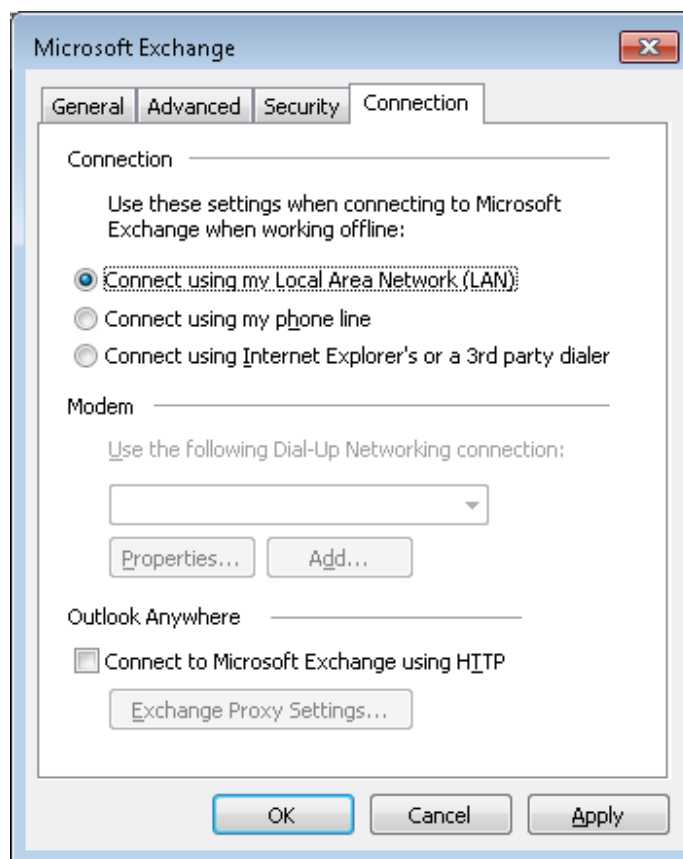
**Figure 63: Advanced Tab**

14. Click "Outlook Data File Settings" to modify the default location of OST file.
15. Switch to "Security" tab to view and modify the security settings.



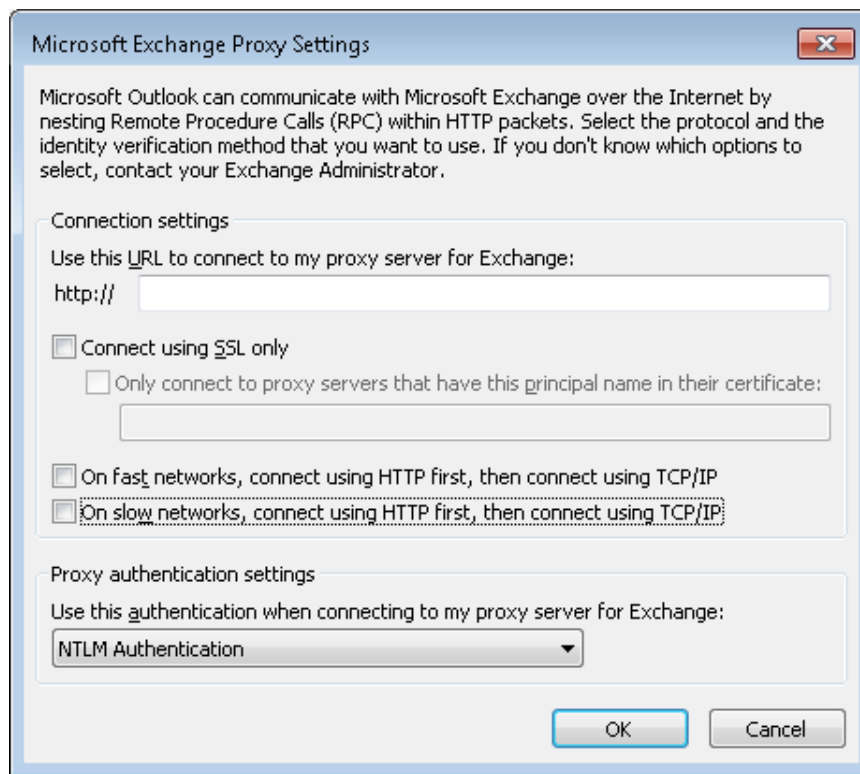
*Figure 64: Security Tab*

16. "Connection" tab deals with the connectivity settings.



*Figure 65: Connection Tab*

17. Click "Exchange Proxy Settings" in this tab to access the Proxy Settings.



*Figure 66: Proxy Settings*

18. Here, you can provide an HTTP URL to allow the software connecting to Exchange Server through it. Also, you can select SSL.
19. **(Optional)** You can select the authentication level here to connect to Exchange Server.
20. Modify other proxy settings, if you want.

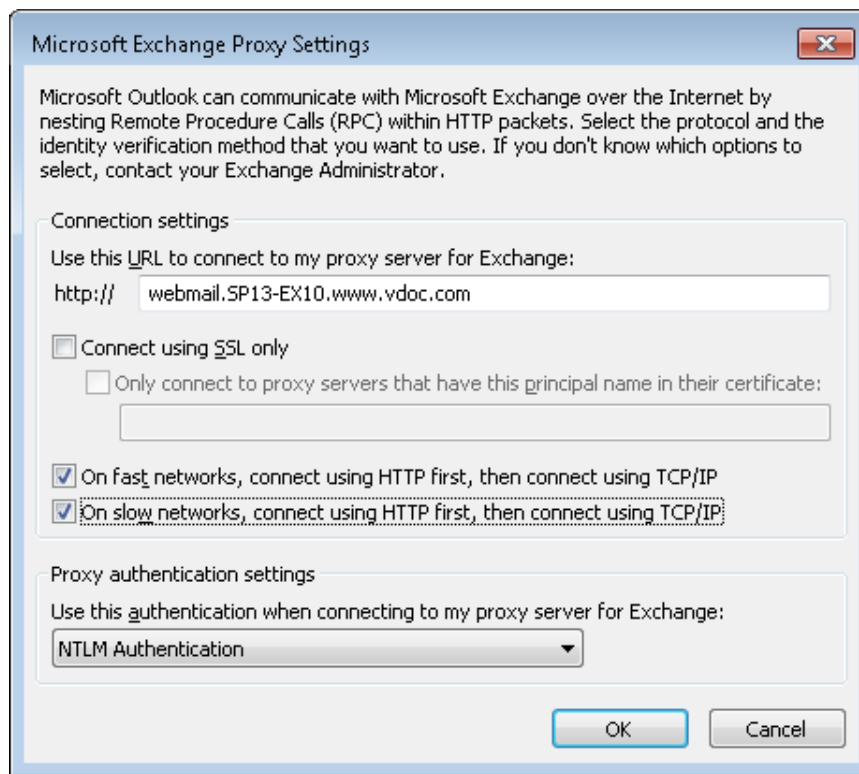


Figure 67: Filled Proxy Settings

21. Click "OK" to go back to the Exchange Configuration.
22. Click "Apply" to apply the modified settings.
23. Click "OK" to establish the connection. It displays the dialog box asking for the credentials.

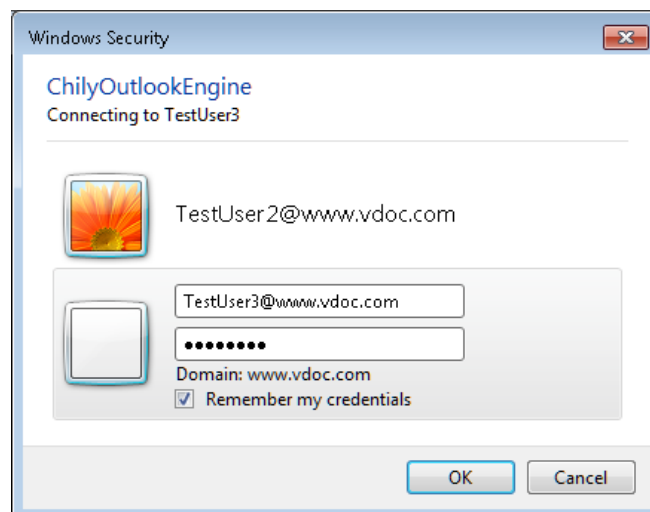
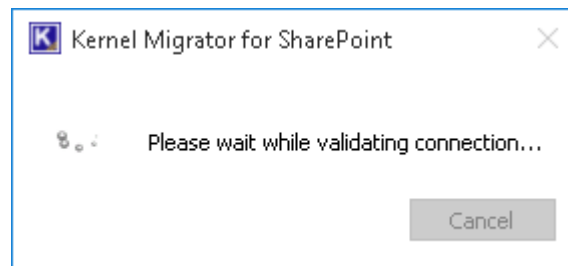


Figure 68: Dialog box asking for login credentials

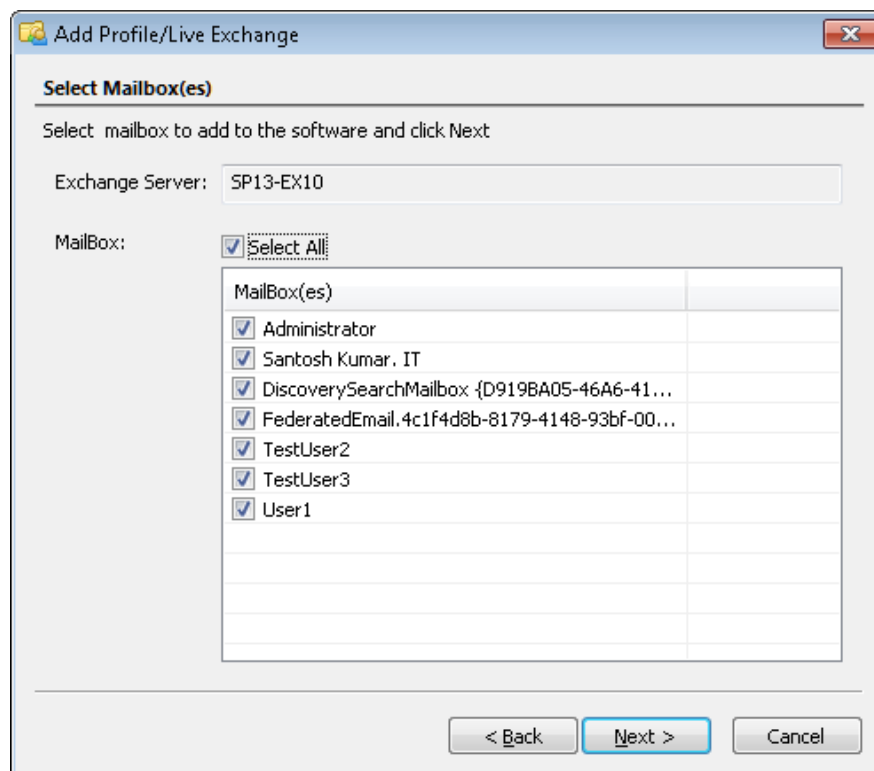
24. Provide the username in the form (Domain\Username) and its password.
25. Click "OK" to proceed further.

26. You may receive the following dialog box while the software is trying to connect to Exchange Server.



*Figure 69: Validating the connection to Exchange Server*

27. Once the connection is established, the software displays the enumerated list of all mailboxes available on the Exchange Server.



*Figure 70: Select the mailboxes*

28. Select the required mailboxes.

29. Click "Next" to display the last step of adding an Exchange Server.

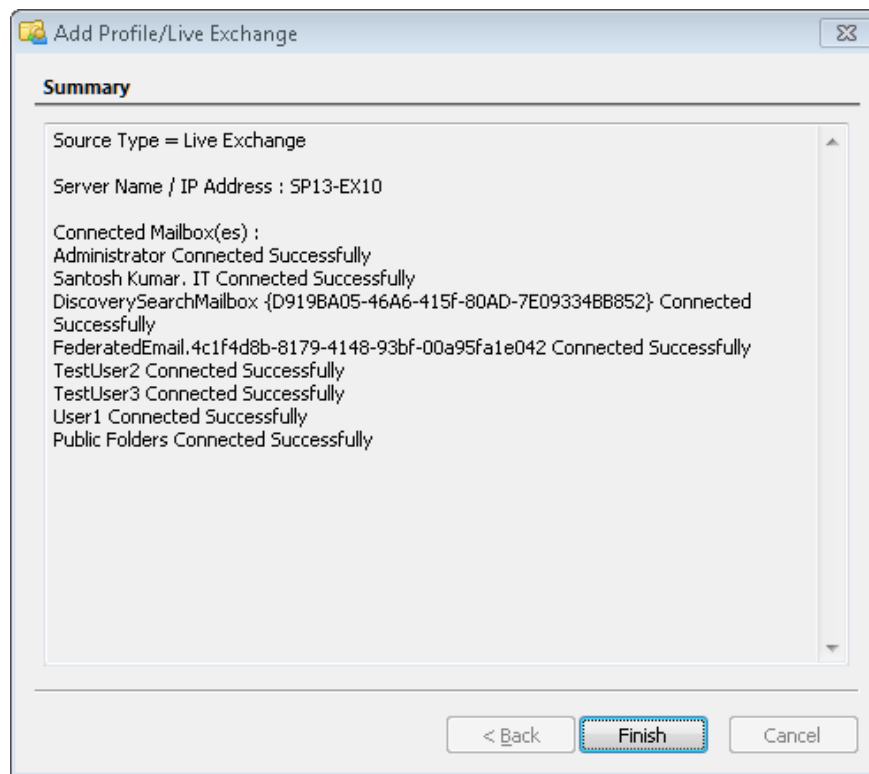


Figure 71: Summary of the connection to Exchange Server

30. Click "Finish" to complete the process.
31. The newly added Exchange Server is displayed under the "Live Exchange" node in the Source pane. If you have configured the profile manually for "Outlook Profiles" option, then newly added Exchange Server comes under the "Outlook Profiles" node.

