AvePoint DocAve 6 User Guide

DocAve® 6 EMC Documentum Migrator

User Guide

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The Enterprise-Class **Management Platform** for **SharePoint** Governance

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What’s New in this Guide

- Minor edits and cover page update for current release.

About EMC Documentum Migrator

DocAve EMC Documentum Migrator efficiently migrates documents from EMC Documentum to Microsoft SharePoint 2016, SharePoint 2013, SharePoint 2010, and SharePoint Online. SharePoint administrators can easily automate the process of consolidating the full spectrum of corporate-wide document sources onto SharePoint, and therefore, maximize the return on investment of existing content residing in EMC Documentum.

To ensure a complete and successful migration, DocAve's Pre-Migration Scanner provides a detailed analysis of the migration before it is performed. The DocAve Pre-Migration Scanner will detect and notify you of any illegal characters, user permissions, user names, user domains, and other legacy elements that must be mapped in order to migrate successfully into SharePoint.

EMC Documentum Migrator allows organizations to:

- **Streamline the data transfer easily** from EMC Documentum to SharePoint
- **Preserve and map all associated metadata and security settings** of EMC Documentum content during the migration
- **Plan migration jobs according to business needs** with granular or bulk content migration and customizable job scheduling

Complementary Products

Many products and product suites on the DocAve 6 platform work in conjunction with one another. The following products are recommended for use with DocAve EMC Documentum Migrator:

- DocAve Content Manager for SharePoint for restructuring or moving SharePoint content.
- DocAve Report Center for SharePoint to examine pain points in the SharePoint infrastructure and report on SharePoint user behavior and changes.
- DocAve Data Protection for setting backup and recovery points prior to adjusting SharePoint governance policies in this product.
- DocAve Replicator to perform live or event-driven, as well as scheduled or offline replication. Synchronization and management of all content, configurations, and securities is performed with full fidelity.

Submitting Documentation Feedback to AvePoint

AvePoint encourages customers to provide feedback regarding our product documentation. You can Submit Your Feedback on our website.

Before You Begin

Refer to the sections below for system and farm requirements that must be in place prior to installing and using DocAve EMC Documentum Migrator.

AvePoint's Testing Policy and Environment Support

Supported Software Environments

AvePoint is committed to testing against all major versions and service packs of SharePoint as well as the latest versions of Windows Server and SQL Server, as Microsoft announces support and compatibility.

***Note:** AvePoint does not recommend or support installing DocAve on client operating systems.

Supported Hardware

AvePoint is committed to maintaining a hardware agnostic platform to ensure that DocAve operates on common Windows file sharing and virtualization platforms. To ensure that DocAve is hardware agnostic, AvePoint tests hardware that is intended to support SharePoint and DocAve infrastructure, storage targets, and hardware-based backup and recovery solutions, as supported by AvePoint's partnerships. AvePoint directly integrates with the following platforms: any Net Share, FTP, Amazon S3, AT&T Synaptic, Box, Caringo Storage, Cleversafe, DELL DX Storage, Dropbox, EMC Atmos, EMC Centera, Google Drive, HDS Hitachi Content Platform, IBM Spectrum Scale Object, IBM Storwize Family, Microsoft Azure Storage, NetApp Data ONTAP, NFS, OneDrive, Rackspace Cloud Files, and TSM.

All other hardware platforms that support UNC addressable storage devices are supported.

***Note**: AvePoint has ended the test and development for Caringo Storage and DELL DX Storage in DocAve since DocAve 6 SP7 CU1, as the providers of these two platforms have stopped the platform maintenance.

***Note:** Due to changes in the IBM Tivoli Storage Manager API, DocAve 6 Service Pack 6 and later versions require that TSM Client version 7.1.2 is installed on the Control Service and Media Service servers.

***Note:** Most of the hardware partnerships referenced in this guide are intended to make use of advanced functionality (such as snapshot mirroring, BLOB snapshots, indexing, long-term storage, WORM storage, etc.), and are not indications that any changes to the product are required for basic support. In most cases, hardware can be supported with no change to the product.

Supported Backup and Recovery

DocAve supports BLOB backup storage according to the list of hardware platforms above. BLOB snapshot function, however, is currently only supported on OEM versions and NetApp hardware.

DocAve supports SQL content and Application database backups via the SharePoint Volume Shadow Copy Service (VSS) on all Windows and SQL server platforms listed above. DocAve also supports

snapshot-based SharePoint VSS on all hardware listed above where the hardware partner has certified support with Microsoft.

DocAve supports application and configuration server backups for all the supported software environments listed above. DocAve 6 SP5 or later supports VM backup via Hyper-V/VMWare for the following operating systems: Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2, and Microsoft Hyper–V Server 2012 R2.

Configurations

In order to use DocAve EMC Documentum Migrator, the DocAve 6 platform must be installed and configured properly on your farm. DocAve EMC Documentum Migrator will not function without DocAve 6 present on the farm.

To review a list of migration source versions and systems supported by DocAve Migrator, refer to Appendix C: Migration Source Environment in the DocAve 6 Installation Guide.

Agents

DocAve Agents are responsible for running DocAve jobs and interacting with the SharePoint object model. DocAve Agents enable DocAve Manager to communicate with the respective servers, allowing for DocAve EMC Documentum Migrator commands to function properly.

***Note:** The use of system resources on a server increases when the installed agent is performing actions. This may affect server performance. However, if the agent installed on a server is not being used, the use of system resources is very low and, therefore, the effect on server performance is negligible.

For instructions on installing the DocAve Platform, DocAve Manager, and DocAve Agents, see the DocAve 6 Installation Guide.

Required Permissions

Refer to the section below for the required permissions for installing and using DocAve EMC Documentum Migrator on SharePoint on-premises and SharePoint Online environments.

Required Permissions for the Source

Before using DocAve EMC Documentum Migrator, ensure the DocAve Agent account in the source has the following permissions:

1. Local System Permissions: The permissions listed in Local System Permissions.

***Note**: If the source DocAve Agent is installed in the machine with the **Documentum DFC Runtime Environment** program installed, ensure the source Agent account has the following permissions:

- Full Control permission to the installation directory of the **Documentum DFC Runtime Environment** program.
- Add the source Agent account to the local **Administrators** group.

2. EMC Documentum Permission: Read permission to EMC Documentum content.

Required Permissions for the Destination: Migration to SharePoint On-Premises

To install and use DocAve EMC Documentum Migrator on the SharePoint on-premises environment properly, ensure that the destination Agent account has the following permissions.

1. Local System Permissions: The permissions are automatically configured by DocAve during the installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.
2. SharePoint on-premises Permissions: These permissions must be manually configured prior to using DocAve 6 EMC Documentum Migrator; they are not automatically configured.
   - User is a member of the **Farm Administrators** group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.
   - Full Control to all zones of all Web applications via User Policy for Web applications
   - Managed Metadata Service
     - Term Store Administrator
     - Managed Metadata Service Administrator with Full Control Permission
3. SQL Permissions: These permissions must be manually configured prior to using DocAve 6 EMC Documentum Migrator; they are not automatically configured.
   - Member has the Database Role of **db_owner** in all of the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, and Central Admin Database, and DocAve Migration database.
   - Member has the Server Roles of **dbcreator** and **securityadmin** in SQL server.

   ***Note**: If a Web application enables the forms based authentication and uses database as the method of forms based authentication, refer to Forms Based Authentication Permissions to configure the additional permissions required for Forms Based Authentication.

Required Permission for the Destination: Migration to SharePoint Online

To install and use EMC Documentum Migrator on the SharePoint Online environment properly, ensure that the following permissions are met:

Local System Permissions for Agent Account

For the registered SharePoint Online site collections, the Agent account is on the Agent machine that will run migration jobs. This machine must have network connection or have configured Agent Proxy Settings. For more information about Agent Proxy Settings, refer to the Control Panel Reference Guide.

For the registered SharePoint on-premises site collections, the Agent account is on the Agent machine that will run migration jobs. This machine must be the Central Administration server or one of the Web front-end servers of the farm where the registered site collections reside, or the machine that can communicate with the Central Administration server or one of the Web front-end servers.

The Agent account must have proper Local System permissions. These permissions are automatically configured by DocAve during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.

Required Permissions for the User Used to Register SharePoint Online Site Collections

The user that is used to register SharePoint Online site collections in **Control Panel** > **Registered SharePoint Sites** > **Manual Input Mode** must have the following permissions to each site collection:

- User is a member of the **Site Collection Administrator** group.
- Managed Metadata Service – Term Store Administrator

The user that is used to register the SharePoint Online site collections in **Control Panel** > **Registered SharePoint Sites** > **Scan Mode** must have the following permissions:

- The user role of SharePoint administrator
- Managed Metadata Service – Term Store Administrator

Required Permissions for the User Used to Register SharePoint On-Premises Site Collections

The user that is used to register SharePoint on-premises site collections in **Control Panel** > **Registered SharePoint Sites** > **Manual Input Mode** must have the following permissions to each site collection:

- User is a member of the **Site Collection Administrator** group.
- Managed Metadata Service
    - Term Store Administrator
    - Full Control

    - Administrator

The user that is used to register the SharePoint on-premises site collections in **Control Panel** > **Registered SharePoint Sites** > **Scan Mode** must have the following permissions:

- Full Control permission to all zones of all Web applications via User Policy for Web Applications.
- Member has a Database Role of **db_owner** for all of the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, and Central Admin Database.
- User is a member of the **Site Collection Administrator** group.
- Managed Metadata Service
    - Term Store Administrator
    - Full Control
    - Administrator

Local System Permissions

The following Local System Permissions are automatically configured during DocAve 6 installation:

- User is a member of the following local groups:
    - IIS WPG (for IIS 6.0) or IIS IUSRS (for IIS 7.0)
    - Performance Monitor Users
    - DocAve Users (this group is created by DocAve automatically):
        - Full control to the Registry of HKEY_LOCAL_MACHINE\SOFTWARE\AvePoint\DocAve6
        - Full control to the Registry of HKEY_LOCAL_MACHINE\System\CurrentControlSet\Services\eventlog
        - Full Control to the Communication Certificate
        - Permission of Log on as a batch job (it can be found within Control Panel > Administrative Tools > Local Security Policy > Security Settings > Local Policies > User Rights Assignment)
        - Full Control Permission for DocAve Agent installation directory

Forms Based Authentication Permissions

If a Web application in the destination node is using forms based authentication and uses a database as the method of forms based authentication, ensure at least one of the following conditions is met:

- The Agent account has a Database Role of **db_owner** to this database.

- Specify a use in the **connectionString** node in this Web application's **web.config** profile that has the access to this database. For details, refer to the instructions below:
    i. Navigate to **Start** > **Administrative Tools** > **Server Manager** > **Roles** > **Web Server (IIS)** > **Internet Information Services (IIS) Manager**, find the desired Web application in the **Sites** list.
    i. Right-click the desired Web application and select **Explore**.
    ii. Find the **web.config** file in the pop-up window.
    iii. Open the **web.config** file with **Notepad**.
    iv. Find the **connectionString** node and specify a user that has access to the database that stores FBA security information.

Migration Speed Considerations

Speed is a very important factor when migrating content. In order to estimate how long your migration plans will take, the following key factors should be taken into consideration prior to running your migration plans.

- Network bandwidth between the EMC Documentum and the SharePoint environments.
- SQL I/O and memory
- Memory on Web front-end servers
- Memory on the server hosting the DocAve Media service
- Number of CPUs on Web front-end servers
- Source environment deployment
    - Number of objects in source
        - Divide database and folder structures into small data sets before running the migration. Consider a granular migration approach.
    - Size of objects in source
        - The smaller the size of the source object, the faster the migration job will run.
    - Complexity of folders and sites
        - Prioritize content to be migrated into SharePoint, and utilize tools to establish co-existence throughout the course of the migration project to slowly roll-out SharePoint to users as their content becomes available.
    - Whether DocAve has to create site collections during migration

        - Use folders to break up large document libraries or data subsets to manage library size, consider utilizing filtering to migrate a sub-set of the data at a time.
    - Whether securities are included in the plan (including mappings)
        - Permissions can be configured to be migrated in the migration plans.
    - Whether metadata is included in the plan

Getting Started

Refer to the sections below for important information on getting started with EMC Documentum Migration.

Launching DocAve EMC Documentum Migration

To launch EMC Documentum Migration and access its functionality, complete the following steps:

1. Log into DocAve. If you are already in the software, click the **DocAve** tab. The **DocAve** tab displays all product suites on the left side of the window.
2. Click **Migration** to view all of the Migration modules.
3. Click **EMC Documentum Migration** to launch that module.

   ***Note:** You can access the **License Usage** information for Migrator products from the **Migration** landing page.

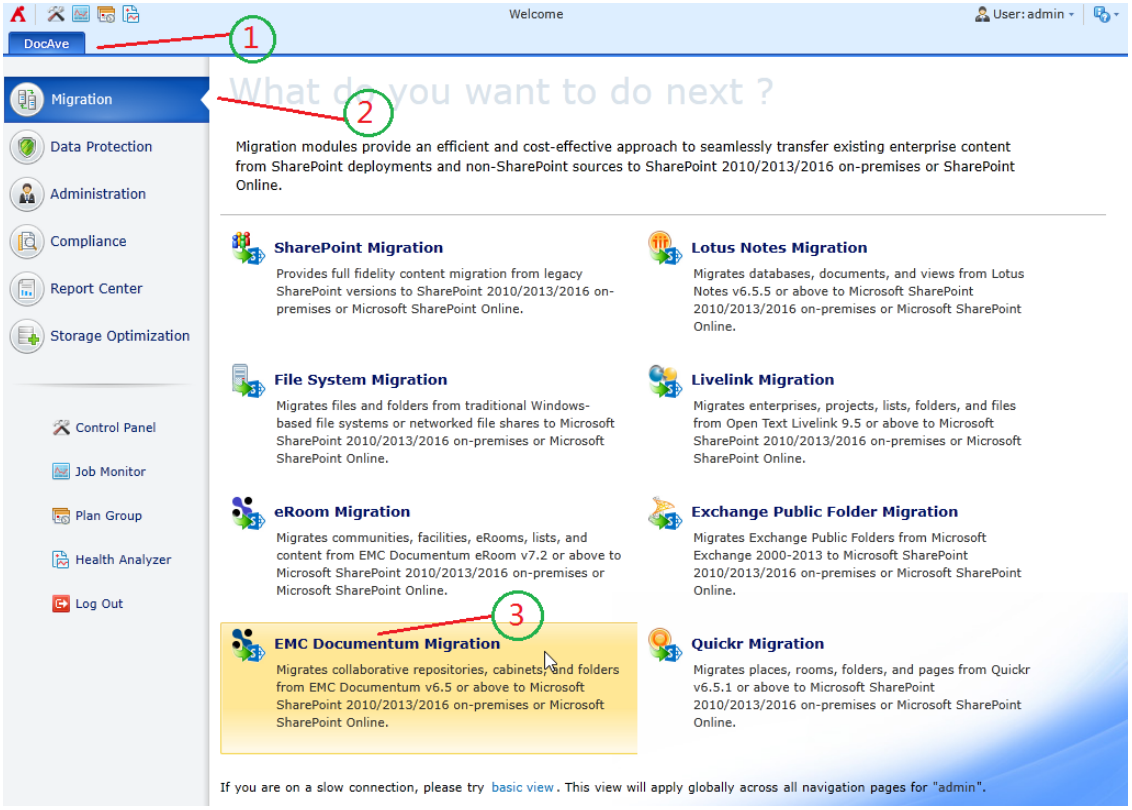


Figure 1: DocAve module launch window.

