

# Dell Content Migrator for SharePoint ® 4.7

User Guide



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## Legend



**CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.



**WARNING:** A WARNING icon indicates a potential for property damage, personal injury, or death.



**IMPORTANT NOTE, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.

Content Migrator for SharePoint User Guide  
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# Introduction to Content Migrator for SharePoint

Content Migrator for SharePoint® is an easy-to-use tool that helps site owners and power users to:

- Move and classify their own content confidently and without posing risk to the environment, reducing the burden on IT
- Move content and version history in bulk quickly and easily to SharePoint, Office 365™ and OneDrive™ for Business, without data loss, downtime or business disruption
- Copy and reorganize content across SharePoint to simplify information access, optimize storage and meet the evolving needs of the business
- Preserve, reassign and add metadata to content as its migrated to make information easier to find and enhance its business value

## Required Permissions

Content Migrator for SharePoint is an easy to use tool for migrating documents, items and folders between sites within your SharePoint environment.

With Content Migrator for SharePoint, you can also easily import files from Windows® network drives and classify imported content to unlock the full potential of SharePoint search and navigation and move Google Drive contents to SharePoint.

### SharePoint

The application connects to SharePoint sites as the currently logged on user by default. If authentication fails for the current user or he/she is not authorized to access the site, the application prompts for alternate credentials to connect. Stored network passwords in Windows can be used to access sites as a different user.

Permission requirements for hosted (e.g. SharePoint Online) sites are the same as for on-premises SharePoint 2007/2010/2013.

### Source SharePoint Sites

SharePoint Version	Required Permissions
SharePoint 2003	Member of the Designer site group
SharePoint 2007/2010/2013	Design (or higher)

### Target SharePoint Sites

SharePoint Version	Required Permissions
SharePoint 2007	Full Control
SharePoint 2010	Full Control
SharePoint 2013	Full Control

### File System

The application connects to local disks and mapped file shares as the currently logged on user. You can run the application as a different user (Run As) to access the local file system beyond your current permissions. Use stored network passwords in Windows to access remote file shares as a different user.

Source	Required Permissions
Local File System	Read
Remote Shared Folders	Read (NTFS and share permissions)

# Installation

Content Migrator for SharePoint is a client side application that can run on any Windows computer with Internet and network access to SharePoint servers.

## Pre-Installation Checklist

Before installing Content Migrator for SharePoint, ensure your system meets the following minimum requirements:

- X86 1GHz or higher processor
- 1.5 GB of RAM
- 250MB of free disk space
- Windows XP, Windows Vista®, Windows 7, Windows 8, Windows Server® 2003, Windows Server 2008, Windows Server 2008 R2, Windows Server 2012, 32-bit or 64-bit.

### *To install the product:*

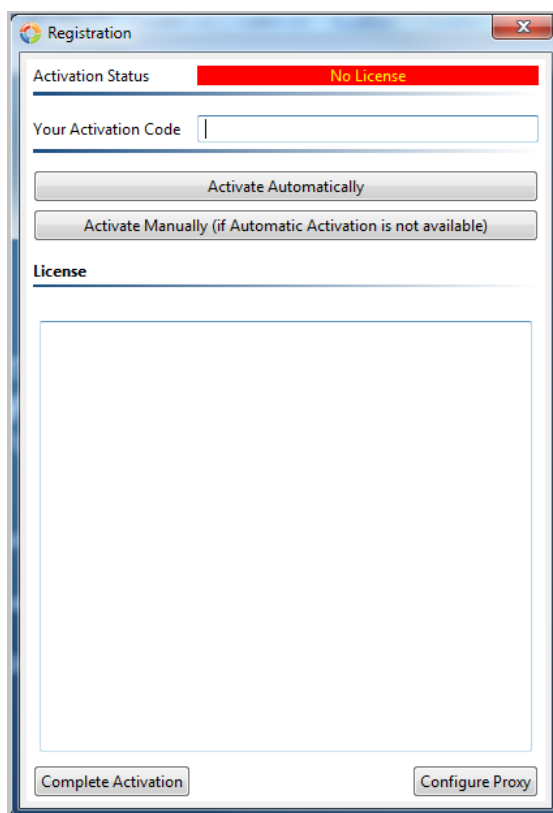
- 1 Extract the contents of the download package to a folder on your computer.
- 2 Run **DellCmSetup.exe** or **DellCmSetup64.exe** depending on your operating system.
- 3 Accept the Dell Software license agreement.
- 4 Specify the installation folder.
- 5 Wait for the setup wizard to install Content Migrator on your computer.
- 6 Click **Finish** to complete the setup.

# Product Activation

Content Migrator for SharePoint needs activation before you can use the product on your computer.

- 1 When you start the application the first time, the **Registration** window is shown prompting to activate the installation:

**Figure 1: Registration Window**

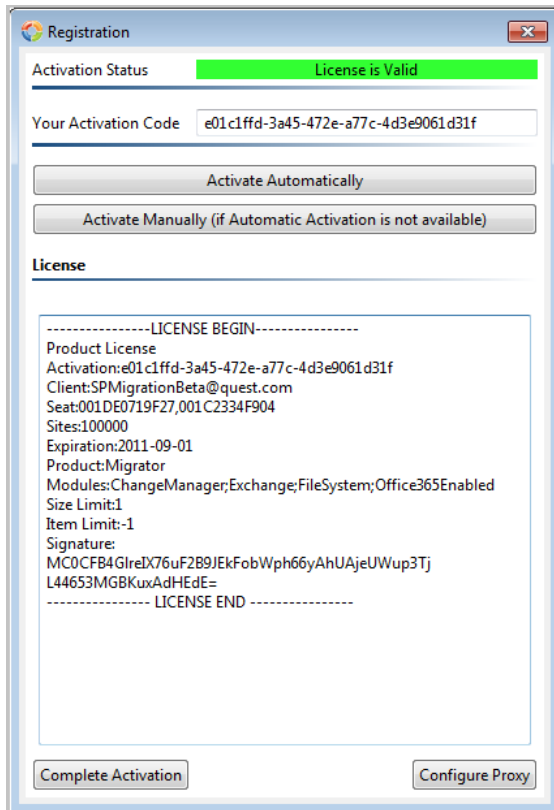


- 7 Enter your trial or purchased activation code.
- 8 If your computer is connected to the Internet via a proxy, click **Configure Proxy** and enter your proxy server settings.
- 9 Click **Activate Automatically**.



10 The activation status will read License is Valid and turn green after a successful activation:

**Figure 2: Activation Status - License is Valid**



11 Click **Complete Activation** to proceed.

## Offline Activation

If the computer you install the application on is not connected to the Internet, use the manual activation option:

- 1 Copy and paste the provided code into the **Activation Code** field.
- 2 Click the **Activate Manually** button. Copy the complete URL to a text file and save the text file that can be moved to another computer.
- 3 On a computer with Internet access, open a browser and paste the URL from the text file saved earlier. A license file will be generated from the Dell web site.
- 4 Copy the entire license, including the ----LICENSE BEGIN---- and ----LICENSE END---- lines into a text file that can be moved to the computer with the application installed.