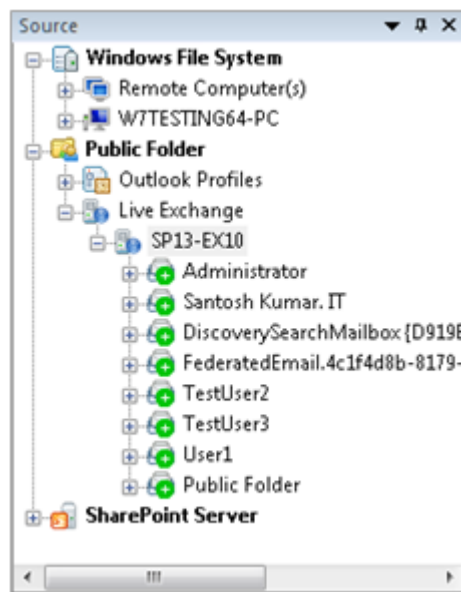


Figure 72: Added new Exchange Server

## 4.4 Add SharePoint Server as Source

Follow the steps below to add a SharePoint Site as a Source. Please note that each SharePoint Site is denoted with a project name in this software.

1. Perform any of the following methods to start the process.
  - i. Click "Add New Source" on the toolbar and select "SharePoint Server."

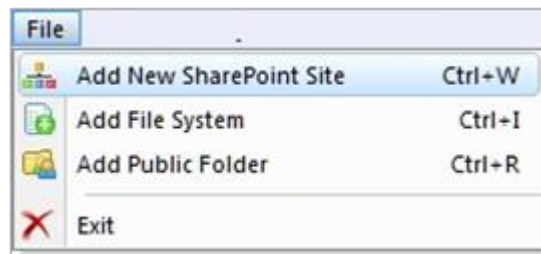


Figure 73: Option to add SharePoint as Source

- ii. Right click the parent "SharePoint Server" node in the "Source" Section and click **Add New SharePoint Site**.
2. Doing any of the above steps displays the following wizard.

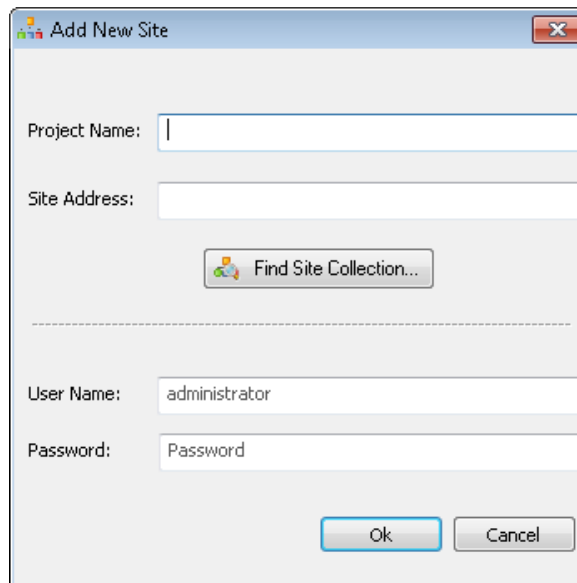

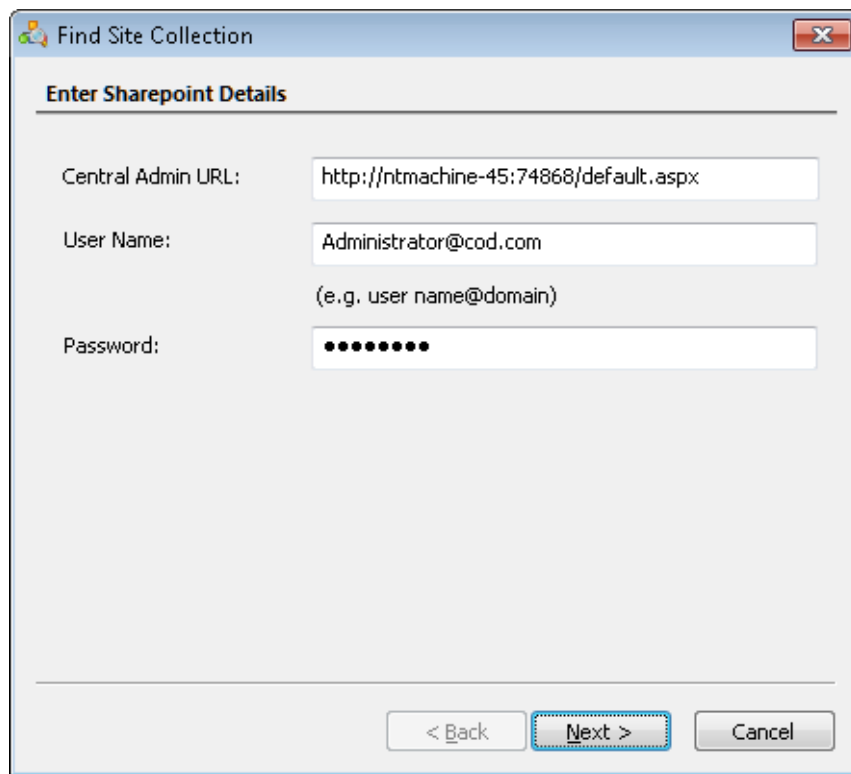
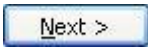


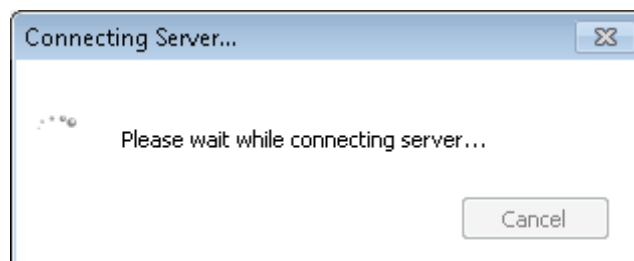
Figure 74: Wizard to add a new Site

3. If you want the software to find and enumerate the complete Site Collection, then follow the steps below.
  - i. Click  to display the following wizard.



*Figure 75: Wizard to find a Site Collection*

- ii. Enter the details like "Central Admin URL", "User Name", and "Password".
- iii. Click  button to proceed further. The software tries to connect to the server.



*Figure 76: Attempting to connect to the server*

- iv. Once it connects to the SharePoint Server, the software displays the list of detected Web Applications.

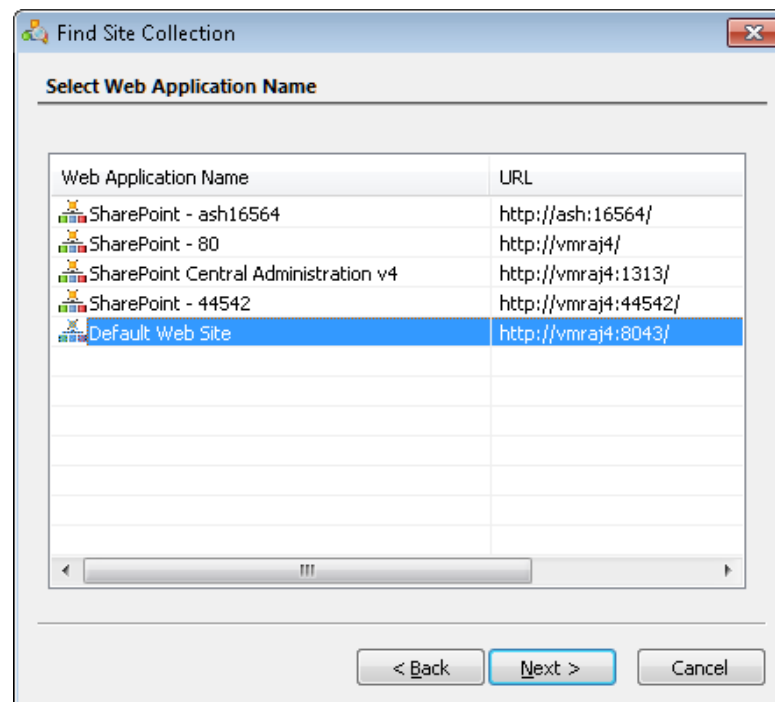


Figure 77: Displaying the detected Web Applications

- v. Select a required Web Application.
- vi. Click "Next". The next step displays the list of the available sites.

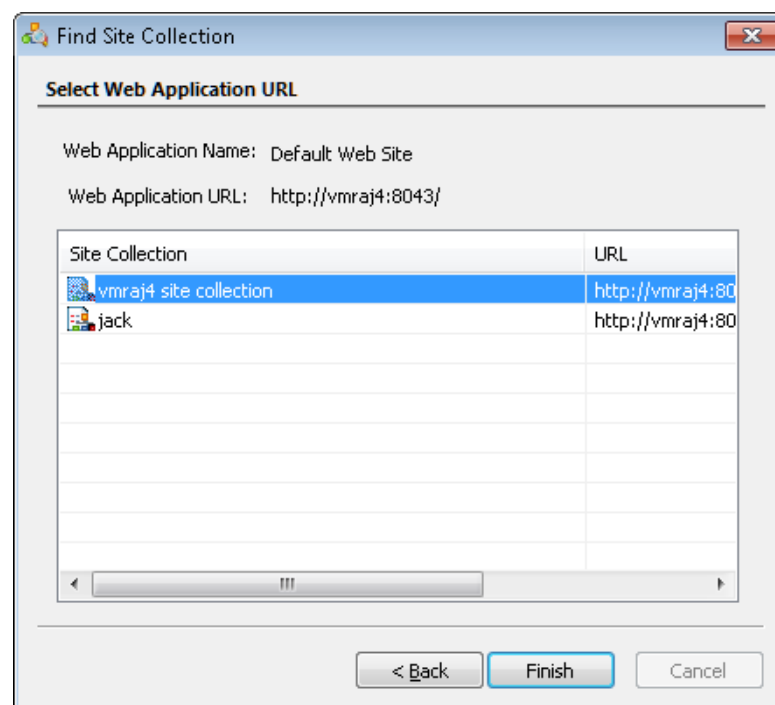
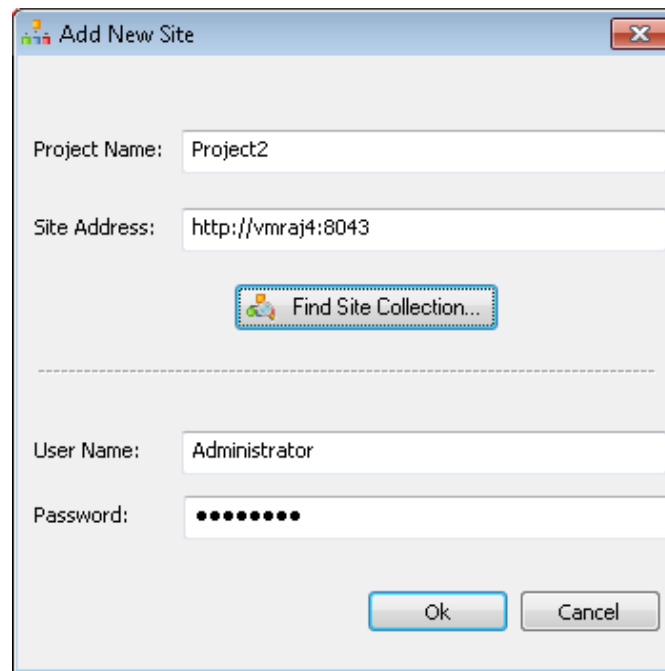


Figure 78: Displaying the list of the available sites

- vii. Select a Site and click "Finish". The software displays the following wizard.

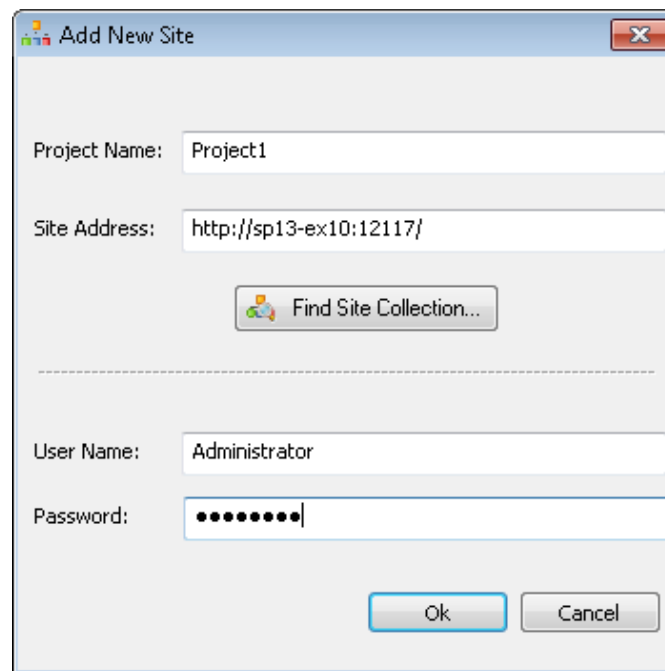
viii. Enter the Project Name.



*Figure 79: "Add New Site" wizard with the selected site*

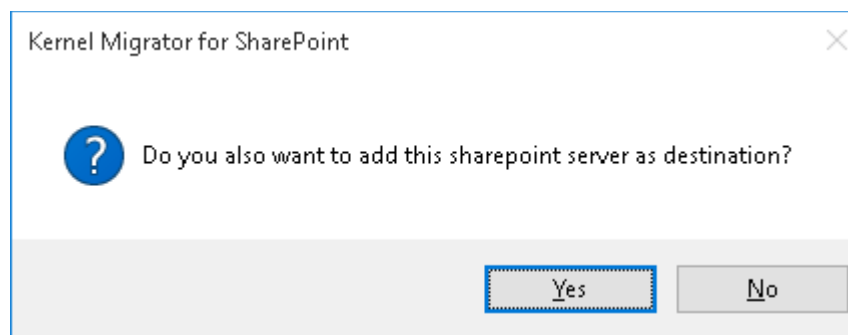
**NOTE:** We are providing the inputs directly without using "Find Site Collection" method in this test case.

4. Enter the desired name of the project in the first text box titled "Project Name".
5. Provide the URL of the SharePoint Site in the next text box titled "Site Address".
6. Enter the username and password of Administrator.