AvePoint recommends using Health Analyzer to check the prerequisites you need to correctly use DocAve EMC Documentum Migration.

***Note**: Only the users in the DocAve **Administrators** group can use Health Analyzer.

***Note**: When creating health analyzer profiles, DocAve EMC Documentum Migration recommends creating two different profiles to scan the source Agent and the destination Agent separately.

After selecting EMC Documentum Migration as the module, all of the scan rules are selected by default, including the rules for the source environment and the rules for the destination environment. When the health analyzer job is finished, you can view the health analyzer results. If the scan rule is for the destination environment, but it is applied on the source environment, ignore the error or warning, and vice versa.

For more information about Health Analyzer, refer to the DocAve 6 Control Panel Reference Guide.

Launching EMC Documentum High Speed Migration

To launch EMC Documentum High Speed Migration and access its functionality, click **High Speed Migration** in the **Plan** group on the ribbon of the EMC Documentum Migration module.

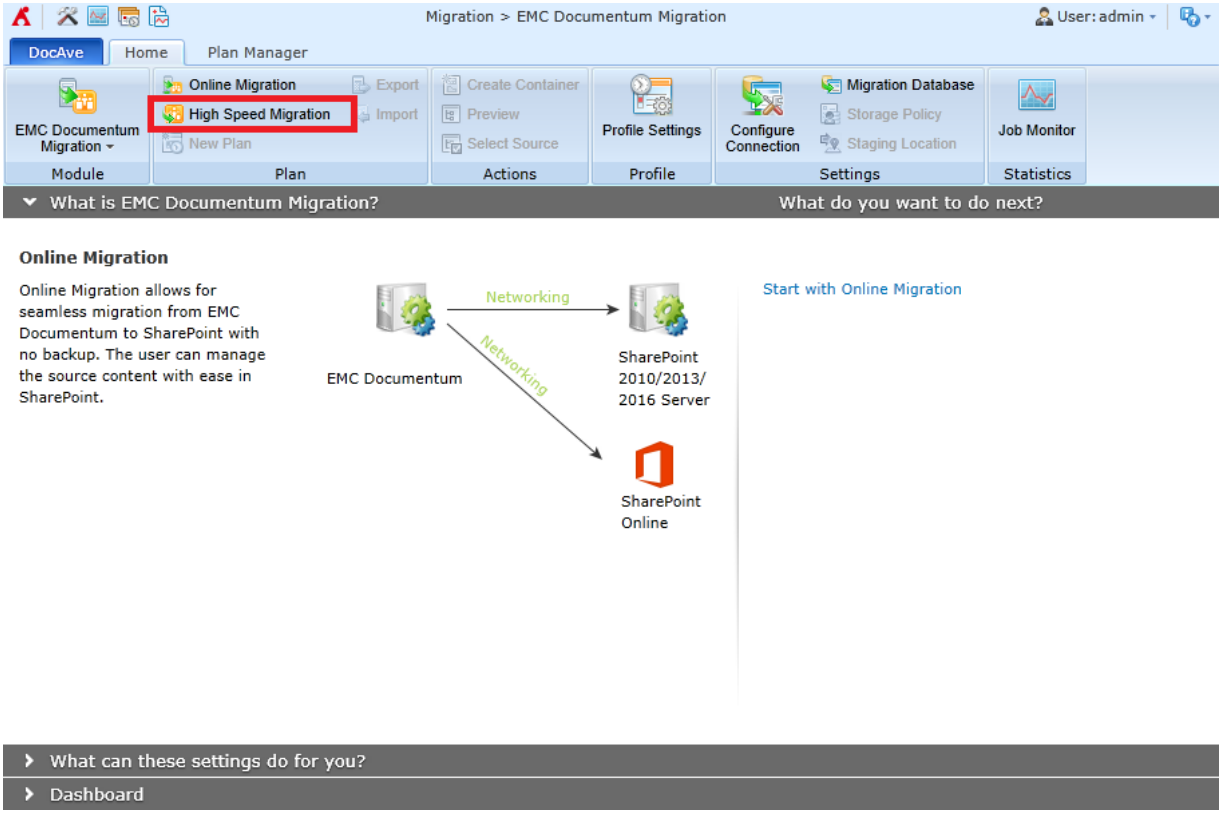


Figure 2: Accessing EMC Documentum High Speed Migration interface.

Navigating DocAve

DocAve mimics the look and feel of many Windows products, making for an intuitive and familiar working environment. While there are many windows, pop-up displays, and messages within DocAve products, they share similar features and are navigated in the same ways.

Below is a sample window in DocAve. It features a familiar, dynamic ribbon, and a searchable, content list view.

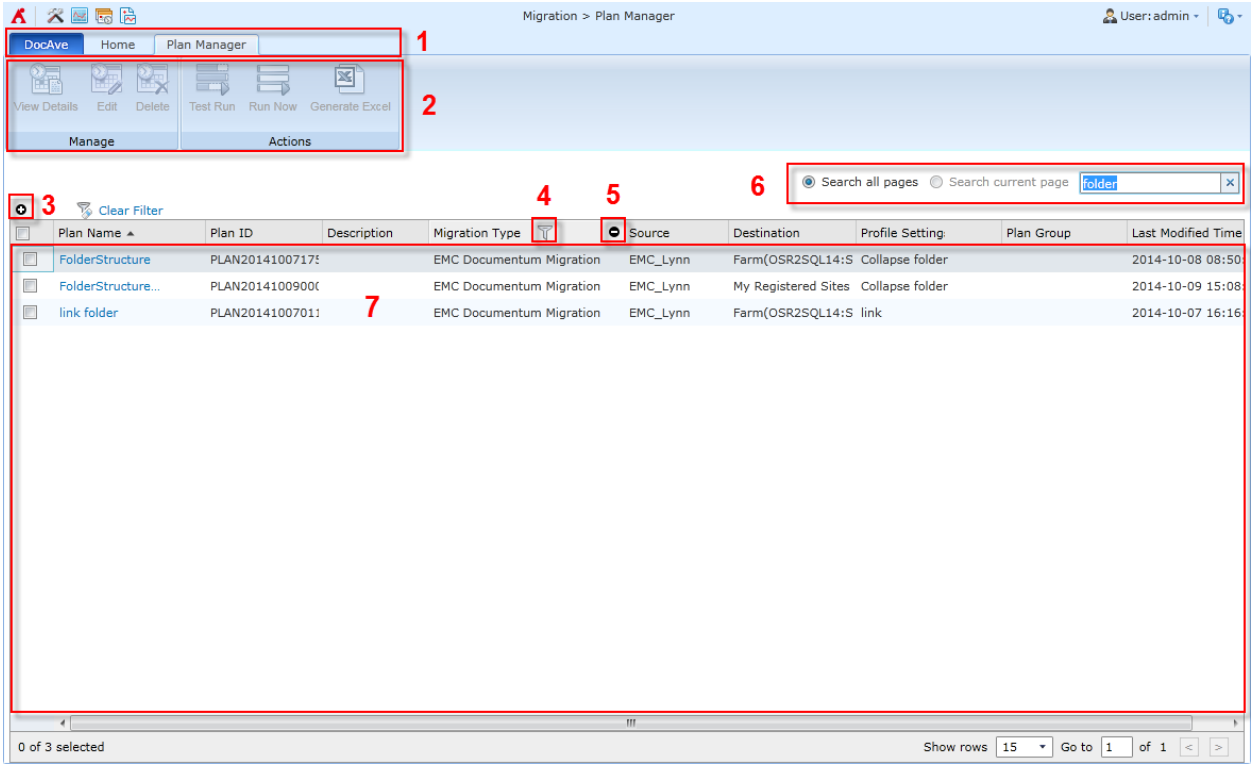


Figure 3: Navigating DocAve.

1. Ribbon Tabs— Allows users to navigate to the DocAve Welcome page and within the active module.
2. Ribbon Panes – Allows users to access the functionality of the active DocAve module.
3. Manage columns (⊕) – Allows users to manage which columns are displayed in the list. Click the manage columns (⊕) button, and then select the checkbox next to the column name in the drop-down list.
4. Filter the column ( ) – Allows users to filter the information in the List View. Click the filter the column ( ) button next to the column and then select the checkbox next to the column name.
5. Hide the column (⊖) – Allows users to hide the selected column.
6. **Search** – Allows users to search the List View pane for a keyword or phrase. You can select **Search all pages** or **Search current page** to define the search scope.
   ***Note:** The search function is not case sensitive.
7. Management Pane – Displays the actionable content of the DocAve module.

About Online Migrations

EMC Documentum Migration provides EMC Documentum Online Migration and EMC Documentum High Speed Online Migration. For more detailed information about these migrations, refer to the sections below.

EMC Documentum Online Migration

An EMC Documentum Online Migration job migrates content, configurations, securities, and users from a source EMC Documentum to a destination SharePoint environment when a network connection between the source and destination is available.

EMC Documentum High Speed Online Migration

EMC Documentum High Speed Online Migration is a special mode of EMC Documentum Online Migration. An EMC Documentum High Speed Online Migration job migrates content, configurations, securities, and users from EMC Documentum to SharePoint Online with high efficiency when a network between the source and destination is available.

Online Migration Overview

While it is theoretically possible to run an EMC Documentum Online Migration job or EMC Documentum High Speed Online Migration job without configuring the settings described in the sections below, it is **strongly** recommended that you configure these settings to ensure appropriate content management during migration.

To perform Online Migration jobs, the following steps must be performed in order. Click the link to navigate to the corresponding section.

1. Pre-migration Configurations
    - Configuring EMC Documentum Connections
    - Configuring Migration Databases
    - Configuring Azure Locations (for High Speed Migrations only)
    - Configuring Filter Policies (Optional)
    - Configuring Mapping Settings (Optional)
    - Configuring Dynamic Rules (Optional)
2. Setting Up EMC Documentum Migration Profiles
    a. Migration Options
    b. Mapping Options

c. Advanced Options

d. Managing Sub-profiles

3. Performing an EMC Documentum Migration

a. Selecting the Source and Destination Nodes

- Creating Containers

b. Select either of the following methods to perform an online migration:

- Configuring the Run Now Interface
- Configuring the Save As New Plan Interface

Pre-migration Configurations

To use EMC Documentum Migrator, first connect DocAve Agents to the EMC Documentum environment. From the Migrator **Home** tab, click **Configure Connection** on the ribbon. The **EMC Documentum Connection** interface appears.

Configure the following settings before performing EMC Documentum Migration. Click the link to navigate to the corresponding section.

- Configuring EMC Documentum Connections
- Configuring Azure Locations (for High Speed Migrations only)
- Configuring Migration Databases (Optional)
- Configuring Filter Policies (Optional)
- Configuring Mapping Settings (Optional)
- Configuring Dynamic Rules (Optional)

Configuring EMC Documentum Connections

An EMC Documentum connection connects a DocAve Agent to your EMC Documentum environment. Created connections are displayed on the **Source** pane when creating a migration job, showing the contents for the EMC Documentum migration job. The **EMC Documentum Connection** interface displays all EMC Documentum connections that you have previously created.

In this interface, you can change the number of EMC Documentum connections displayed per page and the order in which they are displayed. To change the number of EMC Documentum connections displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the EMC Documentum connections, click on a column heading such as **Name**, **Agent** and **Last Modified Time**.

Perform the following actions in the **EMC Documentum Connection** interface:

- Click **Create** on the ribbon to create a new EMC Documentum connection. For details on creating a new EMC Documentum connection, see Creating and Editing EMC Documentum Connections.
- Click **View Details** on the ribbon and you will see the previously configured settings for this EMC Documentum connection. Here you can also click **Edit** on the ribbon to make changes to the EMC Documentum connection's settings. The **Edit EMC Documentum Connection** page will appear, and you can change the settings of this EMC Documentum connection.
- Click **Edit** on the ribbon to change the configurations for this EMC Documentum connection. For details on editing configurations for an EMC Documentum connection, see Creating and Editing EMC Documentum Connections.

- Click **Delete** on the ribbon. A confirmation window appears. Click **OK** to delete the selected EMC Documentum connections or click **Cancel** to return to the **EMC Documentum Connection** interface.

Creating and Editing EMC Documentum Connections

To create a new EMC Documentum connection, click **Create** on the ribbon. To modify a previously configured EMC Documentum connection, select the EMC Documentum connection, and then click **Edit** on the ribbon. In the **Create EMC Documentum Connection** or **Edit EMC Documentum Connection** interface, configure the following settings:

1. **EMC Documentum Connection Name** – Enter a **Name** for the EMC Documentum connection. Then enter an optional **Description** for this EMC Documentum connection for future reference.
2. **Connection** – Configure the following settings to connect the specified repository on the EMC Documentum server to the DocAve Agent.
    - **Agent** – The Agents displayed in the drop-down list are the ones whose Agent type contains **EMC Documentum Migration - EMC Documentum Agent**. From the drop-down list, select an Agent that is able to access the EMC Documentum server from the drop-down list. For more information of Agent type configuration, refer to the DocAve 6 Control Panel Reference Guide.
    - **Login name** – Enter the user's login name for accessing the specified repository.
    - **Password** – Enter the password for accessing the specified repository.
    - **Repository** – Enter the repository name in the text box. DocAve Agent will connect to the repository you specified here.
    - **Domain** – If the repository is running on the domain-required mode, enter the domain name.
3. Click **Validation Test** to verify whether the connection is configured correctly.
4. Click **OK** to save the configurations and return to the **EMC Documentum Connection** interface, or click **Cancel** to return to the **EMC Documentum Connection** interface without saving any changes.

Configuring Azure Locations (for High Speed Migrations only)

A Microsoft Azure location is used to stage migration data when importing to SharePoint Online and OneDrive for Business. A High Speed Online Migration uses a Microsoft Azure location during migration.

To access Azure Location settings, navigate to **High Speed Migration** > **Azure Location**. The **Microsoft Azure Location** interface appears.

Managing Azure Locations

Perform the following actions in the **Microsoft Azure Location** interface:

- **Create** – Click **Create** on the ribbon to create a new Microsoft Azure location. For details on creating a new Microsoft Azure location, refer to Creating and Editing Azure Locations.
- **View Details** – Click **View Details** on the ribbon to view the configured settings for the Microsoft Azure location. Here you can also click **Edit** on the ribbon to make changes to the Microsoft Azure location's settings. You will be redirected to the **Edit Microsoft Azure Location** page where you can change the settings of this Microsoft Azure location.
- **Edit** – Click **Edit** on the ribbon to change the configurations for this Microsoft Azure location. For details on editing configurations for a Microsoft Azure location, refer to Creating and Editing Azure Locations.
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, asking if you want to proceed with the deletion. Click **OK** to delete the selected Microsoft Azure locations, or click **Cancel** to return to the **Microsoft Azure Location** interface without deleting the selected Microsoft Azure locations.

Creating and Editing Azure Locations

To create a new Azure location, click **Create** on the ribbon. To modify an Azure location, select the Azure location, and then click **Edit** on the ribbon.