**NOTE:** The activated license is only valid on the machine where offline activation was initiated.

- 5 Paste the entire license from the text file into the **License** area of the **Registration** screen.
- 6 Close the **Registration** screen.

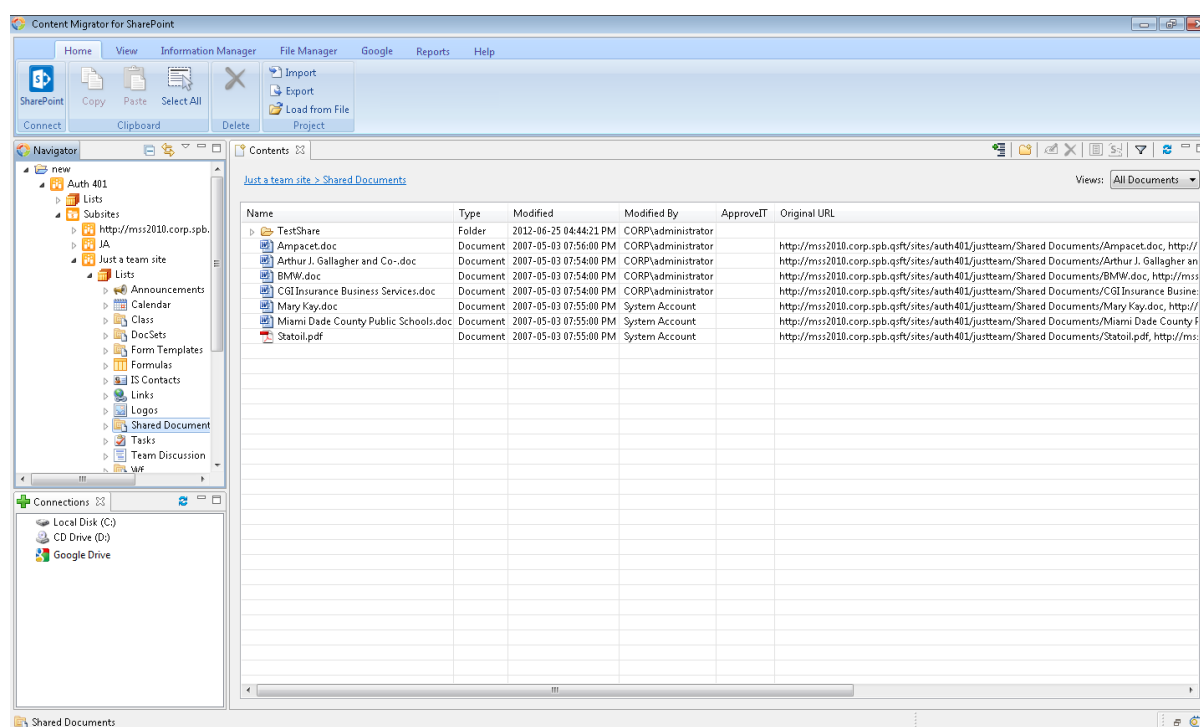
# Working with Content Migrator for SharePoint

## Interface Overview

The application window consists of three primary areas (the picture below represents the default arrangement):

- Navigator View
- Contents Area
- Connections Area

Figure 3: Content Migrator for SharePoint Interface



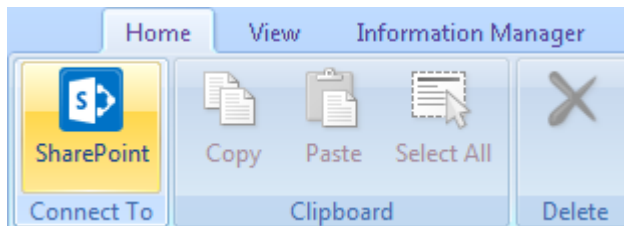
# Connecting to SharePoint

Connecting a SharePoint site enables you to copy/paste or drag and drop content (folders, documents and items) to and from the site.

## To connect to a site:

- 1 Click the **Connect To Site** button on the Home ribbon:

Figure 4: Connect To Site Button



- 2 In the connection window, enter the name for the connection and the site URL.

By default, when the application connects to a site, it loads its contents (lists) but not sub-sites. The tool will load them when you expand the site tree.

You can choose to load sub-sites and their contents in the Connection Wizard using either of the following options:

- **Load Entire Sub-Site Structure** - selecting this option will load the entire sub-site hierarchy below the current site. To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click any sub-site to load its objects individually.
- **Load Entire Sub-Site Structure and Objects** - Selecting this option will load the entire sub-site hierarchy below the current site along with all their objects.

- 3 Content Migrator for SharePoint automatically detects the SharePoint authentication mechanism and your client environment. Depending on your configuration, you may be connected automatically or prompted for your credentials:
  - a If your SharePoint environment is using Integrated Windows Authentication and you are accessing this environment from a computer logged into the same domain, no credentials are required. Click the **Connect** button and you will be automatically logged in using the credentials of the currently logged in user.

**NOTE:** If you want to use an alternate account to connect to a SharePoint site, set the **Use local system credentials** option to False in the Global Variables section of Profile Manager. After you restart the application, you will be prompted for credentials each time you connect to a new site.


  - b If your SharePoint environment is using Integrated Windows Authentication and you are accessing this environment from a computer that is not logged into the same domain, specify your credentials and click **Connect**.
  - c If your SharePoint environment is using Form Based Authentication, specify your user name, password and domain in the provided fields and click **Connect**.
  - d If your SharePoint environment is using Kerberos Authentication, please refer to section [Kerberos Authentication](#) section for configuration instructions.
  - e If your SharePoint environment is using Claims Based Authentication, please refer to the [Claims Based Authentication](#) section for detailed configuration instructions.
- 4 You can store your credentials for frequently accessed sites by using Password Manager. For detailed information, please refer to the [Password Manager](#) section.

- 5 If the SharePoint server you are connecting to is behind a proxy, check the **Use Proxy** option and click **Proxy Configuration** to enter or verify the proxy settings. You can use the **Import Settings** button to import the proxy server address and port from Internet Explorer.
- 6 Upon loading the site, it will be displayed in the Navigator View in the application main window.

## Connecting to OneDrive for Business

### *To connect to OneDrive™ for Business:*

- 1 Login to a SharePoint Online site in the browser.
- 2 Click on the **OneDrive** link in the header at the top of an Office 365 page.
- 3 Copy the site URL from the browser's address line.
- 4 Open the application and specify the OneDrive URL in the Connect to SharePoint wizard.

 **NOTE:** Before connecting the OneDrive site of another user, make sure the OneDrive has been provisioned (i.e. the OneDrive site owner has visited it at least once) and you have administrator permissions granted either by the OneDrive site owner or using the Set-SPOUser commandlet ([http://technet.microsoft.com/en-us/library/fp161375\(v=office.15\).aspx](http://technet.microsoft.com/en-us/library/fp161375(v=office.15).aspx)).