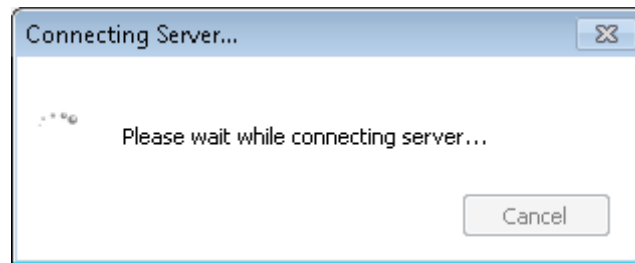
*Figure 80: "Add New Site" wizard with the selected site*

7. Click "OK".
8. The following message box appears that asks whether to add this SharePoint Site also as the destination or not.



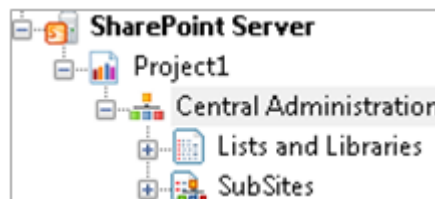
*Figure 81: Message to add the SharePoint also as the destination*

9. Click "Yes" to add this SharePoint Site as the destination also or click "No" to add it as a source only.
10. Clicking any button let the software process the addition of this SharePoint Site.



*Figure 82: Attempting to connect to the server*

11. The provided SharePoint Site is added and displayed with the entered Project name in the Source Panel in the Left Hand Panel. For example, project1 is the newly added node in the Source Panel as per the following image.



*Figure 83: Newly added Project 1 site*

## 5. Software Settings

Kernel Migrator for SharePoint lets you apply some settings, which will be common and universal for all migration jobs from any source to destination. It includes the migration options, download options, and filters along with the options to replace invalid characters or invalid endings. Let us have a look at the steps to modify these software settings.

Click "Tools" menu and select "Settings". It displays the following dialog box, which contains the different tabs.

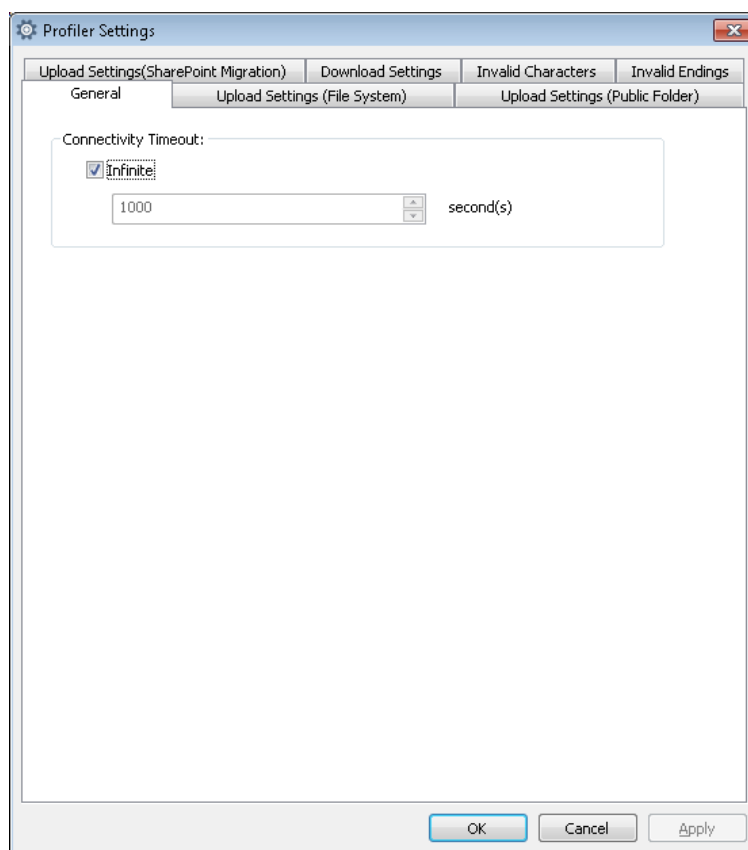


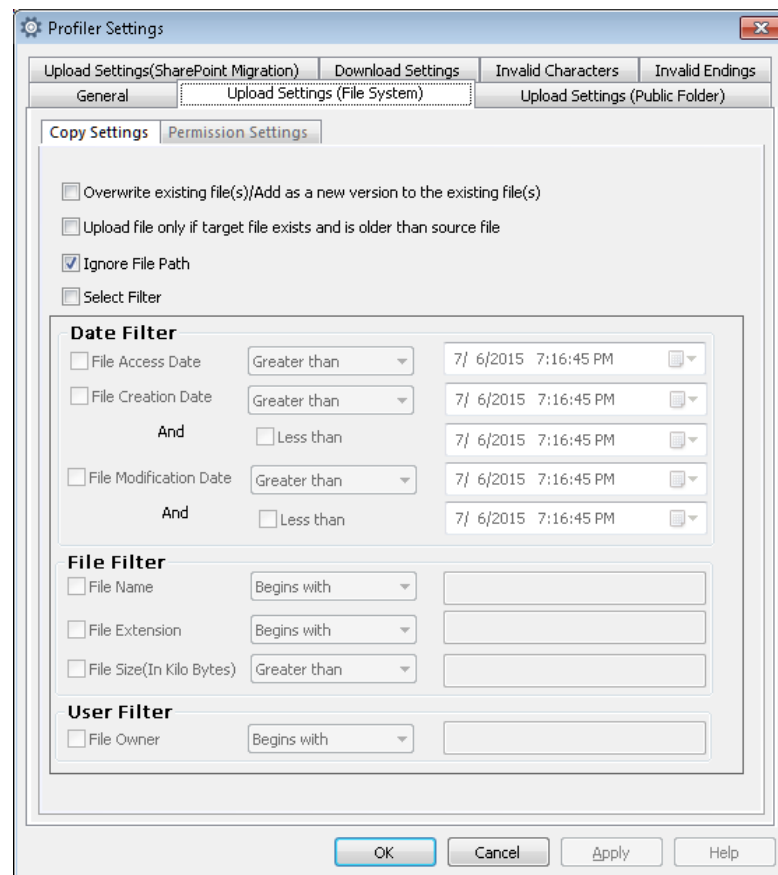
Figure 84: Software Settings

### 5.1 General

**Connectivity Timeout:** By default, the infinite timeout is set. It means that Kernel Migrator for SharePoint wait for infinite moments until a connection has been established with the SharePoint Server. You can uncheck this option and set a custom value using the drop-down box.

### 5.2 Upload Settings (File System)

This tab contains the universal settings for all migrations from the File System to the SharePoint Server. Click it to display its options.



**Figure 85: Upload Content Settings tab for File System**

These settings are visible as Migration Options when you perform File System to SharePoint Migration.

You can modify these settings while creating or editing a migration job. These settings are further divided into the following two tabs.

### 5.2.1 Copy Settings

Copy Settings are, in fact, the migration options that can be modified while performing the File System to SharePoint Migration.

As stated above, settings applied in this tab will be universally applied to all File System to SharePoint Migration Jobs. However, the user has the freedom to modify them accordingly. It contains the following options.

1. **Overwrite existing file(s):** Select this option to overwrite the existing file on the SharePoint Server. It lets the software not to ask for your confirmation once a file is already available on the destination.
2. **Add as a new version to the existing file(s):** If you are trying to upload the content that has the version option enabled, then the above "Overwrite existing file(s)" is replaced with this option.

Select this option to add the source file as its new version. In this case, if another version of the source file exists on the target, then the item is uploaded as a different version. It means that both versions of the selected content coexist at the SharePoint Server after uploading.

3. **Upload file only if the target file exists and is older than source file:** Select this option to upload the file only if the modification date of the source file is greater than the current modification date of the target file.
4. **Ignore File Path:** Select this option if you want the software to ignore the file path and file path limitations while uploading the content.
5. **Select filter:** Select this option to filter the File System content that has to be migrated to the SharePoint Server. The adjacent "Filter" box will be enabled once this option is selected. The different filters and steps to apply them are listed herein below.
  - a) **Date Filter:** Select any of the date filters to sort the content as per the file access, creation, or modification date. It has the following filters.
    - I. **File Access Date:** It filters the files as per the provided accessed date. Enable this filter, select any of the following conditions, and select the date & time for it in the adjacent box.
      - **Greater Than:** It shows the files accessed on the date greater than the provided one.
      - **Less Than:** It shows the files accessed on the date less than the provided one.
      - **Not Equal:** It shows the files not accessed at the provided date.
      - **Equal:** It shows the files accessed at the provided date.
    - II. **File Creation Date:** It filters the files as per the provided created date. Enable this filter, select any of the following conditions, and provide a value for it.
      - **Greater Than:** It shows the files created on the date greater than the provided one. Selecting this condition also enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the files following in this date range.

**NOTE:** Please make sure that "Less Than" date should be greater than the "Greater Than" date.

- **Less Than:** It shows the files created on the date less than the provided date.
  - **Not Equal:** It shows the files not created on the provided date.
  - **Equal:** It shows the files created on the provided date.
- III. **File Modification Date:** It filters the files as per the provided modified date. Enable this filter, select any of the following conditions, and provide a value for it.

**NOTE:** Please make sure that "Less Than" date should be greater than the "Greater Than" date.

- **Greater Than:** It shows the files modified on the date greater than the provided one. Selecting this condition enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the files following in this date range.
  - **Less Than:** It shows the files modified on the date less than the provided date.
  - **Not Equal:** It shows the files not modified on the provided date.
  - **Equal:** It shows the files modified on the provided date.
- b) **File Filter:** It lets the software filter the files based on the parameters related to file such as its name, extension, and size. It contains the following filters.
- **File Name:** It filters the content as per the provided name. You have to enable this filter first. Select any of the following conditions, and then provide a value for it. The entered value should not contain the special characters like /, \, :, \*, ?, ", <, >, and |.
  - **Begins With:** It shows the files, of which name starts with the provided value.
  - **Includes:** It shows the files, of which name contains the entered value.
  - **Not Equal:** It shows the files having the name not similar to the entered value.
- NOTE:** Both File Name and File Extension filters has to be used collectively.
- **Equal:** It shows the files having the name exactly similar to the entered value.
- **File Extension:** It filters the content as per the extension provided. Enable this filter, select any of the following conditions, and provide a value for it. The entered value should not contain the special characters like /, \, :, \*, ?, ", <, >, and |.
- **Begins With:** Select it to show the files whose extension starts with the entered value.
- **Includes:** It shows the files, of which extension contains the entered value.
- **Not Equal:** Select it to show the files having extension not similar to the entered value.
- **Equal:** Select it to show the files having the extension exactly similar to the entered value.
- **File Size (In Kilo Bytes):** It filters the files as per the provided file size in KB. Enable this filter, select any of the following conditions, and provide a value for it in numbers.
- **Greater Than:** It shows the files having size greater than the provided value.
- **Less Than:** It shows the files having size less than the provided value.
- **Not Equal:** It shows the files having size not equal to the provided value.
- **Equal:** It shows the files having the size equal to the provided value.
- c) **User Filter:** It filters the files as per the users. It contains the following filters.

- **File Owner:** It filters the content as per the file owners who created the files. Enable this filter, select any of the following conditions, and provide a value for it.
  - **Begins With:** Select this option to show the files, whose owner's name starts with the entered value.
  - **Includes:** Select it to show the files, whose owner's name contains the entered value.
  - **Not Equal:** Select it to show the files having the owner's name not similar to the entered value.
  - **Equal:** Select it to show the files having the owner's name exactly similar to the entered value.

Check the boxes for the desired filters and provide their values.

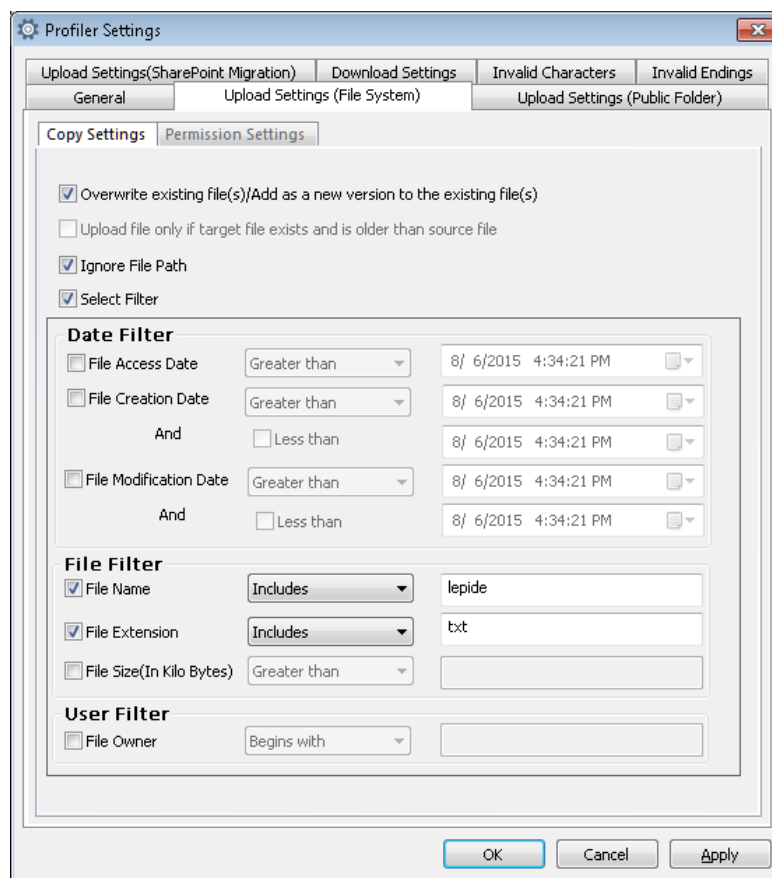
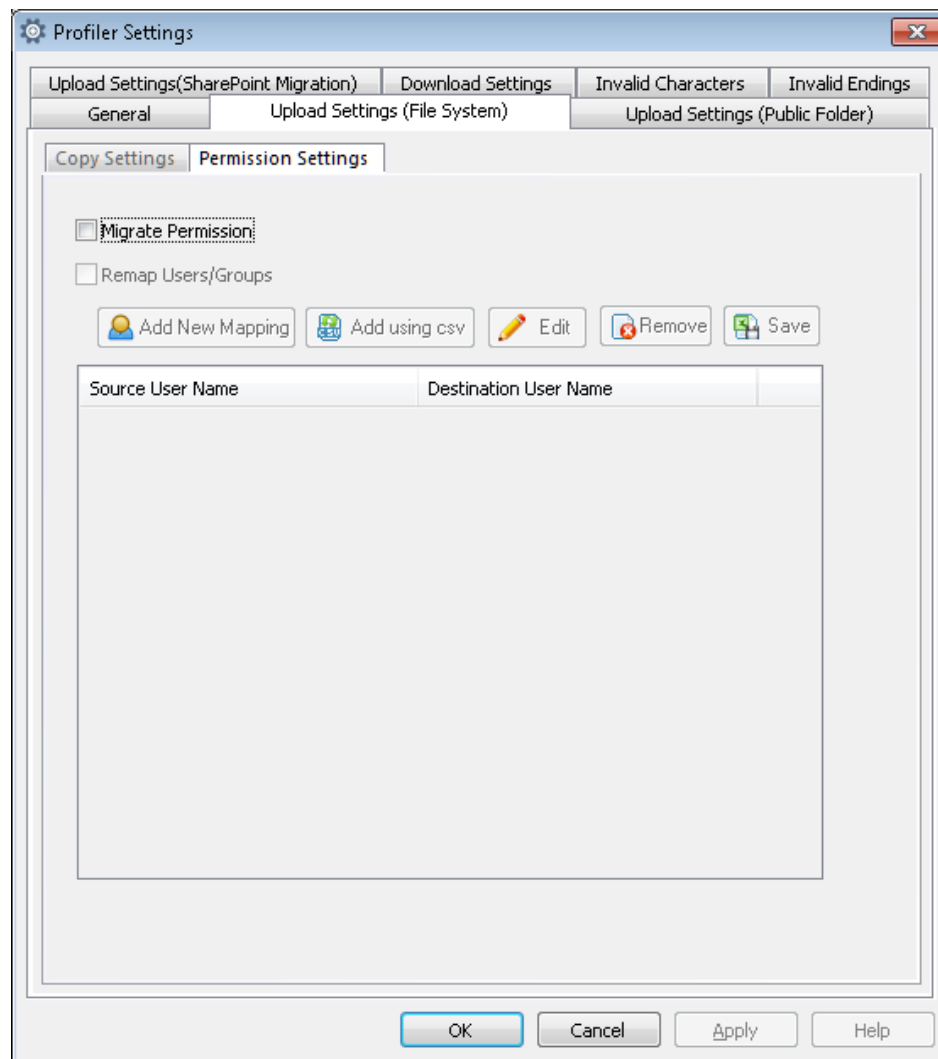