In the **Create a New Microsoft Azure Location** page, configure the following settings:

1. **Name and Description** – Enter a name for the Microsoft Azure location, and enter an optional description.
2. **Path** – Configure the following settings to configure a Microsoft Azure location to stage migration data.
    a. **Blob Service Endpoint URL** – Enter the blob service endpoint URL for the Microsoft Azure location that you are about to configure.
    b. **Storage Account Name** – Enter the Microsoft Azure storage account name in the text box
    c. **Primary Access Key** – Enter the Microsoft Azure primary access key in the text box.

    You can also validate the specific Microsoft Azure location by clicking **Validation Test**.
3. Click **Save** to complete the configurations for the Microsoft Azure location.

Configuring Migration Databases

To use EMC Documentum Migrator, you must configure a migration database to store detailed job information such as the status and type of the job, the user who runs the job, the start and end time of the job, plan information, agent information, the detailed information of each migrated object in the job, etc. For detailed information on the Migration database schema, refer to Appendix A: EMC Documentum Migration Database Information.

***Note:** The version of SQL Server required to create a migration database must be SQL Server 2005 SP1 or higher.

1. On the **Home** tab, in the **Settings** group, click **Migration Database**. The **Migration Database** pop-up window appears.
2. Click **Configure** in the **Edit** column to configure a migration database for the corresponding farm or My Registered Sites. The **Configure** pop-up window appears.
3. Configure the following settings for the database that will store migration job data:
    a. **Configure Migration Database** –To configure a migration database, enter a new **Database Server** and a **Database Name** in the corresponding fields.
    b. **Authentication** – Select the authentication mode for the migration database.
        - **Windows authentication** (recommended) – Use this method if you want the user's identity to be confirmed by Windows.
            - By default, the **Specify a Windows account** checkbox is not selected and DocAve will create a new Migration Database or access the existing Migration database using the Agent account you entered for the Agent on the destination SharePoint server.
            - If you want to access the database server with a specified Windows account, select the **Specify a Windows account** option and then select a managed account from the **Managed Account Profile** drop-down list, or click **New Managed Account Profile** to create a new managed account profile in Control Panel. For more information on configuring a managed account profile, refer to the DocAve 6 Control Panel Reference Guide.
        - If you select **SQL authentication**, the necessary information must be entered in the **Account** and **Password** fields. Enter the necessary information in the **Account** and **Password** fields.

    ***Note**: The account for creating or accessing the Migration database must be the **db_creator** in the SQL server where you want to create the Migration database and the **db_owner** in the newly created or existing Migration database. You can also validate the specified account by clicking **Validation Test**.

    c. **Failover Database Server** (optional) – Enter a failover database server. In the event that the specified migration database collapses, the data stored in the Migration database can be transferred to this standby database.

    Alternatively, you can configure a Migration Database in the **Advanced** settings by entering a connection string instead of configuring the settings in Step 3. Click **Advanced**; the **Connection String** section appears. Check the **Edit Connection String directly** checkbox to activate this feature, and then enter the connection string according to the example listed in the left pane. For more information about how to configure the connection string, refer to the **Connection**

String property in **SQL Server Books Online** or **SQL Server Tutorials** by navigating to **Start** > **Microsoft SQL Server** (with the version you are using) > **Documentation and Tutorials**.

4. Click **OK** to finish and save the configuration, or click **Cancel** to return to the **Migration Database** page without saving any configurations.
5. To view a configured migration database's details, select the farm and click **View Details** in the **Manage** group, or select **View Details** from the drop-down list of corresponding farm. A summary page appears where you can view detailed information such as Database Server, Database Name, and Authentication.

Configuring Filter Policies

The Filter Policy allows you to set up filter rules so that you can control what objects are migrated to the SharePoint destination, allowing you to target content more precisely. By setting up and saving filter policies, you can apply the same filter policy to different EMC Documentum migration plans without having to recreate them each time.

To access the **Filter Policy** interface, click **Profile Settings** on the Migrator **Home** tab. On the **Profile Settings** page, click **Filter Policy** on the ribbon.

The **Filter Policy** interface displays any filter policies that you have previously created in the main display pane.

In this interface, you can change the number of filter policies displayed per page and the order in which they are displayed. To change the number of filter policies displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the filter policies, click on a column heading such as **Filter Policy Name**, and **Description**.

You can perform the following actions in the **Filter Policy** interface:

- Click **Create** on the ribbon to create a new filter policy. For detailed on creating a new filter policy, refer to Creating and Editing Filter Policies.
- Click **Edit** on the ribbon to change the configurations for the selected filter policy. For details on editing configurations for filter policies, see Creating and Editing Filter Policies.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected filter policies, or click **Cancel** to return to the filter policy interface without deleting the selected filter policies.

Creating and Editing Filter Policies

To create a new filter policy, click **Create** on the ribbon. To modify a previously configured filter policy, select the filter policy, and then click **Edit** on the ribbon.

In the **Create Filter Policy** or **Edit Filter Policy** interface, configure the following settings:

1. **Name** – Enter the name for the filter policy that you are creating, or rename the selected filter policy that you are editing.
2. **Description** (optional) – Enter a description for this filter policy.
3. **Filter Rule** – Filters the files or folders that you want to migrate by setting up a set of filter criteria. Follow the steps below to set up your own filter rules:
    a. Under the filter rule configuration pane, select a filter level group from the drop-down list. By default, **Folder** is selected.

b. Click **Add a Filter Level Group**. A folder/file filter level group is created and the filter rule configuration field appears in the pane.

   - For the **Folder** filter level, you can select the following types of rules: **Name**, **Created Time**, and **Modified Time**. By default, the rule of **Name** is automatically created. You can click **Name** to change another rule from the drop-down list.
   - For the **File** filter level, you can select the following types of rules: **Name**, **Size**, **Created Time**, **Modified Time**, **Version**, **Format**, **Metadata: Text**, **Metadata: Number**, **Metadata: Yes/No**, and **Metadata: Date and Time**. By default, the rule of **Name** is automatically created. You can click **Name** to change to another rule from the drop-down list.

     ***Note**: **Metadata: Text**, **Metadata: Number**, **Metadata: Yes/No**, and **Metadata: Date and Time** are the rules for attributes of the EMC Documentum. To apply such rules, you must enter the internal names of the EMC Documentum attributes in the text boxes next to the rule text boxes.

     ***Note**: The file that has an attribute with multiple values will be filtered to be included as long as one of the attribute values meets the rule of the filter policy.

c. Configure the rule by setting the condition, the value, and the logic (**And** or **Or**) with other rules. By default, the logic is set to be **And** You can also change the logic to **Or** by selecting it from the drop-down list.

   - **And** – The content that meets all the criteria will be filtered to be included.
   - **Or** – The content that meets any one of the criteria will be filtered to be included.

d. Repeat steps from **a.** to **c.** to add more rules. If you want to delete a rule, click the delete (✕) button displayed at the end of the rule.

4. Click **OK** to save the configurations and return to the **Filter Policy** interface, or click **Cancel** to return to the **Filter Policy** interface without saving any changes. For more detailed information, refer to Examples of EMC Documentum Filter Policies.

Examples of EMC Documentum Filter Policies

The following table provides the detailed information of using EMC Documentum filter policies.

***Note:** All of the text boxes are not case sensitive, and do not support wildcards.

Filter Level	Rule	Condition	Value	Example
Folder	Name	Contains	*abc*	The folder whose name contains *abc* is included. For example: *abcdef,*or *abc*

Filter Level	Rule	Condition	Value	Example
		Does Not Contain	*abc*	The folder whose name does not contain *abc* is included. For example: *123*, or *bc.*
		Equals	*type*	The folder whose name is *type* is included.
		Does Not Equal	*type*	The folder whose name is not *type* is included.
	Created Time	Before	*2012-10-01 06:00 at Central Time (US & Canada)*	The folder that was created before *2012-10-01 06:00 at Central Time (US & Canada)* is included.
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The folder that was created after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within __ Day(s)/Week(s)/Month(s)	*3* **Days**	The folder which was created within *3 days* is be included.
		Older Than Day(s)/Week(s)/Month(s)	*3* **Days**	The folder whose created time was older than *3 days* is included.
	Modified Time	Before	*2012-10-01 06:00 at Central Time (US & Canada)*	The folder that was last modified before *2012-10-01 06:00 at Central Time (US & Canada)* is included.
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The folder that was last modified after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within __ Day(s)/Week(s)/Month(s)	*3* **Days**	The folder that was last modified within *3 days* is included.
		Older Than Day(s)/Week(s)/Month(s)	*3* **Days**	The folder whose last modified time was older than *3 days* is included.
File	Name	Contains	*abc*	The file whose name contains *abc* is included. For example: *abcdef.docx,* or *abc.xlsx.*

Filter Level	Rule	Condition	Value	Example
		Does Not Contain	*abc*	The file whose name does not contain *abc* is included. For example: *123.png*, or *bc.docx.*
		Equals	*type*	The file whose name is *type* is included.
		Does Not Equal	*type*	The file whose name is not *type* is included.
	Size	>= __ KB/MB/GB	*10* **KB**	The file whose size is not smaller than *10 KB* is included. For example: a file whose size is 15KB.
		<= __ KB/MB/GB	*10* **KB**	The file whose size is not larger than *10 KB* is included. For example: a file whose size is 5 KB.
	Created Time	Before	*2012-10-01 06:00 at Central Time (US & Canada)*	The file that was created before *2012-10-01 06:00 at Central Time (US & Canada)* is included.
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The file that was created after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within __ Day(s)/Week(s)/Month(s)	*3* **Days**	The file that was created within *3 days* is included.
		Older Than Day(s)/Week(s)/Month(s)	*3* **Days**	The file whose created time was older than *3 days* is included.
	Modified Time	Before	*2012-10-01 06:00 at Central Time (US & Canada)*	The file that was last modified before *2012-10-01 06:00 at Central Time (US & Canada)* is included.
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The file that was last modified after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within __ Day(s)/Week(s)/Month(s)	*3* **Days**	The file that was last modified within *3 days* is included.

Filter Level	Rule	Condition	Value	Example
		Older Than Day(s)/Week(s)/Month(s)	*3* **Days**	The file whose last modified time was older than *3 days* is included.
	Version	Latest [] Versions and Current Version	*2*	The latest two versions and the current version of the file are included.
	Format	Does Not Contain	*ppt8*	The file whose format name does not contain the *ppt8* is included. For example: *abc.gif*, or *abcd.doc*
		Equals	*ppt8*	The file whose format name is *ppt8* is included. For example: *abc.ppt*
		Contains	*pt*	The file whose format name contains *pt* is included. For example: *abc.ppt*
		Does Not Equal	*ppt8*	The file whose format name is not *ppt8* is included. For example: *abc.doc*
	Metadata: Text	Contains	*body*	The file whose attribute value for the entered Text attribute contains *body* is included. For example: *normal body,* or *body indent.*
		Does Not Contain	*body*	The file whose attribute value for the entered Text attribute does not contain *body* is included. For example: *normal body,* or *body indent.*
		Equals	*body*	The file whose attribute value for the entered Text attribute is *body* is included.
		Does Not Equal	*body*	The file whose attribute value for the entered Text attribute is not *body* is included.
	Metadata: Number	>=	*10*	The file whose attribute value for the entered Number attribute is not

Filter Level	Rule	Condition	Value	Example
				smaller than *10* is included. For example: a file whose attribute value for the entered Number attribute is 15.
		<=	*10*	The file whose attribute value for the entered Number attribute is not larger than *10* is included. For example: a file whose attribute value for the entered Number attribute is 5.
		=	*10*	The file whose attribute value for the entered Number attribute is *10* is included.
	Metadata: Yes/No	Is Exactly	*Yes*	The file whose attribute value for the entered Yes/No attribute is exactly *yes* is included.
	Metadata: Date and Time	Before	*2012-07-31 06:00 at Central Time (US & Canada)*	The file whose attribute value for the entered Date and Time attribute is before *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The file whose attribute value for the entered Date and Time attribute is after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within	*3* **Days**	The file whose attribute value for the entered Date and Time attribute is within *3 days* is included.
		Older Than	*3* **Days**	The file whose attribute value for the entered Date and Time attribute

Filter Level	Rule	Condition	Value	Example
				is older than *3 days* is included.

Configuring Mapping Settings

Before performing an EMC Documentum migration job, you may want to define the optional Domain Mapping, User Mapping, Group Mapping, and Permission Mapping settings. Default mapping settings are provided in the event that you do not want to customize the mappings.

Refer to the following sections to have a well understanding of the mapping settings, and be aware of when and how to configure the mapping settings.

Configuring Domain Mapping

If there are users with the same name, but with different domains in the source and destination respectively, you can map a source domain name to a SharePoint domain name in the destination by using domain mapping. During the migration, Migrator will change the source domain name to your specified domain name in the destination node. For example, the source user **summer\user1** can be mapped to SharePoint domain user **may\user1** through domain mapping.

1. To access **Domain Mapping**, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **Domain Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears.
3. Click **Create** on the ribbon to create a new domain mapping rule.

For specific instructions on setting up domain mapping, refer to DocAve 6 Control Panel Reference Guide.

Configuring User Mapping

User mapping maps an existing username to an existing SharePoint username in the destination. During the migration, Migrator will replace the source username with the specified username in the destination node.

1. To access User Mapping, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **User Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears.
3. Click **Create** on the ribbon to create a new user mapping rule.

For specific instructions on setting up user mapping, refer to DocAve 6 Control Panel Reference Guide.

Configuring Group Mapping

Group mapping maps an existing source group name, including the EMC Documentum group or Active Directory (AD) group, to a SharePoint group, an AD group, or a FBA role. During the migration, Migrator will replace the source group name with your specified group name in the destination node.

1. To access Group Mapping, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **Group Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears.
3. Click **Create** on the ribbon to create a new group mapping rule.

For specific instructions on setting up user mapping, refer to the DocAve 6 Control Panel Reference Guide.

Configuring Permission Mapping

Permission mapping allows you to map permissions in the source to SharePoint permissions in the destination. During the migration, Migrator will replace the source permission with your specified permission name in the destination node. EMC Documentum Migration provides you with a **Default Permission Mapping** rule to migrate the EMC Documentum permissions to the SharePoint permissions, which is contained as the default permission mapping rule in the default main profile.

***Note:** If you have configured both the user mapping and permission mapping in the Mapping Options profile, you can merge the source user's mapping permissions in SharePoint to the permissions of the mapped destination user.

1. To access Permission Mapping, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **Permission Mapping** from the drop-down menu. The **Permission Mapping** interface appears.

The **Permission Mapping** interface displays all previously configured permission mappings. In this interface, you can change the number of permission mappings displayed per page and the order in which they are displayed. To change the number of permission mappings displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the permission mappings, click on a column heading such as **Permission Mapping Name**, and **Description**.

You may perform the following actions to a permission mapping:

- Click **Create** on the ribbon to create a new permission mapping rule. For detailed on creating a new permission mapping, see Creating and Editing Permission Mappings.
- Click **View Details** on the ribbon and you will see the previously configured settings for this permission mapping. Here you can also click **Edit** on the ribbon to make changes to the permission mapping's settings. You will be brought to the **Edit Permission Mapping** page where you can change this permission mapping.
- Click **Edit** on the ribbon to change the configuration of this permission mapping. For details on editing permission mapping, see Creating and Editing Permission Mappings.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected permission mappings, or click

Cancel to return to the **Permission Mapping** interface without deleting the selected permission mappings.

Creating and Editing Permission Mappings

To create a new permission mapping, click **Create** on the ribbon. To edit a previously configured permission mapping, select the permission mapping and then click **Edit** on the ribbon.