## Kerberos Authentication

For detailed information on configuring the application to connect to SharePoint sites using Kerberos authentication, refer to <http://communities.quest.com/docs/DOC-12844>.

## Claims Based Authentication

Content Migrator directly support Windows claims authentication and many third-party claims providers so that you can connect to SharePoint by entering your valid credentials in the application. In case you cannot connect to a SharePoint site using a custom claims provider, you can still connect using the browser-based authentication method as follows:

- 1 Go to **Help > Profile Manager > Global Variables**.
- 2 Set the **Enable browser connect** option to True.
- 3 Click **Apply**.
- 4 Close and restart the application.
- 5 Click the **Connect to Site** button on the ribbon.
- 6 Specify the connection name and the URL for your site. Click the **Finish** button. An authentication box will pop up.
- 7 Click the **Claims** button. A browser will pop up.
- 8 Enter your claims based credentials.

 **NOTE:** If the site does not use claims based authentication, the connection will fail.

## Password Manager

Password Manager connects you to your SharePoint sites automatically without entering a password for each connection when the application is restarted. The connection credentials are stored securely on the computer and protected with a master password.


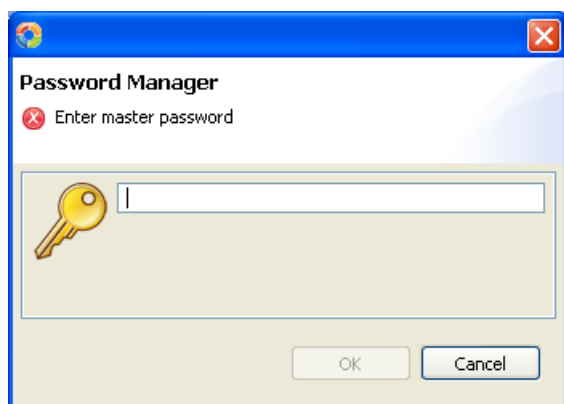

When you start a migration, you will be prompted for your credentials. To launch Password Manager, click the  icon. In the **Password Manager** window specify the master password, confirm it, and then click **OK**.

Figure 5: Password Manager



After you enter your credentials in the **Connect to SharePoint** window, click the password manager icon again, and then click **Connect**. Your credentials will be successfully stored.

During the next launch of the tool, when connecting to your site, you can click the Password Manager icon, enter your master password, and your credentials will be entered for you.

If you do not want Password Manager to store your credentials or you want to remove them from Password Manager, click the  icon. This icon will be displayed if you have logged into password manager correctly and have previously stored your credentials.

## Using Site Collection Discovery

You can connect to a site collection by entering the site collection URL in the Site Address field of the SharePoint Connection Wizard as described above.

Alternatively, use the site collection discovery feature as described below.

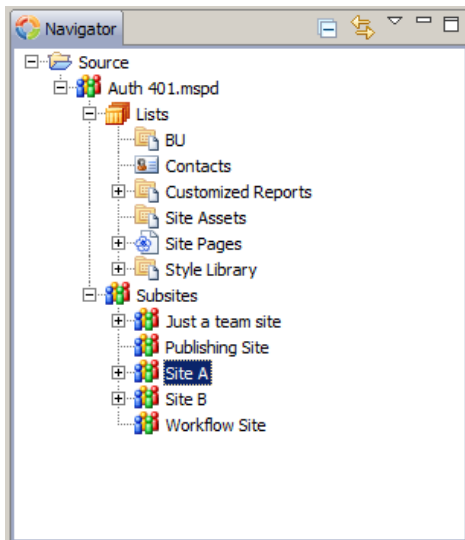
 **NOTE:** Site collection discovery does not support SharePoint 2003.

- 1 In the SharePoint Connection Wizard, click **Discover Site Collections**.
- 2 In the **Select Web Application** window enter the Central Administration site URL and click **Connect**.
- 3 Select a web application from the list and click **Next** to display site collections in the web application.
- 4 On the **Select Site Collection** screen, select the site collection to connect to and click **OK**. You can use URL Search to filter the site collections list.
- 5 The URL of the site collection you selected will be inserted into the **Site Address** field of the SharePoint Connection Wizard.

## Navigator View

The **Navigator** pane shows the connected SharePoint sites and allows you to browse the site hierarchy and site content in a tree view. SharePoint objects displayed in Navigator area are limited to sites, sub-sites, lists and libraries.

Figure 6: Navigator Pane

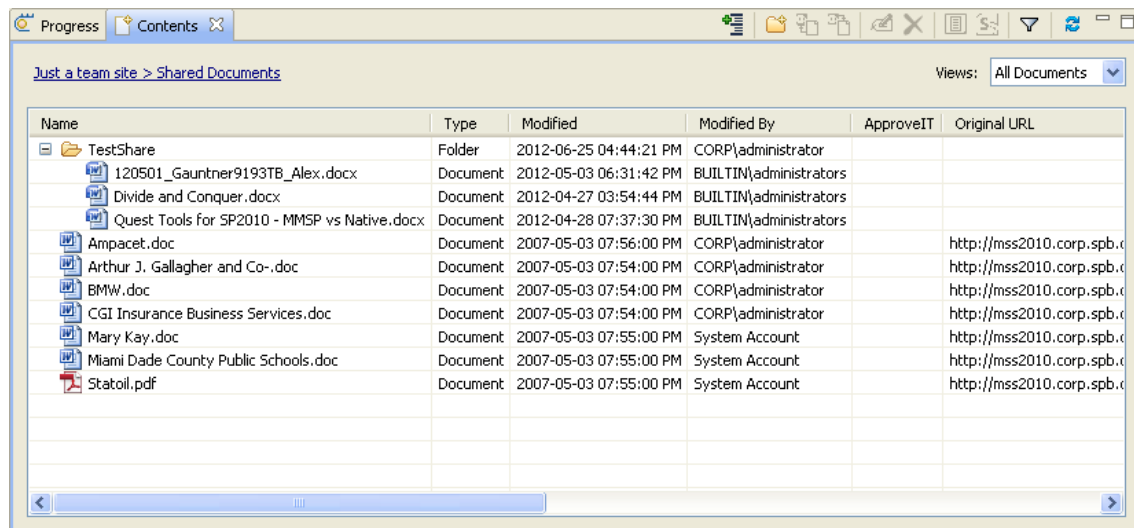


Double-clicking on any of the sites, lists or libraries will trigger the application to display the content for that object. In addition, a set of actions is available from right-click menus on sites, lists and libraries.

## Contents Area

The **Contents** area displays the actual data inside a list or library. In addition to viewing list content, the user can copy list items or documents from this pane.