Figure 86: Dialog box shows the set of applied filters

## 5.2.2 Permission Settings

Permission Settings allows you applying the universal settings for migrating permissions and remapping users. Once applied, these settings will be applicable universally for all File System to SharePoint Migration.

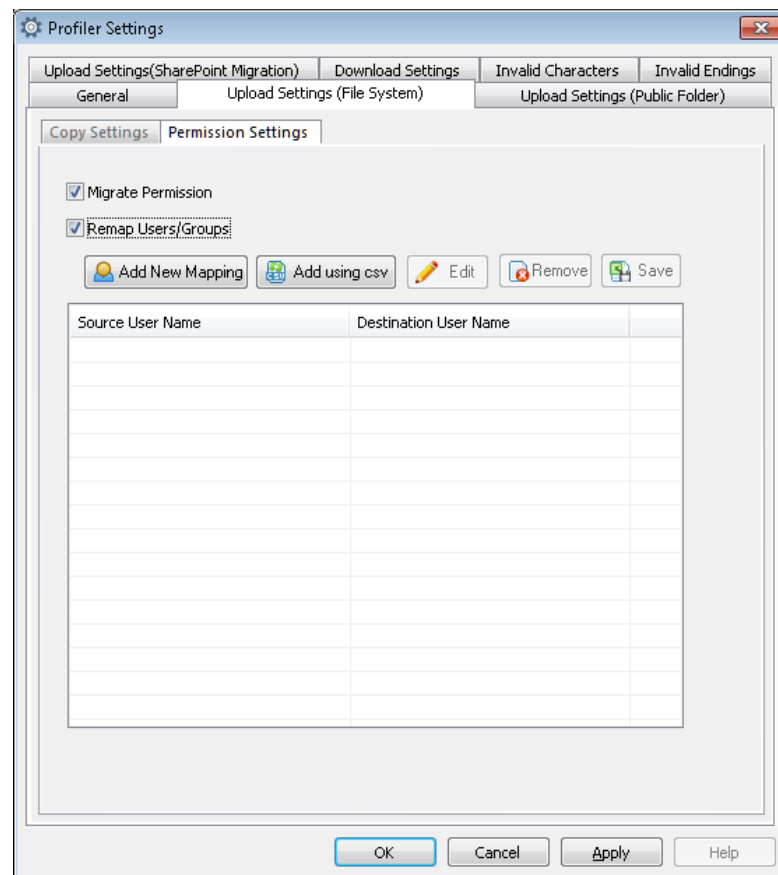


**Figure 87: Permission Settings**

Follow the steps below to apply the Permissions Settings.

While performing File System to SharePoint Migration, you can follow the similar steps to modify or reject these permission settings.

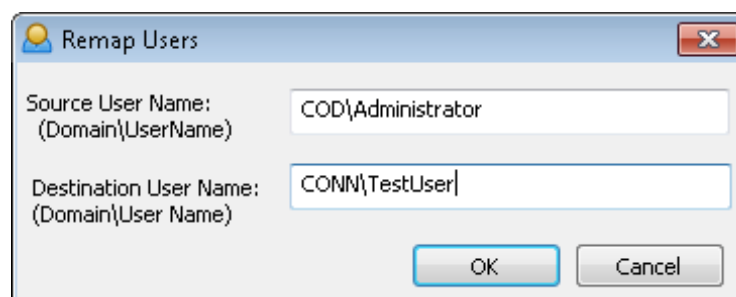
1. Check the box saying "Migrate Permissions" if you wish to migrate the permissions of content from File System to the SharePoint Server. Doing this enables the adjacent option to map users, i.e. "Remap Users". Enabling the "Remap Users" enables the complete section to let you map the users.



**Figure 88: The section to migrate permissions and map users is enabled.**

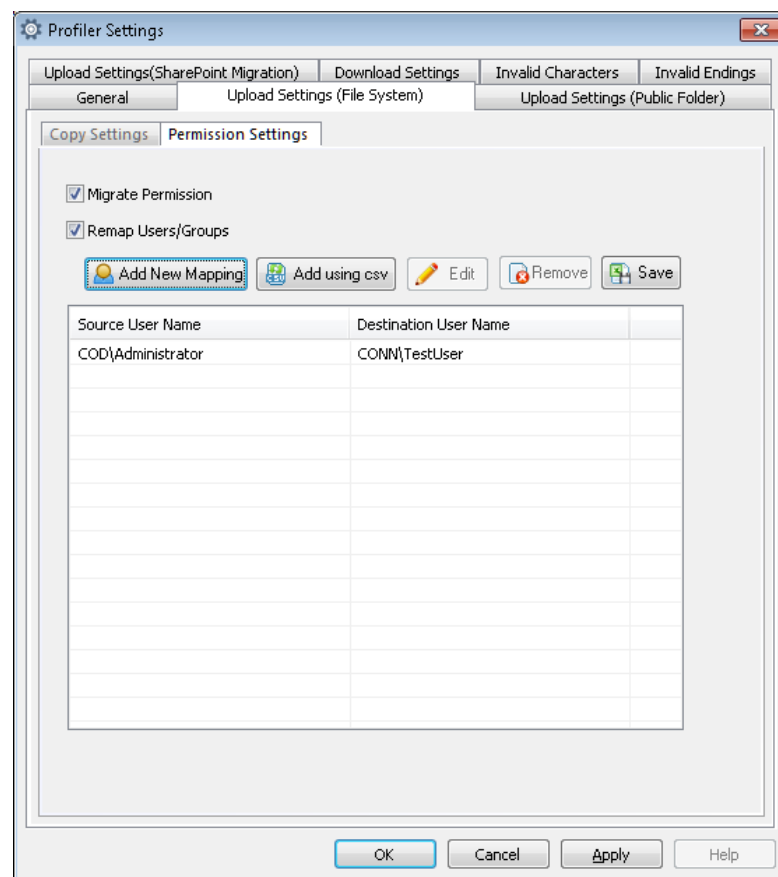
"Migrate Permissions" option will work only when the user of source content is available in the Active Directory of the destination SharePoint. In another case, you have to use the option "Remap Users" to map the users.

2. Click to add a new user mapping.







**Figure 89: Dialog box to map the users**

3. Add the source and target user names in their respective boxes.
4. Click "OK" to add the mapping. It takes you back to the migration wizard, where the mapping section displays the currently added user mapping.

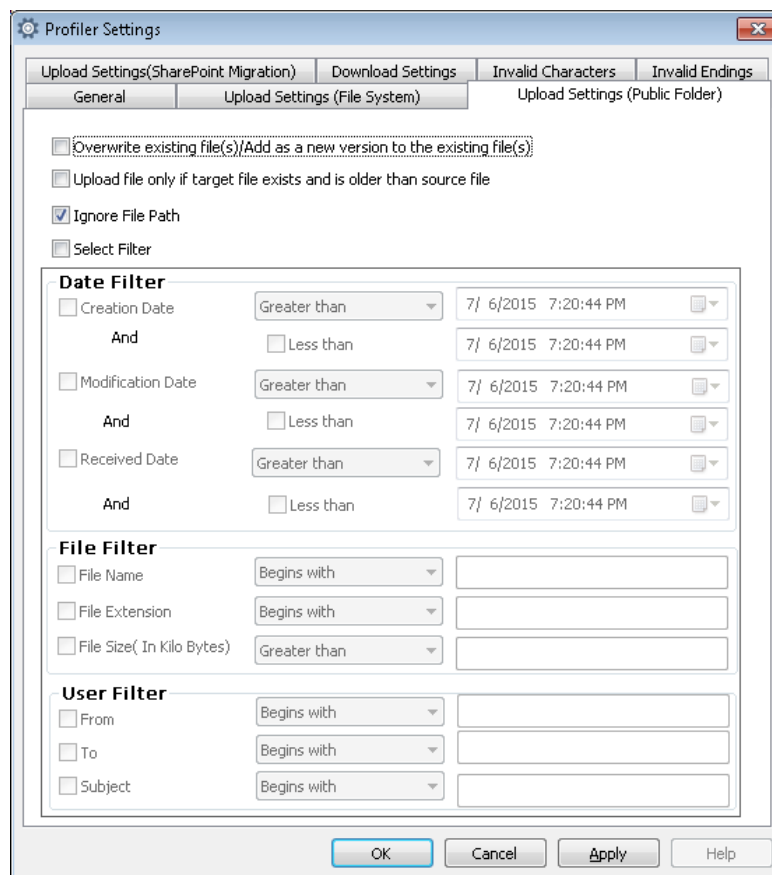


**Figure 90: User Mapping**

5. You can perform the following functions in this section.
-  **Edit...**: Click it to edit the selected mapping.
  -  **Remove**: Click it to delete the selected mapping.
  -  **Save**: Click it to save the mapping list as a CSV file.
  -  **Add Using CSV**: Click it to load the mapping list from an existing CSV file.

## 5.3 Upload Settings (Public Folder)

This tab contains the migration options for Public Folder to SharePoint Migration. Click it to display the following tab.



**Figure 91: Settings to upload content from Public Folder to SharePoint**

Once applied, these settings will be universally applicable to all Public Folder to SharePoint Migration Jobs. These settings are visible while performing the public folder migration. A user is free to modify or reject these settings while performing any Public Folder to SharePoint Migration. It contains the following options.

1. **Overwrite existing file(s):** Select this option to overwrite the existing file on the SharePoint Server. It lets the software not to ask for your confirmation once a file is already available on the destination.
2. **Add as a new version to the existing file(s):** If you are trying to upload the content, which has the version option enabled, then the above "Overwrite existing file(s)" will be replaced with this option.

Select this option to add the source file as its new version. In this case, if another version of the source file exists on the target, then the item will be uploaded as a different version. It means that both versions of the selected content will coexist at the SharePoint Server after uploading.

3. **Upload file only if the target file exists and is older than source file:** Select this option to upload an item only if the modification date of the source item is greater than the current modification date of the target item.

4. **Ignore File Path:** Select this option if you want the software to ignore the file path and file path limitations while uploading the content.
5. **Select filter:** Select this option to filter the File System content that has to be migrated to the SharePoint Server. Selecting this option enables the adjacent "Filter" box. The different filters and the steps to apply them are listed herein below.

1. **Date Filter:** Select any of the date filters to sort the content as per the access, received, or modification date. It has the following filters.
  - i. **Creation Date:** It filters the files/items as per the provided created date. Enable this filter, select any of the following conditions, and provide a value for it.

**NOTE:** Please make sure that "Less Than" date should be greater than the "Greater Than" date.

- **Greater Than:** It shows the files/items created on the date greater than the provided one. Selecting this condition also enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the files following in this date range.

- **Less Than:** It shows the files/items created on the date less than the provided date.
- **Not Equal:** It shows the files/items not created on the provided date.
- **Equal:** It shows the files/items created on the provided date.

2. **Modification Date:** It filters the files/items as per the provided modified date. Enable this filter, select any of the following conditions, and provide a value for it.

**NOTE:** Please make sure that "Less Than" date should be greater than the "Greater Than" date.

- **Greater Than:** It shows the files/items modified on the date greater than the provided one. Selecting this condition also enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the files following in this date range.

- **Less Than:** It shows the files/items modified on the date less than the provided date.
- **Not Equal:** It shows the files/items not modified on the provided date.
- **Equal:** It shows the files/items modified on the provided date.

3. **Received Date:** Select it to filter the mails/files as per the received date. Enable this filter, select any of the following conditions, and select the date & time for it in the adjacent box.

