



# DocAve® 6 eRoom Migrator

## User Guide

Service Pack 6, Cumulative Update 1

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## What's New in this Guide

- Minor edits and cover page update for current release.

# About eRoom Migrator

DocAve eRoom Migrator efficiently migrates documents from eRoom to Microsoft 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, maximizing the return on investment of existing content residing in eRoom.

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.

eRoom Migrator allows organizations to:

- **Streamline the data transfer easily** from eRoom to SharePoint
- **Preserve and map all associated metadata and security settings** of eRoom 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 eRoom 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 eRoom Migrator.

## AvePoint's Testing Policy and Environment Support

### 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, IBM Storwize Family, FTP, Amazon S3, AT&T Synaptic, Dropbox, Box, Caringo Storage, Del DX Storage, EMC Centra, HDS Hitachi Content Platform, Rackspace Cloud Files, TSM, Network File System, and Windows Azure Storage.

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

**\*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 functionality, 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 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 eRoom Migrator, the DocAve 6 platform must be installed and configured properly on your farm. DocAve eRoom 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 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 eRoom Migrator on SharePoint on-premises and SharePoint Online environments.

### Required Permissions for the Source

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

1. Local System Permissions: The permissions listed in [Local System Permissions](#), which are automatically configured by DocAve during installation  
**\*Note:** If the source DocAve Agent is not installed on the eRoom file server, the source Agent account must have Read or above permission to the file server directory.
2. eRoom Permission: The permission must be manually configured prior to using DocAve 6 eRoom Migrator; it is not automatically configured.
  - Full Control to eRoom file server.

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

To install and use DocAve eRoom 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 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 eRoom 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 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 eRoom Migrator; they are not automatically configured.
  - Member has a Database Role of **db\_owner** for all of the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, Central Admin Database, and DocAve Migration Database.
  - **dbcreator** and **securityadmin** Server Roles in SQL Server

**\*Note:** If a Web application enables the Forms Based Authentication and uses a 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 Permissions for the Destination: Migration to SharePoint Online

To install and use eRoom 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 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; it has the following permissions):
    - 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 enables the forms based authentication and uses database as the method of forms based authentication, ensure at least one condition:

- The Agent account has a Database Role of **db\_owner** in this database.
- Specify a user 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. To set expectations for how long your migration plans will take (in order to better inform stakeholders), the following are some key factors that should be taken into consideration prior to running your migration plans.

- Network bandwidth between the two 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
    - A single 1GB file will migrate far quicker than a million files which have a sum of 1GB.
  - Complexity of folders, and sites
    - Divide database and folder structures into small data sets before running the migration. Consider a granular migration approach.
  - Whether DocAve has to create site collections during a 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

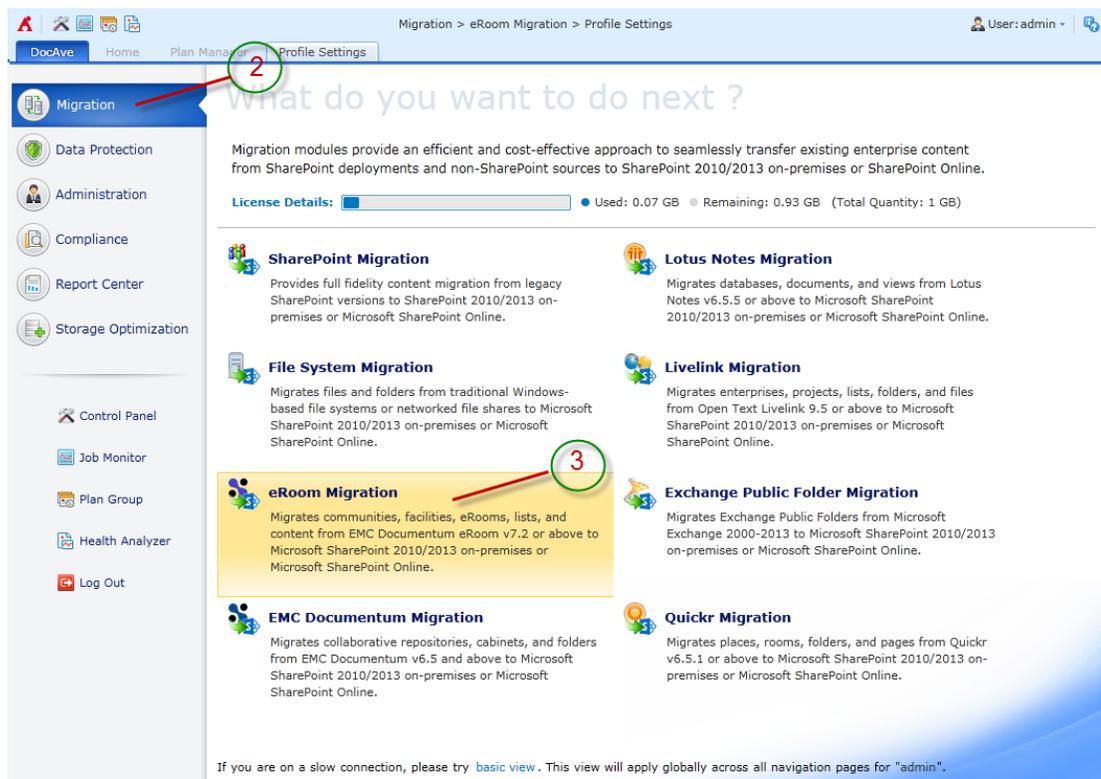
Refer to the sections below for important information on getting started with eRoom Migration.

## Launching DocAve eRoom Migration

To launch eRoom Migration and access its functionality, follow the instructions below:

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 **eRoom Migration** to launch that module.

**\*Note:** If desired, 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 eRoom Migration.

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

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

After selecting eRoom 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](#).

# 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.

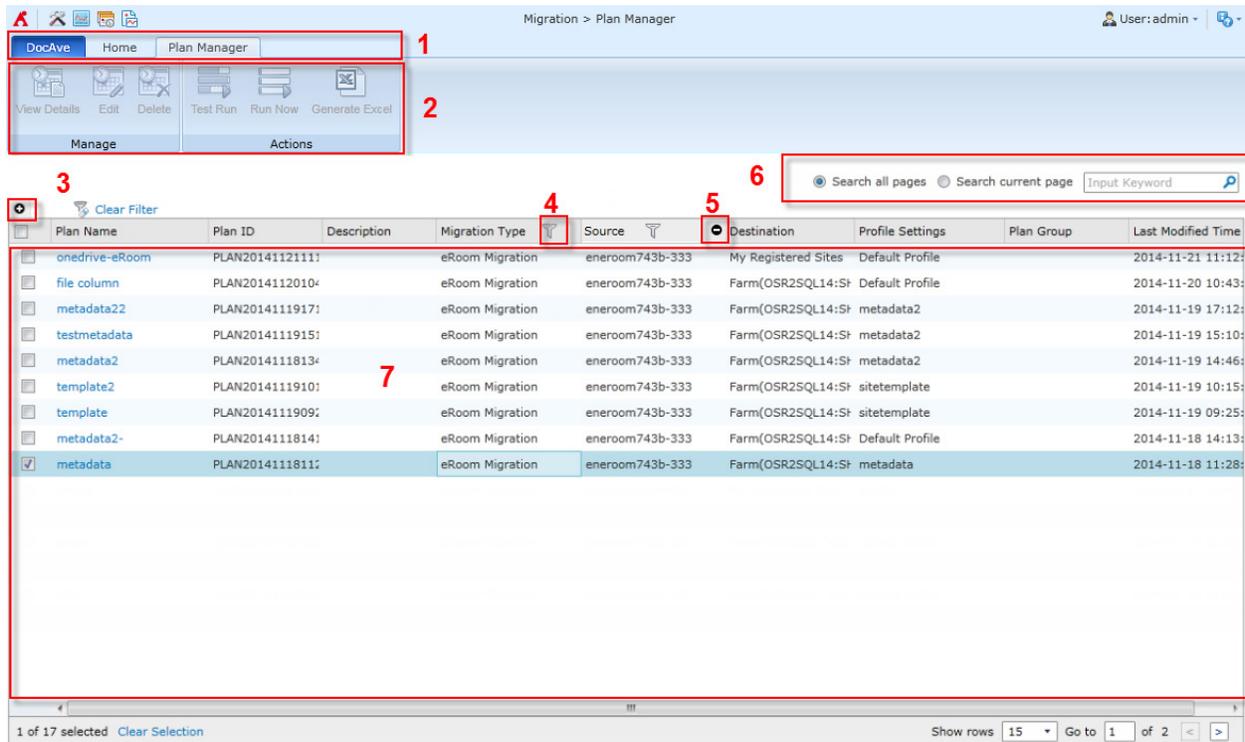


Figure 2: Navigating DocAve.

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 (funnel) – Allows users to filter the information in the List View. Click the filter the column (funnel) 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.

# Pre-migration Configurations

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

1. [Configuring Migration Databases](#)
2. [Configuring Filter Policies](#) (Optional)
3. [Configuring Mapping Settings](#) (Optional)
4. [Configuring Dynamic Rules](#) (Optional)
5. [Configuring Staging Locations](#) (Offline Jobs Only)

## Configuring Migration Databases

In order to use eRoom Migrator, you **must** configure a dedicated migration database to store links and detailed job information in SQL for every farm that will be using these migrators. For detailed information on the Migration database schema, refer to [Appendix A: eRoom 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. Select the farm that will be using the eRoom Migrator.

**\*Note:** You must complete the following steps for each farm using the eRoom Migrator.

3. Click **Configure** in the **Edit** column. The **Configure** pop-up window appears.
4. Configure the following settings for the database that will store migration job data:
  - a. **Configure Migration Database** – Specify 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.
    - **Window Authentication** (recommended) – Choose this method if you want the user's identity to be confirmed by Windows.
      - By default, the **Specify a Windows account** checkbox is deselected and DocAve will create a new Migration Database or access the existing Migration database using the Agent account you specified 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](#).

- **SQL Authentication** – Choose this method if you want SQL Server to confirm the user's identity according to the user's account and password. Enter the necessary information in the **Account** and **Password** fields.

**\*Note:** The specified account for creating or accessing the Migration database must be the **db\_creator** of the SQL server where you want to create the Migration database and the **db\_owner** of the newly created/existing Migration database. You can also validate the specified account by clicking **Validation Test**.

- c. **Failover Database Server** (optional) – Specify 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 specify 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 *Microsoft SQL Server Help Document*.

- 5. Click **OK** to finish and save the configuration, or click **Cancel** to return to the Migration Database page without saving any configurations.

After creating the migration database, you can click **View Details** on the ribbon to view the detailed information.