In the **Create or Edit Permission Mapping** interface, configure the following settings:

1. **Permission Mapping Name** – Enter a name for the permission mapping that you are about to create or edit. Then enter an optional description for this permission mapping for future reference.
2. **Permission Mapping** – Set up the mapping of EMC Documentum permissions to SharePoint permissions. You can configure the permission mappings on the following levels:
   - **Repository Level** – Map the EMC Documentum permissions on the repository level to the specified SharePoint groups, and then specify the permission levels for the SharePoint group. You can create a new SharePoint group by clicking **New SharePoint Group** from the **SharePoint Group** drop-down menu, or you can create a new SharePoint permission level by clicking **New SharePoint Permission Level** from the **SharePoint Permission Level** drop-down menu. When you select **Add a Repository Mapping**, you can also create a new repository level permission by clicking **New EMC Documentum Permission**.
   - **Cabinet/Folder Level** – Map the EMC Documentum permissions on the cabinet/folder level, you can choose the default SharePoint permission levels, or previously created SharePoint permission levels, or you can directly create a new SharePoint permission level by clicking **New SharePoint Permission Level** from the drop-down menu. When you select **Add a Cabinet/Folder Mapping**, you can also create a new cabinet/folder level permission by clicking **New EMC Documentum Permission**.
   - **Document Level** – Map the EMC Documentum permissions on the document level, you can choose the default SharePoint permission levels, or previously created SharePoint permission levels, or you can directly create a new SharePoint permission level by clicking **New SharePoint Permission Level** from the drop-down menu. When you select **Add a Document Mapping**, you can also create a new document level permission by clicking **New EMC Documentum Permission**.

   If you want to map the source customized permissions to SharePoint, you can create EMC Documentum permissions in DocAve depending on the source permissions.
3. Click **OK** to save the configurations and return to the **Permission Mapping** interface, or click **Cancel** to return to **Permission Mapping** interface without saving any changes.

EMC Documentum Permissions

You can manage EMC Documentum permissions by creating a new EMC Documentum permission, viewing details of the existing EMC Documentum permissions, editing a previously configured EMC Documentum permission, or deleting previously configured EMC Documentum permissions.

To access **Manage EMC Documentum Permission** interface, click **Profile Settings** on the **Home** tab > **Mappings** > **Permission Mapping** > **Manage EMC Documentum Permission**. The **Manage EMC Documentum Permission** interface appears, and you will see a list of provided or previously configured EMC Documentum permissions. By default, the **Repository Level** is selected and the permissions on the repository level are displayed. You can change the level by clicking **Repository Level** and select another level.

In this interface, you can change the number of EMC Documentum permissions displayed per page and the order in which they are displayed. To change the number of EMC Documentum permissions displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the EMC Documentum permissions, click on a column heading.

Perform the following actions on the **Manage EMC Documentum Permission** page.

- **Repository/Cabinet/Folder/Document Level** – By default, the **Repository Level** is selected. You can manage the Document permissions on the repository level. To change to other levels, click **Repository Level**, and then select **Cabinet/Folder Level**, or **Document Level** to manage the corresponding permissions.
- Click **Create** on the ribbon to create a new EMC Documentum permission. For detailed instructions on creating a new EMC Documentum permission, see Creating and Editing EMC Documentum Permissions.
- Click **View Details** on the ribbon and you will see the settings for this EMC Documentum permission. You will be brought to the **Edit EMC Documentum Permission** page where you can change its settings.
- Click **Edit** on the ribbon to change the configurations for this EMC Documentum permission. Note that the pre-defined EMC Documentum permissions are not editable. For details on editing configurations for EMC Documentum permission, see Creating and Editing EMC Documentum Permissions.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected EMC Documentum permissions, or click **Cancel** to return to the **Manage EMC Documentum Permission** interface without deleting the selected EMC Documentum permissions. Note that the pre-defined EMC Documentum permission cannot be deleted.

Creating and Editing EMC Documentum Permissions

To create a new EMC Documentum permission, select the level where you want to create the permission and then click **Create** on the ribbon. To modify a previously configured EMC Documentum permission, select the EMC Documentum permission, and then click **Edit** on the ribbon.

In the **Create New EMC Documentum Permission** or **Edit EMC Documentum Permission** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this permission that you are about to create or edit. Then enter an optional **Description** for future references.

2. **Permissions** – Choose which permissions to be included in this permission.
    - **Repository Level** – When creating a permission on the repository level, specify the privilege, the extended privilege, and the client capability.
    - **Cabinet/Folder Level** – When creating a permission on the cabinet/folder level, specify the basic permission and the extended permission.
    - **Document Level** – When creating a permission on the document level, specify the basic permission and the extended permission.

Click **OK** to save the configurations and return to the **Manage EMC Documentum Permission** interface, or click **Cancel** to return to the **Manage EMC Documentum Permission** interface without saving any changes.

SharePoint Group

You can manage SharePoint groups by creating a new SharePoint group, viewing details of a previously configured SharePoint group, editing a previously configured SharePoint group, or deleting a previously configured SharePoint group.

To access **Manage SharePoint Group** interface, click **Home** tab > **Mappings** > **Permission Mapping** > **Manage SharePoint Group**. The **Manage SharePoint Group** interface appears, and you will see a list of provided or previously configured SharePoint groups.

In this interface, you can change the number of SharePoint groups displayed per page and the order in which they are displayed. To change the number of SharePoint groups displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the SharePoint groups, click on a column heading.

Perform the following actions in the **Manage SharePoint Group** interface:

- Click **Create** on the ribbon to create a new SharePoint group. For detailed on creating a new SharePoint group, see Creating and Editing SharePoint Groups.
- Click **View Details** on the ribbon and you will see the settings for this SharePoint group. Here you can also click **Edit** on the ribbon to make changes to the SharePoint group's settings. You will be brought to the **Edit SharePoint Group** interface where you can change this SharePoint group.
- Click **Edit** on the ribbon to change the configuration of this SharePoint group. For details on editing SharePoint group, see Creating and Editing SharePoint Groups.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected SharePoint groups, or click **Cancel** to return to the **SharePoint Group** page without deleting the selected SharePoint groups.

Creating and Editing SharePoint Groups

To create a new SharePoint group, click **Create** on the ribbon. To modify a previously configured SharePoint group, select the SharePoint group, and then click **Edit** on the ribbon.

In the **Create SharePoint Group** or **Edit SharePoint Group** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this group that you are about to create or edit. Then enter an optional **Description** for future references.
2. **SharePoint Group Owner** – Specify the SharePoint group owner.
3. **Site Title** - Whether to add the site title to be a part of the group name. For example, if the site title is **A** and the group name you specified is **B**, the created SharePoint group name is **A B**.

SharePoint Permission Levels

You can manage SharePoint permission levels by creating a new level, viewing details of existing levels, editing a previously configured level, or deleting a level.

To access **Manage SharePoint Permission Level** interface, click **Profile Settings** on the **Home** tab > **Mappings** > **Permission Mapping** > **Manage SharePoint Permission Level**. The **Manage SharePoint Permission Level** interface appears, and you will see a list of provided or previously configured SharePoint permission levels.

In this interface, you can change the number of SharePoint permission levels displayed per page and the order in which they are displayed. To change the number of SharePoint permission levels displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the SharePoint permission levels, click on a column heading.

You can perform the following actions in the **Manage SharePoint Permission Level** page:

- Click **Create** on the ribbon to create a new SharePoint permission level. For detailed instructions on creating a new SharePoint permission level, see Creating and Editing SharePoint Permission Levels.
- Click **View Details** on the ribbon and you will see the previously configured settings for this SharePoint permission level. Here you can also click **Edit** on the ribbon to make changes to the SharePoint permission level's settings. You will be brought to the Edit SharePoint Permission Level page where you can change its settings.
- Click **Edit** on the ribbon to change the configurations for this SharePoint permission level. Note that the pre-defined SharePoint permission levels including Contribute, Design, Full Control, Read, and View Only, are not editable. For details on editing configurations for a SharePoint permission level, see Creating and Editing SharePoint Permission Levels.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected SharePoint permission levels, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without deleting the selected SharePoint permission levels. Note that the pre-defined SharePoint permission levels cannot be deleted.

Creating and Editing SharePoint Permission Levels

To create a new SharePoint permission level, click **Create** on the ribbon. To modify a previously configured customized SharePoint permission level, select the SharePoint permission level, and then click **Edit** on the ribbon.

In the **Create SharePoint Permission Level** or **Edit SharePoint Permission Level** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this permission level that you are about to create or edit. Then enter an optional **Description** for future references.
2. **Permissions** – Choose which permissions to include in this permission level. You can select specified permissions of list permissions, site permissions, and personal permissions by checking the checkboxes before a specified permission. Check the **Select All** checkbox to select or clear all permissions.

Click **OK** to save the configurations and return to the **Manage SharePoint Permission Level** interface, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without saving any changes.

Configuring Dynamic Rules

Dynamic rules map EMC Documentum fields to SharePoint metadata using DLL files customized in C#. In a migration profile, if dynamic rules conflict with the configured column mapping, dynamic rules take over the role of column mapping.

Managing Dynamics Rules

To use the dynamic rule feature, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears. Click **Dynamic Rule** on the ribbon.

In the **Dynamic Rule** interface, you will see a list of previously configured dynamic rules.

In this interface, you can change the number of dynamic rules displayed per page and the order in which they are displayed. To change the number of dynamic rules displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the dynamic rules, click on a column heading such as **Name**, **Description**, **DLL File Name**, and **Last Modified Time**.

You may perform the following actions to a Dynamic Rule:

- Click **Create** on the ribbon to create a dynamic rule. For detailed information on creating a new dynamic rule, see Configuring a Dynamic Rule.
- Click **View Details** on the ribbon and you will see the previously configured settings for this dynamic rule. Here you can also click **Edit** on the ribbon to make changes to the dynamic rule's settings. You will be brought to the **Edit Dynamic Mapping** page where you can change this dynamic rule.

- Click **Edit** on the ribbon to change the configuration of this dynamic rule. For details on editing dynamic rule, see Configuring a Dynamic Rule.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected dynamic rules, or click **Cancel** to return to the dynamic rule without deleting the selected dynamic rules.

Configuring a Dynamic Rule

To create a new dynamic rule, click **Create** on the ribbon. To edit a previously configured dynamic rule, select the dynamic rule and then click **Edit** on the ribbon.

In the **Create Dynamic Rule** interface or **Edit Dynamic Rule** interface, configure the following settings:

1. **Name and Description** – Enter a **Dynamic Rule Name** for the dynamic rule that you are about to create or edit. Then enter an optional description for this dynamic rule for future reference.
2. **Upload a DLL File** – Upload a DLL file customized in C# from the local path. This file contains your configured mapping settings.
3. Click **OK** to save the configuration and return to the **Dynamic Rule** interface. Click **Cancel** to return to the **Dynamic Rule** interface without saving any configuration or changes.

Setting Up EMC Documentum Migration Profiles

The Migration Profile allows you to specify and define numerous settings for the migration jobs including Migration Options, Filter Options, Mapping Options, and Advanced Options. Follow the instructions below to create a Migration Profile.

1. From the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
3. Enter a profile name in the pop-up window and click **OK**.
4. Select the **Migration Options** from the left-hand pane. Select a previously configured **Migration Options Sub-Profile** from the drop-down menu or enter a name and click **Create a New Profile** to create a new sub-profile. For details about this section, refer to Migration Options.
5. Select the **Filter Options** from the left-hand pane and select a previously configured filter policy from the drop-down menu or click **New Filter Policy** from the drop-down menu to create a new filter policy. For details on creating a filter policy, refer to Creating and Editing Filter Policies.
6. Select the **Mapping Options** from the left-hand pane. Select a previously configured **Mapping Options Sub-Profile** from the drop-down menu or enter a name and click **Create a New Profile** to create a new sub-profile. For details about this section, refer to Mapping Options.
7. Select the **Advanced Options** from the left-hand pane and configure the **Dynamic Rule**, **Character Length Settings** and the **Illegal Character Replacement Settings**. For details about this section, refer to Advanced Options.
8. Click **Save** in the **Main Profile** row to save the profile. Alternatively, click **Save as** and enter a profile name to save it as another profile. Select **Save and replace the existing main profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Migration Options

Configure the settings in Migration Options to specify how to migrate the content and the security to SharePoint. Set up a sub-profile of Migration Options by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. Click **Migration Options** on the left-hand pane, and from the **Profile Settings** tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the **Migration Options** field active.
3. From the Profile Setting tab, under the Profile/Sub-profile group, click New.
4. Enter a sub-profile name in the pop-up window and click **OK**.
5. Click the **Content** tab to configure the following settings.
    - **Managed Path** – If the destination node is a Web application, the site collections will be created under this Web application when migrating the source data. The value entered in the **Customized a managed path** textbox and the site template selected from the **Site**

template drop-down list are the managed path and the site template for the newly created site collection. You are allowed to enter the site template ID in the **Site template** textbox to specify a desired site template. You can also select a language for this newly created site collection from the **Site language** drop-down list.

*__Note__: The **Managed Path** setting is not available for EMC Documentum High Speed Migration.

- **Navigation Options** – Choose navigation design options for destination newly generated sites when performing the migration.
    - Display the site on the top link bar of the parent site when creating a site
    - Display the site on the Quick Launch of the parent site when creating a site
    - Inherit top link bar of the parent site when creating a site

  *__Note__: The **Navigation Options** setting is not available for EMC Documentum High Speed Migration.

- **Document Migration** – Configure the settings for the document migration.
    - **Migrate root files to a document library** – When the source node is a cabinet node, selecting this option will migrate the root files that are under the cabinet to a specified SharePoint document library. If you select this option, customize the library name by entering a name in the text box. **Root Documents** is provided as a default document library name. If you do not select this option, the root files under the cabinet will not be migrated to the destination.
    - **Migrate incompatible version numbers** – Since EMC Document use the concept of **Branch Version** which is not supported in SharePoint, you can use this option to specify how to migrate the source versions.
        - Select the checkbox to migrate all source versions. The source versions will be changed after the migration by using the SharePoint version format: source major version remains the same; for each major version, its minor version and branch version become the destination minor version. View the example below:

Source Version	Destination Version
1.0	1.0
2.0	2.0
2.1	2.1
2.1.1.0	2.2
2.1.1.2	2.3
2.5	2.5

        - Deselect the checkbox to only migrate source major and minor versions to destination and the migrated major and minor versions remain the same. The branch versions will be skipped and recorded in the job report. View the example below:

Source Version	Destination Version
1.0	1.0
2.0	2.0
2.1	2.1
2.1.1.0	Skipped
2.1.1.2	Skipped
2.5	2.5

- **Virtual Document Migration** – Specify how to migrate with the source virtual documents.
    - Select **Document Set** to migrate a source virtual document to a destination document set. DocAve migrates the source virtual document file and each child to the destination document set, migrates desired versions (all versions, major versions, or major and minor versions, which is decided by the selection of the **Migrate incompatible version numbers** option and your source data's version situation) of a virtual document to be the versions of destination document set, and migrates the corresponding versions of each file to be the versions of destination file.
    - Select **Folder** to migrate a source virtual document to a destination folder.
        - Create a first-level folder named by the virtual document file. Migrate desired versions of the virtual document into this first-level folder. Each virtual document version has its own folder under this first-level folder.
        - Each migrated virtual document version's each child and its current version of the virtual document file will be migrated to their own folder named by the virtual document name and the version.
        - Migrate the virtual document file and its desired versions into this first-level folder.
- **Snapshot Migration** – Specify how to migrate with the source snapshots.
    - Select **Document Set** to migrate a source snapshot to a destination document set. The virtual document and each child, contained in this snapshot, are migrated to the document set and the version history is kept.
    - Select **Folder** to migrate a source snapshot to a destination folder. The virtual document and each child, contained in this snapshot, are migrated to the folder and the version history is kept.
- **Rendition Migration** - Specify how to migrate with the source renditions.
    - Select **Migrate rendition to document set** to migrate a source file and all its added renditions to a destination document set. DocAve migrates desired versions (all versions, major versions, or major and minor versions, which are decided by the selection of the **Migrate incompatible version numbers** option and your source data's current version) of this source file to be the versions of the destination document set. The renditions in each version are migrated to the document set.