- **Greater Than:** It shows the emails/files received on the date greater than the provided one.
- **Less Than:** It shows the mails/files received on the date less than the provided one.
- **Not Equal:** It shows the emails/files not received at the provided date.

**NOTE:** Both File Name and File Extension filters has to be used collectively.

- **Equal:** It shows the emails/files received at the provided date.
- a. **File Filter:** It lets the software filter the files based on the parameters related to file such as its name, extension, and size.
  - i. **File Name:** It filters the content as per the provided name. You have to enable this filter first. Select any of the following conditions, and then provide a value for it. The entered value should not contain the special characters like /, \, :, \*, ?, ", <, >, and |.
    - **Begins With:** Select it to show the files whose name starts with the entered value.
    - **Includes:** Select it to show the file names containing the entered value.
    - **Not Equal:** Select it to show the files having the name not similar to the entered value.
    - **Equal:** Select it to show the files having the name exactly similar to the entered value.
  - ii. **File Extension:** It filters the content as per the provided extension. Enable this filter, select any of the following conditions, and provide a value for it. The entered value should not contain the special characters like /, \, :, \*, ?, ", <, >, and |.
    - **Begins with:** Select it to show the files whose extension starts with the entered value.
    - **Includes:** Select it to show the files whose extension contains the entered value.
    - **Not Equal:** Select it to show the files having extension not similar to the entered value.
    - **Equal:** Select it to show the files having the extension exactly similar to the entered value.
  - iii. **Size (In Kilo Bytes):** It filters the files as per the provided file size in KB. Enable this filter, select any of the following conditions, and provide a value for it in numbers.
    - **Greater Than:** It shows the files having size greater than the provided value.
    - **Less Than:** It shows the files having size less than the provided value.
    - **Not Equal:** It shows the files having the size not equal to the provided value.
    - **Equal:** It shows the files having the size equal to the provided value.
- b. **User Filter:** It filters the files as per the user of the files.
  - i. **From:** It filters the emails as per the sender who has sent the email. Enable this filter, select any of the following conditions, and provide a value for it.
    - **Begins With:** Select it to show the files of which sender's name starts with the entered value.
    - **Includes:** Select it to show the files of which sender's name contains the entered value.
    - **Not Equal:** Select it to show the files having the sender's name not similar to the entered value.
    - **Equal:** Select it to show the files having the sender's name exactly similar to the entered value.

- ii. **To:** It filters the emails as per the recipient in the "To" field of the email. Enable this filter, select any of the following conditions, and provide a value for it.
- **Begins With:** Select it to show the files of which recipient's name starts with the entered value.
  - **Includes:** Select it to show the files of which recipient's name contains the entered value.
  - **Not Equal:** Select it to show the files having the recipient's name not similar to the entered value.
  - **Equal:** Select it to show the files having the recipient's name exactly similar to the entered value.
- iii. **Subject:** It filters the emails as per the subject. Enable this filter, select any of the following conditions, and provide a value for it.
- **Begins With:** Select it to show the emails of which subject starts with the entered value.
  - **Includes:** Select it to show the emails of which subject contains the entered value.
  - **Not Equal:** Select it to show the emails having the subject not similar to the entered value.
  - **Equal:** Select it to show the emails having the subject exactly similar to the entered value.

Check the boxes for the desired filters and provide their values.

The screenshot shows the 'Profiler Settings' dialog box with the 'Upload Settings (File System)' tab selected. The 'General' sub-tab is active, showing several checkboxes: 'Overwrite existing file(s)/Add as a new version to the existing file(s)' (checked), 'Upload file only if target file exists and is older than source file' (unchecked), 'Ignore File Path' (checked), and 'Select Filter' (checked). Below these are three filter sections:

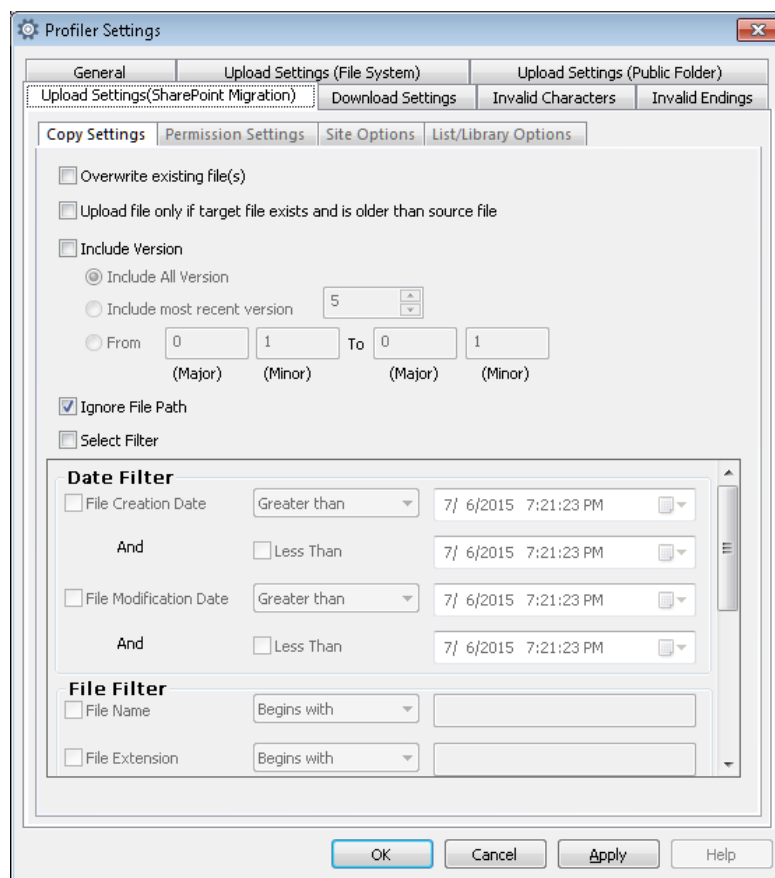
- Date Filter:** Contains three rows for 'Creation Date', 'Modification Date', and 'Received Date'. Each row has a 'Greater than' dropdown, a 'Less than' checkbox, and a date/time input field (all set to '8/ 6/2015 4:36:07 PM').
- File Filter:** Contains three rows: 'File Name' (checked) with an 'Includes' dropdown and value 'lepide'; 'File Extension' (checked) with an 'Includes' dropdown and value 'xls'; and 'File Size( In Kilo Bytes)' (unchecked) with a 'Greater than' dropdown.
- User Filter:** Contains three rows: 'From', 'To', and 'Subject'. Each has a 'Begins with' dropdown and an empty text input field.

At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

*Figure 92: Dialog box shows the set of applied filters*

## 5.4 Upload Settings (SharePoint)

This tab contains the universal settings for all migrations from the Source SharePoint Server to the Destination SharePoint Server. Click it to display its options.



*Figure 93: Upload Content Settings tab for File System*

These settings are visible when you visit the step of modifying migration options in SharePoint to SharePoint Migration. You can modify these settings while creating or editing a migration job. These settings are further divided into the following four tabs.

### 5.4.1 Copy Settings - SharePoint

Copy Settings are, in fact, the migration options that can be modified while performing the SharePoint to SharePoint Migration.

As stated above, settings applied in this tab will be universally applicable to all SharePoint to SharePoint Migration Jobs. However, the user has the freedom to modify them accordingly. It contains the following options.

1. **Overwrite existing file(s):** Select this option to overwrite the existing file on the SharePoint Server. It lets the software not to ask for your confirmation once a file is already available on the destination.

2. **Upload file only if the target file exists and is older than source file:** Select this option to upload the file only if the modification date of the source file is greater than the current modification date of the target file.
3. **Ignore File Path:** Select this option if you want the software to ignore the file path and file path limitations while uploading the content.
4. **Include Versions:** If you wish to include the versions of the content, then check "Include Versions".

☒ Include Version  
☒ Include All version  
☐ Include most recent version 5  
☐ From 0 1 To 0 1  
                   (Major) (Minor)                   (Major) (Minor)

Figure 94: Include file version options

It enables the following options. You can select anyone of them.

- i. **Include All Versions:** Select this option to include all versions of the files during migration.
- ii. **Include most recent versions:** Select how many last versions of the content you want to migrate.

☒ Include most recent versions: 5

Figure 95: Include recent versions option

Enter the number of the recent version of the content, which you want to migrate.

- iii. **From:** Select the range of the versions of all content that you have to download. Enabling this option enables the "To" field.

☒ From: 2 1 To: 5 1  
                   (Major) (Minor)                   (Major) (Minor)

Figure 96: Include versions from and to option

Enter the "from" and "to" range of the versions of content to be migrated. Such as, entering 2.1 (2 in Major and 1 in Minor) in "From" field and 5.1 (5 in major and 1 in minor) in "To" field, will migrate all versions of a file from 2.1 to 5.1.

5. **Select filter:** Select this option to filter the File System content that has to be migrated to the SharePoint Server. Selecting this option enables the adjacent "Filter" box. The different filters and the steps to apply them are listed herein below.
  - a. **Date Filter:** Select any of the date filters to sort the content as per the file access, creation, or modification date. It has the following filters.
    - i. **File Creation Date:** It filters the files as per the provided created date. Enable this filter, select any of the following conditions, and provide a value for it.

**NOTE:** Please make sure that "Less Than" date should be greater than the "Greater Than" date.

- **Greater Than:** It shows the files created on the date greater than the provided one. Selecting this condition also enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the files following in this date range.
  - **Less Than:** It shows the files created on the date less than the provided date.
  - **Not Equal:** It shows the files not created on the provided date.
  - **Equal:** It shows the files created on the provided date.
- ii. **File Modification Date:** It filters the files as per the provided modified date. Enable this filter, select any of the following conditions, and provide a value for it.

**NOTE:** Please make sure that "Less Than" date should be greater than the "Greater Than" date.

- **Greater Than:** It shows the files modified on the date greater than the provided one. Selecting this condition also enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the files following in this date range.
- **Less Than:** It shows the files modified on the date less than the provided date.
- **Not Equal:** It shows the files not modified on the provided date.

**NOTE:** Both File Name and File Extension filters has to be used collectively.

- **Equal:** It shows the files modified on the provided date.
- b. **File Filter:** It lets the software filter the files based on the parameters related to file such as its name, extension, and size. It contains the following filters.
- i. **File Name:** It filters the content as per the provided name. You have to enable this filter first. Select any of the following conditions, and then provide a value for it. The entered value should not contain the special characters like /, \, :, \*, ?, ", <, >, and |.
- **Begins With:** Select it to show the files whose name starts with the entered value.
  - **Includes:** Select it to show the file names containing the entered value.
  - **Not Equal:** Select it to show the files having the name not similar to the entered value.
  - **Equal:** Select it to show the files having the name exactly similar to the entered value.
- ii. **File Extension:** It filters the content as per the provided extension. Enable this filter, select any of the following conditions, and provide a value for it. The entered value should not contain the special characters like /, \, :, \*, ?, ", <, >, and |.
- **Begins With:** Select it to show the files whose extension starts with the entered value.
  - **Includes:** Select it to show the files whose extension contains the entered value.

- **Not Equal:** Select it to show the files having extension not similar to the entered value.
  - **Equal:** Select it to show the files having the extension exactly similar to the entered value.
- iii. **File Title:** It filters the content as per the provided title. You have to enable this filter first. Select any of the following conditions, and then provide a value for it. The entered value should not contain the special characters like /, \, :, \*, ?, ", <, >, and |.
- **Begins With:** It shows the files whose title starts with the entered value.
  - **Includes:** Select it to show the file whose title contains the entered value.
  - **Not Equal:** Select it to show the files having the title not similar to the entered value.
  - **Equal:** Select it to show the files having the title exactly similar to the entered value.
- iv. **File Content Type:** It filters the content as per the provided Content Type. Enable this filter, select any of the following conditions, and provide a value for it. The entered value should not contain the special characters like /, \, :, \*, ?, ", <, >, and |.
- **Begins With:** Select it to show the files whose Content Type starts with the entered value.
  - **Includes:** Select it to show the files whose Content Type contains the entered value.
  - **Not Equal:** Select it to show the files having Content Type not similar to the entered value.
  - **Equal:** Select it to show the files having the Content Type exactly similar to the entered value.
- v. **File ID:** It filters the content as per the provided ID. Enable this filter, select any of the following conditions, and provide a value for it. The entered value should not contain the special characters like /, \, :, \*, ?, ", <, >, and |.
- **Begins With:** Select it to show the files whose ID starts with the entered value.
  - **Includes:** Select it to show the files whose ID contains the entered value.
  - **Not Equal:** Select it to show the files having the ID not similar to the entered value.
  - **Equal:** Select it to show the files having the ID exactly similar to the entered value.
- vi. **File Size (In Kilo Bytes):** It filters the files as per the provided file size in KB. Enable this filter, select any of the following conditions, and provide a value for it in numbers.
- **Greater Than:** It shows the files having size greater than the provided value.
  - **Less Than:** It shows the files having size less than the provided value.
  - **Not Equal:** It shows the files having the size not equal to the provided value.
  - **Equal:** It shows the files having the size equal to the provided value.
- c. **User Filter:** It filters the files as per the user of the files. It contains the following filters.
- i. **Who Created:** It filters the content as per the file owners who created the files. Enable this filter, select any of the following conditions, and provide a value for it.

- **Begins With:** Select this option to show the files, whose owner's name starts with the entered value.
  - **Includes:** Select it to show the files, whose owner's name contains the entered value.
  - **Not Equal:** Select it to show the files having the owner's name not similar to the entered value.
  - **Equal:** Select it to show the files having the owner's name exactly similar to the entered value.
- ii. **Who Modified:** It filters the content as per the users who modified the files. Enable this filter, select any of the following conditions, and provide a value for it.
- **Begins With:** Select this option to show the files, whose modifier name starts with the entered value.
  - **Includes:** Select it to show the files, whose modifier name contains the entered value.
  - **Not Equal:** Select it to show the files having the modifier name not similar to the entered value.
  - **Equal:** Select it to show the files having the modifier name exactly similar to the entered value.

Check the boxes for the desired filters and provide their values.