## Configuring Filter Policies

Filter policy allows you to set up filter rules so that you can control which files in the eRoom will be migrated. By setting up and saving filter policies, you can apply the same filter policy to different eRoom migration plans without having to recreate them each time.

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

In the **Filter Policy** interface, all the previously created filter policies are displayed.

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**.

Perform the following actions in the **Filter Policy** interface:

- Click **Create** in the **Manage** group to create a new filter policy. For detailed on creating a new filter policy, see [Creating Filter Policies](#).
- Click **Edit** in the **Manage** group to change the configurations for the selected filter policy. For details on editing configurations for filter policies, see [Creating Filter Policies](#).
- Click **Delete** in the **Manage** group. 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 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** – A filter rule allows you to filter the files 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. Click **Add a Filter Level Group** to add a filter rule. The **File** filter rule configuration field appears. The default filter rule is **Name** and default filter condition is **Contains**. Click **Name** and **Contains** respectively to change a filter rule and a filter condition from the corresponding drop-down list.
  - b. Enter a value in in the **Value** column according to the specified filter rule and filter condition.
  - c. Repeat the steps above to add more filter rules.

There are two logic settings: **And** and **Or**. By default, the logic is set to **And**. If desired, change the logic to **Or** by selecting it from the drop-down list.

- **And** – The content which meets all the criteria will be filtered to be included.
  - **Or** – The content which meets any one of the criteria will be filtered to be included.
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 about Filter Policies, refer to [Examples of eRoom Migrator Filter Policies](#).

## Examples of eRoom Migrator Filter Policies

The table below lists the examples of eRoom filter rules that are used to filter the desired content to migrate.

**\*Note:** If you select Equals for Condition, it does not support case sensitive.

Filter Level	Rule	Conditions	Value	Result
File	Name	Contains	test	The file whose name contains <i>test</i> will be searched out. For example, <i>training test</i> will be searched.
		Does Not Contain	test	The file whose name does not contain <i>test</i> will be searched. For example, <i>training test</i> will not be searched.
		Equals	test	The file whose name is <i>test</i> will be searched.
		Does Not Equal	test	The file whose name is not <i>test</i> will be searched.
	Version	Latest [] Versions and Current Version	2	The file's latest two versions and the current version will be searched. For example, a document has the following versions: 1, 2, 3, and then version 1 and 2 will be searched. <b>*Note:</b> After migration, the version is bigger than the original one, which is 1, 2 and 3.
	Size	>=	1 MB	The file whose size is not smaller than 1MB will be searched. For example, a 2MB file will be searched.
		<=	1 MB	The file whose size is not bigger than 1MB will be searched. For example, a 500KB file will be searched.
	Modified Time	Before	2012-08-06 12:15:50	The file which is modified before <i>12:15:50 08/06/2012</i> will be searched.
		After	2012-08-06 12:15:50	The file which is modified after <i>12:15:50 08/06/2012</i> will be searched.

Filter Level	Rule	Conditions	Value	Result
		Within	5 Days	The file which is modified in last 5 days will be searched out.
		Older Than	5 Days	The file which is modified 5 days ago will be searched out.
	Created Time	Before	2012-08-06 12:15:50	The file which is created before 12:15:50 08/06/2012 will be searched out.
		After	2012-08-06 12:15:50	The file which is created after 12:15:50 08/06/2012 will be searched.
		Within	5 Days	The file which is created in last 5 days will be searched.
		Older Than	5 Days	The file which is created 5 days ago will be searched.
	Type	Contains	doc	The file whose extension name contains the doc is searched. For example: <i>abc.doc</i> , or <i>abcd.docx</i>
		Does Not Contain	docx	The file whose extension name does not contain the doc is searched. For example: <i>abc.gif</i> , or <i>abcd.doc</i>
		Equals	docx	The file whose extension name is docx is searched. For example: <i>abc.docx</i>
		Does Not Equal	docx	The file whose extension name is not docx is searched. For example: <i>abc.doc</i>

## Configuring Mapping Settings

Before performing a migration job, you may want to define optional **Domain Mapping**, **User Mapping**, and **Group Mapping**. Refer to the following sections to learn how to configure the mapping settings.

### Configuring Domain Mapping

If there are users with the same login name but with different domains respectively in the source and destination, you can map a source domain name to a SharePoint domain name in the destination by using Domain Mapping. During a 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 a domain mapping.

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

For specific instructions on setting up **Domain Mapping**, refer to the [DocAve 6 Control Panel Reference Guide](#).

## Configuring User Mapping

Use **User Mapping** if you wish to map an existing source node username to an existing SharePoint user name in the destination. During a migration, Migrator will replace the source username with your specified username in the destination node.

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

For specific instructions on setting up **User Mapping**, refer to the [DocAve 6 Control Panel Reference Guide](#).

## Configuring Group Mapping

Use **Group Mapping** if you wish to map an existing source group name a SharePoint group. During the migration, Migrator will replace the source group name with your specified group name in the destination node.

To access **Group Mapping**, click **Profile Settings** on the ribbon of **Home** tab and the **Profile Settings** tab appears. Click **Mappings** on the ribbon, and then select **Group Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears. Click **Create** on the ribbon to create a new Group Mapping rule. For specific instructions on setting up **Group Mapping**, refer to the [DocAve 6 Control Panel Reference Guide](#).

## Configuring Dynamic Rules

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

## Managing Dynamic 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, refer to [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, refer to [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.

## Configuring Staging Locations (Offline Jobs Only)

The Staging Location feature is a mandatory step for exporting or importing data in an offline eRoom Migrator. There are two staging location modes: Export Mode and Import Mode. Export Mode is used to set up an export location where you will store offline migration data. Import Mode migrates exported data to the destination farm.

To access Export Location settings, follow the steps below.

1. Click **Export** or **Import** in the **Plan** group on the ribbon to enter Export mode or Import mode.
2. Click **Staging Location** in the **Settings** group on the ribbon; the **Staging Location** interface appears.

## Managing Staging Location

In both Export Mode and Import Mode in the **Staging Location** interface, all previously created staging locations are displayed in the main display pane.

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

Perform the following actions in the **Staging Location** interface:

- **Create** – Click **Create** on the ribbon to create a new staging location. For details on creating a new staging location, see [Creating and Editing Staging Locations](#).
- **View Details** – Click **View Details** on the ribbon and you will see the previously configured settings for this staging location. Here you can also click **Edit** on the ribbon to make changes to the staging location's settings. You will be brought to the **Edit Staging Location** page where you can change the settings of this staging location.
- **Edit** – Click **Edit** on the ribbon to change the configurations for this staging location. For details on editing configurations for a staging location, refer to [Creating and Editing Staging Locations](#).
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected staging locations, or click **Cancel** to return to the **Staging Location** interface without deleting the selected staging locations.

## Creating and Editing Staging Locations

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

### Export Mode

In the **Create Staging Location** for Export Mode or **Edit Staging Location** for Export Mode interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for the export location that you are about to create. Then enter an optional **Description** for future reference.

2. **Agent and Path** – Configure the following settings to specify an export location to store the offline migration data.
  - **Agent** – Select your desired DocAve Agent installed in the source environment for this export location that you are about to create from the drop-down list.
  - **UNC Path** – Enter a Universal Naming Convention (UNC) path as the location where the exported data will be stored in the **UNC path** text box. For example, \\admin-PC\c\$\data or \\admin-PC\shared folder
  - **Managed Account Profile** – Select a managed account profile in the drop-down list or create a new managed account profile to access the UNC path configured above. Then click **Validation Test** and DocAve will test the path to make sure the selected account is valid.
3. Click **OK** to complete the configuration of the export location for Export Mode.

## Import Mode

In the **Create Staging Location** for Import Mode or **Edit Staging Location** for Import Mode interface, configure the following settings:

1. **Name and Description** – Enter a Name for the import location that you are about to create. Then enter an optional description for future reference.
2. **Farm and Path** – Configure the following settings to designate the export location where to retrieve the exported data and specify a farm where you wish the exported data to be migrated to.
  - **Farm** – Select your desired destination farm which the exported data will be imported to from the **Farm** drop-down list.
  - **UNC Path** – Enter the UNC path which has been configured in **Staging Location for Export Mode** and has stored the exported data to get the data. For example, \\admin-PC\c\$\data or \\admin-PC\shared folder
  - **Managed Account Profile** – Select a managed account profile in the drop-down list or create a new managed account profile to access the UNC path configured above. Then click **Validation Test** and DocAve will test the path to make sure the selected account is valid.
3. Click **OK** to complete the configuration of the import location for Import Mode.

# About Online Migrations

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

See the sections below to use eRoom Online Migration.

## Online Migration Overview

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

1. [Pre-migration Configurations](#)
  - [Configuring Migration Databases](#)
  - [Creating Filter Policies \(Optional\)](#)
  - [Configuring Mapping Settings \(Optional\)](#)
  - [Configuring a Dynamic Rule \(Optional\)](#)
2. [Setting Up eRoom Online Migration Profiles](#)
  - a. [Migration Options](#)
  - b. [Mapping Options](#)
  - c. [Advanced Options](#)
  - d. [Managing Sub-profiles](#)
3. [Performing an eRoom Online 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](#)

## Setting Up eRoom Online Migration Profiles

The Online eRoom Migrator Profile allows you to define numerous settings including Migration Options, Filter Options, Mapping Options and Advanced Options. Follow the instructions below to create an eRoom Online Migration Profile.

1. On the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** page appears where you can configure the profile settings.
2. On the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.
3. On the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.
5. Select the **Migration Options** from the left-hand pane. Select a previously configured **Migration Options Sub-Profile** from the drop-down menu. For details about this section, refer to [Migration Options](#).
6. Select the **Filter Options** from the left-hand pane and select a previously configured filter policy from the drop-down menu, or select **New Filter Policy** from the drop-down menu to create a new filter policy. For details on creating a filter policy, refer to [Creating Filter Policies](#).
7. After configuring the filter options, select **Mapping Options** from the left-hand pane. Select a previously configured **Mapping Options Sub-Profile** from the drop-down menu. For more details about this section, refer to [Mapping Options](#).
8. 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](#).
9. 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 existing main profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

## Migration Options

Migration options allow you to define how the eRoom content and security are migrated to SharePoint. To set up a sub-profile for eRoom migration options, complete the following options:

1. On the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** page appears where you can configure the profile settings.
2. On the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.
3. Click **Migration Options** on the left-hand panel, and from the **Profile Settings** tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the Migration Options field active.
4. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
5. Enter a profile name in the pop-up window and click **OK**.
6. Click the **Content** tab. Configure the following settings:
  - **Managed Path** – If the destination node is a Web application, the corresponding site collections will be created under this Web application for migrating the source rooms. Configure the following settings:
    - **Customize path** – Enter the managed path you want to use for the site collection.

