



Proventeq Migration Accelerator - Meridio to SharePoint Installation Guide

Version: 7.1

Authored by: Proventeq Ltd.

Reading Enterprise Centre
Earley Gate
Whiteknights Road
Reading RG6 6BU

Website: www.proventeq.com

Information: info@proventeq.com

Phone: +44 118 907 9296

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ABOUT THIS GUIDE

This document contains detailed instructions on how to install Proventeq Migration Accelerator for migrating content from Meridio to SharePoint.

For additional information about the Training, Technical Support and feedback on the documentation, please contact pma.support@proventeq.com.

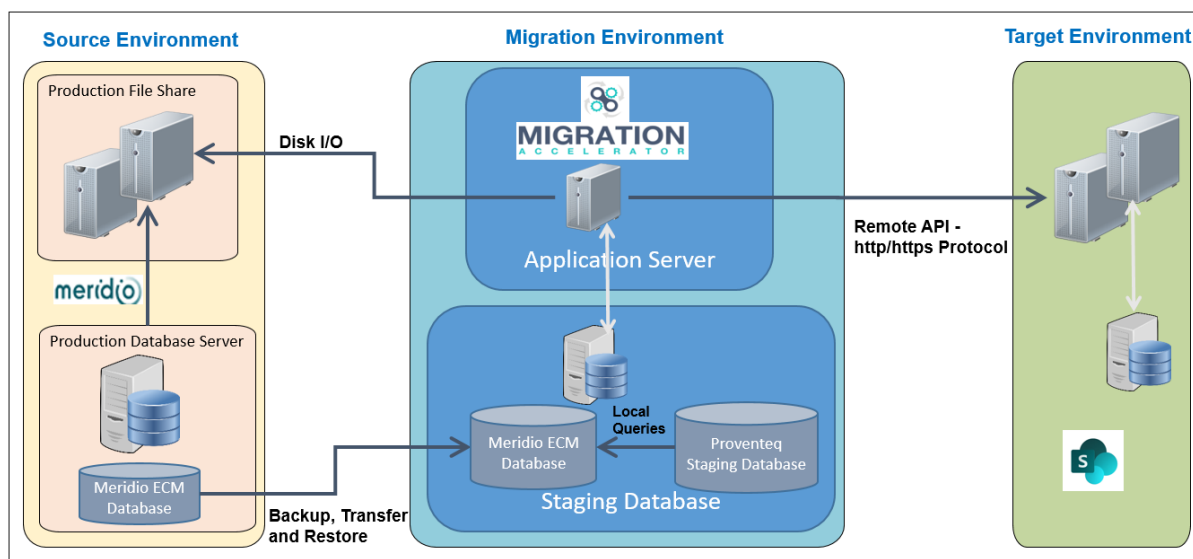
AUDIENCE

This guide is designed for the Proventeq Migration Accelerator product users, operators, and supervisors who are familiar with the migration project and its associated environment.

1. INTRODUCTION

The Proventeq Migration Accelerator is a versatile enterprise grade migration engine that is deployed as a Windows .NET application. It allows you to configure the different source and target system connections in the migration engine, perform content analysis, set up advanced content transformation rules, execute and monitor an end to end migration.

1.1 Migration Accelerator Deployment Overview



The deployment includes source environment, migration environment and target environment.

- The source environment includes Meridio source system related file content server and database servers. It is recommended that the initial analysis and migration is carried out against a restored backup of Production database, instead of directly connecting to Production database.
- The migration environment includes application server and staging database server which should be configured within the customer network. The application server will have Migration Accelerator application installed and configured. Whereas the database server will host the migration staging database along with backup of Meridio source system database, which will be referred for accessing documents and their metadata during initial analysis and migration.
- The target environment will include target SharePoint Online or SharePoint On Premise system related application and database servers.

2. SYSTEM REQUIREMENTS

The Migration Accelerator is a Windows Application, which requires a Migration Application Server and SQL Server staging database.

2.1 Migration Accelerator Application Server

If you are planning to provision application server on Azure Cloud, then please use D4 V3 Windows Server with OS Only option and disk space as 512 GB (which may vary depending on total migration volume or size).