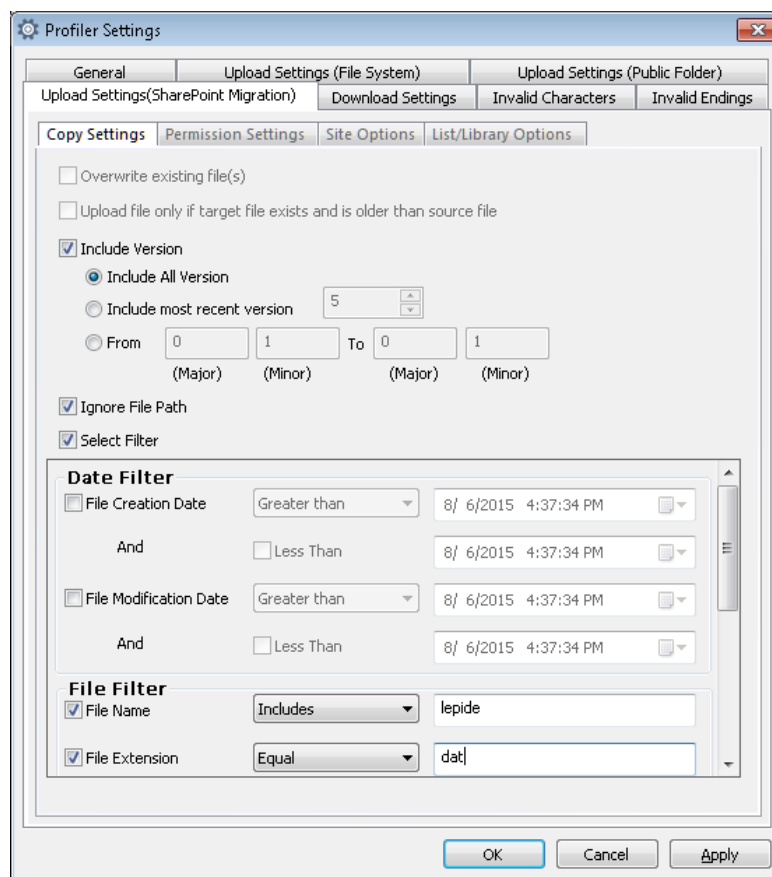
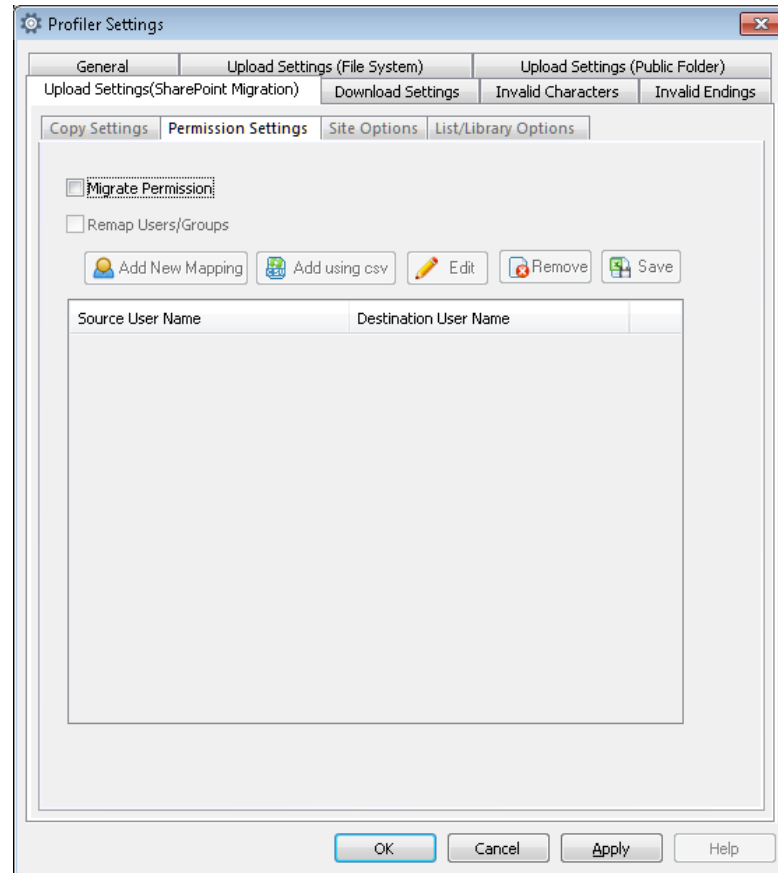


Figure 97: Dialog box shows the set of applied filters

## 5.4.2 Permission Settings – SharePoint

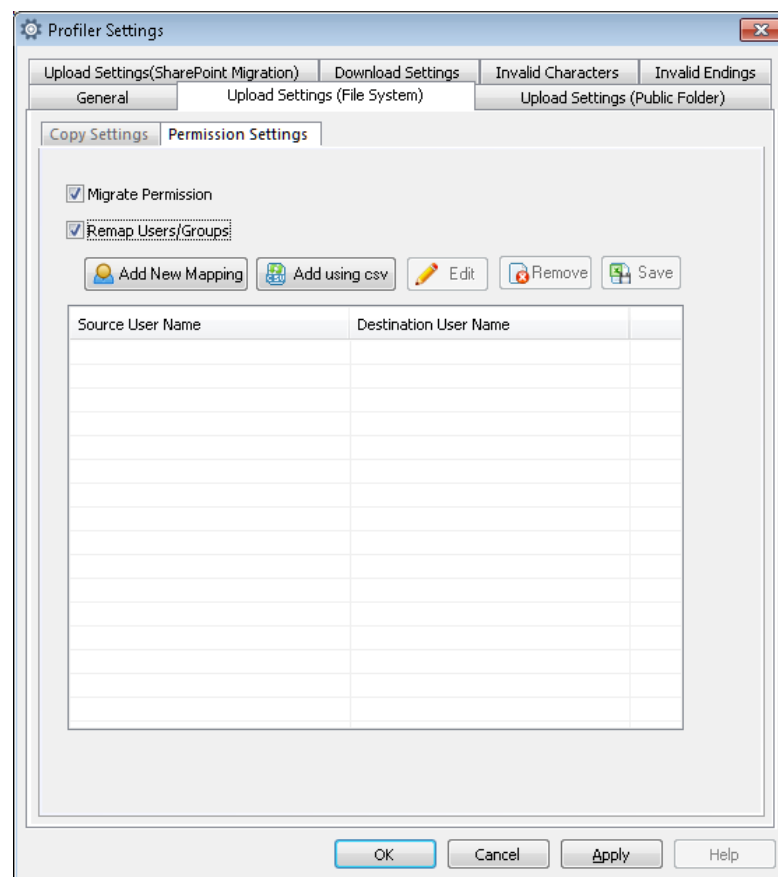
Permission Settings allow you to apply the universal settings for migrating the permissions and remapping the users. Once applied, these settings will be applicable universally for all SharePoint to SharePoint Migration Jobs.



**Figure 98: Permission Settings**

Follow the steps below to apply the Permissions Settings. While performing SharePoint to SharePoint Migration, you can follow the similar steps to modify or reject these permission settings.

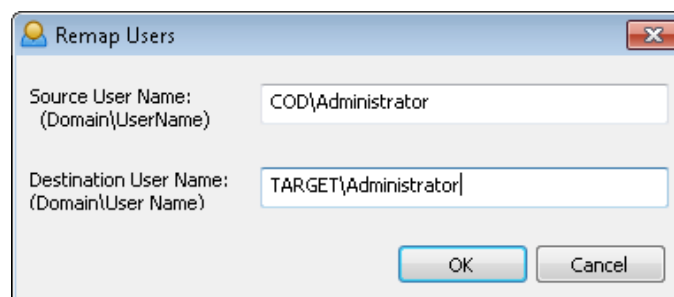
1. Check the box saying "Migrate Permissions" if you wish to migrate the permissions of content from the Source SharePoint to the Destination SharePoint. Doing this enables the adjacent option to map users, i.e. "Remap Users". Enabling the "Remap Users", in turn, enables the complete section that lets you map the users.



**Figure 99: The section to migrate permissions and map users is enabled.**

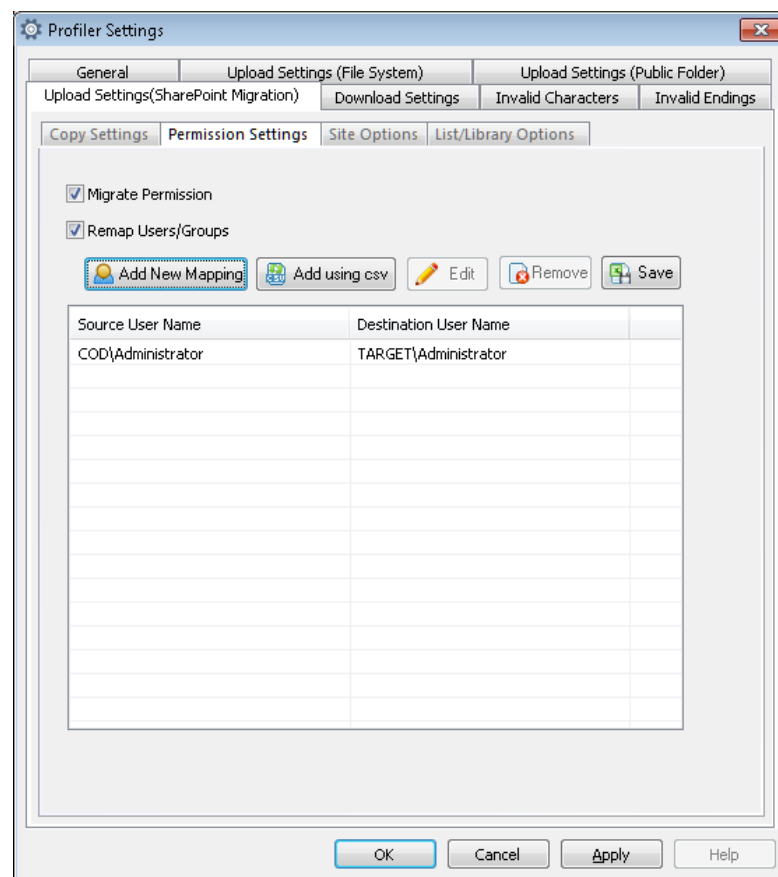
"Migrate Permissions" option works only when the user of source content is available in the Active Directory of the destination SharePoint. In another case, you have to use the option "Remap Users" to map the users.

2. Click  button to add a new user mapping.

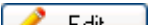





**Figure 100: Dialog box to map the users**

3. Add the source and target user names in their respective boxes.
4. Click "OK" to add the mapping and bring you back to the migration wizard, where the mapping section displays the currently added user mapping.

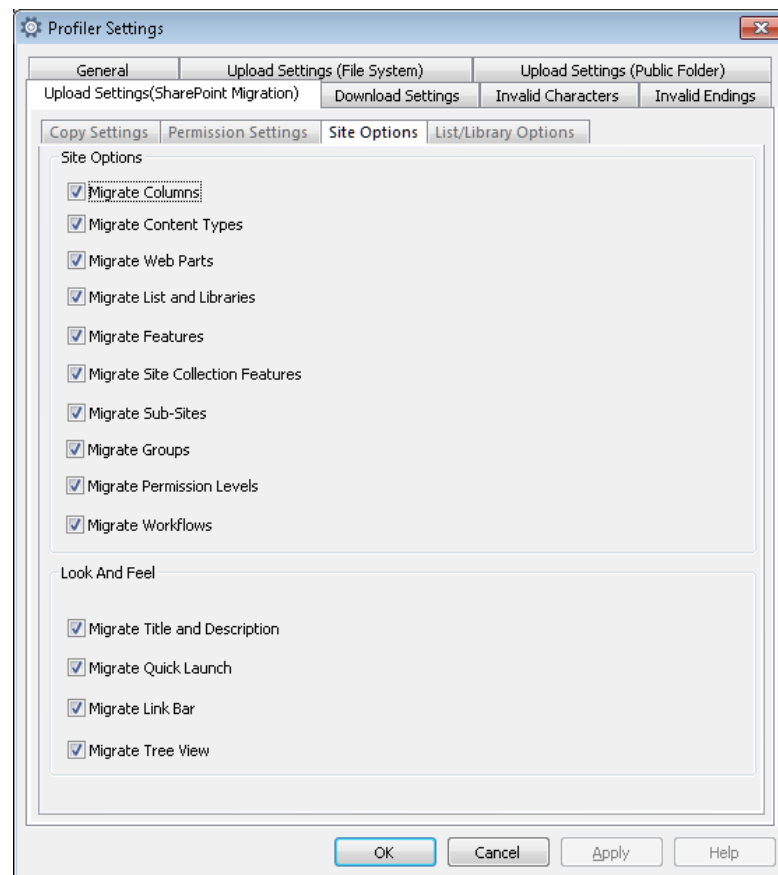


**Figure 101: User Mapping**

5. You can perform the following functions in this section.
-  Edit... : Click it to edit the selected mapping.
  -  Remove : Click it to delete the selected mapping.
  -  Save : Click it to save the mapping list as a CSV file.
  -  Add Using CSV : Click it to load the mapping list from an existing CSV file.

### 5.4.3 Site Settings - SharePoint

"Site Options" Tab allows you applying the settings to select what all objects will be migrated while migrating any Site from a Source SharePoint to the Destination SharePoint. Once applied, these settings will be applicable universally for all SharePoint to SharePoint Migration jobs.



**Figure 102: Site Options for SharePoint Migration**

Here, you can select what objects have to be migrated or excluded during a SharePoint to SharePoint Migration. These settings are divided into following two settings. You can check the content and items to be migrated and uncheck not to be migrated.