- **Site template** – Select a site template for the site collection or site from the drop-down list. You are also allowed to enter a template name in the textbox. Customized site templates are supported.
  - \***Note:** If the template you entered cannot be found while migrating, the job will fail.
- **Site language** – Select the language from the drop-down list that you want the site collection or site to use. Ensure that the selected language pack is installed in SharePoint.
  - \***Note:** By default, a top link bar and quick launch for the migrated site will be automatically added to its corresponding parent site after a migration.
- **Navigation Options** – Choose navigation design options for destination sites that are created during 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
- **Owner Column** – Check the **Migrate owner column** checkbox to choose how the eRoom owner column is migrated. Migrate the eRoom owner column either to the SharePoint person/group column or the single line of text column by clicking the corresponding radio button.
  - **As person or group column** – A person or group column will be created at the destination for migrating the eRoom owner column. The user or the group under the source eRoom owner column will be migrated to the corresponding user or group under the person or group column.
  - **As single line of text column** – A single line of text column will be created at the destination for migrating the eRoom owner column. The user or the group under the source eRoom owner column will be migrated to the corresponding character string indicating the user or group under the single line of text column.
- **Comment** – Check the **Migrate comment** checkbox to choose how the comments of eRoom lists or items are migrated. You can migrate the eRoom comments either to the SharePoint discussion topics or enhanced rich text column values.
  - If you select **As discussion topic**, a list of the **Discussion Board** type will be automatically created at the destination for migrating the comments. The comment of an eRoom list or item will be migrated to the subject of the Discussion Board list and the corresponding reply of the eRoom comment is also migrated to the corresponding reply of the subject. The newly created Discussion Board list will be named as **list/folder name: Discussion**.
    - \***Note:** If the list has comments in it and the items under this list also have comments in them, the items' comments will be migrated along with the list. All

of the items' comments will be migrated to the subjects in the newly created Discussion Board list whose name is **Listname: Discussion**.

For example, with this option selected, when you choose to restore a list named **Training** that has comments in it, after a migration, a Discussion Board list named **Training: Discussion** is created and the comment will be the subject of this Discussion Board list.

- If you select **As enhanced rich text**, a column of the enhanced rich text type will be created in the destination SharePoint list and the comments of eRoom items will be migrated as the values in the newly created column of the corresponding destination items.

**\*Note:** The comments of eRoom lists cannot be migrated as values of enhanced rich text columns in the destination SharePoint list. eRoom Migration can migrate an eRoom list's comment as the description of the destination list. To do so, select the **As enhanced rich text** checkbox and set the **ListCommentAsDescription** node's flag to **true** in the **eRoom MigrationConfiguration.xml** configuration file. For details on configuring this configuration file, refer to [eRoomMigrationConfiguration.xml](#).

- **Vote** – Check the **Migrate vote as survey** checkbox to migrate the eRoom vote. A Survey list will be automatically created at the destination and the questions are also migrated to the SharePoint survey. If not checked, the added eRoom votes will not be migrated.

- **Folder Settings** – Check the **Create content type for the folders to migrate folder's descriptions** to configure the settings for migrating eRoom folder's descriptions. Enter the **Content type name** and the **Column name** in the corresponding textbox. The corresponding content type will be created for migrating the eRoom folders and the description of the folder will be migrated as values of the created column.

**\*Note:** When the description of **Event** is migrated to SharePoint, the text format of the description may be different, and the pictures contained in the description are not supported to be migrated.

- **Link Settings** – Link Settings allow you to define how the eRoom links are migrated. For each link, if DocAve discovers that only one of the two linked objects is contained in the current migration scope, the migration job will not migrate this link.

- **Link Type Settings** – Choose how the eRoom link types are migrated by clicking the corresponding radio button. **Content Type (Link to a document)** migrates the eRoom links to the destination as the corresponding items and the content type of these items are **Link to a document**. **Column** migrates the eRoom links to the destination as the corresponding columns; a column name must be defined in the **Back Link Settings** field if you select this option.

**\*Note:** The link type settings work only when the source node where the links locate can be migrated to **library** in the destination.

- **Back Link Settings** – By default, if you select to migrate eRoom links to columns, **Links** will be the column name. Enter a column name in the textbox if you want to change the default column name.
- **Advanced Settings** –Click **Advanced** to configure the advanced settings for migrating eRoom content according to the information below:
  - **Inbox Mail Page** – Allows you to migrate eRoom Inbox Mail Page to SharePoint document library by checking the **Covert inbox into document library** checkbox. You can also select the **Migrate mail page attachment as .eml attachment** checkbox, and then the files in the source eRoom Inbox Mail Page will be migrated to the destination as the attachments in the format of **.eml**. If the **Covert inbox into document library** checkbox is deselected, the eRoom Inbox will be migrated as a SharePoint list, and the included Inbox Mail pages will be migrated as list items in the destination list.
  - **Notification** – Select whether or not to migrate the eRoom notification settings to be SharePoint alert settings. eRoom Migration supports to migrate the notification settings at the top-level folder level, subfolder level, list level, item level, attachment level, and attachment folder level.
  - **Grouping View** – Choose whether to migrate the source database’s grouping view. If selected, a grouping view of the source database will be migrated to the destination. If do not select this option, the grouping view of the database will not be migrated.
  - **Folder Structure Management** – Choose a method to handle the folder structure while migrating eRoom folders to SharePoint.
    - If you select **Collapse all the folder structure**, after a migration, all levels of the folder structure of the source content will be collapsed. All files within the folders will be migrated to the library. No sub-folder will be created in the destination. If you want to track the original folder structure, you can select the **Add a column to keep the source path/parent folder name** option to add a column for the migrated items.
      - To add a column for keeping the source path of the migrated content, select the **Source path** option. You can enter a column name in the text box or use the provided column name **DocAve Source Path**. The source path will be the column values in the destination.
      - To add a column for keeping the parent folder name of the migrated content, select the **Parent folder name** option. You can enter a column name in the text box or use the provided column name **Parent Folder Name**. The parent folder name of the migrated content will be the column values in the destination.

**\*Note:** If the selected source node will be migrated to a site in the destination, the top level folder in the source will be migrated to a list in

the destination that is automatically created with the same name of the top-level folder and all the items in the sub folders will be migrated to this list.

- If you select **Create top level folder on destination**, a top level folder will be generated at the destination and the source folder, including all of the sub folders under it, will be migrated as a whole to this top-level folder. Thus the folder structure will be kept after a migration.

7. Click the **Security** tab, configure the following settings:

- **User** – Choose whether to migrate eRoom users. If you select the **Migrate user** checkbox, all of the active eRoom users will be migrated to the destination site. The user will be added to the corresponding migrated SharePoint group depending on source group that the user belongs to. If the source user does not belong to any group, after a migration, the user will be added to one of the built-in groups according to the base role group mappings configured in the [Mapping Options](#).

By default the deactivated eRoom users will not be migrated unless you select the **Migrate deactivated user**. After a migration, the deactivated users will be migrated to the SharePoint site without any permissions.

**\*Note:** If an eRoom user is deleted, but the user still has some permissions for an eRoom list, the user will be migrated to the destination.

- **Security** – Choose whether to migrate the user's security. If you select the **Migrate security** checkbox, the security will be migrated according to mappings configured in the [Mapping Options](#).
- **eRoom Role** – Choose whether to migrate the eRoom roles to the SharePoint groups. If you select the **Migrate eRoom role as SharePoint group** checkbox, eRoom roles will be migrated to SharePoint groups in the destination. The permission levels of the destination SharePoint groups are based on the configured eRoom role mappings in the [Mapping Options](#).
  - The names of the destination SharePoint groups for built-in eRoom roles are based on the built-in group name mapping settings in the [Mapping Options](#).
  - By default, the custom eRoom roles will be migrated to SharePoint groups with the same names. You can also customize the destination SharePoint group names for custom eRoom roles by configuring group mapping rules in the [Mapping Options](#).

For more information on migrating eRoom roles, refer to the explanation for **eRoom Role Mapping** in [Mapping Options](#).

8. Click **Save** in the **Profile/Sub-profile** group 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

**Mapping Options** allow you to configure the list mappings and the security mappings to migrate eRoom lists and securities. Follow the steps below to set up a sub-profile for eRoom mapping options.

1. On the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** page appears where you can configure the profile settings.
2. On the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.
3. Click **Mapping Options** on the left-hand panel, and from the **Profile Settings** tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the Mapping Options field active.
4. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
5. Enter a profile name in the pop-up window and click **OK**.
6. Click the **List Mapping** tab. Configure the following settings:
  - a. **List Mapping** – Configure the list mapping settings when you want to change the eRoom list name after a migration. Click **Add a List Mapping**, enter the source eRoom list name in the **eRoom List Name** text box, and then enter a new destination SharePoint list name (which will be created automatically in the destination) in the **SharePoint List Name** text box.

To add more list mappings, click **Add a List Mapping** again. To delete the list mappings, check the checkboxes and then click **Delete the Selected List Mapping(s)**.

- **List Template Mapping** – Configure a list template mapping rule for the eRoom migration. By default, the source eRoom lists using different templates will be mapped to the destination SharePoint lists using the following corresponding templates. For example, if the source list is using the Database template in eRoom, then the migrated list will use the Custom List template in SharePoint. If you deselect the **Allow multiple values** checkbox, the value of the source column will be mapped as one managed metadata term in the destination managed metadata column.

You can manage the created list mapping rules in the following ways:

- Click the plus (+) to add another list mapping after complete configuring the current mapping.
  - Click the triangle (▼) and all the created list mapping rules are displayed in the drop-down menu. Click on the rule name to view the settings of the selected list mapping rule.
  - Click the cross ✖ next to rule name to delete the corresponding list mapping rule.
7. Click the **Security Mapping** tab, configure the following settings:

- **User Mapping** (Optional) – Select a previously created user mapping from the drop-down list, or select **New User Mapping** to create a new one. For more information about creating a user mapping, refer to [DocAve 6 Control Panel Reference Guide](#).
- **Domain Mapping** (Optional) – Select a previously created domain mapping from the drop-down list, or select **New Domain Mapping** to create a new one. For more information about creating a domain mapping, refer to [DocAve 6 Control Panel Reference Guide](#).
- **Group Mapping** (Optional)– Select a previously created group mapping from the drop-down list, or select **New Group Mapping** to create a new one. For more information about creating a group mapping, refer to [DocAve 6 Control Panel Reference Guide](#).
- **Built-in Group Name Mapping** (Required) – By default, the built-in eRoom groups will be migrated to the corresponding SharePoint built-in groups shown in table below.

eRoom Group	SharePoint Group
Coordinators	Owners
Participants	Members
Observers	Visitors

Double-click the SharePoint group name to enter a group name that the corresponding eRoom group will be mapped to. If the entered group does not exist at the destination, a new group with the specified name will be created.