- Deselect this option to not migrate the renditions to the destination document set.

DocAve does not support the migration of renditions that are added to a virtual document.

- **Linked Folder/Document Migration** – Configure how to migrate the source linked folders and/or documents, including the child files of virtual documents.
  - Select **Folder/document** to migrate a linked folder or document as a destination folder or document.
  - Select **Link To a Document item** to migrate a source linked folder or document to the destination Link To a Document item. When this option is selected, there are two possible results of a migration job:
    - If the linked folder or document and its source are migrated in the same migration job, the destination item provides the link for the destination SharePoint object of the corresponding source folder or document.
    - If a linked folder or document and its source are not migrated to the destination in the same migration job, only the source object's ID will be stored in the destination item's URL. Additionally, you can also update the links by selecting the **Update previously migrated links** option.
- **Folder Structure Management** – Choose a method of structuring folders while migrating EMC Documentum folders to SharePoint.
  - If you select a library or folder node as the destination, choose either of the following folder structuring methods:
    - **Collapse all the folder structure** – Migrate all of the files within the source folders to the destination libraries or folders directly, breaking the folder structures. To track the original folder structure, select the **Add a column to keep the source path/parent folder name** option and then select the **Source path** option to add a column for keeping the source path of the folder, or select the **Parent folder name** option to add a column for keeping the parent folder name of the migrated content.
    - **Create a top-level folder on the destination** – Create top level folders for containing the migrated EMC Documentum content in the destination after the migration, and preserve the source folder structures under the top level folders. By default this checkbox is selected. If deselect this checkbox, the source content will be migrated to the destination without the top level folders created, but preserving the source folder structure.
  - If you select a site as the destination node, a library with the same name as the source top-level folder will be created in the destination site. Use the **Collapse all the folder structure** option to break the source folder structure under the newly created library.

- To break the source folder structure, select the **Collapse all the folder structure** option. All of the files within the source folder will be migrated to the newly created library directly, therefore, breaking the source folder structure.
- To preserve the source folder structure in the newly created library, deselect the **Collapse all the folder structure** option.

6. Click the **Security** tab next to the **Content** tab and configure the **Security** settings.
   - **Migrate user** – Migrates the source users to SharePoint.
   - **Migrate security** – When you choose to migrate the source users, you can further select whether to migrate the users' security to SharePoint by selecting the **Migrate security** checkbox.
   - **Permission Inheritance** – For the source contents that inherit permissions from the parent, select the **Break permission inheritance** option to make the migrated content and/or the newly created containers have the unique permissions, and do not inherit parent permissions. If you leave this checkbox deselected, the migrated content and/or the newly created containers will use the same permissions as the destination parent. For the source contents that do not inherit permissions from the parent, these contents will have unique permissions after the migration.
7. Click **Save** to save the profile. Alternatively, click **Save as** and enter a profile name to save it as another profile. Select **Save and replace the existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Mapping Options

Configure settings in Mapping Options to set the List Mapping, Content Type Mapping, and Security Mapping. Set up a sub-profile for Mapping Options by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. Click **Mapping Options** on the left-hand pane, and from the **Profile Settings** tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the **Mapping Options** field active.
3. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
4. Enter a sub-profile name in the pop-up window and click **OK**.
5. Configure the following settings by referring to corresponding sections: List Mapping, Content Type Mapping, and Security Mapping.
6. Click **Save** to save the profile. Alternatively, click **Save as** and enter a profile name to save it as another profile. Select **Save and replace the existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile

List Mapping

Set up the list name mapping to specify a new name for the migrated source list. Without list mapping, the newly created library name is the same as the name of the selected source folder.

- If the specified destination library in the list mapping does not exist in the destination, DocAve creates a new library in the destination.
- If the specified destination library in the list mapping exists in the destination, DocAve migrates the contents from the source list to this existing library. This logic takes effect when you select a destination node that is higher than the library level.

To change the library name, set up the list name mapping as follows:

1. With **List Mapping** tab activated, click **Add a List Name Mapping** on the **List Name Mapping** section.
2. Enter an EMC Documentum folder name in the **EMC Documentum Folder Name** text box.
3. Enter a SharePoint library name in the **SharePoint List Name** text box.
4. Repeat steps from 1 to 4 to add another list name mapping. To delete the list name mappings, select the checkboxes and then click **Deleted the Selected List Name Mapping(s)**.

Content Type Mapping

Configure the content type mapping, which allows you to match the types of folders or documents in the source to SharePoint content types.

- **Use the content type mapping generated by Migrator Tool** – Select this option to use the content type mapping settings generated by Migrator Tool. The content type mapping settings are in the configuration file located in the *…\AvePoint\DocAve6\Agent\data\Migrator\DocumentumMigrator\TypeMappings* directory. For details of using the **MigratorTool.exe**, refer to the DocAve 6 Supplementary Tools User Guide.
- **Manually configure the content type mapping** – Select this option to configure the content type mapping manually. You can also click **Upload** in the **Sub-profile** group on the ribbon to upload an XML file generated by Migrator Tool for further editing. After selecting this option, the content type mapping configuration pane appears.
    i. In the **Content Type Mapping** section, enter the source EMC Documentum type name in the **EMC Documentum Type** text box, and enter the destination SharePoint content type name in the **SharePoint Content Type Name** text box. The source EMC Documentum type will be mapped to the destination SharePoint content type after the migration.
    ii. On the **Column Mapping** section, configure the column mapping settings for this content type mapping. The source attribute will be mapped to the specified destination column.

iii. Click **Add a Column Mapping**, configure the following settings:

iv. Enter the source attribute name in **EMC Documentum Attribute Name** text box.

v. Enter the destination column name in **SharePoint Column Name** text box.

vi. Select a column type from the **SharePoint Column Type** drop-down list.

When selecting **Person or Group** column type, the **User Name Type** pop-up window appears. Specify the type of the source attribute, **Login Name** or **Display Name**.

When selecting **Managed Metadata** column type, the **Managed Metadata** pop-up window appears. Enter an existing term set path in the **Term Set Path** text box. To enter a term set path with a nested structure, separate each section of the path with semicolons. For example: "Term Group; Term Set; Term 1; Term 2."

- To allow EMC Documentum Migration jobs to migrate the value of one source attribute as multiple managed metadata terms to the destination managed metadata column, select the **Allow multiple values** checkbox. EMC Documentum Migration will split the source attribute value into multiple values for the destination managed metadata column by a separator. The default separator is a semicolon. For example, the value of the source attribute **1;2;3** will be mapped as three destination managed metadata terms: **1**, **2**, and **3** and are displayed as **1;2;3** in the destination column. To customize the separator for the multiple values, select the **Allow multiple values separated by; into columns** checkbox and enter the desired character into the text box.
- If you deselect the **Allow multiple values** checkbox, the value of the source attribute will be mapped as one managed metadata term in the destination managed metadata column.

vii. Select whether to use these column mapping settings in this content type mapping. Select the checkbox of **Migrate Column** to use it and migrate the source attribute, and deselect the checkbox of **Migration Column** to not use it and not migrate the source attribute.

viii. Specify whether to add this SharePoint column to the default view by selecting the **Add to Default View** checkbox.

Security Mapping

Specify the user mapping, domain mapping, group mapping, and permission mapping.

- **User Mapping** (Optional) – Replaces existing user name in EMC Documentum with another username in SharePoint metadata fields. Select a previously created user

mapping rule from the drop-down menu, and you are able to access the detailed information about this selected user mapping by clicking **View**. To create a new user mapping rule, click **New User Mapping** in the drop-down menu, and the **User Mapping Create** page appears. For specific instructions on setting up user mapping, refer to the DocAve 6 Control Panel Reference Guide.

- **Domain Mapping** (Optional) – Replaces existing domain name in EMC Documentum with another domain name in SharePoint metadata fields. Select a previously created domain mapping rule from the drop-down menu and click **View** to access detailed information about Domain Mapping. To create a new domain mapping rule, click **New Domain Mapping** in the drop-down menu, and the **Domain Mapping Create** page appears. For specific instructions on setting up domain mapping, refer to the DocAve 6 Control Panel Reference Guide.
- **Group Mapping** (Optional) – Replaces groups in EMC Documentum to the existing groups in SharePoint metadata field. Select a previously created group mapping rule from the drop-down menu and click **View** to access detailed information about Group Mapping. To create a new group mapping rule, click **New Group Mapping** in the drop-down menu, and the **Group Mapping Create** page appears. For specific instructions on setting up group mapping, refer to the DocAve 6 Control Panel Reference Guide.
- **Permission Mapping** (Required) – Maps the EMC Documentum permissions to the SharePoint permissions. A default permission mapping rule is provided with the name of **Default Permission Mapping**. Select a previously created permission mapping rule from the drop-down menu and click **View** to access detailed information about Permission Mapping. To create a new permission mapping rule, click **New Permission Mapping** in the drop-down menu, and the **Permission Mapping Create** page appears. For specific instructions on setting up permission mapping, refer to Creating and Editing Permission Mappings.

Advanced Options

Configure the settings in Advanced Options to set the dynamic rules, character length settings, and the illegal character replacement settings. The configuration settings are saved to the current main-profile.

Thread Setting

Configure the number of threads to simultaneously migrate source content to SharePoint Online by entering an integer in the text box. You can define a value between 1 and 256. The default value is **32**.

***Note**: This setting is only available for EMC Documentum High Speed Migration.

Source Data Package Setting

Configure the maximum number and maximum size of objects that can be stored in a data package. If either the number of objects or the total size of objects exceeds the configured limitation, the source data package will be split.

By default, every **100** objects or the objects whose total size is **100 MB** will be split into a package. You can define the maximum object number between 50 and 1000, and define the maximum size of objects between 50 and 1024 MB.

***Note**: This setting is only available for the EMC Documentum High Speed Migration.

Dynamic Rule

Maps the source EMC Documentum type names, filed types, field names and the corresponding values to the corresponding attributes in SharePoint. Select a previously created dynamic rule or click **New Dynamic Rule**. For more information on creating a dynamic rule, see Configuring a Dynamic Rule.

Character Length Settings

In the **Character Length Settings** section, configure character length limitations for SharePoint URLs, file names, and folder names. In SharePoint, the maximum length of a URL is 260 characters and the maximum length of file or folder name is 260 characters.

- **Maximum Length of the folder name** – The default value is 60 characters, however, the system maximum is 260 characters. Only the SharePoint 2016 or SharePoint Online folder name length can be between 129 and 260 characters. If a folder name exceeds the limitation set with this option, the extra characters will be pruned. For example: **10** is the maximum character length of the folder name, then a folder named **012345678910111213** will be pruned to **0123456789** after the migration.
- **Maximum Length of the file name** – The default value is 80 characters, however, the system maximum is 260 characters. Only the SharePoint 2016 or SharePoint Online file name length can be between 129 and 260 characters. If the total number of characters of a file name its extension exceed the limitation set with this option, the extra characters will be pruned. For example: **6** is the maximum character length, then a file named **012345.doc** will be pruned to **01.doc** after the migration.
- **Maximum Length of the SharePoint URL –** The default value is 255 characters, and the system maximum is 400 characters. Only the SharePoint Online URLs can be between 261 and 400 characters. The length of the SharePoint URL is calculated from the first character of the managed path. For example, the length of SharePoint URL is calculated from the **s** character within **sites** in the URL: **http://www.contoso.com/sites/marketing/documents/_layouts/xlviewer.aspx**. When a folder or file's URL exceeds the maximum character length, the folder and all its files will be migrated to the next folder up in the hierarchy until the URL does not exceed the limitation.

Illegal Character Replacement Settings

The source EMC Documentum group names, folder names, and file names may contain some characters which are illegal characters in SharePoint. Configure the **Illegal Character Replacement Settings** section to replace these illegal characters with valid characters while migrating the corresponding EMC

Documentum objects to SharePoint via the EMC Documentum Migration jobs. By default, all illegal characters are replaced with an underscore (_). Click **Group Level**, **Folder Level** or **File Level** to configure the settings for folder and/or file names.

- To modify an illegal character mapping, double-click the underscore in the **Replace with** column and enter a new valid character.
- To add an illegal character mapping, click **Add an Illegal Character**. Then enter the illegal character in the **Illegal character in SharePoin**t column and the valid character in the **Replace with** column.
- To delete one or more illegal character mapping, select the **Illegal characters in SharePoint** check box, all mappings are selected, deselect the mappings that you do not want to delete, and then click **Delete the Selected Illegal Character(s)**.

  Note the following:

  - In SharePoint 2016, **~**, **&**, **{**, and **}** are no longer folder level illegal characters. Additionally, **~**, **&**, *****, **:**, **{**, **}** and **|** are no longer file level illegal characters. You can delete mappings of these characters; however, deleting those mappings may result in errors on SharePoint 2010, SharePoint 2013, or SharePoint Online destination migration jobs.
  - In SharePoint Online, # and % are not folder and file level illegal characters any more. You can delete mappings of these characters, but note that the deletion may result in errors on migration jobs if the profile is applied to jobs whose destination is SharePoint on-premises.
  - If you want to delete mappings for default illegal characters, you must disable the **<IsEnableIllegalCharReplacement Flag="true"/>** node in the **MigrationCommonConfiguration.xml** configuration file. The file is located in the *…\AvePoint\DocAve6\Agent\data\Migrator\MigrationCommonMigrator* directory on the destination DocAve Agent server. Otherwise, the deleted illegal character will be replaced with an underscore (_).

    ***Note**: If the name of a migrated folder ends with one or multiple periods (.), EMC Documentum Migration will replace all periods (.) with underscores (_) during the migration job. If the name of a migrated file ends with one or multiple periods (.), EMC Documentum Migration will replace the last period (.) with an underscore (_) during the migration job.

Managing Sub-profiles

EMC Documentum Migrator provides the Migration Options sub-profile to manage the folder structure and the securities for the migrated contents. Additionally, it provides the Mapping Options sub-profile to specify the Property Mapping, Content Type Mapping, and Security Mapping (the Security Mapping contains the User Mapping, Domain Mapping, Group Mapping, and Permission Mapping).Refer to the information below to manage an existing sub-profile.

Editing an Existing Sub-profile

1. Select an existing sub-profile from the **Sub-Profile** drop-down list.
2. Click **Edit Sub-profile** in the **Sub-profile** group to edit the sub-profile settings.
3. Click **Save** in the **Sub-profile** group to save the sub-profile settings. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace the existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Deleting an Existing Sub-profile

1. Select an existing sub-profile from the **Sub-Profile** drop-down list.
2. Click **Delete** in the **Profile/Sub-profile** group to delete the sub-profile, or directly click **Delete** next to the sub-profile name in the drop-down list. Note that the default sub-profile and the sub-profile used in the main profile cannot be deleted.