1. **Site Options:** This section lists the objects that can be migrated during a SharePoint to SharePoint Migration.
  - a. Migrate Columns
  - b. Migrate Content Types
  - c. Migrate Web Parts
  - d. Migrate List and Libraries
  - e. Migrate Features
  - f. Migrate Site Collection Features
  - g. Migrate Sub-Sites
  - h. Migrate Groups
  - i. Migrate Permission Levels
  - j. Migrate Workflows

2. **Look and Feel:** This section lists the user interface elements of a SharePoint Site that will be migrated during a SharePoint to SharePoint Migration.
  - a. Migrate Title and Description
  - b. Migrate Quick Launch
  - c. Migrate Link Bar
  - d. Migrate Tree View

#### 5.4.4 List/Library Options – SharePoint

"List/Library Options" Tab allows you applying the settings to select what all objects will be migrated while migrating any list or library from a Source SharePoint Server to the Destination SharePoint. Once applied, these settings will be applicable universally for all SharePoint to SharePoint Migration jobs.

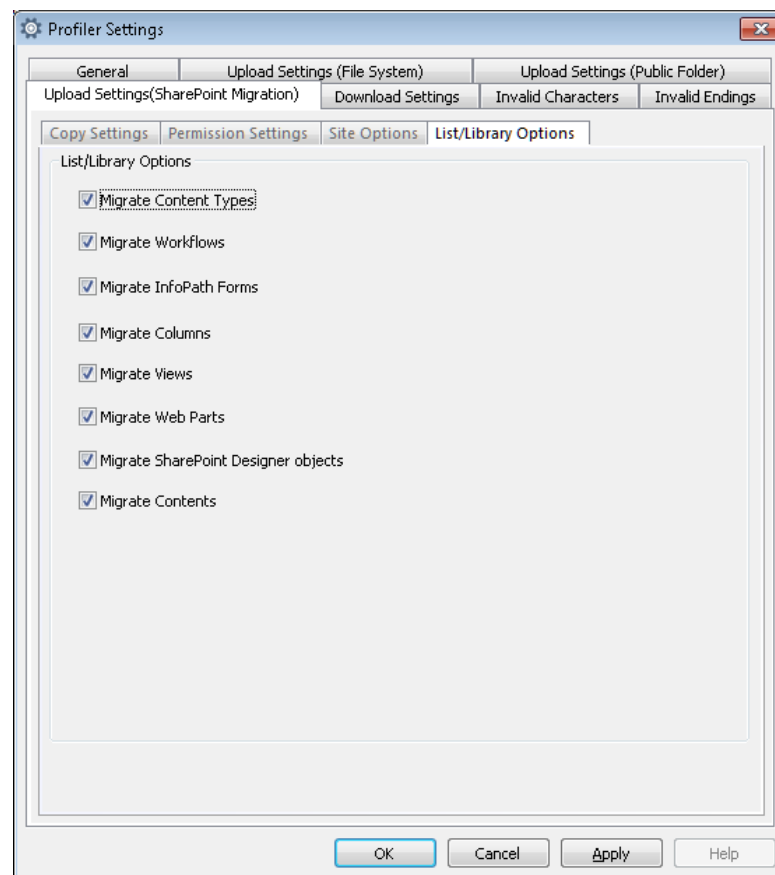


Figure 103: Universal List/Library Migration Options

## 5.5 Download Settings

This tab contains the universal settings for all download jobs from SharePoint to the File System. Click it to display the following tab.

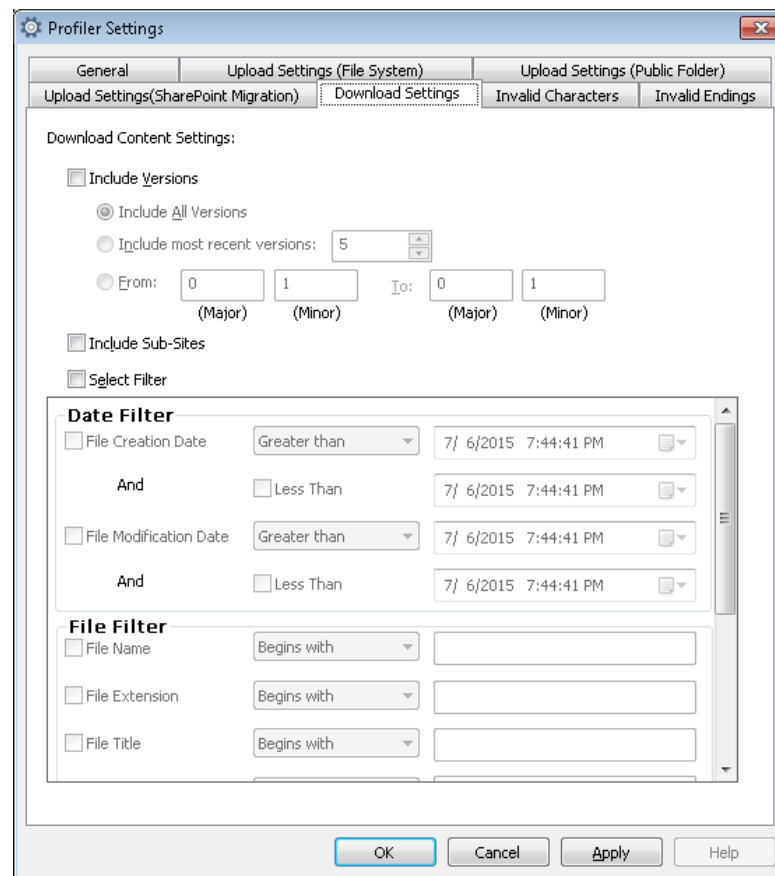


Figure 104: Download Content Settings

These settings are visible at the download wizard. You can modify these settings while downloading the content from the Destination SharePoint Server. It contains the following options.

1. **Include Versions:** If you want to include the versions of the content, then check "Include Versions".

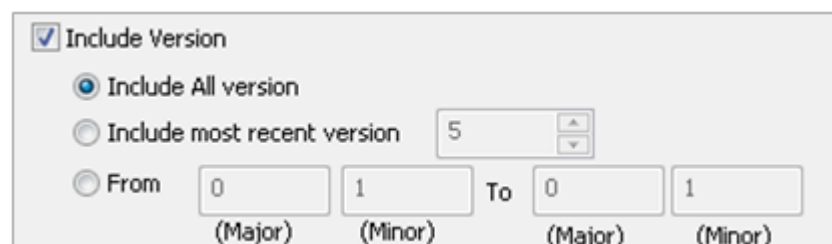


Figure 105: Include file version options

It enables the following options. You can select anyone of them.

- i. **Include All Versions:** Select this option to include all versions of the files.

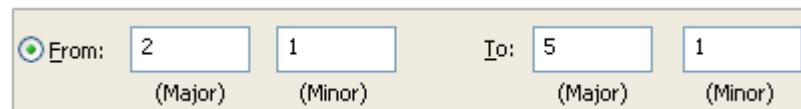
- ii. **Include most recent versions:** Select how many last versions of the content you want to download.

A screenshot of a configuration option. It features a radio button with a green dot, followed by the text "Include most recent versions:". To the right of this text is a text input field containing the number "5". Further right is a small blue button with up and down arrows.

*Figure 106: Include recent versions option*

Enter the number of the recent version of the content, which you want to download.

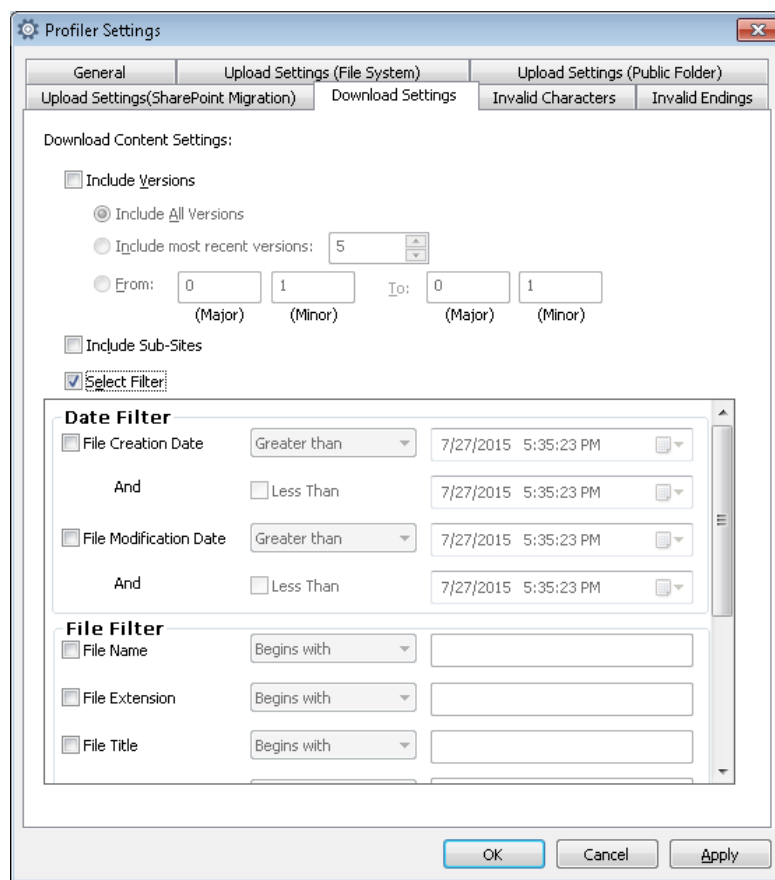
- iii. **From:** Select the range of the versions of all content that you have to download. "To" field is also enabled when you enable this option.

A screenshot showing two sets of input fields for version ranges. The first set is labeled "From:" and contains two input fields: the first has "2" and is labeled "(Major)" below it; the second has "1" and is labeled "(Minor)" below it. The second set is labeled "To:" and also contains two input fields: the first has "5" and is labeled "(Major)" below it; the second has "1" and is labeled "(Minor)" below it. A radio button with a green dot is positioned to the left of the "From:" label.

*Figure 107: Include versions from and to option*

Enter the "from" and "to" range of the versions of content, which you want to download. Such as, entering 2.1 (2 in Major and 1 in Minor) in "From" field and 5.1 (5 in major and 1 in minor) in "To" field will download all versions of a file from 2.1 to 5.1.

2. **Include Sub-Sites:** This option is available only when you are trying to download the complete SharePoint Site or Sub-Site containing a subsite. Check this option only when you want to download the content of the subsites as well.
3. **Set Filter:** Use this option to apply the filters on the data being downloaded. Check the box saying "Set Filter" if you want to apply the filter on the content to be downloaded. Selecting this option enables the filter section.



**Figure 108: Filters to filter the SharePoint Content while downloading**

Here, you can select the following filters.

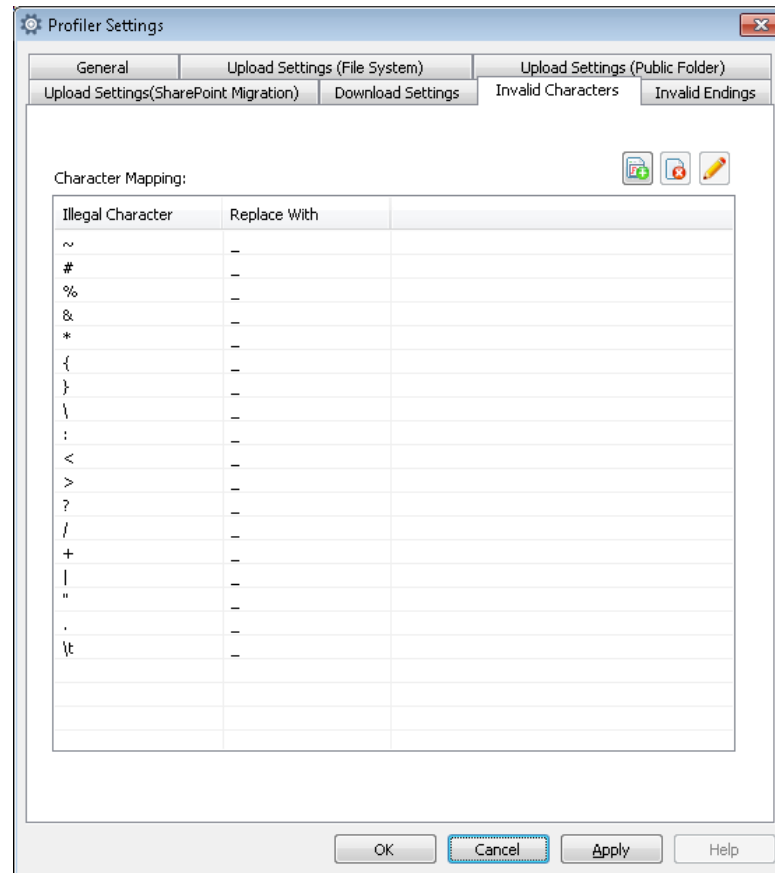
- a. **Date Filter:** A date filter allows you sorting the content as per the provided creation and/or modification date. This category contains the following filters.
  - i. **File Creation Date:** It filters the items as per the provided created date. Enable this filter, select any of the following conditions, and provide a value for it.
    - **Greater Than:** It shows the items created on the date greater than the provided one. Selecting this condition also enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the items following in this date range.
    - **Less Than:** It shows the items created on the date less than the provided date.
    - **Not Equal:** It shows the items not created at the provided date.
    - **Equal:** It shows the items created at the provided date.
  - ii. **File Modification Date:** It filters the content as per the provided modified date. Enable this filter, select any of the following conditions, and provide a value for it.

- **Greater Than:** It shows the items modified on the date greater than the provided one. Selecting this condition also enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the items following in this date range.
  - **Less Than:** It shows the items modified on the date less than the provided date.
  - **Not Equal:** It shows the items not modified on the provided date.
  - **Equal:** It shows the items modified on the provided date.
- b. **File Filter:** These filters allow you filtering the files based on the attributes such as file name, extension, ID, etc. It contains the following filters.
- i. **File Name:** It filters the content as per the provided name. You have to enable this filter, select any of the following conditions, and then provide a value for it.
    - **Begins With:** Select it to show the items of which name starts with the entered value.
    - **Includes:** Select it to show the items of which name contains the entered value.
    - **Not Equal:** Select it to show the items having the name not similar to the entered value.
    - **Equal:** Select it to show the items having the name exactly similar to the entered value.
  - ii. **File Extension:** It filters the content as per the provided extension. Enable this filter, select any of the following conditions, and provide a value for it.
    - **Begins With:** Select it to show the files whose extension starts with the entered value.
    - **Includes:** Select it to show the files whose extension contains the entered value.
    - **Not Equal:** Select it to show the files having the extension not similar to the entered value.
    - **Equal:** Select it to show the files having the extension exactly similar to the entered value.
  - iii. **File Title:** It filters the content as per the provided title. Enable this filter, select any of the following conditions, and provide a value for it.
    - **Begins With:** Select it to show the items whose title start with the entered value.
    - **Includes:** Select it to show the items whose title contain the entered value.
    - **Not Equal:** Select it to show the items having the title not similar to the entered value.
    - **Equal:** Select it to show the items having the title exactly similar to the entered value.
  - iii. **File Content Type:** It filters the content as per the provided content type. Enable this filter, select any of the following conditions, and provide a value for it.
    - **Begins With:** Select it to show the items whose type start with the entered value.
    - **Includes:** Select it to show the items whose type contain the entered value.
    - **Not Equal:** Select it to show the items having the type not similar to the entered value.