- **eRoom Role Mapping** (Required)– By default, the eRoom base roles will be migrated to the corresponding SharePoint permission levels shown in table below.

eRoom Role	SharePoint Permission Level
Coordinator	Full Control
Participant	Contribute
Observer	Read

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

You can change an eRoom role mapping by double-clicking the SharePoint permission level you want to change and selecting a desired permission level from the drop-down list, or click **New SharePoint Permission Level** to create a new permission level. For more details about creating a new SharePoint permission level, refer to [Creating a SharePoint Permission Level](#).

Click **Add an eRoom Role** to add more eRoom role mappings, or click **Delete the Selected Role Mapping(s)** to delete the selected role mapping.

**\*Note:** The default role mappings cannot be deleted.

- If the **Migrate eRoom role as SharePoint group** checkbox is selected in the [Migration Options](#) sub-profile you select, eRoom roles will be migrated to SharePoint groups in the destination. The destination SharePoint groups will be granted the mapped permission levels according to the eRoom role mappings.
  - The eRoom built-in roles will be migrated to the corresponding SharePoint groups according to the built-in group name mappings, and the permissions will be migrated according to the configured role mappings. As the two tables above show, after a migration, the eRoom built-in group **Coordinators** will be migrated to SharePoint group **Owners** with the **Full Control** permission.
  - By default, eRoom custom roles maintain their original name when migrated to the destination. To customize the destination group name for a specific eRoom role, add a group mapping rule for this eRoom role in **Group Mapping**. Enter the desired custom eRoom role in the **Source Group Name** column and enter the desired destination group name in the **Destination Group Name** column.
 

**\*Note:** You cannot enter an eRoom custom role name in the **Source Group Name** column of **Group Mapping** unless you select the **Migrate eRoom role as SharePoint group** checkbox in the [Migration Options](#) sub-profile you select.
- If the **Migrate eRoom role as SharePoint group** checkbox is not selected in the [Migration Options](#) sub-profile you select, eRoom roles will be migrated to SharePoint permission levels in the destination. The eRoom roles will be migrated to the corresponding SharePoint Permission Levels according to the eRoom role mappings, and the users and groups in the corresponding eRoom role will be granted the mapped permission level after a migration. If you do not add an eRoom role mapping for a specific customized eRoom role, the customized eRoom role will be migrated according to its base role's permission mapping.

See the following eRoom role mapping table below for an example.

eRoom Role	SharePoint Permission Level
Coordinators	Full Control
Participants	Contribute
Observers	Read
Test 1	Design

## Creating a SharePoint Permission Level

When configuring eRoom Role Mapping settings, after clicking **New SharePoint Permission Level**, the **Create a SharePoint Permission Level** interface appears. Refer to the steps below to create a permission level:

1. **Name and Description** – Enter a name and an optional description for the SharePoint Permission Level you are about to create, which is used to locate the permission level while configuring the eRoom role mapping.  
  
**\*Note:** If the permission level you are about to create already exists in SharePoint, the newly created permission level will not replace the existing one.
2. **Permissions** – Select the permissions you want to add to this permission level by clicking the corresponding checkboxes in this field. Check the **Select All** checkbox to add all of the permissions into this permission level.
3. Click **OK** in the **Commit** group to save your changes or click **Cancel** to return to the **Manage SharePoint Permission Level** page without saving any configurations.

## Advanced Options

Advanced options allow you to configure character length and illegal character replacement settings. Set up Advanced Options by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** interface appears.
2. From the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.
3. Click **Advanced Options** on the left-hand pane, and then the Advanced Options page appears. You can configure the following settings:
  - **Dynamic Rule** – Map the source eRoom field names and the corresponding values to SharePoint column names and column values. Select a previously created dynamic rule or click **New Dynamic Rule** to create a new one.
  - **Character Length Settings** – This is used to set character length limitations for folder names, file names, and SharePoint URLs.
    - **Maximum length of the folder name** – The default value is 60 and you can define the value from between 1 and 128 characters. If the folder name exceeds the maximum, the extra characters will be pruned from the end. For example, a folder migrated from a database is named **abcdef** in the source and the value that you set here is 5. The folder will be named **abcde** after the migration.
    - **Maximum length of the file name** – The default value is 80 and you can define the value from between 1 and 128 characters. If the file name, including the file extension, exceeds the maximum, the extra characters will be pruned from the end. For example, a file is named **abcdef.txt** in the source and the value that you set here is 5. The file will be named **a.txt** after the migration.
    - **Maximum length of the SharePoint URL** – The default value is 255 and you can define the value from between 1 and 260 characters. The length of the SharePoint URL is calculated from the first character of the managed path after **/**. When the folder or file's URL exceeds the limitation, the migration results are as follows:
      - If a folder URL exceeds the maximum and no files are in this folder, the folder is migrated to the next folder up in the hierarchy until the folder URL does not exceed the maximum character length.
      - If the file URL in a folder exceeds the maximum, the folder and all files in it are migrated to the next folder up in the hierarchy until the file URL does not exceed the maximum character length.
  - **Illegal Character Replacement Settings** – Replaces illegal SharePoint characters with valid characters. You can modify and add illegal character mappings for Group/Role Level, Folder level, and File level to the specified characters in SharePoint. By default, all illegal characters are replaced with an underscore (**\_**). Click **Group/Role Level**, **Folder Level**, or **File Level** on the tab to enter into each page.

- To modify an illegal character mapping, double-click the underscore in the column of **Replace with** next to an illegal character and change it to a different character.
- To add an illegal character mapping, click **Add an Illegal Character** and then enter the illegal character into the **Illegal character in SharePoint** column and the corresponding valid character in the **Replace with** column.
- To delete one or more previously configured illegal character mappings, select the mappings and click **Delete the Selected Illegal Character(s)**. You can also remove a previously configured illegal character mapping by clicking .

**\*Note:** The default illegal character mappings cannot be deleted.

## Managing Sub-profiles

eRoom Migrator provides sub-profile Migration Options to manage the Content and Security migration. Additionally, it provides sub-profile Mapping Options to specify the List Mapping and Security 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 with 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 eRoom Online Migration

An online eRoom Migrator job migrates the selected eRoom content to SharePoint keeping the source eRoom intact by configuring various migration settings.

To start an eRoom migration job, click **Online Migration** on the ribbon, and then you are brought to the **Create a New Plan** interface.

Follow the steps below to run an online eRoom migration job:

### Selecting the Source and Destination Nodes

1. In the **Source** pane, click the Agent name to expand the eRoom data tree from the community level down to the item level.
  - a. Find the eRoom data that you want to migrate. Enter the name of community, facility, eRoom, folder or the item into the **Input Keyword** text box to search the desired content as the source. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes that are not displayed in the expanded tree cannot be search. After entering the keyword, the search result will be displayed.
  - b. Select the source node by checking the corresponding checkbox. With each folder level, there is a node named **Items** to display how many objects (including the files and items) are contained in the **Items** node. You can click the **Items** node and the **Item Browser** interface appears. Select the files/items that you wish to migrate by checking corresponding checkboxes and click **OK**.

**\*Note:** For source contents that are supported and unsupported in the migration, refer to [Supported and Unsupported Elements for eRoom Migrator](#).

2. In the **Destination** pane, click the farm name to expand the SharePoint data tree. Select the destination node:
  - a. Find the destination location where the selected source data will be migrated. If working with a large environment, enter the site collection URL into the **Input Keyword** textbox to search for the desired site collection. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. After entering the keyword, the search result will be displayed.

- b. To narrow down the search criteria and display fewer nodes on the tree, right-click a particular farm or Web application node 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.
      - If you use **Advanced Search** at the farm level, you can configure the **URL** rules for the Web application nodes.
      - If you use **Advanced Search** at the Web application level, you can configure the **URL** rules and **Name** rules for the site collection 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 clicking the corresponding radio button. You can also create a new site collection, site, list or folder by entering the specified name and click **Create Container**. For details on creating containers, refer to [Creating Containers](#).
3. 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 eRoom migration plan, which then can be used to perform an eRoom migration job. For more information on the **Save As New Plan** interface, refer to [Configuring the Save As New Plan](#).

## Creating Containers

Prior to migration, containers should be created in the destination to store the migrated content. The destination container in eRoom Migration can be a site collection, site, list, library, or folder.

You can create containers in SharePoint without leaving the DocAve interface.

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 settings for each type of container as such.

**\*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 Site Collection 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:** eRoom Migrator only supports creating site collections in on-premises SharePoint.

## Creating a Site

Configure these settings in the Create Site 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 List/Library

Configure these settings in the Create List page:

- **Object Type** – Choose whether you wish to create a **List** or **Library** by selecting the corresponding radio button.
- **Category** – Select the category for the new list or library.
- **Navigation** – Select **Yes** if you want to display the library/list on the Quick Launch.
- **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.
- **Document Version History** (for Document Library, Form Library) – Select **Yes** to create a version each time you edit a file in this library.

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** –Specify a conflict resolution to handle the conflicts occurred when migrating eRoom content to the destination. For more information about conflict resolution, refer to [Appendix D: Conflict Resolution](#).
2. **Profile Selection** – Configure the related migration options, mapping options and advanced options for the migration job. Select a previously configured profile from the drop-down list. eRoom migration provides you a default main profile named **Default Profile (default)**.
3. **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.
4. **Migration Database** – 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 select 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.eRoomM.JobDetail**, **DocAve6.eRoomM.JobNotification**, and **DocAve6.eRoomM.JobStatistics**. For more information about the tables, refer to [Appendix A: eRoom Migration Database Information](#).
  - **Store log information in the migration database** – Select this checkbox to store log information in the **DocAve6.eRoomM.JobLogs** table within the migration database. For more information about the table, refer to [Appendix A: eRoom Migration Database Information](#).
5. **Notification** – Designate DocAve users to receive e-mail notification containing reports when a certain triggering event occurs. 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](#).