Figure 7: Contents Area

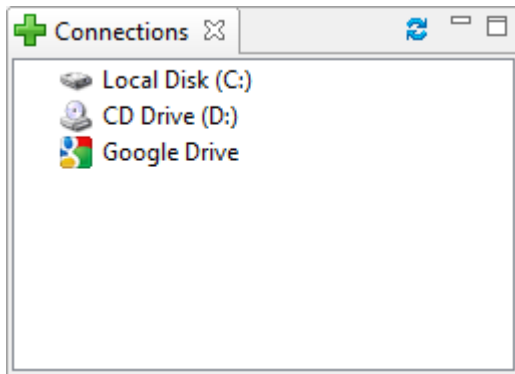


Located in the top left-hand corner is a breadcrumb definition of the list or library, whose contents is displayed in the window. The top right corner contains a set of icons that represent available activities for the user. Most of these options can be exposed by right-clicking on items inside the window. The list of available activities will depend on what is selected in the window.

## Connections Area

The **Connections** pane connects you to your file system, mapped disks and Google Drive.

Figure 8: Connections Area



# Migrating SharePoint Content

Content Migrator for SharePoint allows you to migrate folders, items and documents between sites within your SharePoint.

## Supported SharePoint Environments

- SharePoint Online (Office 365) or other hosted SharePoint services
- SharePoint Server 2013
- SharePoint Foundation 2013
- SharePoint Server 2010
- SharePoint Foundation 2010
- Microsoft Office SharePoint Server 2007
- Windows SharePoint Services v3
- SharePoint Portal Server 2003 (read only)
- Windows SharePoint Services v2 (read only)



# Migrating Individual Items/Documents

With Content Migrator for SharePoint you can copy list items, documents and folders between SharePoint sites. During the item copy, you can control how item metadata is mapped to the target list, remap columns or tag the migrated items with arbitrary values.

- 1 Double-click the source list/library in **Navigator** to load its content into the **Contents** tab.
- 2 Select the items you want (use CTRL or SHIFT to mark multiple items) to copy and use either of the following options:
  - a Drag them to the target list.
  - b Copy to buffer (CTRL+C) and paste (CTRL+V) to the target list.
  - c Use the **Copy To** command on the ribbon.
- 3 In the Item Copy Wizard confirm the target location.
- 4 On the **Properties** screen review and adjust the metadata mapping if needed. Refer to [Metadata Mapping and Tagging](#) for detailed information on adjusting the metadata mapping.

Figure 9: Properties Screen

The screenshot shows the 'Properties' dialog box with the following details:

- Content Type: Document
- Name: <Copy Value From: Name>
- Title: <Copy Value From: Title>
- Created At: <Copy Value From: Created At>
- Modified At: <Copy Value From: Modified At>
- Created By: <Copy Value From: Created By>
- Modified By: <Copy Value From: Modified By>

Buttons at the bottom: Save Template, Load Template, < Back, Next >, Finish, Cancel.

- 5 On the **Summary** screen you can choose and configure item copy options:
  - **Delete item(s) from Source** - This option allows you to remove item(s) from source when migration is completed.
  - **Include sub-folders** - This option allows you to include all items and documents in sub-folders into migration.
  - **Overwrite if file exists** - In a versioned library, selecting this option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.
  - **Remove folder structure** - This option allows you to remove folders during migration. If this option is selected, the application will load all documents and items from all sub-folders into one selected location (list) in SharePoint.
  - **Apply Filter** - This option allows you to include or exclude items by user defined criteria, such as date, size, file extension, file name, or file owner.

- **Re-map Users** - This option allows you to map users between different domains or to change the user account in the target environment during copy. For more information, see [User Mapping](#).

**i** **NOTE:** The application includes a convenient tool to manage copy settings for various SharePoint objects using predefined profiles. See [Appendix A. Profile Manager](#) for more information.

- 6 Click **Finish** to start copying items.

## In-Place Content Tagging

In addition to tagging/classifying items and documents on the fly when copying them to an existing list or document library, you can tag items in any list or library.

- 1 Go to the **Information Manager** tab of the ribbon.
- 2 Double-click the list/library in Navigator to load its content into the **Contents** tab.
- 3 Select the items you want to tag (use CTRL or SHIFT to mark multiple items).
- 4 Click **Tag** in the **Documents/Items** section of the ribbon.
- 5 On the **Properties** screen make the required changes. Refer to [Metadata Mapping and Tagging](#) for detailed information on adjusting the metadata mapping.

**i** **NOTE:** For lists with Content Approval enabled, the **Approval Status** field will be displayed. This field can be used to bulk approve/reject selected content.

- 6 On the **Summary** screen you can choose the following copy options:
  - **Include sub-folders** -This option allows you to include all items and documents in sub-folders into migration.
  - **Overwrite if file exists** - In a versioned library, selecting this option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.
- 7 Click **Finish** to start tagging.

# Migrating Files to SharePoint

Content Migrator for SharePoint allows you to you move contents of your file shares to either on-premises or hosted SharePoint 2007/2010/2013.

## Supported Sources

- Windows file servers
- Local disks

## Supported SharePoint Targets

- SharePoint Online (Office 365) or other hosted SharePoint services
- SharePoint Server 2013
- SharePoint Foundation 2013
- SharePoint Server 2010
- SharePoint Foundation 2010
- Microsoft Office SharePoint Server 2007
- Windows SharePoint Services v3

## Supported Objects

- Files and folders on file shares and local disks

**i** **NOTE:** The application supports migration only of network file shares mapped to the local drives, i.e. the **Connections** pane does not allow connecting to the shares via a UNC path and displays only local and mapped network drives.

### *To import files:*

- 1 Locate the folder containing the files you want to migrate to SharePoint in the **Connections** pane and double-click it to load the folder contents into the **Contents** pane.
- 2 Mark the files you want to upload to SharePoint. You can select multiple files using CTRL or SHIFT.
- 3 Drag or copy/paste the selected files to the destination document library in the Navigator.
- 4 The File Copy Wizard starts.
- 5 On the **Location** step confirm the destination or select another site or list.
- 6 On the **Properties** tab review and adjust the metadata mapping if needed. Refer to [Metadata Mapping and Tagging](#) for detailed information on adjusting the metadata mapping.

**i** **NOTE:** Metadata mapping supports only standard properties of files and Office documents. Mapping of other metadata formats (e.g. PDF) is not supported.

- 7 On the **Summary** screen you can choose from a number of available copy options:

- **Include sub-folders** - Selecting this option will all files in sub-folders into migration.

- **Overwrite if file exists** - In a versioned library, selecting this option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.
- **Remove folder structure** - This option allows you to remove folders during migration. If this option is selected, the application will load all files from all sub-folders into one selected location (list) in SharePoint.
- **Apply Filter** - This option allows you to include or exclude items by user defined criteria, such as date, size, file extension, file name, or file owner.
- **Re-map Users** - This option allows you to map users between different domains or to change the user account in the target environment during copy. For more information, see [User Mapping](#).

8 Click **Finish** to start file upload.

9 When the task completes, you can see the upload log.

# Migrating Google Drive Content to SharePoint

With Content Migrator for SharePoint you can quickly and easily migrate content of your Google Drive into your SharePoint environment preserving all valuable metadata.