Uploading a Previously Configured Sub-profile

1. In the **Profile Settings** interface, click **Migration Options** or **Mapping Options** on the left panel.
2. Click **Edit Sub-profile** to make the **Migration Options** field active.
3. Click **Upload** in the **Sub-profile** group.
4. Select a previously created sub-profile and click **Open** to upload it. If a sub-profile having the same name exists in DocAve, you have two options:
    - **Upload as a new profile** – Upload the sub-profile and name the uploaded sub-profile by adding a suffix, for example, *subprofile_1*.
    - **Overwrite current profile** – Replace the existing sub-profile. The Default Mappings sub-profile and the Default Migration Options profile sub-profile cannot be overwritten.

Downloading an Existing Sub-profile

1. In the **Profile Settings** interface, click **Migration Options** or **Mapping Options** on the left-hand panel.
2. Select an existing sub-profile and click **Edit Sub-profile** in the **Sub-profile** group.
3. Click **Download** in the **Sub-profile** group to save the sub-profile to the local disk.

Performing an EMC Documentum Migration

An EMC Documentum migration migrates contents, configurations, and securities from the EMC Documentum environment to the SharePoint environment.

To start an EMC Documentum migration job, click **Online Migration** on the ribbon in the **Home** tab. To perform an EMC Documentum migration job, follow the instructions below:

Selecting the Source and Destination Nodes

1. In the **Source** pane, click **Select Source**. The **Select Source** pop-up window appears.
2. On the **Select Source** pop-up, select the desired Agent from the **Agent** drop-down list. The connections relied on this Agent will be loaded, and select the desired one from the **Connection** drop-down list.
3. Click **OK** and return to the **Source** pane. The connection name is displayed on the **Source** pane. If you want to change the current connection, click **Change Source** to select another connection.
4. Click the connection name to load the source data and then expand the data tree to specify the data to be migrated.
    a. Find the node that you wish to migrate. If you are working with a large environment, enter the name of the node into the **Input Keyword** text box to search for it. You can only search the nodes whose names are displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search.
    b. Select the source nodes by selecting the corresponding checkboxes.
        - Underneath each node, there is a node named **Items** to display how many objects are contained in the **Items** node. You can click the **Items** node and the **Item Browser** interface appears. Select the objects that you wish to migrate by selecting corresponding checkboxes and click **OK**.
        - Click **Actions** on the top right corner of the source pane. Click **Only show selected nodes** to show the selected nodes, and click **Shown all nodes** to show all available nodes.
5. In the destination pane, click the farm name and expand the data tree to specify the destination node (supported from the web application node to the folder node).
    a. Find the node which you wish to migrate the source data to. If you are working with a large environment, enter the name of the node into the **Input Keyword** text box to search for it. You can only search the nodes whose names are displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search.
    b. To narrow down the search criteria and display fewer nodes on the tree, right-click a particular farm/Web application level node, a **Sites** node, a **Lists** node, or a **Folders** node

on the tree and select **Advanced Search**. In the **Advanced Search** interface, click **Add a Criterion** and configure the following settings:

i. **Rule** – Select the rule for this search. You can use the **URL** rule to filter Web application level nodes, and the **URL** rule and the **Name** rule to filter site collection/site/list/library/folder level nodes.

ii. **Condition** – Select the condition for the rule from the drop-down list.

iii. **Value** – Enter the value for the rule in the text box.

iv. To add more criteria, click **Add a Criterion**, and repeat steps above. You can change the logical relationships between the criteria by clicking the **And** or **Or**. By default, the logical relationship is set to **And**.

- **And** – Child nodes that meet all of the criteria will be included in the result.
- **Or** – Child nodes that meet any criterion will be included in the result.

The **Basic Filter Condition** area displays the logic relationships of filter criteria.

v. Click Search to start searching the child nodes.

c. Select the destination node by selecting the corresponding checkbox.

- You can also create a new container to be the destination node without leaving the current page.
- For details on creating a container in SharePoint, refer to Creating Containers.
- Click **Actions** on the top right corner of the source pane. Click **Only show selected node(s)** to show the selected nodes, and click **Shown all nodes** to show all available nodes.

6. When finished configuring the job, select one of the following options:

- Click **Run Now** to perform a migration job immediately. For more information on the **Run Now** interface, refer to Configuring the Run Now Interface.
- Click **Save As New Plan** to configure more specific settings and then save them as an EMC Documentum migration plan, which then can be used to perform a n EMC Documentum migration job. For more information on the **Save As New Plan** interface, refer to Configuring the Save As New Plan Interface.

Creating Containers

Prior to migration, containers should be created in the destination to store the migrated content. The destination container in EMC Documentum Migration and EMC Documentum High Speed Migration can be a site collection, site, library, or folder.

DocAve allows you to create containers in SharePoint without leaving the DocAve interface, providing you the ability to perform migration tasks without using SharePoint to create all of the necessary containers in the destination.

To create a container, in the Destination pane, enter the name of a new container in the available field, and then click **Create Container**. The **Create Container** interface will pop up. Depending on the container type you are creating, configure the following settings:

***Note**: When creating a folder, no settings need to be configured, and clicking **Create Container** at folder level will create a folder immediately.

Creating a Site Collection

Configure these settings in the **Create Container** page:

- **Title and Description** – Enter the **Title** of the new site collection and a **Description** for future references.
- **Template Selection** – Select the desired language from the **Select a language** drop-down list. Then select a site template for this new site collection. Click on a tab to access the templates listed in that category, or click on the **Custom** tab and select **Select Template Later…** to not choose a template upon creation.
- **Primary Site Collection Administrator** – Enter the **Username** of the primary administrator for this site collection. Then click to check whether the user is valid, or click to select people and groups in a new page.
- **Secondary Site Collection Administrator** – Enter the **Username** of the secondary administrator for this site collection.
- **Quota Template** – Select the storage quota template to apply to this site collection.
- **Content Database** – Select the Content Database for this site collection

Click **OK** to create the new site collection, or click **Cancel** to close the Create Container interface.

***Note**: EMC Documentum Migrator only supports creating site collections in on-premise SharePoint.

Creating a Site

Configure these settings in the **Create Container** page:

- **Title and Description** –Enter the **Title** of the new site and a **Description** for future references.
- **Template Selection** – Select the desired language from the **Select a language** drop-down list. Then select a site template for this new site. Click on a tab to access the templates listed in that category.
- **Permissions** – Select **Use unique permissions** to allow a unique set of users access to this new site. Select **Use same permissions as parent site** to allow the same users who can access the parent site access to this new site.
- **Navigation** – Select the **Yes** radio button if you want a link to this site to appear in the Quick Launch and top link bar of the parent site.
- **Navigation Inheritance** – Select **Yes** to use the top link bar from the parent site.

Click **OK** to create the new site, or click **Cancel** to close the **Create Container** interface.

Creating a Library

Configure these settings in the **Create Container** page:

- **Object Type** – Select **Library** by default and it is not editable.
- **Category** – Select the category for the new library.
- **Document Template** (for Library only) – For a new library, select a document template from the drop-down list to determine the default for all new files created in this document library.
- **Navigation** – Select **Yes** if you want to display the library on the Quick Launch.
- **Document Version History** (for Document Library, Form Library) – Select **Yes** to create a version each time you edit a file in this library.
- **Picture Version History** (for Picture Library only) – Select **Yes** to create a version each time you edit a file in this picture library.
- **Data Connection Version History** (for Data Connection Library only) – Select **Yes** to create a version each time you edit a file in this data connection library.
- **Item Version History** (for Report Library and Asset Library) – Select **Yes** to create a version each time you edit a file in this list.

Click **OK** to create the new list or library, or click **Cancel** to close the **Create Container** interface.

Configuring the Run Now Interface

In the **Run Now** interface, configure the settings below:

1. **Conflict Resolution –** If the object ID in the source node is the same as an existing object in the destination node, it is considered a conflict.
    - **Container level conflict resolution** – Set the conflict resolution to container level. There are two possible resolutions:
        - **Skip** ignores the source container that has the same name as the destination one. For the content in the source container, if you do not select the **Check lower objects for conflicts** checkbox, the content will be also ignored. If you select the **Check lower objects for conflicts** checkbox, continue to configure Content level conflict resolution.
        - **Merge** combines the configuration of the source and destination container. For the content in the source container, continue to configure Content level conflict resolution.
    - **Content level conflict resolution** – Set the conflict resolution to content level. There are three possible resolutions.
        - **Skip** ignores the source document that has the same object ID as the destination document.
        - **Overwrite** copies the source document to the destination by overwriting the destination document with same object ID.
        - **Append** adds the source document to the destination with an underscore and an integer added in the document name.

    For more information on Conflict Resolution, refer to Appendix D: Conflict Resolution.

2. **Profile Selection** – Configure the related migration options, filter options, mapping options, and advanced options for the migration job. Select a previously configured profile from the drop-down list. EMC Documentum migration provides you a default main profile named **Default Profile (default)**.

3. **Microsoft Azure Location** (for High Speed Online Migrations only) – Select a Microsoft Azure location where you want to store the migration data. You can select the **Default Azure Location** option to use the free Microsoft Azure storage; or you can also click **New Microsoft Azure Location** to create a new one. For more information about how to create a new Microsoft Azure location, refer to Creating and Editing Azure Locations.

    After selecting the **Microsoft Azure Location** you created, you can select the **Enable encryption on the migrated data** checkbox to encrypt the migrated data.

    ***Note**: If you select the **Default Azure Location** option, the data that is migrated and stored in the free Microsoft Azure storage location will be encrypted automatically.

4. **Destination Agent Group** – Select a destination Agent Group to execute the migration job. An Agent Group can contain multiple Agents for load balancing and better performance.

***Note:** This section only appears when the destination node is in SharePoint on-premises.

5. **Migration Database** – The Migration database you configured for the farm where the destination node reside will be used to store link data of this job. You can check whether the migration database is available by clicking **Test**. After the testing is completed, you can click **Details** to view the information of all agents and the connected status.

   You can also choose the following options:

   - **Store job data in the migration database** – Select this checkbox to store detailed job information in the following tables within the migration database: **DocAve6.DocumentumM.JobDetail**, **DocAve6.DocumentumM.JobNotification**, and **DocAve6.DocumentumM.JobStatistics**. For more information about the tables, refer to Appendix A: EMC Documentum Migration Database Information.
   - **Store log information in the migration database** – Select this checkbox to store log information in the **DocAve6.DocumentumM.JobLogs** table within the migration database. For more information about the table, refer to Appendix A: EMC Documentum Migration Database Information.

6. **Notification** – Select a previously configured notification profile from the drop-down list, or click **New Notification Profile** in the drop-down list to create a new one. For details on creating a notification profile, refer to the DocAve 6 Control Panel Reference Guide.
7. **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the EMC Documentum migration job status. If only the content metadata or security fails to migrate and you select **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.
8. Click **OK** to run the job immediately or click **Cancel** to return to the **Home** page of Online Migration.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings to build a migration plan.

1. **Plan Name** – Enter the plan name and the optional description for future reference.
2. **Profile Selection** – Specify the main profile configured in Setting Up EMC Documentum Migration Profiles.
3. **Microsoft Azure Location** (for High Speed Online Migrations only) – Select a Microsoft Azure location where you want to store the migration data. You can select the **Default Azure Location** option to use the free Microsoft Azure storage; or you can also click **New Microsoft Azure Location** to create a new one. For more information about how to create a new Microsoft Azure location, refer to Creating and Editing Azure Locations.

   After selecting the **Microsoft Azure Location** you created, you can select the **Enable encryption on the migrated data** checkbox to encrypt the migrated data.

***Note**: If you select the **Default Azure Location** option, the data that is migrated and stored in the free Microsoft Azure storage location will be encrypted automatically.

4. **Destination Agent Group** – Select a destination Agent Group from the drop-down list to execute the migration jobs of this plan. Agent Groups can contain multiple Agents for load balancing and performance.

   ***Note:** This section only appears when the destination node is in SharePoint on-premises.

   ***Note:** This field will not appear when a My Registered Site is selected as the destination node or in the mode of EMC Documentum High Speed Migration. The Agents in the Agent group configured for the SharePoint Sites Group or OneDrive for Business Group will be used when running an EMC Documentum Migration job.

5. **Schedule Selection** – Specify the schedule to start the migration job.
   - **No schedule** – Select this option to run the plan manually.
   - **Configure the schedule myself** – Select this option and the **Schedule Settings** section appears under the **Schedule Selection** section. Click **Add Schedule** and the **Add Schedule** interface pops up. For more information on the **Add Schedule** interface, refer to Configuring Schedule Settings in the Add Schedule Interface.
6. **Notification** – Select a previously configured notification profile from the drop-down list, or click **New Notification Profile** in the drop-down list to create a new one. For details on creating a notification profile, refer to the DocAve 6 Control Panel Reference Guide.
7. **Associated Plan Group** – Select an associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.
8. **Migration Database** – The Migration database you configured for the farm where the destination node reside will be used to store link data of the jobs of this plan. You can check whether the Migration database that you previously configured is available by clicking **Test**. After the testing is completed, you can click **Details** to view the information of all agents and the connected status.

   You can also choose the following options:

   - **Store job data in the migration database** – Select this checkbox to store detailed job information in the following tables within the migration database: **DocAve6.DocumentumM.JobDetail**, **DocAve6.DocumentumM.JobNotification**, and **DocAve6.DocumentumM.JobStatistics**. For more information about the tables, refer to Appendix A: EMC Documentum Migration Database Information.
   - **Store log information in the migration database** – Select this checkbox to store log information in the **DocAve6.DocumentumM.JobLogs** table within the migration database. For more information about the table, refer to Appendix A: EMC Documentum Migration Database Information.

9. When finished configuring the plan, select one of the following options:
    - Click **Save** to save the plan you have configured. The **Plan Manager** interface appears. For more information, refer to Managing Plans.
    - Click the triangle next to **Save**, then select **Save and Run Now** to save the plan you have configured. The **Run Now** interface appears. For detailed information on the options in the **Run Now** interface, refer to the Configuring the Run Now Interface.

Configuring Schedule Settings in the Add Schedule Interface

Follow the instructions below to configure the schedule settings.

1. **Options** – Select a type of migration for the customized schedule. Choose **Full migration** to migrate all contents from the source node to the destination node. Choose **Incremental migration** to migrate the source node content that has been modified (**Add** and **Modify**) since the last migration job and the content that failed to be migrated in the last migration job.

   ***Note**: If you select the **Incremental migration** option, the **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job** option in the **Conflict Resolution** section will be enabled, and you are required to decide whether or not to re-migrate the objects whose metadata or securities failed to be migrated in the last migration job.

   ***Note**: The **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job** option is unavailable for the EMC Documentum High Speed Migration.