6. **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the eRoom 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**.
7. 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 a name for the plan and add an optional description for the plan.
2. **Profile Selection** – Allows you to configure the related migration options, mapping options and advanced options for the migration job. Select a previously configured profile from the drop-down list or click **New Profile** to configure a new one. eRoom migration provides you a default main profile named **Default Profile (default)**.
3. **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.
4. **Schedule Selection** – Choose whether to run the plan on schedule by clicking the corresponding radio button.
  - **No Schedule** – The plan will not run until you manually start it.
  - **Configure the schedule myself** – Configure a customized schedule, and run the plan by the schedule. The **Schedule Settings** section appears after clicking **Configure the schedule myself**. Click **Add Schedule**, and then the **Add Schedule** interface appears. For more information on the **Add Schedule** interface, refer to [Configuring Schedule Settings in the Add Schedule Interface](#).
5. **Notification** – Select the e-mail **Notification** profile for sending the notification report. For more information on working with notification policies, refer to the [DocAve 6 Control Panel Reference Guide](#).
6. **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](#).
7. **Migration Database** – 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 connection status.

- **Store job data in the migration database** – Select this checkbox to store detailed job information in the following tables within the migration database: **DocAve6.eRoomM.JobDetail**, **DocAve6.eRoomM.JobNotification**, and **DocAve6.eRoomM.JobStatistics**. For more information about the tables, refer to [Appendix A: eRoom Migration Database Information](#).
  - **Store log information in the migration database** – Select this checkbox to store log information in the **DocAve6.eRoomM.JobLogs** table within the migration database. For more information about the table, refer to [Appendix A: eRoom Migration Database Information](#).
8. 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** – Choose a migration mode for this plan. Choose **Full migration** to migrate all the specified eRoom content to SharePoint. Choose **Incremental migration** to only 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 remigrate the objects whose metadata/securities failed to be migrated in the last migration job.
2. **Conflict Resolution** – Select a conflict resolution for the container level and the content level separately to handle the conflicts occurred during a migration. For more information about this, refer to [Appendix D: Conflict Resolution](#).
3. **Schedule Settings** – Specify the running frequency for this plan by entering an integer in the textbox.
4. **Range of Recurrence** – Specify the start time and end time for this plan in the provided field.
5. **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the eRoom 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**.
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. You can repeat the configurations above to create more schedules.

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

## Conflict Resolution

Conflicts occur when one or more items in the destination have the same name as items in the source. To handle the Container and Content level conflicts resolution, see the information below. For more detailed information of Conflict Resolution, refer to [Appendix D: Conflict Resolution](#).

- **Container Level** – A container conflict occurs when the name of the source eRoom container is the same as that of a destination container. Two conflict resolutions are available: **Merge** and **Skip**. **Merge** adds the content in the source container to the conflict destination container. If you select Merge, the conflict resolution for the content level must be defined to handle the content conflicts. **Skip** ignores the conflicting containers and takes no action on the source and destination. If you select Skip, the **Check lower objects for conflict** checkbox is checked by default, which means that the lower containers under the specified container will also be checked, if conflicts occur, the lower containers will also be ignored during a migration. The content in the lower containers will be migrated according to the configured content conflict resolution.
- **Content Level** – A content level conflict occurs in the event that the ID of the source eRoom item that you want to migrate is the same as that of a destination item. Three conflict resolutions are available: **Overwrite**, **Skip** and **Append**.  
**Overwrite** replaces the destination item by the source same named item. **Skip** ignores the conflicting items and takes no action on them. **Append** adds the source item to the destination, marking it with an underscore and an integer added in the item name.

## eRoom Migration for SharePoint Online

You can use eRoom Migration to migrate eRoom objects to SharePoint Online. To perform this migration, you must configure your Agent groups and SharePoint sites in DocAve Control Panel. For more detailed information about this configuration, see the **Agent Groups** and **SharePoint Sites** sections in the [DocAve 6 Control Panel Reference Guide](#).

Before using eRoom Migration for SharePoint Online, make sure you have purchased the corresponding eRoom to SharePoint Online Migration licenses. Navigate to **DocAve 6 Manager > Control Panel > License Manager**, then click **Migration** tab to verify that the **eRoom for SharePoint Online Migration** license is available.

For details on how to manage migration profiles or how to perform an eRoom Migration job, refer to [About Online Migrations](#).

**\*Note:** In **User Mapping**, the **Add a placeholder account to keep metadata even if the user no longer exists** option is not supported for use with eRoom Migration to SharePoint Online. This option replaces non-existent destination users with a placeholder account in the destination Active Directory.

eRoom Migration to SharePoint Online does not support the Create Container function at the site collection level in a SharePoint Online destination node.

# About Offline Migrations

An Offline Migration job migrates content, configurations, securities, and users from a source eRoom to a destination SharePoint environment when a network between the source and destination is unavailable.

While it is theoretically possible to run an Offline 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 a migration.

## Offline Migration Overview

To perform Offline Migration jobs, the following steps must be performed in this order. Click the link to jump to the corresponding section.

1. [Pre-migration Configurations](#)
  - [Configuring Migration Databases](#)
  - [Configuring Staging Locations](#) (Offline Jobs Only)
  - [Configuring Filter Policies](#) (Optional)
  - [Configuring Mapping Settings](#) (Optional)
  - [Configuring Dynamic Rules](#) (Optional)
2. [Configuring eRoom Offline Migration Profiles](#)
  - a. [Setting Up an Export Profile](#)
  - b. [Setting Up an Import Profile](#)
3. [Performing an eRoom Offline Migration](#)
  - a. [Exporting Data](#)
  - b. [Importing Data](#)
    - [Creating Containers](#)

## Configuring eRoom Offline Migration Profiles

The corresponding eRoom export profile and import profile must be in place prior to running an offline eRoom Migration job. The section below instructs the steps to set up an export profile and an import profile.

## Setting Up an Export Profile

An eRoom export profile contains settings of Migration Options and Filter Options that are used to import the selected eRoom content to the specified export location.

To create an eRoom export profile, refer to the instructions below:

1. On the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** page appears where you can configure the profile settings.
2. On the **Profile Settings** tab, in the **Plan Mode** group, ensure **Export Mode** is highlighted.
3. On the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.
5. Select the **Migration Options**. For details about this section, refer to [Migration Options](#).  
**\*Note:** The **Managed Path** setting is not supported for the export mode.
6. After selecting the migration options, select the **Filter Options**.
7. In the Filter Policy field, select a previously created filter policy from the drop-down list. If there is no existing filter policy, select **New Filter Policy** to create a new one. For detailed information about creating a filter policy, refer to [Creating Filter Policies](#).
8. Click **Save** next to the **Main Profile** textbox 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.

## Setting Up an Import Profile

An eRoom import profile contains settings of Migration Options, Mapping Options and Advanced Settings that are used to import the eRoom content from an export location into SharePoint.

To create an eRoom import profile, refer to the instructions below:

1. On the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** page appears where you can configure the profile settings.
2. On the **Profile Settings** tab, in the **Plan Mode** group, ensure **Import Mode** is highlighted.
3. On the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.
5. Select **Migration Options**. For details about this section, refer to [Migration Options](#).
6. Select **Mapping Options**. For more details about this section, refer to [Mapping Options](#).
7. Configure the **Advanced Options**. For more details about this section, refer to [Advanced Options](#).

8. Click **Save** next to the **Main Profile** textbox 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.

## Performing an eRoom Offline Migration

eRoom Migrator allows you to migrate the eRoom data from an offline source to an offline destination by exporting the eRoom data that you want to migrate to an export location, then import the eRoom data to from the export location to the destination. The export location must be configured before running an offline eRoom Migrator job. For more details about creating an export location, refer to [Configuring Staging Locations \(Offline Jobs Only\)](#) .

### Exporting Data

Follow the steps below to export the eRoom data to an export location in order to perform the offline eRoom migration job:

1. On the **Home** tab, ensure the **eRoom Migration** is selected in the **Module** group.
2. Click **Export** in the **Plan** group.
3. In the **Source** pane, click the Agent name to expand the eRoom data tree.
  - a. Find the eRoom data that you want to migrate. Enter the name of community, facility, eRoom, folder or item into the **Input Keyword** text box to search the desired content as the source. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. After entering the keyword, the search results will be displayed.
  - b. Select the source node by checking the corresponding checkbox. Each folder level has a node named **Items**, which displays how many objects (including the files and items) are contained in the **Items** node. You can click the **Items** node and the **Item Browser** interface appears. Select the files/items that you wish to migrate by checking corresponding checkboxes and click **OK**.

**\*Note:** For what kinds of source contents are supported and unsupported in the migration, refer to [Supported and Unsupported Elements for eRoom Migrator](#).

4. In the **Destination** pane, select a previously created staging location to store the exported data, or click **New Export Location** to create a new one. For more details about this, refer to [Configuring Staging Locations \(Offline Jobs Only\)](#).
5. Click **Save As New Plan** in the **Commit** group. The **Save As New Plan** interface appears.
  - a. **Plan Name** – Enter a name for the plan and add an optional description for the plan.

- b. **Profile Selection** – Configure the related migration options and filter options for the migration job. Select a previously configured profile from the drop-down list or click **New Profile** to configure a new one. For more details about creating an offline profile, refer to [Setting Up an Export Profile](#). eRoom Migration provides you a default main profile named **Default Profile (default)**.
  - c. **Schedule Selection** – Choose whether to run the plan on schedule by clicking the corresponding radio button.
    - **No Schedule** – The plan will not run until you manually start it.
    - **Configure the schedule myself** – Configure a customized schedule, and run the plan by schedule. The Schedule Settings field appears after clicking **Configure the schedule myself**. Click **Add Schedule** to add a customized schedule and configure the following settings in the pop-up window:
      - **Options** – Choose a migration mode for this plan. **Full migration** migrates all the specified eRoom content to the specified export location while the **Incremental migration** only migrates the updates since the last migration job.
      - **Conflict Resolution** – Select a conflict resolution for the container level and the content level separately to hand the conflicts occurred during a migration. For more information about this, refer to [Appendix D: Conflict Resolution](#).
      - **Schedule Settings** – Specify the running frequency for this plan by entering an integer in the textbox.
      - **Range of Recurrence** – Specify the start time and end time for this plan in the provided field.
      - **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the eRoom 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**.

Click **OK** to save the schedule.
  - d. **Notification** – Select the e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the [DocAve 6 Control Panel Reference Guide](#).
  - e. **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](#).
6. Click **Save** to save this plan or click **Save and Run Now** to run the plan immediately.

The **Run Now** window pops up after clicking **Save and Run Now**. Configure the **Options** setting and **Job Status Option** settings. Then, click **OK** to start the job.

eRoom Migrator contains a **Job Monitor** button where users can view the status of the running jobs as well as the detailed job information. This is useful for monitoring jobs or troubleshooting for errors.

Refer to the [DocAve 6 Job Monitor Reference Guide](#) for more information.