- **Equal:** Select it to show the items having the type exactly similar to the entered value.
- iv. **File ID:** It filters the content as per the provided ID Number. Enable this filter, select any of the following conditions, and provide value in numbers for it.
- **Begins With:** Select it to show the files whose ID starts with the entered value.
  - **Includes:** Select it to show the files whose ID contain the entered value.
  - **Not Equal:** Select it to show the files having the ID not equal to the entered value.
  - **Equal:** Select it to show the files having the ID equal to the entered value.
- v. **File Size (In Kilo Bytes):** It filters the content as per the provided file size in KB. Enable this filter, select any of the following conditions, and provide a value for it.
- **Greater Than:** It shows the items having the size greater than the provided value.
  - **Less Than:** It shows the items having size less than the provided value.
  - **Not Equal:** It shows the items having the size not equal to the provided value.
  - **Equal:** It shows the items having the size equal to the provided value.
- b. **User Filter:** Such filters let you filter the content as per the user attributes of the content. This category contains the following filters.
- i. **Who Created:** It filters the content as per the user who has created it. Enable this filter, select any of the following conditions, and provide a value for it.
- **Begins With:** Select it to show the items of which creator's name starts with the entered value.
  - **Includes:** Select it to show the items of which creator's name contains the entered value.
  - **Not Equal:** Select it to show the items having the creator's name not similar to the entered value.
  - **Equal:** Select it to show the items having the creator's name exactly similar to the entered value.
- ii. **Who Modified:** It filters the content as per the user who has modified it recently. Enable this filter, select any of the following conditions, and provide a value for it.
- **Begins With:** Select it to show the items of which modifier's name start with the entered value.
  - **Includes:** Select it to show the items of which modifier's name contains the entered value.
  - **Not Equal:** Select it to show the items having the modifier's name not similar to the entered value.
  - **Equal:** Select it to show the items having the modifier's name exactly similar to the entered value.


## 5.6 Invalid Characters

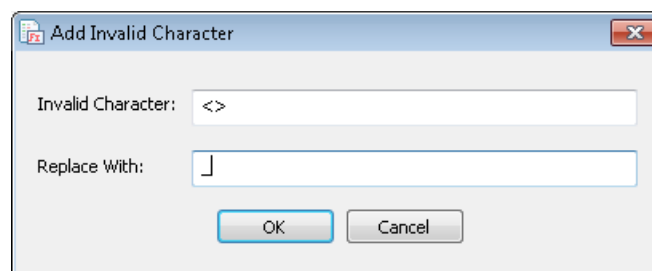
This tab contains the settings related to the invalid characters, which may be available in the names of content that has to be migrated to the SharePoint. It lists the invalid characters and their suggested replacements.



**Figure 109: Invalid Character Tab**

The software already has some predefined entries. It allows you performing the following operations here: -

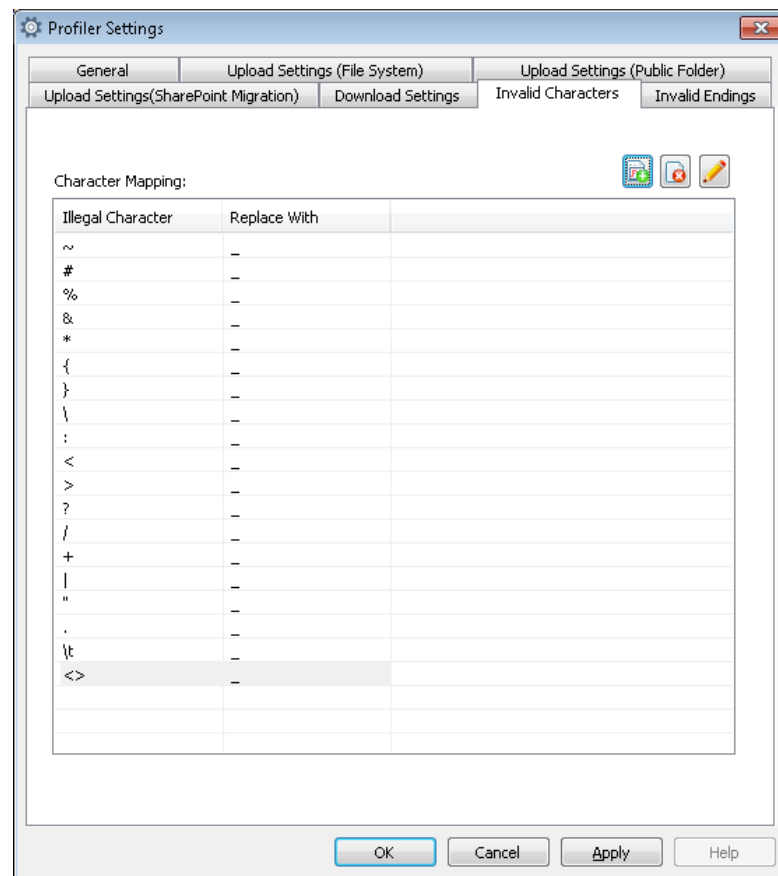
- : Click this icon to add a new invalid character and its replacement using the following dialog box.





**Figure 110: Add Invalid Character and its replacement**

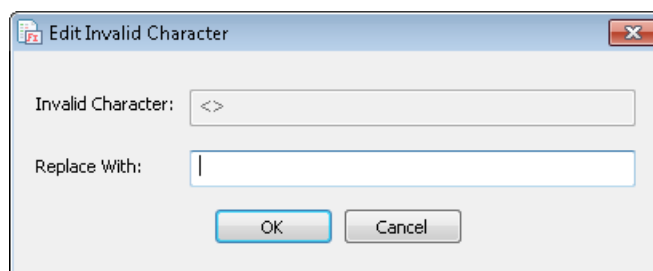
Enter the invalid character in the first text box and then add its replacement.

Click "OK" to add the new invalid character. It takes you back to the same tab, where the newly added character is visible in the last row.



**Figure 111: Showing the added invalid character and its replacement**

- : Click this icon to remove the user-defined invalid character. Please note that you cannot remove the predefined invalid characters.
- : Click this icon to edit the selected invalid character using the following dialog box.

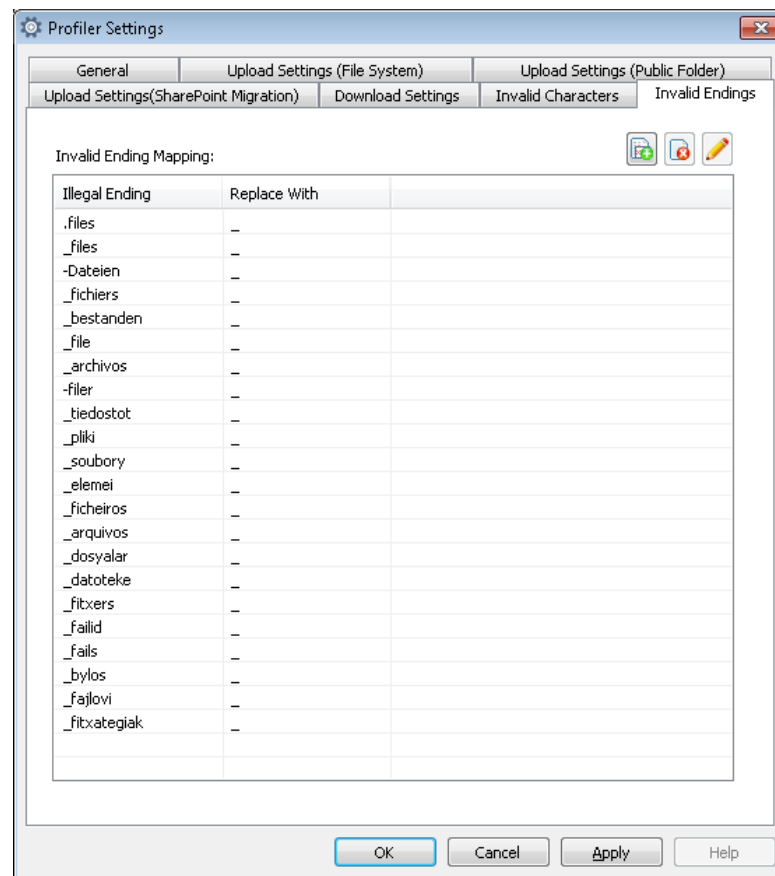


**Figure 112: Editing an invalid character**

you just have to provide a new value for this invalid character, which will replace it. Click "OK" to save the changes.


## 5.7 Invalid Ending

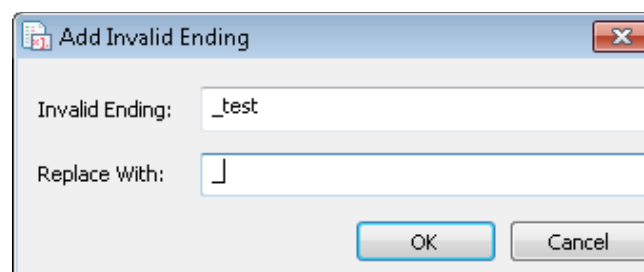
This tab contains the settings related to the invalid endings, with which the name of the content items ends. It specifies the invalid endings and their suggested replacements.



**Figure 113: Invalid Ending Tab**

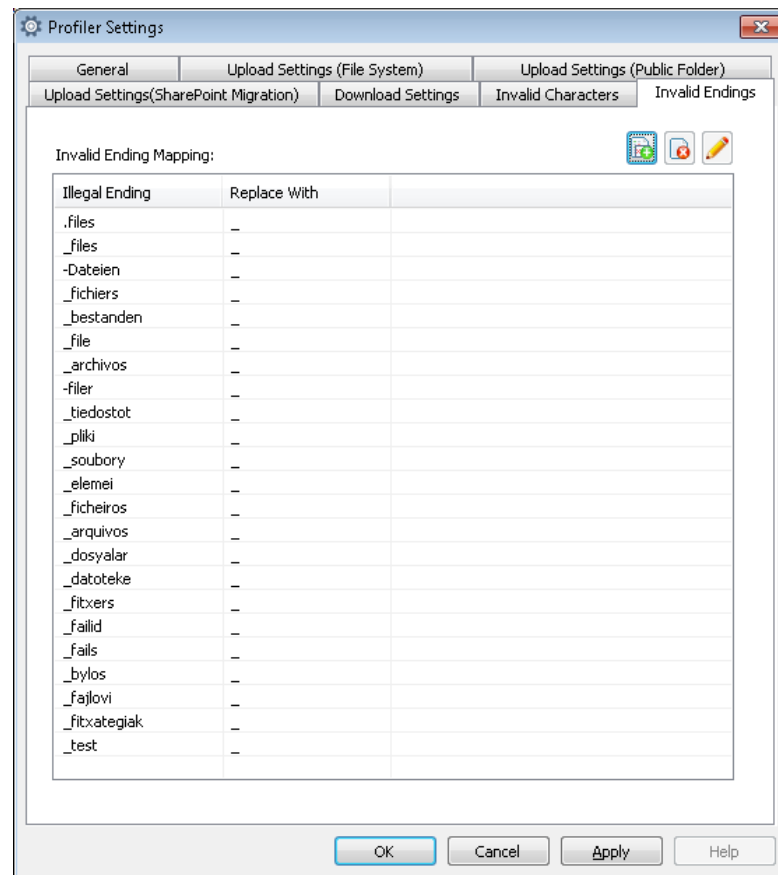
The invalid endings setting work only for the folders, but do not work for the files. The software already has a set of some predefined entries. It allows you performing the following operations here: -

- : Click this icon to add a new invalid ending and its replacement using the following dialog box.





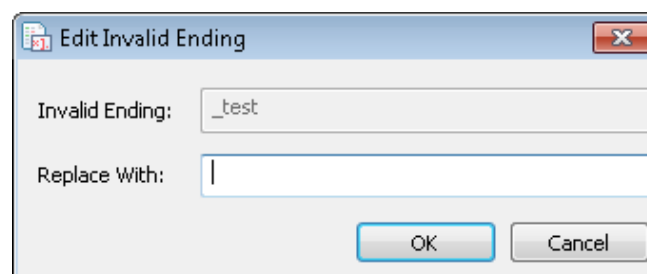
**Figure 114: Add invalid ending and its replacement**

Enter the invalid ending in the first text box and then add its replacement. Click "OK" to add the new invalid ending. It takes you back to the same tab, where the newly added ending is visible in the last row.



**Figure 115: Showing the added invalid ending and its replacement**

- : Click this icon to remove the user-defined invalid endings. Please note that you cannot remove the predefined invalid endings.
- : Click this icon to edit the selected invalid ending with the following dialog box. You just have to provide a new value for this invalid ending, which will replace it. Click "OK" to save the changes.



**Figure 116: Editing an invalid ending**

You just have to provide a new value for this invalid ending, which will replace it. Click

"OK" to save the changes.

## 6. Conclusion

After following the steps mentioned above, you can start performing the migration. To know the detailed steps of migration, please check the software help manual that comes preinstalled with the software.

To read more about the software visit: <https://www.nucleustechnologies.com/sharepoint-migration/>

**For software related queries, you can contact us at:**

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For Sales: [sales@nucleustechnologies.com](mailto:sales@nucleustechnologies.com)

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