2. **Conflict Resolution –** If the object ID in the source node is the same as an existing object in the destination node, it is considered a conflict.
    - **Container level conflict resolution** – Set the conflict resolution to the list and folder level. There are two possible resolutions:
        - **Skip** ignores the source container that has the same name as the destination one. For the content in the source container, if you do not select the **Check lower objects for conflicts** checkbox, the content will be also ignored. If you select the **Check lower objects for conflicts** checkbox, continue to configure Content level conflict resolution.
        - **Merge** combines the configuration of the source and destination container. For the content in the source container, continue to configure Content level conflict resolution.
    - **Content level conflict resolution** – Set the conflict resolution to the document level. There are three possible resolutions.
        - **Skip** ignores the source document that has the same object ID as the destination document.
        - **Overwrite** copies the source document to the destination by overwriting the destination document with same object ID.

- **Append** adds the source document to the destination with an underscore and an integer added in the document name.

For more information of Conflict Resolution, refer to Appendix D: Conflict Resolution.

3. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minutes**, **Hours**, **Days**, **Weeks** or **Months** from the drop-down list.
4. **Range of Recurrence** – Specify when to start and end the running recurring schedule.
   - **Start time** – Set up the time to start the plan and the Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.
   - **Schedule ending** – Designate when to stop the scheduled job.
     - **No end date** – Select this option to repeat running the plan until being stopped manually.
     - **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.
     - **End by** – Set up the time to end the recurrence of plans.
5. **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the migration job status. If only the metadata/securities of the content failed to be migrated, and you select **Ignore metadata/security exceptions** option, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.
6. Click **OK** on the ribbon to save the schedule setting configurations. Click **Cancel** on the ribbon to return to the **Plan setting** interface without saving any changes. Repeat the configurations above to create more schedules. Click **Calendar View** to preview the configured schedule in a calendar. You can delete a configured schedule by clicking ✕ next to the schedule.

   ***Note**: If a plan has been associated to plan groups, it must be removed for the new schedule to run.

Supported SharePoint Object Levels for Different EMC Documentum Object Levels

For each type of source object level, you can only migrate it to the supported SharePoint object levels. Refer to the table below for details on which type of destinations nodes you can migrate to from selected sourced nodes. DocAve EMC Documentum Migrator does not support the objects that are not listed in the list below.

EMC Documentum Object Level	Supported SharePoint Object Level
Cabinet	Web Application
	Site Collection
	Site
Folder	Site
	Library
	Folder
Document	Site
	Library
	Folder
Virtual document	Site
	Library
	Folder
Snapshot	Site
	Library
	Folder
Rendition	Site
	Library
	Folder
Linked folder/document	Site
	Library
	Folder

Managing Plans

To manage migration plans created by different modules, you can use the Plan Manager. After launching the migration module, click **Plan Manager** next to the **Home** tab. In the **Plan Manager** interface, any plans that you have previously created are displayed in the main display pane.

In this interface, you can change the number of plans displayed per page. To change the number of plans displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the plans, click the column heading such as **Plan Name**, and **Plan ID**.

Perform the following actions in the **Plan Manager** interface:

- Select a plan and click **View Details**. The source node and the destination node are displayed on the data tree. You can also click **Settings** on the ribbon to view the migration settings of this plan. When you want to change the nodes you selected or want to modify the migration settings, click **Edit** on the ribbon.
- Select a plan and click **Edit** on the ribbon to change the configurations for the selected plan. You can change the nodes you selected and modify the migration settings. Besides, you can click **Profile Settings** or **Create Container** to performing the corresponding actions.
- Select the plans that you want to delete and click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected plans, or click **Cancel** to return to the **Plan Manager** interface without deleting the selected plans.
- Click **Test Run** to perform a test run job that simulates the real migration job. By viewing the job report of the test run, you can find whether the source contents can be migrated to the destination successfully, and then adjust the plans or optimize the settings.

  *__Note__: Test Run results may differ from the results of an actual migration. Investigate Test Runs that display **Finished with Exceptions** results by reviewing the log file. If no obvious content, metadata, or permission errors are found, it is likely that the actual migration will complete successfully.

- Click **Run Now** to perform the migration job.

EMC Documentum Migration for SharePoint Online

You can use EMC Documentum Migration to migrate EMC Documentum objects to SharePoint Online. To perform this kind of migration properly, you must configure your agent groups and SharePoint sites in Control Panel. For more detailed information about this configuration, see the **Agent Groups** and **SharePoint Sites** section in the DocAve 6 Control Panel Reference Guide.

Before using EMC Documentum Migration for SharePoint Online, make sure you have purchased the corresponding EMC Documentum to SharePoint Online Migration licenses. You can navigate to **DocAve 6 Manager** > **Control Panel** > **License Manager**, then click the **Migration** tab to view whether or not the corresponding EMC Documentum to SharePoint Online Migration licenses are available.

For details on how to manage migration profiles, or perform an EMC Documentum Migration job, refer to About Online Migrations.

***Note:** EMC Documentum Migration for SharePoint Online only supports the Create Container function for site and library level in a SharePoint Online destination node.

EMC Documentum Migrator Tools

The EMC Documentum migration tools are provided in the *…\AvePoint\Agent\bin*. This tool is used to scan the source contents selected for migration and generate a report that shows information on the scanned contents. Additionally, you can configure domain mapping, group mapping, user mapping, and content type mapping, which can be used during EMC Documentum migration. Refer to the DocAve 6 Supplementary Tools User Guide for instructions on using these tools.

Accessing EMC Documentum Migration Using Hot Key Mode

To work faster and improve your productivity, DocAve supports Hot Key mode to perform corresponding actions quickly by using only the keyboard. To access Hot Key mode, in DocAve interface, use the key combinations of **Ctrl** + **Alt** + **Z** on the keyboard, and then press **1** to direct to the products pane. To access the Migration products, press **M**. The following is a list of hot keys for the top level. Using the hot key listed below to access to the corresponding product interface.

For example, continue pressing **D**, you will be brought to the **EMC Documentum Migration** Interface.

Functionality Name and Hot Key	
SharePoint Migration	SM
File System Migration	F
Lotus Notes Migration	N
eRoom Migration	E
Livelink Migration	L
Exchange Public Folder Migration	P
Quickr Migration	Q
EMC Documentum Migration	D

EMC Documentum Migration

To access Hot Key mode, in the **EMC Documentum Migration** interface, use the key combinations of **Ctrl + Alt + Z** on the keyboard.

The following is a list of hot keys for the top level, each time you want to go back to the top level after accessing the interface of lower level, press **Ctrl + Alt + Z** on the keyboard.

For example, continue pressing **H**, you are brought to the **Home** tab.

Operation Interface	**Hot Key**
Home	H
Plan Manager	P
DocAve Home Page	1
AvePoint Official Website	2
Control Panel	3
Job Monitor	4
Plan Group	5
Health Analyzer	6
User	9
Help and About information	0

Home Page

To access the **Home** tab by using hot keys, in the **EMC Documentum Migration** interface, use key combinations of **Ctrl + Alt + Z** to access the Hot Key mode, and then press **H** on the keyboard to enter the **Home** tab.

The following is a list of hot keys for the functionalities on the ribbon of the **Home** tab.

For example, continue pressing **O**, you are brought to the Online Migration.

Functionality Name and Hot Key	
EMC Documentum Migration	D
Online Migration	O
Profile Settings	PS
Configure Connection	CF
Migration Database	MD
Job Monitor	J

Online Migration

Functionality Name and Hot Key	
Online Migration	O
High Speed Migration	H
New Plan	N
Select Source	SS
Profile Settings	PS
Configure Connection	CF
Migration Database	MD
Job Monitor	J
Save As New Plan	A
Run Now	R

High Speed Migration

Functionality Name and Hot Key					
Online Migration	O				
New Plan	N				
Create Container	CC				
Preview	PR				
Select Source	SS				
Profile Settings	PS				
Configure Connection	CF				
Azure Location	AL				
Migration Database	MD				
Job Monitor	J				
Save As New Plan	A	Save	S	Save	SA

Functionality Name and Hot Key					
				Save and Run Now	SR
		Cancel	C		
Run Now	R				
Back	B				

Profile Settings

Functionality Name and Hot Key					
Filter Policy	F	Create	N	Save	S
				Cancel	C
		View	V	Edit	E
				Cancel	C
		Edit	E	Save	S
				Cancel	C
		Delete	D		
		Close	X		
Mappings	M	Domain Mapping	DO		
		User Mapping	U		
		Group Mapping	G		
		Permission Mapping	P		
Dynamic Rule	DY	Create	N	OK	O
				Cancel	C
		View	V	Edit	E
				Close	X
		Edit	E	OK	O
				Cancel	C
		Delete	D		
		Download Sample Code	L		
		Close	X		
Set as Default	DF				
Edit Sub-profile	ES				
Upload	U				
Download	DL				
New	N				
Delete	DE				
Save	S	Save	S		
		Save as	A		
Discard Changes	DC				
Close	X				

Configure Connection

Functionality Name and Hot Key			
Create	N	Save	S
		Cancel	C

Functionality Name and Hot Key					
View Details	V	Edit	E	Save	S
				Cancel	C
		Close	X		
Edit	E	Save	S		
		Cancel	C		
Delete	D				
Close	X				

Migration Database

Functionality Name and Hot Key					
Configure	C	Save	S		
		Cancel	C		
View Details	V	Configure	C	Save	S
				Cancel	C
		Close	X		
Close	X				

Plan Manager Page

To access the **Plan Manager** page by using hot keys, in the **EMC Documentum Migration** interface, use key combinations of **Ctrl** + **Alt** + **Z** to access the Hot Key mode, and then press **P** on the keyboard to enter the **Plan Manager** page.

The following is a list of hot keys for the functionalities on the ribbon of the **Plan Manager** page.

For example, continue pressing **V**, you are brought to the **View Details** interface.

Functionality Name and Hot Key							
View Details	V	Source & Destination	SD				
		Settings	SE				
		Edit	E	Save	SA	Save and Run Now	SR
						Save As	A
						Save	SA
				Cancel	X		
		Test Run	TR		OK	O	
					Cancel	C	
		Run Now	R		OK	O	
					Cancel	C	
		Close	X				
Edit	E	Source & Destination	SD				
		Settings	SE				

Functionality Name and Hot Key					
		Profile Settings	P		
		Save	SA	Save and Run Now	SR
				Save	SA
				Save As	A
		Cancel	X		
Delete	D				
Test Run	TR	OK	O		
		Cancel	C		
Run Now	R	OK	O		
		Cancel	C		

Appendix A: EMC Documentum Migration Database Information

Refer to the following tables to view the detailed job and log information stored in the migration database. In Job Detail, you can view the job details of each migrated source object, the source/destination object ID, the URL of the source/destination object, the size of the source object, the owner of the source/destination object, the migration start time, the end time, and so on. In Job Notification, you can view the status of the migration job and view the comment related to the migration job. In Job Statistic, you can view the statistical information of the migration job, such as, the job ID, the plan ID, the source/destination start time, the source/destination end time, the source/destination Agent name, the number of migrated/failed/skipped items/folders/lists, and so on. In Job Logs, you can view the ID of the job that the log belongs to, the time the log was written, the detailed log information, and the log level.

Job Detail

View the job details information in the table below.

Column Name	Description	Value
JobId	It is the ID of the job.	The prefix of the job ID facilitates the distinction of different migrations. The job ID for EMC Documentum Migration is MC, and for the EMC Documentum High Speed Migration is HMC. For example, MC20130909183557939148 indicates an EMC Documentum Migration job ID; HMC20170512165609427856, indicates an EMC Documentum High Speed Migration job ID.
SequenceId	It is the sequence ID of each migrated source object.	The value represents the sequence of each migrated source object. For example, 1, it indicates that this source object is the first migrated object.
SourceObjectId	It is the ID of the source object.	The value is the ID of the source object.
SourceObjectParentID		The value is the ID of the parent of the source object.
TargetObjectId	It is the ID of the target object.	The value is the GUID of each target object level from site

Column Name	Description	Value
		collection level to item level. For example, df3f11c6-c499-4597-b4fc-d482a2fc9f56 is the GUID of the target folder.
TargetObjectParentID		The value is blank.
SourceFullUrl	It is the full URL of the source object.	The value is the full URL of the source object. Use the value to find the source object.
TargetFullURL	It is the full URL of the target object.	The value is the full URL of the target object. Use the full URL to find the target object. If the source object is not migrated to the target, the column value is blank.
SourceObjectTitle	It is the title of the source object.	The value is the title of the source object.
TargetObjectTitle	It is the title of the target object.	The value is the title of the target object.
SourceObjectType	It is the type of the source object.	The value represents the type of the source object, which is different according to the source you selected. • 801 – Cabinet • 802 – Folder • 803 – Document • 804 – Virtual Document • 805 – Snapshot • 806 – Virtual Document Version • 1001 – Group • 1002 – User • 1003 – Permission
TargetObjectType	It is the type of the target object.	The value represents the type of the target object. • 10001 – Web Application • 10002 – Site Collection • 10003 – Site • 10004 – Library

Column Name	Description	Value
		• 10006 – Folder • 10007 – Document
SourceObjectSizeBytes	It is the size of the source object. The unit is byte.	The value is the real size of the source object.
TargetObjectSizeBytes	It is the size of the target object. The unit is byte.	The value is the size of the target object.
SourceObjectOwner	It is the owner of the source object.	The value represents the user who creates the source object.
TargetObjectOwner	It is the owner of the target object.	The value represents the user who creates the target object.
SourceObjectVersion	It is the version of the source object.	The column value is blank.
TargetObjectVersion	It is the version of the target object.	The column value is blank.
Operation	It is the operation performed for each source object during migration.	The value represents the operation performed when migrating the source object to the target. • 0 – None • 1 – Skipped • 2 – New Created • 3 – Overwritten • 4 – Appended • 5 – Filtered • 7 – Merge
Status	It is the migration status of the source object.	The value represents the status of the job. • 0 – Starting • 1 – Successful • 2 – Backup Failed • 3 – Restore Failed • 4 – Be filtered and excluded from the result. • 5 – Skipped • 6 – Exceptional
StartTime	It is the time when the backup starts.	The value represents the time when the backup starts.

Column Name	Description	Value
EndTime	It is the time when the restore completes.	The value represents the time when the restore completes.
FilteredOutPolicy	It is the status of using filter policy.	The value represents the status of using filter policy. • 0 – Not Used • 1 – Used
TruncatedPolicy	It is the truncated policy that is applied to the source object.	The value represents the truncated policy that is applied to the source object. • None – No truncated policy. • Truncated – The object name is truncated. • Renamed – The object name is renamed. • MoveUp – The object is moved up to the higher level.
TruncatedOrRenamedAs	It is the new name of the object in the target.	The value is the new name of the object in the target after truncating or renaming.
CustomMetadata	It is the status of using custom metadata.	The value represents the status of using custom metadata. • 0 – Not Used • 1 – Used The default value is 0.
MetadataMapping	It is the statues of using C-Based Object Oriented Language (C# Language) Mapping.	The value represents the status of using C-Based Object Oriented Language (C# Language) Mapping. • 0 – Not Used • 1 – Used
Message	It displays the migration message of the source object.	The value is the migration message of the source object.

Job Notification

View the job notifications information in the table below.

Column Name	Description	Value
SequenceId	It is the ID of the sequence for each job.	The value represents the sequence of each job. For example, 1, it indicates that this job is the first migration job.
JobId	It is the ID of the job.	The prefix of the job ID facilitates the distinction of different migrations. The job ID for EMC Documentum Migration is MC. For example, MC20130909183557939148.
Status	It is the status of the job.	The value represents the status of the job. • 0 – In Progress • 2 – Finished • 3 – Failed • 4 – Stopped • 7 – Finished With Exception • 8 – Paused
Message	It displays the job comment.	The value displayed is the same as the comment in Statistics of Job Details.