<https://docs.microsoft.com/en-us/azure/virtual-machines/windows/sizes-general>

If you are going to provision this server on premise, then please refer below requirements:

Component	Requirement								
Processor	Quad core architecture preferred, but minimum CPU is: Dual core Xeon 2.8 GHz processor or higher								
Memory	Recommended 32 GB RAM. Minimum 8 GB RAM								
Disk space	At least 100 GB free disk space. Space requirement would vary based on the volume of data being migrated.								
Display	1024x768 resolution or higher								
Operating System	Windows Server 2012 or above								
User Accounts and Access Permissions	Administrative access to migration server for installing and running the product.								
Additional software	Microsoft Office (Outlook, Word, Excel, PowerPoint) or later (if using link resolution) SQL Server Management Studio (corresponding to SQL server version)								
Pre-requisites	<table border="1"> <thead> <tr> <th>Component</th> <th>Link to download latest version</th> </tr> </thead> <tbody> <tr> <td>.NET framework 3.5</td> <td>https://www.microsoft.com/en-us/download/details.aspx?id=21</td> </tr> <tr> <td>.NET framework 4.7 or later</td> <td>https://www.microsoft.com/en-us/download/details.aspx?id=56116</td> </tr> <tr> <td>Power BI Desktop</td> <td>https://download.microsoft.com/download/8/8/0/880BCA75-79DD-466A-927D-1ABF1F5454B0/PBIDesktopSetup-2020-08_x64.exe To support advance business intelligence reporting.</td> </tr> </tbody> </table>	Component	Link to download latest version	.NET framework 3.5	https://www.microsoft.com/en-us/download/details.aspx?id=21	.NET framework 4.7 or later	https://www.microsoft.com/en-us/download/details.aspx?id=56116	Power BI Desktop	https://download.microsoft.com/download/8/8/0/880BCA75-79DD-466A-927D-1ABF1F5454B0/PBIDesktopSetup-2020-08_x64.exe To support advance business intelligence reporting.
	Component	Link to download latest version							
	.NET framework 3.5	https://www.microsoft.com/en-us/download/details.aspx?id=21							
	.NET framework 4.7 or later	https://www.microsoft.com/en-us/download/details.aspx?id=56116							
Power BI Desktop	https://download.microsoft.com/download/8/8/0/880BCA75-79DD-466A-927D-1ABF1F5454B0/PBIDesktopSetup-2020-08_x64.exe To support advance business intelligence reporting.								

	Choose “Advanced Download Options” for direct installer download. Select File name “PBIDesktop_x64.msi”.
SQL CLR Functions 2012	https://www.microsoft.com/en-us/download/details.aspx?id=56041 Select file name ENU\x64\SQLSysClrTypes.msi
Report Viewer 2012 Redistributables	https://www.microsoft.com/en-us/download/details.aspx?id=35747

2.2 Staging Database

The staging repository is where the migration configuration is stored along with all the content, metadata and security information in various stages of migration.

The staging database could either be on a dedicated SQL Server instance or on an existing (shared) SQL Server instance.

2.2.1 Essential System Requirements for staging database

Database Server Version	SQL Server 2016/2014
Pre-requisites and User permissions	<p>The installation program can either create a new database and configure it or configure a pre-created blank database.</p> <ul style="list-style-type: none"> To create the database, Installation program would need credentials of a user account which has db_creator permissions on the database server. To configure an existing empty database, the Installation program requires a blank database created with a name that would be input during installation (e.g. Proventeq_Staging). In order to configure the database and create the schema, Installation program would need credentials of a user with db_owner permissions on this database.
Disk space	At least 100 GB free disk space. Space requirement would vary based on the volume of data being migrated.

2.2.2 Additional system requirements for dedicated staging database server

If you are setting up a dedicated SQL Server for hosting migration accelerator staging database, then the following system requirements applies for the database server.


If you are planning to provision this server on Azure Cloud, then please use D4 V3 Windows Server with SQL Server option and disk space as 512 GB (which may vary depending on total migration volume or size).