## Connecting to Google Drive

*To connect to Google Drive:*

- 1 Right-click **Google Drive** in the **Connections** pane and select **Connect to Google**. Alternatively, you can use the **Google** button on the **Google** ribbon.
- 2 In the appeared **Connect to Google** window, provide your Google account credentials.

When the connection is established, Google Drive content will be uploaded into the **Contents** pane on the right.

## Migrating Google Drive Content

*To migrate Google Drive content:*

- 1 To migrate an entire Google Drive content, drag and drop (or Copy/Paste) the **My Drive** folder to the desired SharePoint list or library.  
  
To migrate individual documents and folders, select the documents you want to upload to SharePoint (you can select multiple documents using CTRL or SHIFT) and drag or copy/paste the selection to the desired SharePoint list or library.
- 2 The Copy wizard starts. On the **Location** step, confirm or change the target site and list/library.
- 3 On the **Properties** step, review and adjust the metadata mapping if needed. Refer to [Metadata Mapping and Tagging](#) for detailed information on adjusting the metadata mapping.
- 4 On the **Summary** screen you can choose from a number of available copy options and select the format to which your Google Drive content should be converted.  
  
For more information on user mapping, refer to [User Mapping](#).
- 5 Click **Finish** to start the copy process.

# Deleting Google Connections

To delete Google connections, right-click **Google Drive** in the **Connections** pane and select **Delete Connections**.

## Metadata Mapping and Tagging

When you migrate SharePoint folders, documents, items or import, files with Content Migrator for SharePoint, the application automatically maps source metadata to columns in the target SharePoint list or library. This happens behind the scenes when you migrate data to a new SharePoint list. You can adjust the metadata mapping and classify/tag migrated items when you migrate to an existing list or document library. You can also classify/tag SharePoint items and documents in place.


This section describes the **Properties** screen that is displayed when you:


- Migrate individual SharePoint items to an existing SharePoint list (Refer to [Migrating Items/Documents](#))
- Migrate files to an existing SharePoint document library (Refer to [Migrating Files to SharePoint](#))
- Tag items in a SharePoint list (Refer to [In-Place Content Tagging](#))

## Data Analysis Mode


The application can optionally analyze the source items metadata to allow selecting from the existing values to be assigned rather than manually entering the value, which reduces error risk.

### **To enable Data Analysis Mode:**

- 1 Double-click on any SharePoint list to open the **Contents** tab.
- 2 Click **Turn ON Data Analysis** () at the top of the tab.

 **NOTE:** Data Analysis Mode may slow down the application depending on the number of selected items. Disable Data Analysis mode if you no longer need it.

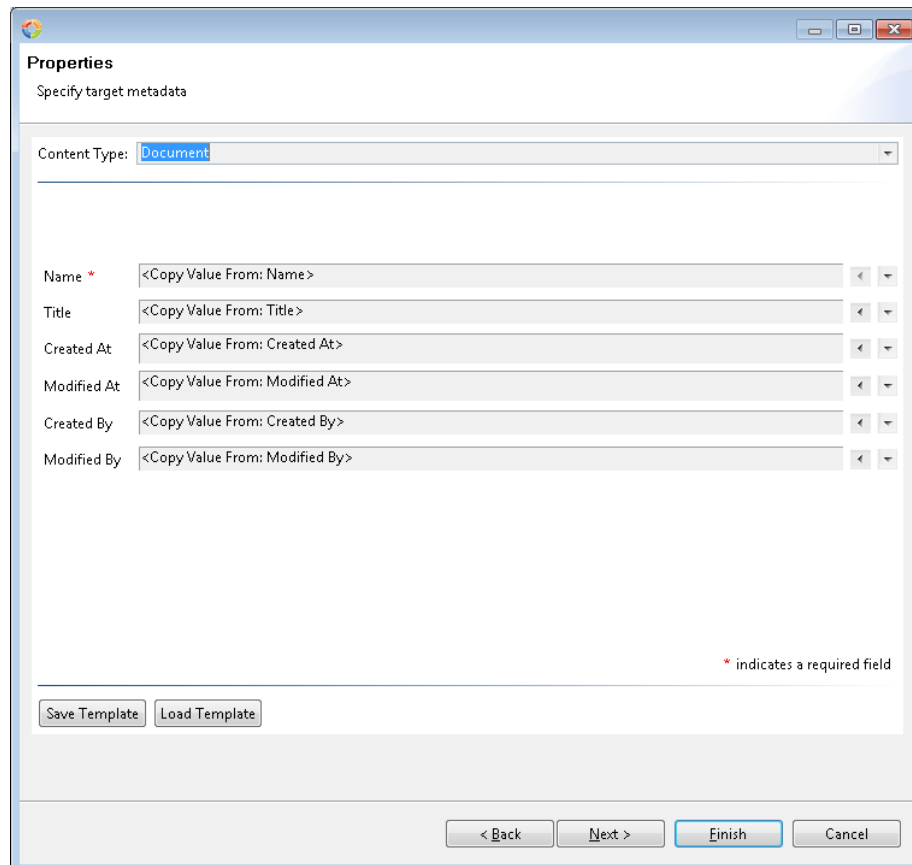
### **To disable Data Analysis Mode:**

- 1 Double-click on any SharePoint list to open the **Contents** tab.
- 2 Click **Turn OFF Data Analysis** () at the top of the tab

# Properties Screen


This screen is used to tag the selected list of items:

Figure 10: Properties Screen




## Content Type

By default, the wizard preloads the default content type for the destination SharePoint list/library. You may select an alternate content type by using the drop-down button. If a new content type is selected, the list of fields below will be updated correspondingly. The application will automatically attempt to match the fields from the source content type(s) to the destination. The **Keep Original** option allows you to retain existing content type(s) for selected items. This is useful when moving or copying a set of items from multiple content types.


 **NOTE:** **Keep Original** is only available when Data Analysis Mode is disabled.


## Tagging/Classification


The wizard provides several methods for smart tagging, which is accomplished through the use of buttons located to the right of each field.

Left-Arrow Button (  ): one way to efficiently tag content is to group items that need to be tagged with a common value. For example, you may have a set of files that share a common project name or number, a choice, check box or lookup value, (Yes/No) or a common user name. The left-arrow button provides access to directly enter or modify the value of the field. The wizard will automatically provide controls corresponding to the type of field being worked on.



Down-Arrow Button (  ): pressing this button will generate the **Field Value Selection** window which is intended to give you more control over tagging. The functionality for this window is described below.