Job Statistic

View the job statistics information in the table below.

Column Name	Description	Value
JobId	It is the ID of the job.	The prefix of the job ID facilitates the distinction of different migrations. The job ID for EMC Documentum is MC, and for the EMC Documentum High Speed Migration is HMC. For example, MC20130909183557939148, it indicates an EMC Documentum Migration job ID; HMC20170512165609427856, indicates an EMC Documentum High Speed Migration job ID.
PlanId	It is the ID of the plan.	The value is the plan ID, for example, PLAN20120702184321934938.
PlanName	It is the name of the plan.	The value is the plan name. If you run a job without saving it as a plan, the value is Instance Plan.
PlanGroupId	It is the ID of the plan group.	The value is the ID of the plan group that you set for the plan. If you run a job of a plan which do not belong to a plan group, the value is blank.
PlanGroupName	It is the name of the plan group.	The value is the name of the plan group that you set for the plan. If you run a job of a plan which do not belong to a plan group, the value is blank.
SourceAgentType	It is the source Agent type.	The value represents the source Agent type. 9 indicates the souce Agent type is EMC Documentum.
TargetAgentType	It is the target Agent type.	The value represents the target Agent type. • 5 – SharePoint 2010 • 6 – SharePoint 2013 • 12 – SharePoint 2016 • 11 – SharePoint Online

Column Name	Description	Value
SourceAgentName	It is the source Agent name.	The value is the source Agent name.
TargetAgentName	It is the target Agent name.	The value is the target Agent name.
Status	It is the status of the job.	The value represents the status of the job. • 0 – In Progress • 2 – Finished • 3 – Failed • 4 – Stopped • 7 – Finished With Exception • 8 – Paused
Run Type	It is the type of the job.	The value represents the type of the job. • 0 – Run and Rerun • 1 – Test Run
SourceStartTime	It is the time when the backup starts.	The value represents the time when the backup starts.
SourceFinishTime	It is the time when the backup completes.	The value represents the time when the backup completes.
TargetStartTime	It is the time when the restore starts.	The value represents the time when the restore starts.
TargetFinishTime	It is the time when the restore completes.	The value represents the time when the restore completes.
Description	It is the description of the job.	The value is the description of the job.
UserName	It is the DocAve user who runs the job.	The value is the username who runs the job.
JobOption	It is the option of the job.	The value is 0.
JobType	It is the type of the job.	The value represents the type of the migration job. • 0 – Full Migration • 1 – Incremental Migration
ContainerConflictResolution	It is the container conflict resolution.	The value represents the resolution of container conflict. • 0 – Skip • 5 – Merge

Column Name	Description	Value
ContentConflictResoltuion	It is the content conflict resolution.	The value represents the resolution of content conflict. • 0 – Skip • 2 – Append • 3 – Overwrite
MigratedBytes	It is the size of the migrated data. The unit is byte.	N/A
FailedBytes	It is the size of the data that are failed to be migrated. The unit is byte.	N/A
SkipedBytes	It is the size of the skipped data. The unit is byte.	N/A
FilteredBytes	It is the size of the data that is filtered and excluded from the result. The unit is byte.	N/A
MigratedSiteCollectionCount	It is the number of migrated site collections.	N/A
MigratedSiteCount	It is the number of the migrated sites.	N/A
MigratedListCount	It is the number of the migrated lists.	N/A
MigratedFolderCount	It is the number of migrated folders.	N/A
MigratedItemCount	It is the number of migrated items.	N/A
FailedSiteCollectionCount	It is the number of site collections that are failed to be migrated.	N/A
FailedSiteCount	It is the number of the sites that are failed to be migrated.	N/A
FailedListCount	It is the number of the lists that are failed to be migrated.	N/A
FailedFolderCount	It is the number of the folders that are failed to be migrated.	N/A
FailedItemCount	It is the number of the items that are failed to be migrated.	N/A
SkippedSiteCollectionCount	It is the number of the skipped site collections.	N/A
SkippedSiteCount	It is the number of the skipped sites.	N/A
SkippedListCount	It is the number of the skipped lists.	N/A
SkippedFolderCount	It is the number of the skipped folders.	N/A

Column Name	Description	Value
SkippedItemCount	It is the number of the skipped items.	N/A
FilteredOutSiteCollectionCount	It is the number of site collections that are filtered and excluded from the result.	N/A
FilteredOutSiteCount	It is the number of sites that are filtered and excluded from the result.	N/A
FilteredOutListCount	It is the number of lists that are filtered and excluded from the result.	N/A
FilteredOutFolderCount	It is the number of folders that are filtered and excluded from the result.	N/A
FilteredOutItemCount	It is the number of items that are filtered and excluded from the result.	N/A

Job Logs

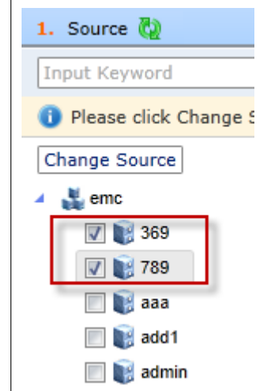
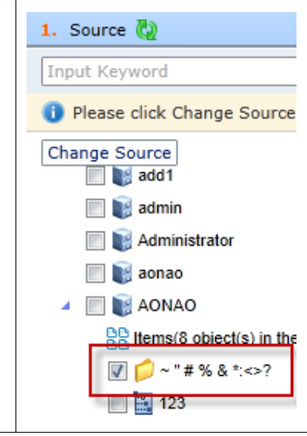
View the information of the job logs in the table below.

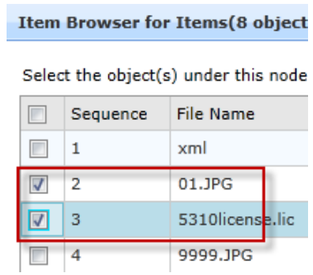
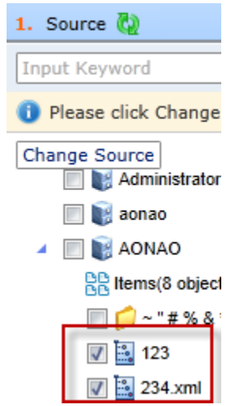
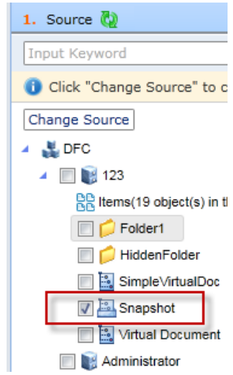
Column Name	Description	Value
JobId	It is the ID of the job that the log belongs to.	The prefix of the job ID facilitates the distinction of different migrations. The job ID prefix for EMC Documentum Migration is MC. For example, MC20150210145847665555, it indicates an EMC Documentum Migration job ID.
Time	It is the time when the log is written to the table.	The value represents the time when the log is written to the table.
Message	It displays the detailed information of the log.	The value is the detailed log information. For each piece of log, there is a mark **Source** or **Destination**. • Source– The log is for the action of the source DocAve Agent. • Destination – The log is for the action of the

Column Name	Description	Value
		destination DocAve Agent.
LogLevel	It is the level of the log.	The value represents the level of the log. • INFO – Information • WARN – Warning • ERROR – Error • DEBUG – Debug

Appendix B: EMC Documentum Migrator Customization Table

The following table shows what kinds of source node are supported to be migrated to the corresponding destination nodes. √ means the migration is **Supported** at this level and a blank area means the migration is **Not Supported** at this level.

Destination level / What to migrate	Web Application	Site Collection	Site	Library	Folder	Notes	What to select in the source
Cabinet	√	√	√				
Folder			√	√	√	EMC Documentum Migration does not support migrating EMC Documentum folders to SharePoint Wiki Page libraries.	

Destination level / What to migrate	Web Application	Site Collection	Site	Library	Folder	Notes	What to select in the source
Document			√	√	√	EMC Documentum Migration does not support migrating EMC Documentum documents to SharePoint Wiki Page libraries.	
Virtual document			√	√	√	EMC Documentum Migration does not support migrating EMC Documentum virtual documents to SharePoint Wiki Page libraries.	
Snapshot			√	√	√	EMC Documentum Migration does not support migrating EMC Documentum snapshots to SharePoint Wiki Page libraries.	

Destination level / What to migrate	Web Application	Site Collection	Site	Library	Folder	Notes	What to select in the source
Rendition			√	√	√	EMC Documentum Migration does not support migrating EMC Documentum reditions to SharePoint Wiki Page libraries.	***Note**: Renditions are not listed on the source tree. When you select a document with renditions on the tree, all of its renditions are selected as well. Use the **Rendition Migration** option in **Profile Settings** to select whether to migrate the renditions of the selected source document.
Linked folder/document			√	√	√	EMC Documentum Migration does not support migrating EMC Documentum linked folders/documents to SharePoint Wiki Page libraries.	***Note**: In the data tree, a linked folder/document appears in everywhere that it links. You can find a linked folder/document in the tree from the node that it links.

Appendix C: Advanced Settings in EMC Documentum Migrator Configuration Files

You are allowed to customize the EMC Documentum migration settings by configuring the attribute of the corresponding node in the **DocumentumMigrationConfiguration.xml** file. Navigate to to *…\Agent\data\Migrator\DocumentumMigrator* directory on the machine where the DocAve agent is installed and locate the **DocumentumMigrationConfiguration.xml** file.

DocumentumMigrationConfiguration.xml

Open the **DocumentumMigrationConfiguration.xml** file with Notepad and configure the following settings in each node:

- **<PerformanceLog Flag="true" />** – Choose whether to collect the performance log. Performance log records the performance about migrated items. Enable/Disable this feature according to the AvePoint representative's suggestion. Set the value of the **Flag** attribute as explained below:
  - **true** means to generate the performance log when performing an migration job.
  - **false** means to not to generate the performance log. By default, the value of the attribute **Flag** is set to **true**.

    You can go to the DocAve Agent installation path *…\AvePoint\DocAve6\Agent\jobs* to find the EMC Documentum migration job folder, for example, **MC20130416184817462177_Backup**. The performance log, for example, **EMCBackupPerformance.xml**, is generated in this job folder.
- **<ContentServer Host=""/>** – This node is used to designate the hostname of the EMC Documentum content server in the source environment. If an EMC Documentum Migration job fails because that DocAve cannot automatically connect to the EMC Documentum content server, set the hostname of the content server as the value of **Host**. The content server's hostname entered here can ensure DocAve can properly connect to the EMC Documentum content server.
- **<RestoreToSelectedSite Flag="true" />** – This node allows you to choose whether to migrate the source objects to the selected site collection or site on the destination tree, or a newly created sub site under the selected site collection or site, when a site collection or site is selected on the destination tree.
  - **true** – **true** is the default value. During a migration, the source objects will be migrated to the selected destination site collection or site.
  - **false** – When the value of **Flag** is **false**, DocAve will first create a new sub site under the selected a site collection or site and then migrate the source objects to the newly created sub site.

- **<RestoreHidden Flag="true"/>** – Choose whether to display and migrate hidden objects:
    - **false** means to not display hidden objects on the tree. When performing a migration job, DocAve will not migrate hidden objects.
    - **true** is the default value. It means to display hidden objects on the tree. When selecting source nodes on the tree, you can determine whether to migrate hidden objects.
- **<CreateNewTermIfDoesNotExist Flag="true"/>** – This node allows you to choose whether to create new terms in the destination Managed Metadata Term Store for migrating the source objects' metadata column values that do not exist in the destination.
    - **true** – **true** means the EMC Documentum Migration will migrate the source objects' metadata column values that do not exist in the destination by creating new terms in the destination Managed Metadata Term Store.

      false – **false** means that EMC Documentum Migration will not migrate the source objects' metadata column values that do not exist in the destination.
- **<MultiThreadConfig Enabled="false" MaxMultiThread="5"/>** – This node allows you to choose whether or not to allow the **DocumentumMigrationRestore.exe** (for SharePoint Online 2010) or **SP2013DocumentumMigrationRestore.exe** (for SharePoint Online 2013) process to create multiple threads for restoring data to the destination SharePoint Online nodes. Multiple threads can help to improve the migration speed of the EMC Documentum Migration for SharePoint Online jobs, but will lead to more CPU and memory usage than a single thread.
    - **true** – Allow the **DocumentumMigrationRestore.exe** or **SP2013DocumentumMigrationRestore.exe** process to create multiple threads for restoring data to SharePoint Online nodes. Set the value of **Enabled** to **true**, and then enter an integer as the value of **MaxMultiThread** to set the maximum number of threads that can be created by this process.
    - **false** – Enforce that the **DocumentumMigrationRestore.exe** or **SP2013DocumentumMigrationRestore.exe** process can only create a single process for restoring data to SharePoint Online node. Set the value of **Enabled** to **false**. **false** is the default value.
- **<DeleteAzureContainer Flag = "true"/>** – This node is used to configure whether or not to delete the automatically generated job data in the Microsoft Azure locations after completing the EMC Documentum High Speed Migration jobs.
    - **False** – Do not delete the EMC Documentum High Speed Migration jobs data.
    - **True** – This is the default value. Delete the EMC Documentum High Speed Migration jobs data.
- **<HSMTimeOutMinutes Value = "900"/>** – This node allows you to configure a session time-out value for EMC Documentum High Speed Migration jobs. The default value is

900, which means that a thread of an EMC Documentum High Speed Online Migration job will time out if it hangs for 15 hours.

- **<UploadDatThreadCount Flag = "10"/>** – This node allows you to configure the number of threads to back up, encrypt (if configured), and upload EMC Documentum data to a Microsoft Azure location in a EMC Documentum High Speed Migration job. The default value is **10**.

  ***Note**: The number of threads configured here effects the utilization of the CPU. Configure this number based on the size of the EMC Documentum data you want to migrate and the computer configuration of the EMC Documentum server.

- **<WaitSourceFileUploadTime Time = "60"/>** – This node allows you to configure the time threshold during which an EMC Documentum High Speed Migration job's import process waits for the upload of EMC Documentum data to the Microsoft Azure location. The default time threshold is **1** hour.

Appendix D: Conflict Resolution

In this appendix, each resolution is described in detail. View the tables below for your reference.

Container Level Conflict Resolution

Resolution	Object	Conflict	No Conflict
Skip	Configuration	Ignore the conflicting configuration and do nothing on the destination.	A new SharePoint object will be created.
	Security	Ignore the conflicting security and do nothing on the destination.	A new SharePoint object will be created.
Merge	Configuration	Merge the settings in the destination node with settings from the source node.	A new SharePoint object will be created.
	Security	Permissions – Source permissions that do not already exist in the destination node will be added to the destination node. Permission Levels – the permission levels that do not already exist in the destination node will be added to the destination node. The permission levels that already exist in the destination node will not be replaced.	A new SharePoint object will be created.

Content Level Conflict Resolution

Resolution	Object	Conflict	No Conflict
Overwrite	Content	Delete the conflicting content on destination first and overwrite it with the source content.	A new SharePoint object will be created.
Skip	Content	Ignore the conflicting content and do nothing on destination.	A new SharePoint object will be created.

Resolution	Object	Conflict	No Conflict
Append	Content	The conflicting content will not be deleted; and the conflicting data will be migrated to the destination by adding a suffix (_1, _2,…, increasing in numerical value).	A new SharePoint object will be created.

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