## Importing Data

Follow the steps below to import the eRoom data to a SharePoint destination location in order to perform the offline eRoom migration job:

1. On the **Home** tab, ensure the **eRoom Migration** is selected in the **Module** group.
2. Click **Import** in the **Plan** group.
3. In the **Source** pane, click the farm name to expand the export location. Select the backed up data you want to import. Click the **Details** tab to view the content of the backup data.
4. In the **Destination** pane, click on the farm name to expand the data tree. Select the destination node:
  - a. Find the destination location where the selected backup data will be imported to. If you are working with a large environment, enter the site collection URL into the **Input Keyword** textbox to search for the desired site collection. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. After entering the keyword, the search results will be displayed.
  - b. To narrow down the search criteria and display fewer nodes on the tree, right-click a particular farm or Web application node 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.
      - If you use **Advanced Search** at the farm level, you can configure the **URL** rules for the Web application nodes.
      - If you use **Advanced Search** at the Web application level, you can configure the **URL** rules and **Name** rules for the site collection 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 clicking the corresponding radio button. You can also create a new site collection, site, list or folder by entering the specified name and click **Create Container**. For details on creating containers, refer to [Creating Containers](#).
5. Click **Save As New Plan** in the **Commit** group. The **Save As New Plan** interface appears.
- a. **Plan Name** – Enter a name for the plan and add an optional description for the plan.
  - b. **Profile Selection** – Allows you to configure the related migration options, mapping options and advanced options for the migration job. Select a previously configured profile from the drop-down list or click **New Profile** to configure a new one. For more details about creating an offline profile, refer to [Setting Up an Import Profile](#). eRoom migration provides you a default main profile named **Default Profile (default)**.
  - c. **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.
  - d. **Schedule Selection** – Choose whether to run the plan on schedule by clicking the corresponding radio button.
    - **No Schedule** – The plan will not run until you manually start it.
    - **Configure the schedule myself** – Configure a customized schedule, and run the plan by schedule. The Schedule Settings field appears after clicking **Configure the schedule myself**. Click **Add Schedule** to add a customized schedule and configure the following settings in the pop-up window:
      - **Options** – Choose a migration mode for this plan. **Full migration** migrates all the specified eRoom content to SharePoint while the **Incremental migration** only migrates the updates since the last migration.
      - **Conflict Resolution** – Select a conflict resolution for the container level and the content level separately to hand the conflicts occurred during a migration. For more information about this, refer to [Appendix D: Conflict Resolution](#).
      - **Schedule Settings** – Specify the running frequency for this plan by entering an integer in the textbox.

- **Range of Recurrence** – Specify the start time and end time for this plan in the provided field.
- **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the eRoom 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**.

Click **OK** to save the schedule.

- e. **Notification** – Select the e-mail **Notification** profile for sending the notification report. For more information on working with notification policies, refer to the [DocAve 6 Control Panel Reference Guide](#).
- f. **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](#).
- g. **Migration Database** – 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. To use the migration database to store the job data, select **Also use Specified Database to store the job data**.

6. Click **Save** to save this plan or click **Save and Run Now** to run the plan immediately.

The **Run Now** window pops up after clicking **Save and Run Now**. Configure **Option** settings, **Conflict Resolution** settings, and **Job Status Option** settings.

eRoom Migrator contains a **Job Monitor** button where users can view the status of the running jobs as well as the detailed job information. This is useful for monitoring jobs or troubleshooting for errors.

Refer to the [DocAve 6 Job Monitor Reference Guide](#) for more information.

## Creating Containers

Prior to migration, containers should be created in the destination to store the migrated content. The destination container in eRoom Migration can be a site collection, site, list, library, or folder.

You can create containers in SharePoint without leaving the DocAve interface.

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 settings for each type of container as such:

**\*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 Site Collection 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:** eRoom Migrator only supports creating site collections in on-premise SharePoint.

## Creating a Site

Configure these settings in the Create Site 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 List/Library

Configure these settings in the Create List page:

- **Object Type** – Choose whether you wish to create a **List** or **Library** by selecting the corresponding radio button.
- **Category** – Select the category for the new list or library.
- **Navigation** – Select **Yes** if you want to display the library/list on the Quick Launch.
- **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.
- **Document Version History** (for Document Library, Form Library) – Select **Yes** to create a version each time you edit a file in this library.

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

# eRoom Migration Column Type Mapping Table

The table below lists the supported mappings between eRoom column types and SharePoint column types.

eRoom Field's Data Type	SharePoint Column Type
Plain text	Single line of text
Formatted text	Multiple lines of text_Enhanced rich text
Date	Date and Time _ Date & Time
Number	Number
Autonumber	Number
Yes/No	Yes/No
Traffic light	Choice
Choice list	Choice
Choice list (Allow multiple choices)	Choice
Member list	Person or Group
Approval	Person or Group
Comment area	Comment area is migrated to the SharePoint Discussion list.
Attachment box	For the migration of Attachment box field in the eRoom Database, refer to the information below: The contents in the Attachment box are migrated according to their content types. The lists in the Attachment box are migrated as SharePoint lists. The folders and files are migrated into the eRoom Attachment Folders, and links to the folders and files will be added in their parent list to keep track of the folders and files.
Change log	Multiple lines of text_Enhanced rich text

**\*Note:** **Traffic Light** field will be migrated to the **Choice** column in SharePoint, but the eRoom Migration does not support to migrate the icons in the Traffic Light field.

**\*Note:** By default, the destination SharePoint **Number** column, which is migrated from an eRoom **Autonumber** field, is configurable. To set the destination columns of the eRoom **Autonumber** fields to read only, configure the **AutoNumberField ReadOnly** node in the **eRoomMigrationConfiguration.xml** configuration file. For detailed instructions, refer to [eRoomMigrationConfiguration.xml](#).

# Supported and Unsupported Elements for eRoom Migrator

The table below lists the supported status of each eRoom source element and what the corresponding source element can be migrated to if it is supported. DocAve eRoom Migrator does not support the elements that are not listed in the list below.

Source	Destination	Status
Folder	Document Library/Folder	Supported
File/Item	File/Item	Supported
Security and Property	Mapping Settings	Supported
Calendar	Calendar	Supported
Project Plan	Project Tasks	Supported
Poll	Survey	Supported
Inbox	Document library/Announcement List	Supported
Note	Announcements	Supported
Link	Links	Supported
Discussion	Discussion Board	Supported
The Vote in the List	Survey	Supported
The Version in the List Attachment	Document Version	Supported
Embedded Picture in List Description	N/A	Unsupported
Dashboard	Custom List	Partially Supported. <b>*Note:</b> eRoom Migration can only migrate the metadata, votes, attachments, and comments of eRoom Dashboard. eRoom Migration does not support migrating the content of eRoom Dashboard. The attachment items of the Dashboard are migrated as attachments of the destination SharePoint Custom List. The attachment folders of the Dashboard are migrated to the <b>eRoom Attachment Folders</b> library in the destination SharePoint site. The votes in the Dashboard are migrated as SharePoint Surveys in the destination SharePoint site. The comments of the Dashboard

Source	Destination	Status
		are migrated to discussion topics in the destination SharePoint Custom List or description for the destination SharePoint Custom List, based on the settings in <b>Profile Settings &gt; Migration Options &gt; Comment</b> .
The Reply in the Title Discussion	Reply in Discussion Board	Supported
Recycle	N/A	Unsupported
Database	Custom List	Partially Supported. <b>*Note:</b> eRoom Migration does not support migrating the Enterprise Overview Database items to SharePoint Custom Lists. While migrating the content of Issues (approval process), RFP Process (approval process), and T&E Processing (approval process) to SharePoint, the <b>Database Steps</b> are migrated to the <b>Choice</b> column of the destination Custom List, and attachments contained in the <b>Database Steps</b> and entries are migrated to the <b>eRoom Attachment Folders</b> in the destination SharePoint site. You can only change the <b>Steps</b> in the <b>Choice</b> column of the Custom List manually.
Document Version	Document Version	Supported <b>*Note:</b> Since eRoom documents are only major versions, the source major versions migrate to the destination and they remain major versions.
Site Template	Team Site	Supported
	Blank Site	Supported
	Document Workspace	Supported
	Basic Meeting Workspace	Supported
	Blank Meeting Workspace	Supported
	Decision Meeting Workspace	Supported

<b>Source</b>	<b>Destination</b>	<b>Status</b>
	Social Meeting Workspace	Supported

# Managing Plans

You can use Plan Manager to manage the migration plans created by different modules. 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.
- 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. 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 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.

## eRoom Migrator Tools

The eRoom migration tools are provided in the ...\*AvePoint\Agent\bin*. This tool is used to scan the source contents selected for migration and generate the report to view the information of the scanned contents. Besides, you can configure Domain Mapping, User Mapping, and Group Mapping, which can be used during eRoom migration. Refer to the [DocAve 6 Supplementary Tools User Guide](#) for instructions on using these tools.

# Accessing eRoom 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 **E**, you will be brought to the **eRoom 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

## eRoom Migrator

To access Hot Key mode, in the **eRoom 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
eRoom Migrator Home Page	H
eRoom Plan Manager	P
DocAve Home Page	1
AvePoint Official Website	2
Control Panel	3
Job Monitor	4
Plan Group	5
Health Analyzer	6
Account Information	9
Help and About	0

## Home Page

To access the Home tab by using hot keys, in the **eRoom 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				
eRoom Migration	E			
Online Migration	O			
Export	EX			
Import	I			
New Plan	N			
Profile Settings	PS			
Migration Database	MD	Configure	C	OK O
				Cancel C
		Close	X	
Staging Location	SL	Export Mode	P	
		Import Mode	I	
		Create	N	
		View Details	V	
		Edit	E	
		Delete	D	
		Close	X	
Job Monitor	J			

## Profile Settings

On the **Home** tab, continue pressing **PS**, you are brought to the Profile Settings page.

The following is a list of hot keys for the functionalities on the ribbon of the Profile Settings tab.

Functionality Name and Hot Key			
Online Mode	O		
Export Mode	Ex		
Import Mode	I		
Filter Policy	F	Create	N
		Edit	E
		View	V
		Delete	D
		Close	X
Mappings	M	Domain Mapping	DO

Functionality Name and Hot Key			
		User Mapping	U
		Group Mapping	G
Dynamic Rule	DY	Create	N
		View Details	V
		Edit	E
		Delete	D
		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		

## Plan Manager Page

To access the Plan Manager tab by using hot keys, in the **eRoom 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** tab.