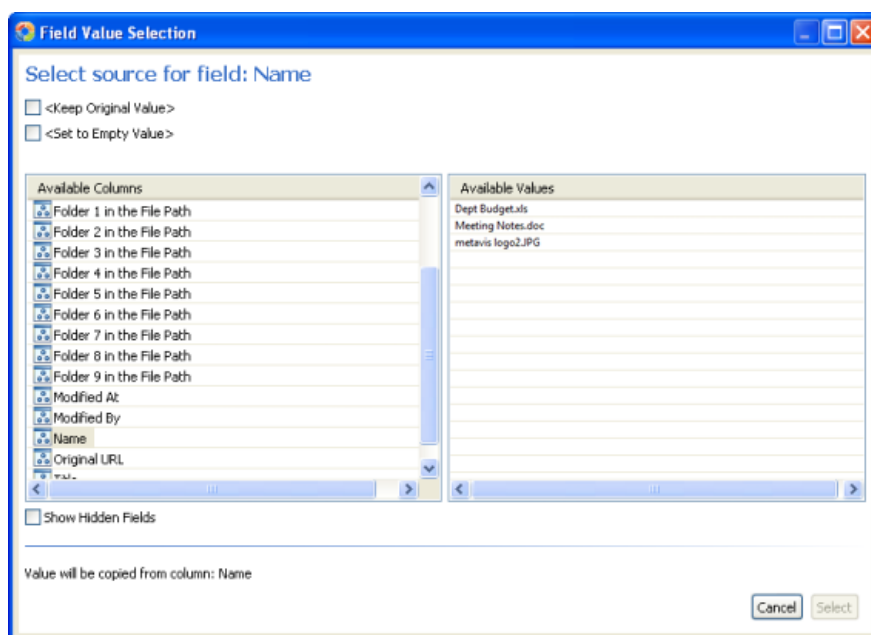
Plus Button (  ): this button is only shown for multi-valued fields. When enabled any new values are appended to existing ones. When disabled, new values will replace existing ones.

 **NOTE:** Because the **Name** field in a Library must have a unique value, only the down-arrow is enabled. This allows the user to change the value of this field by mapping to another normalized field.

**Save Template/Load Template:** many classification operations are done over and over again for different sets of content. These buttons allow you to store and recall all the tagging parameters set in this window.

## Field Value Selection Screen

Figure 11: Field Value Selection Screen




This screen is generated by clicking on the down-arrow next to a specific field in the Properties Screen. All actions within this screen only apply to that field (its name is displayed at the top of the window).

**Keep Original Value** - selecting this check box will negate any changes made in this screen.

**Set to Empty Value** - selecting this check box will remove any existing value from the field.


**Auto Tag** - selecting this check box will place an appropriate value in the field based on document analysis.

 **NOTE:** **Auto Tag** works with choice, person, group, lookup fields, and managed metadata, and can tag files imported from file systems, public folders and Google Documents.

**Available Columns** - selecting a field name from this list will designate it as the “source” and result in the metadata values from this field to be transferred to the destination for each item.

**Show Hidden Fields** - selecting this check box will display hidden fields in the Available Columns list.

**Available Values** - when a “source” field is selected from the Available Columns list, the metadata values for all the items are displayed in the Available Values list.

 **NOTE:** This option is only available if Data Analysis Mode is enabled.

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

## Migrating Created/Modified Metadata

In most cases, the application maintains the Created By/Modified By/Created At/Modified At properties of the migrated items and documents as long as the following prerequisites are met:

- User performing the migration must be a site owner (administrator)
- Author/editor user accounts must exist (usually in Active Directory®) and be enabled

**i** **NOTE:** If the original author/editor cannot be resolved, the Created By and Modified By properties will be set either to the account under which the user connected to the target site or to the account specified in the Default User Account setting of Profile Manager (if any specified).

However, in certain situations, it is not possible to set the Created/Modified metadata using remote Web Services calls (including when the application is installed on a server in the target SharePoint farm):

- SharePoint 2007 as target:
  - Created/Modified can be maintained or reset to the current date and user depending on the service pack/patch combination on the target farm
- SharePoint 2010/2013 as target:
  - All patch levels - both dates and author/editor are maintained
  - Lists/libraries with major and minor versions enabled - Created/Modified is maintained for major versions, but not for minor versions

To facilitate retention of the Created/Modified properties in situations where setting them remotely is not possible, an extension SharePoint web service is provided to be deployed to the target SharePoint 2007/2010/2013 farm. After the service is installed, no further product configuration is necessary. The application will detect the service automatically and use it to set the Created/Modified metadata.

**i** **NOTE:** Installing the Extension web service allows you to preserve both Created/Modified and Content Approval Status properties for items and documents simultaneously when copying content between SharePoint locations. When the service is installed, the priority setting (Authorship) in Profile Manager is ignored. It is not recommended to change the default mappings for Created/Modified and Approval Status fields when the service is installed. If the Extension web service cannot be installed, you can enable the Preserve Approval Status/Comments option in the Copy List or Copy Site section of Profile Manager to retain the content approval status for items and documents. Please note that the Preserve Approval Status/Comments option works only on non-versioned or major versioned lists and document libraries.

## Installing Extension Web Service

**Perform the following steps:**

- 1 Remove the previous version (if installed).
- 2 Download the service installer available on the product download page and extract files to your hard drive.
- 3 Copy the folder corresponding to your target SharePoint version from the service download package to a front-end web server in your target SharePoint farm.
- 4 Run **Setup.exe** and follow the steps of the installation wizard.

5 Select web applications to deploy the service to.



**NOTE:** The extension service is provided as a SharePoint solution package. You can use the solution file to install and deploy the extension service to the farm using standard SharePoint tools.

## Advanced Migration Features

### User/Group Mapping

The user mapping feature enables migration of SharePoint users/groups and permissions between domains, which may include Active Directory, Microsoft LiveID, Forms and other authentication providers.

With this feature you can also map SharePoint security groups to Active Directory groups.

**NOTE:** When a user cannot be created in the target environment, the application by default will replace that user account with the account of the user executing the operation. You may override this behavior by updating the **Default User Login** field in **Help>Profile Manager>Global Variables**.

To turn on the user mapping, check the **Re-map Users** option in the copy wizard and load a CSV file that maps source users to target users:

The CSV file should have a source to target entries for each user and group to map. You can also do a wildcard domain mapping as shown below:

Figure 12: Wildcard Domain Mapping

	A	B
1	ACME-EAST\*	ACME-WEST\*
2	ACME-EAST\aklein	ACME-WEST\amy.klein
3	ACME-EAST\bwood	ACME-WEST\brian.wood
4	ACME-EAST\bwilson	ACME-WEST\bob.wilson
5	ACME-EAST\cphillips	ACME-WEST\disabled
6	ACME-EAST\csmith	ACME-WEST\chris.smith

**TIP:** The application provides the Site Users report that is a good starting point to create your mapping file:

1. Right-click on the source site and select **Reports > Site Users Report (csv)**.
2. Specify the CSV file to export site users to.
3. When export completes, click **Open CSV**.
4. Map each source user to a target user account.