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

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

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

Functionality Name and Hot Key							
		Close		X			
Edit	E	Source & Destination	SD	Create Container	CC	OK	O
						Cancel	C
				Save	SA	Save	SA
						Save As	A
		Settings	SE	Save	SA	Save and Run Now	SR
						Save	SA
						Save As	A
						Save and Run Now	SR
Delete	D						
Test Run	TR	OK	O				
		Cancel	C				
Run Now	R	OK	O				
		Cancel	C				

## Appendix A: eRoom Migration Database Information

Refer to the following tables to view the detailed job 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.

### Job Detail

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 eRoom migration is EM. For example, EM20130818234955955559.
Sequenceld	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 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.

Column Name	Description	Value
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.
TargetObjectType	It is the type of the target object.	The value represents the type of the target object. <ul style="list-style-type: none"> <li>• 10001 – Web Application</li> <li>• 10002 – Site Collection</li> <li>• 10003 – Site</li> <li>• 10004 – Library</li> <li>• 10005 – List</li> <li>• 10006 – Folder</li> <li>• 10007 – Document</li> <li>• 10008 – Item</li> <li>• 10009 – Attachment</li> </ul>
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 value represents the version of the source object.
TargetObjectVersion	It is the version of the target object.	The value represents the version of the target object.
Operation	It is the operation performed for each source object during a migration.	The value represents the operation performed when migrating the source object to the target. <ul style="list-style-type: none"> <li>• 0 – None</li> <li>• 1 – Skipped</li> <li>• 2 – New Created</li> <li>• 3 – Overwritten</li> </ul>

Column Name	Description	Value
		<ul style="list-style-type: none"> <li>• 4 – Appended</li> <li>• 5 – Filtered</li> <li>• 6 – Collapsed</li> <li>• 7 – Merge</li> </ul>
Status	It is the migration status of the source object.	<p>The value represents the status of the job.</p> <ul style="list-style-type: none"> <li>• 0 – Starting</li> <li>• 1 – Successful</li> <li>• 2 – Backup Failed</li> <li>• 3 – Restore Failed</li> <li>• 4 – Be filtered and excluded from the result</li> <li>• 5 – Skipped</li> <li>• 6 – Exceptional</li> </ul>
StartTime	It is the time when the backup starts.	The value represents the time when the backup starts.
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.	<p>The value represents the status of using filter policy.</p> <ul style="list-style-type: none"> <li>• 0 – Not Used</li> <li>• 1 – Used</li> </ul>
TruncatedPolicy	It is the truncated policy that is applied to the source object.	<p>The value represents the truncated policy that is applied to the source object.</p> <ul style="list-style-type: none"> <li>• None – No truncated policy.</li> <li>• Truncated – The object name is truncated.</li> <li>• Renamed – The object name is renamed.</li> <li>• MoveUp – The object is moved up to the higher level.</li> </ul>
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.

Column Name	Description	Value
CustomMetadata	It is the status of using custom metadata.	The value represents the status of using custom metadata. <ul style="list-style-type: none"> <li>• 0 – Not Used</li> <li>• 1 – Used</li> </ul> The default value is false.
MetadataMapping	It is the statuses 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. <ul style="list-style-type: none"> <li>• 0 – Not Used</li> <li>• 1 – Used</li> </ul>
Message	It displays the migration message of the source object.	The value is the migration message of the source object.

## Job Notification

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.
Status	It is the status of the job.	The value represents the status of the job. <ul style="list-style-type: none"> <li>• 0 – In Progress</li> <li>• 2 – Finished</li> <li>• 3 – Failed</li> <li>• 4 – Stopped</li> <li>• 7 – Finished With Exception</li> <li>• 8 – Paused</li> </ul>
Message	It displays the job comment.	The value displayed is the same as the comment in Statistics of Job Details.

## Job Statistic

Column Name	Description	Value
JobId	It is the ID of the job.	The prefix of the job ID facilitates the distinction of different migrations.
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.
PlanGroupName	It is the name of the plan group.	The value is the name of the plan group that you set for the plan.
SourceAgentType	It is the source Agent type.	The value represents the source Agent type.
TargetAgentType	It is the target Agent type.	The value represents the target Agent type. <ul style="list-style-type: none"> <li>• 5 – SharePoint 2010</li> <li>• 6 – SharePoint 2013</li> </ul>
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. <ul style="list-style-type: none"> <li>• 0 – In Progress</li> <li>• 2 – Finished</li> <li>• 3 – Failed</li> <li>• 4 – Stopped</li> <li>• 7 – Finished With Exception</li> </ul>
Run Type	It is the type of the job.	The value represents the type of the job. <ul style="list-style-type: none"> <li>• 0 – Run</li> <li>• 1 – Test Run</li> </ul>

Column Name	Description	Value
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. <ul style="list-style-type: none"> <li>• 0 – Full Migration</li> <li>• 1 – Incremental Migration</li> </ul>
ContainerConflictResolution	It is the container conflict resolution.	The value represents the resolution of container conflict. <ul style="list-style-type: none"> <li>• 0 – Skip</li> <li>• 5 – Merge</li> </ul>
ContentConflictResoluion	It is the content conflict resolution.	The value represents the resolution of content conflict. <ul style="list-style-type: none"> <li>• 0 – Skip</li> <li>• 2 – Append</li> <li>• 3 – Overwrite</li> <li>• 8 – New Version</li> </ul>
MigratedBytes	It is the size of the migrated data. The unit is byte.	
FailedBytes	It is the size of the data that are failed to be migrated. The unit is byte.	
SkippedBytes	It is the size of the skipped data. The unit is byte.	
FilteredBytes	It is the size of the data that is filtered and excluded from the result. The unit is byte.	
MigratedSiteCollectionCount	It is the number of migrated site collections.	
MigratedSiteCount	It is the number of the migrated sites.	

<b>Column Name</b>	<b>Description</b>	<b>Value</b>
MigratedListCount	It is the number of the migrated lists.	
MigratedFolderCount	It is the number of migrated folders.	
MigratedItemCount	It is the number of migrated items.	
FailedSiteCollectionCount	It is the number of site collections that are failed to be migrated.	
FailedSiteCount	It is the number of the sites that are failed to be migrated.	
FailedListCount	It is the number of the lists that are failed to be migrated.	
FailedFolderCount	It is the number of the folders that are failed to be migrated.	
FailedItemCount	It is the number of the items that are failed to be migrated.	
SkippedSiteCollectionCount	It is the number of the skipped site collections.	
SkippedSiteCount	It is the number of the skipped sites.	
SkippedListCount	It is the number of the skipped lists.	
SkippedFolderCount	It is the number of the skipped folders.	
SkippedItemCount	It is the number of the skipped items.	
FilteredOutSiteCollectionCount	It is the number of site collections that are filtered and excluded from the result.	
FilteredOutSiteCount	It is the number of sites that are filtered and excluded from the result.	
FilteredOutListCount	It is the number of lists that are filtered and excluded from the result.	
FilteredOutFolderCount	It is the number of folders that are filtered and excluded from the result.	
FilteredOutItemCount	It is the number of items that are filtered and excluded from the result.	

## Job Logs

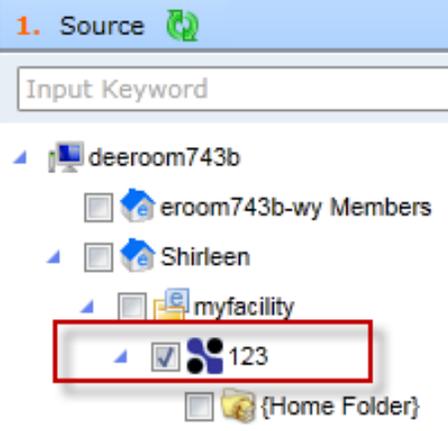
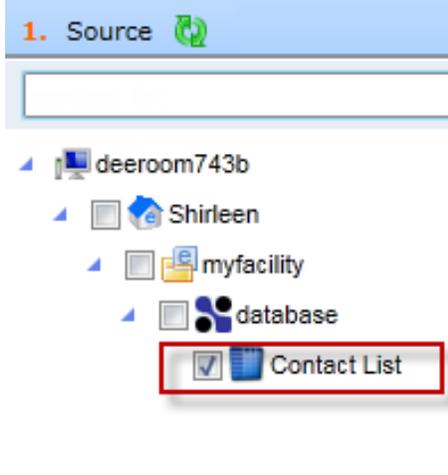
View the information of the job logs in the table below.

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 eRoom Migration is EM. For example, EM20150210145847665555, it indicates an eRoom 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 <b>Source</b> or <b>Destination</b> . <ul style="list-style-type: none"><li>• Source– The log is for the action of the source DocAve Agent.</li><li>• Destination – The log is for the action of the destination DocAve Agent.</li></ul>
LogLevel	It is the level of the log.	The value represents the level of the log. <ul style="list-style-type: none"><li>• INFO – Information</li><li>• WARN – Warning</li><li>• ERROR – Error</li><li>• DEBUG – Debug</li></ul>

## Appendix B: eRoom Migration 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	List	Note	What to select in the source
Community	✓	✓	✓			<p>1. Source </p> <p>Input Keyword</p> <ul style="list-style-type: none"> <li>deerom743b           <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> erom743b-wy Members</li> <li><input type="checkbox"/> Shirleen</li> <li><input type="checkbox"/> user</li> </ul> </li> </ul>
Facility	✓	✓	✓			<p>1. Source </p> <p>Input Keyword</p> <ul style="list-style-type: none"> <li>deerom743b           <ul style="list-style-type: none"> <li><input type="checkbox"/> erom743b-wy Members</li> <li><input type="checkbox"/> Shirleen</li> <li><input checked="" type="checkbox"/> myfacility</li> <li><input type="checkbox"/> user</li> </ul> </li> </ul>
eRoom	✓	✓	✓			

Destination level What to migrate	Web Application	Site Collection	Site	List	Note	What to select in the source
						 <p>1. Source </p> <p>Input Keyword</p> <ul style="list-style-type: none"> <li>deerroom743b <ul style="list-style-type: none"> <li>erom743b-wy Members</li> <li>Shirleen <ul style="list-style-type: none"> <li>myfacility <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> 123</li> <li>{Home Folder}</li> </ul> </li> </ul> </li> </ul> </li> </ul>
List/Folder	v	v	v	v		 <p>1. Source </p> <p>Input Keyword</p> <ul style="list-style-type: none"> <li>deerroom743b <ul style="list-style-type: none"> <li>Shirleen <ul style="list-style-type: none"> <li>myfacility <ul style="list-style-type: none"> <li>database <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Contact List</li> </ul> </li> </ul> </li> </ul> </li> </ul> </li> </ul>

## Appendix C: Advanced Settings in Configuration Files

You are allowed to customize some default eRoom migration settings by configuring the attribute of the corresponding node in the **eRoomMigrationConfiguration.xml** file. Navigate to ...\*Agent\data\Migrator\***eRoomMigrator** on the machine where the DocAve Agent is installed and locates **eRoomMigrationConfiguration.xml**.