## Updating the Application

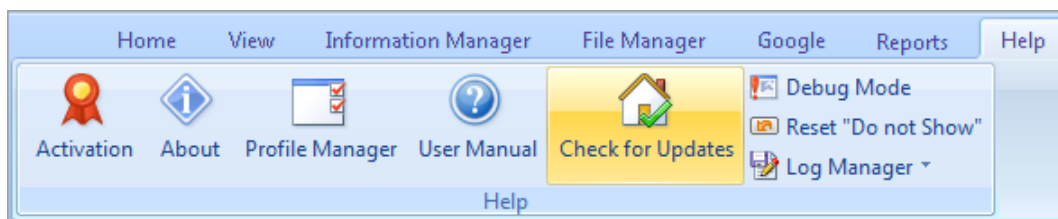
Content Migrator for SharePoint includes an automatic update feature that notifies you about new updates available for the application. If you choose to apply the update, the update is downloaded and installed automatically.

**NOTE:** Windows Vista/7 users may need to start the application as administrators to apply updates.

**NOTE:** If you have the application installed on a computer with no Internet access, you can download the latest install package from the Dell web site and use it to update the application offline.

The application checks for available updates at startup, but you can also use the **Check for Updates** button on the **Help** ribbon:

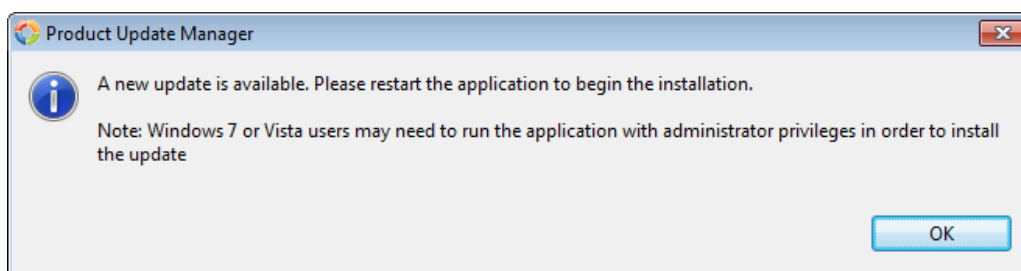
Figure 13: Check for Updates Option



If there is a new update, you will be prompted to apply it.

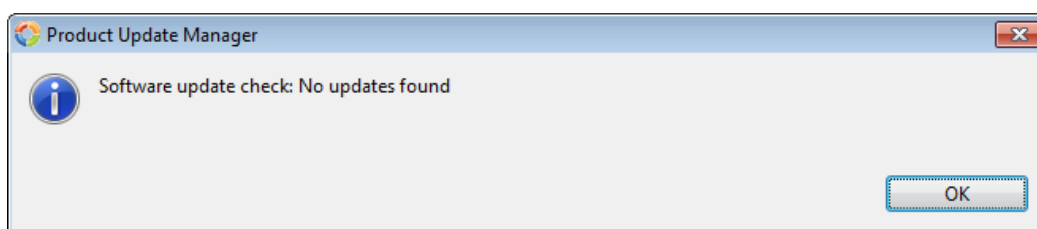
If you see the following notification, close the application and start it as administrator to apply the update:

Figure 14: Restart the Application Notification



If no updates are found, you will see the following notification:

Figure 15: No Updates Found Notification

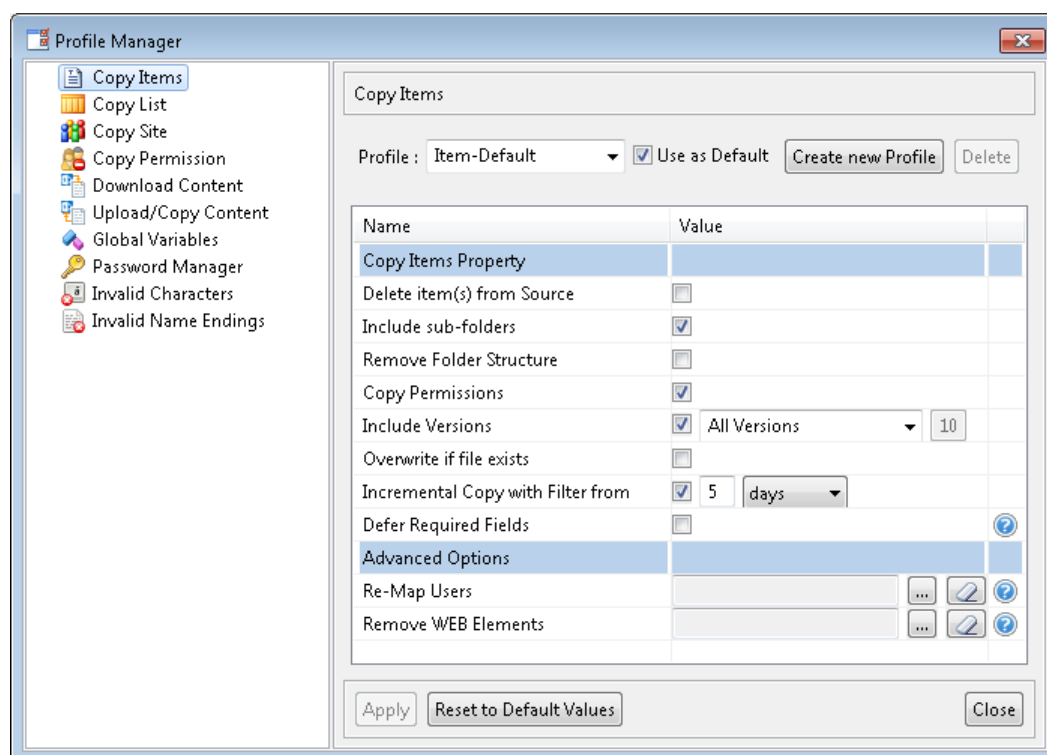


## Appendix A: Profile Manager

Many options and choices have been included to enable fine control over specific operations. Upon installation, the options are pre-selected with the most common settings. Users always have the option to modify these settings prior to commencing an operation, but they are automatically returned to the default state the next time the operation is run.

In some cases, users need the ability to adjust these setting or create profiles that contain selections for common operations that are appropriate for them. Profile Manager available from the Help ribbon is intended for this purpose. You can alter default profiles or create new ones. The profiles may then be selected during the corresponding operations, allowing you to set all appropriate options at one time.

Figure 16: Profile Manager



Selecting an operation displays a profile name along with a list of available options. By default, the selections in the profile correspond to “out-of-the-box” functionality.

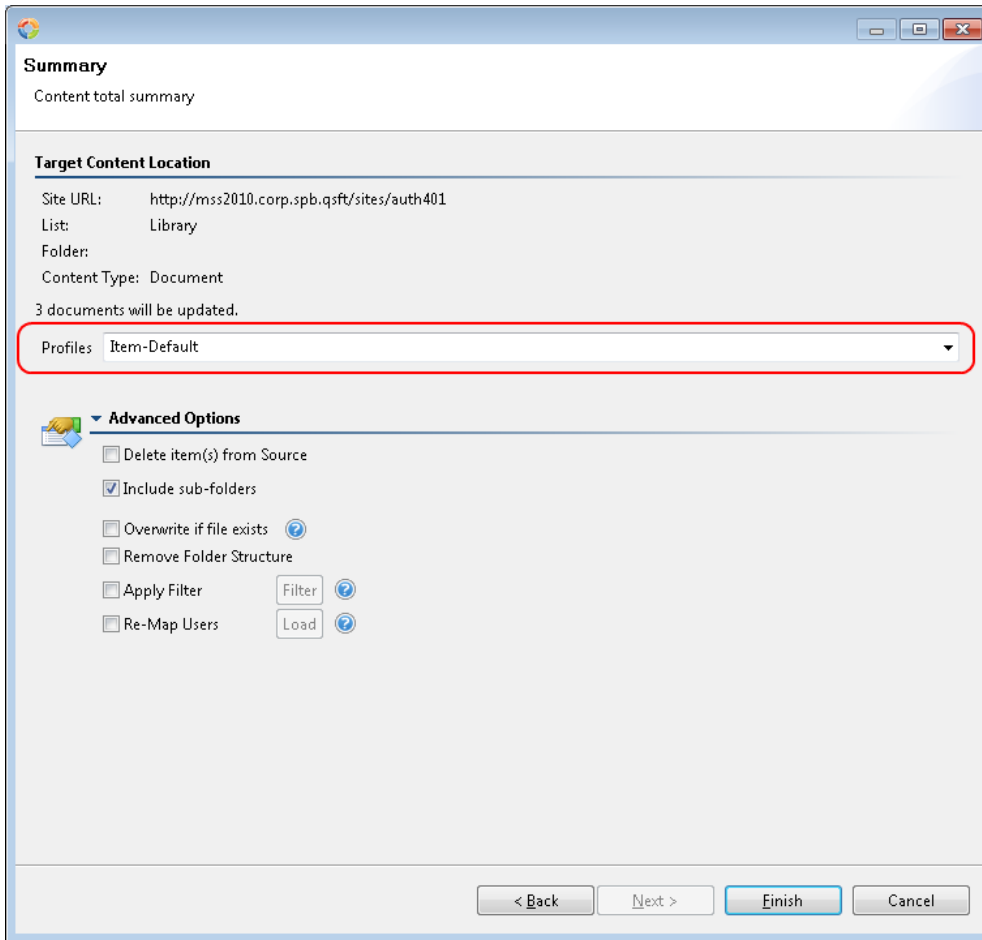
**NOTE:** The options shown are unique to each operation and are not inherited to higher level operations (e.g. changes to item level profiles are not inherited by list or site level profiles).

**NOTE:** Copy Site and Copy List profiles are applicable to Content Migrator for SharePoint.

**NOTE:** Global Variables profile is primarily intended for diagnostic purposes and should not be modified unless advised to do so by Dell Support.

To select an alternate profile, use the provided drop-down field:

**Figure 17: Profile Selection Field**



**NOTE:** Note that individual options may still be changed regardless of the selected profile.

## Appendix B: Troubleshooting

When something is not working as expected in the application, the Dell Support team may request some information from you to help resolve the issue:

- Screenshots - it is almost always easier to diagnose issues and collect information using pictures. Please try to send several screenshots with relevant data along with other logs.
- Log files - the application creates two types of logs: user logs and systems logs.
  - User logs are generated for most operations and are displayed in the **Log Viewer**. All (or specific) items in the log can be selected and saved on your computer for later use.
  - System logs are generated behind the scenes and contain internal information that is intended for the engineering team. Besides the standard logging, there is also a Debug Mode logging procedure that collects significantly more information. **Debug Mode** can be enabled using a checkbox on the **Help** tab of the ribbon.

**NOTE:** **Debug Mode** should not be enabled by default as it collects a great deal of information and subsequently slows down the application. Remember to turn off **Debug Mode** after collecting extended logs.

The application contains a special utility for collecting and compressing system and user logs into a single zip file.

### *To collect the logs, follow this procedure:*

- 1 Click **Log Manager** on the Help tab of the ribbon.
- 2 Click the ... button and select the location and file name for the zip file.
- 3 Click **Save Logs** or **Save Environment** (which collects additional data about your environment).
- 4 Send the zip file to Dell Support along with screenshots.



## Appendix C: Log Files Location

After the tool is installed and started for the first time, a new directory is created that will store user specific information related to the application.

By default, this workspace will be created in the user's home directory. In Windows Vista and higher, the default workspace location is `C:\Users\%username%\Dell`. For earlier versions of Windows, it will be stored in the **Documents and Settings** directory.

To change the default workspace location, perform the following steps:

- 1 Close the application.
- 2 Create a new folder in your drive (e.g. `C:\DellCM`).
- 3 Go to `%ProgramFiles%\Dell Software\Migration Solutions for SharePoint\dell\configuration` and open the `config.ini` file for editing.

**NOTE:** Please note:

1. This folder is hidden, so you may need to show hidden files/folders in Folder Options.
2. Use WordPad to open the file.
3. You may need to start WordPad using the **Run as Administrator** option to overcome Windows security settings.

- 4 Edit the last line of this file. Change `osgi.instance.area.default=@user.home/Dell` to `osgi.instance.area.default=c:/Dell` (\*note that the forward slash is used instead of back slash)
- 5 Save and close `config.ini`.
- 6 Start the application.

The workspace stores the following data:

- License Information
- The project directories that are displayed in the Navigator pane, which includes the cache of the site structure
- Log files (metadata)
- Temporary connection properties used by the tool
- Various settings and filters used throughout the application interface

The following types of logging information are stored within the workspace:

- **User logs** - these logs are displayed after a Content Migrator operation is complete. They are stored as `.xml` files and located in the `appLog` directory.
- **Debug logs** - these logs are created when the **Debug Mode** is activated. The `.log`, `bak_0.log`, etc. contain the operations that the tool is performing with enhanced logging. Lots of information is written when the **Debug Mode** is enabled which is helpful when investigating customer issues. Only 10 of these files are created, which means they will start to write over themselves if large operations are performed in the **Debug Mode**. Please perform as small a test as possible while this mode is enabled.
- **Connection logs** - these logs are created when encountering connection issues and stored to the `transport.log` file.

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## Contacting Dell

Technical Support:  
[Online Support](#)

Product Questions and Sales:  
(800) 306-9329

Email:  
[info@software.dell.com](mailto:info@software.dell.com)

## Technical support resources

Technical support is available to customers who have purchased Dell software with a valid maintenance contract and to customers who have trial versions. To access the Support Portal, go to <http://software.dell.com/support/>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. In addition, the portal provides direct access to product support engineers through an online Service Request system.

The site enables you to:

- Create, update, and manage Service Requests (cases)
- View Knowledge Base articles
- Obtain product notifications
- Download software. For trial software, go to [Trial Downloads](#).
- View how-to videos
- Engage in community discussions
- Chat with a support engineer