### eRoomMigrationConfiguration.xml

Open the **eRoomMigrationConfiguration.xml** file with Notepad. Refer to the information below to configure the attribute in each node in the **eRoomMigrationConfiguration.xml** file.

- **MigrateAnnouncementToList** – This node allows you to choose whether to migrate the eRoom announcements to SharePoint.
  - **true – true** means the eRoom announcements will be migrated when an eRoom migration job is run. If there is no announcement list in the specified destination site, an announcement list named **Announcements** will be automatically created for migrating the eRoom Announcement. By default, the attribute of **Flag** is set to **true**.
  - **false – false** means the eRoom announcements will not be migrated when an eRoom migration job is run.
- **ListCommentAsDescription** – The eRoom list’s comment is not supported to migrate as enhanced rich text column values. If you choose to migrate eRoom **Comment** to **enhanced rich text** in the [Migration Options](#), you are allowed to specify how the eRoom list’s comment is migrated by configuring this node.
  - **true – true** means that the eRoom list’s comment will be migrated to the description of the list when an eRoom migration job is run. By default, the value of the attribute **Flag** is set to **true**.
  - **false – false** means the list’s comment will not be migrated if you choose to migrate eRoom comment to enhanced rich text when an eRoom migration job is run.
- **RestoreVersionToFile** – This node allows you to migrate the file of each version to a corresponding individual file.
  - **true – true** means that the eRoom file version will be migrated to individual files when an eRoom migration job is run. After migration, a corresponding file version in bracket is added to the migrated file’s name.

For example, there is a document whose file name is **Test.txt**. This file has two versions: version **1** and version **2**. After a migration, this file is migrated to two files, which are **Test(1).txt** and **Test(2).txt**.

- **false – false** means that the eRoom file version will not be migrated to individual files when an eRoom migration job is run. By default, the value of the attribute **Flag** is set to **false**.
- **ShowTemplateRoom** –This node allows you to specify whether the built-in rooms that are automatically created while creating a facility will be displayed in the source tree.
  - **true – true** means that the built-in rooms of a facility will be loaded while browsing the source tree and then you can select the desired room to migrate.
  - **false – false** means that the built-in rooms of a facility will not be loaded while browsing the source tree. By default the attribute **Flag** is set to **False**.
- **CloseConnection** – This node allows to choose whether to close the connection with eRoom when an eRoom migration job is completed.
  - **true – true** means that the connection with eRoom will be closed once an eRoom migration job is completed. By default, the value of the attribute **Flag** is set to **true**.
  - **false – false** means that the connection with eRoom will not be closed when an eRoom migration job is completed.
- **PerformanceLog** –This node allows you to choose whether to collect the performance log. Enable/Disable this feature according to the AvePoint representative’s suggestion. The performance log records the performance about migrated items when performing an eRoom migration job. Set the value of the **Disable** attribute as explained below:
  - **true – true** means that the performance log will not be collected when performing an eRoom migration job.
  - **false – false** means that the performance log will be collected when performing an eRoom migration job. By default, the value of the attribute **Disable** is set to **false**.

You can go to the DocAve Agent installation path  
 ...\\AvePoint\DocAve6\Agent\jobs to find the eRoom migration job folder.
- **AutoNumberField ReadOnly** – This node allows you to choose whether to set the destination columns of the **Autonumber** fields in an eRoom Database to read only when the migration is completed.
  - **true – true** means that the destination columns of the **Autonumber** fields in an eRoom Database will be set to read only when the migration is completed.
  - **false – false** means that the destination columns of the **Autonumber** fields in an eRoom Database will be configurable when the migration is completed.
- **RestoreCustomField** –Use the two attributes (**Flag** and **AddCustomFieldToDefaultContentType**) in this node to choose whether to migrate the custom fields in the source and add the migrated custom fields to the default content type of the destination SharePoint list/library.

- **Flag** – This attribute allows you to choose whether to migrate the custom eRoom fields in the source.
  - **true – true** means that the custom eRoom fields in the source will be migrated as columns of the destination items/files.
  - **false – false** means that the custom eRoom fields in the source will not be migrated.
- **AddCustomFieldToDefaultContentType** – This attribute allows you to choose whether to add the destination columns of the migrated eRoom custom fields to the default content type of the destination SharePoint library.
  - **true – true** means that the destination columns of the migrated custom eRoom custom fields will be added to the default content type of the destination SharePoint library.
  - **false – false** means that the destination columns of the migrated custom eRoom custom fields will not be added to the default content type of the destination SharePoint library.
- **RestoreeRoomAsRootWeb** – This node allows you to choose whether to migrate the source data to the top-level site and it can take effect when you select the destination site collection node.
  - **true – true** means that the source data will be migrated to the top-level site of the destination site collection.
  - **false – false** means that the source data will be migrated to a subsite in the destination site collection. The subsite title is the source eRoom name.
- **AddDatabaseCustomView** – This node allows you to choose whether to create a custom view in the destination for the source database.
  - **true – true** means a custom view will be created according to the source database view and this newly created view will be made the default view of the destination list.
  - **false – false** means a custom view will not be created.
- **MigrateItemAttachmentVersion** – This node allows you to choose whether to migrate the versions of eRoom list attachments as version of the destination SharePoint files.
  - **true – true** means the versions of eRoom list attachments will be migrated as versions of the destination files.
  - **false – false** means that the versions of eRoom list attachments will not be migrated.
- **FileServerPath** – When your facilities are related to multiple file servers, you must specify the path of the file servers in this node, with the exception of the primary file server.

- **CreateNewTermIfDoesNotExist** – 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** – eRoom 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** – eRoom Migration will not migrate the source objects' metadata column values that do not exist in the destination.
  
- **AccurateSecurityTrimming Option** – This node allows you to choose whether to migrate the **Open** and **Edit** permissions of source eRoom items in a more accurate way to avoid the discrepancies between the source permissions and the destination permissions, which might occur after directly migrating permissions. These discrepancies are caused by the difference of permission inheritance hierarchy between eRoom and SharePoint.
  - **false** – The default value of this attribute is **false**. eRoom Migration will directly migrate the source eRoom items' **Open** and **Edit** permissions to the destination SharePoint items. Due to the difference of permission inheritance hierarchy between eRoom and SharePoint, the following discrepancies between the source permissions and the destination permissions would occur.
    - If a user has **Open** permission to an eRoom item and does not have **Open** permission to any of its higher-level folders (up to the root folder of the list that contains the item), the user cannot access this eRoom item. After migration, the user has **Open** permission to the destination SharePoint item and can access this item, which is different from the corresponding access control of the source eRoom item.
    - In eRoom, an item does not inherit the **Edit** permission settings from its parent folder and can have different **Edit** permission settings from its parent folder. In SharePoint, a newly created item inherits the **Edit** permission settings from its parent until the permission inheritance is manually broken. After migration, the destination SharePoint item might inherit the **Edit** permission settings from its parent folder, and the unique **Edit** permission settings of the source item are overwritten.
  - **true** – eRoom Migration will migrate the source eRoom items' **Open** and **Edit** permissions in a more accurate way to avoid the permission discrepancies mentioned above. So that the **Open/Edit** permission settings of the destination SharePoint items have the same effects as the access control of the source eRoom items.
  
- **<SkipCalculateTotalSize Flag="false" EstimateValue="500M" />** – This node allows you to choose whether or not to skip the calculation of the source data's total size during eRoom Migration jobs. Skipping the calculation of the source data's total size can help to improve the migration speed of the eRoom Migration job.
  - **false** – The default value of the **Flag** is **false**. During an eRoom Migration job, DocAve calculates the total size of the source data and then checks whether or

not your DocAve license for eRoom Migration has enough remaining quantity for the source data.

- **true** – To skip the calculation of the source data's total size, set the value of the **Flag** to **true** and then enter an estimated total size of the source data as the value of **EstimateValue** in the format: **NumberM** or **NumberG**. **M** and **G** represent the units of the estimated total size: **MB** and **GB**. During a migration, DocAve will check whether or not your DocAve license for eRoom Migration has enough remaining quantity for the source data according to this value.
- **MultipleUpdateLink** – This node allows you to choose whether or not to allow the **eRoomMigrationRestore.exe** (for SharePoint 2010 farm) or **SP2013eRoomMigrationRestore.exe** (for SharePoint 2013 farm) process to create multiple threads for updating the links of migrated linked objects in the destination.
  - **true** – To allow the **eRoomMigrationRestore.exe** or **SP2013eRoomMigrationRestore.exe** process to create multiple threads for updating the links of migrated linked objects in the destination, set the value of **Flag** to **true**.
  - **false** – To force the **eRoomMigrationRestore.exe** or **SP2013eRoomMigrationRestore.exe** process to only create a single thread for updating the links of migrated linked objects in the destination, set the value of **Flag** to **false**. **false** is the default value.
- **ApplyUserMappingFile** – This node allows you to choose whether or not to apply the user mapping settings configured in the **eRoomMigrationUserMapping.xml** configuration file that is generated by the eRoom Migration tool and resides in the `... \AvePoint \DocAve6 \Agent \data \Migrator \eRoomMigrator` directory on the destination DocAve Agent server.
  - **false** – This default value of this node is **false**. The user mapping settings configured in the **eRoomMigrationUserMapping.xml** configuration file will not be applied.
  - **true** – To apply the user mapping settings in the **eRoomMigrationUserMapping.xml** configuration file, set the value of this node to **true**. However, the priority of the user mapping settings configured in the eRoom Migration profile is higher than the user mapping settings in the **eRoomMigrationUserMapping.xml** file.
- **<MultiThreadConfig Flag="false" MaxThreadCount="5"/>** – This node allows you to choose whether to allow the **eRoomMigrationRestore.exe** or **SP2013eRoomMigrationRestore.exe** 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 eRoom Migration for SharePoint Online jobs, but will lead to more CPU and memory usage than a single thread.
  - **true** – To allow the **eRoomMigrationRestore.exe** or **SP2013eRoomMigrationRestore.exe** process to create multiple threads for restoring data to SharePoint Online nodes, set the value of **Flag** to **true** and then

enter an integer as the value of **MaxThreadCount** to set the maximum number of threads that can be created by this process.

- **false** – To force the **eRoomMigrationRestore.exe** or **SP2013eRoomMigrationRestore.exe** process to only create a single thread for restoring data to SharePoint Online node, set the value of **Flag** to **false**. **false** is the default value.

## 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.

<b>Resolution</b>	<b>Object</b>	<b>Conflict</b>	<b>No Conflict</b>
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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