<https://docs.microsoft.com/en-us/azure/virtual-machines/windows/sizes-general>

If you are setting up a dedicated SQL Server for hosting migration accelerator staging database, then the following system requirements applies for the database server:

Component	Requirement
Processor	Quad core architecture preferred, but minimum CPU is: Dual core Xeon 2.8 GHz processor or higher
Memory	Recommended 32 GB RAM. Minimum 16 GB RAM
Operating System	Windows Server 2012 or above
Disk space	At least 100 GB free disk space. Space requirement would vary based on the volume of data being migrated.

2.2.3 User Accounts Requirements

System Name	User Accounts Requirements
Migration Application Server	Windows user account with Administrator permissions to perform installation of software pre-requisites and Migration Accelerator product features.
Migration Database Server	Windows or SQL user account with 'db_owner' or 'sysadmin' permission to access migration configuration information from Proventeq staging database. The same account requires 'db_owner' permissions on Meridio staging database to access source documents and their properties.
Meridio File Share	At least Read permissions for Windows user account (used on Migration Application Server) to access Meridio File Share while performing migration.
SharePoint/SharePoint Online 	SharePoint Site Collection user account having 'Administrator' permissions to load content and metadata to respective SharePoint site collection.

2.2.4 Ports and API Requirement

System Name	API and Ports Requirements
Migration Application Server	<ul style="list-style-type: none"> - In case of dedicated SQL Server, we should have necessary ports opened between Migration Application server and Migration Database server. - Similarly Meridio File Share should be accessible from Migration Application Server.

SharePoint/SharePoint Online	SharePoint or SharePoint Online Site Collection URL and respective ports access from Migration Application Server for SharePoint remote API access to upload content to SharePoint/SharePoint Online.
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Note: Please note that, the minimum Network Bandwidth required is 50 mb/sec to perform the migration smoothly.

3. MIGRATION ACCELERATOR INSTALLATION

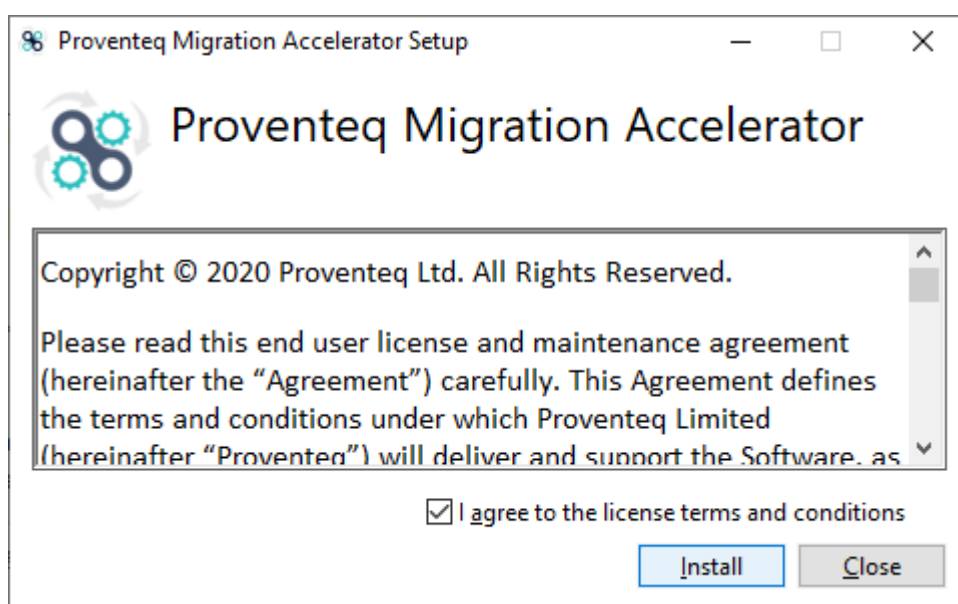
3.1 Upgrading to V7.1

To upgrade the Proventeq Migration Accelerator, user needs to uninstall previous released or trial version from the machine and then install newer version.

Follow the steps mentioned in the section [5.Uninstall the Software](#)

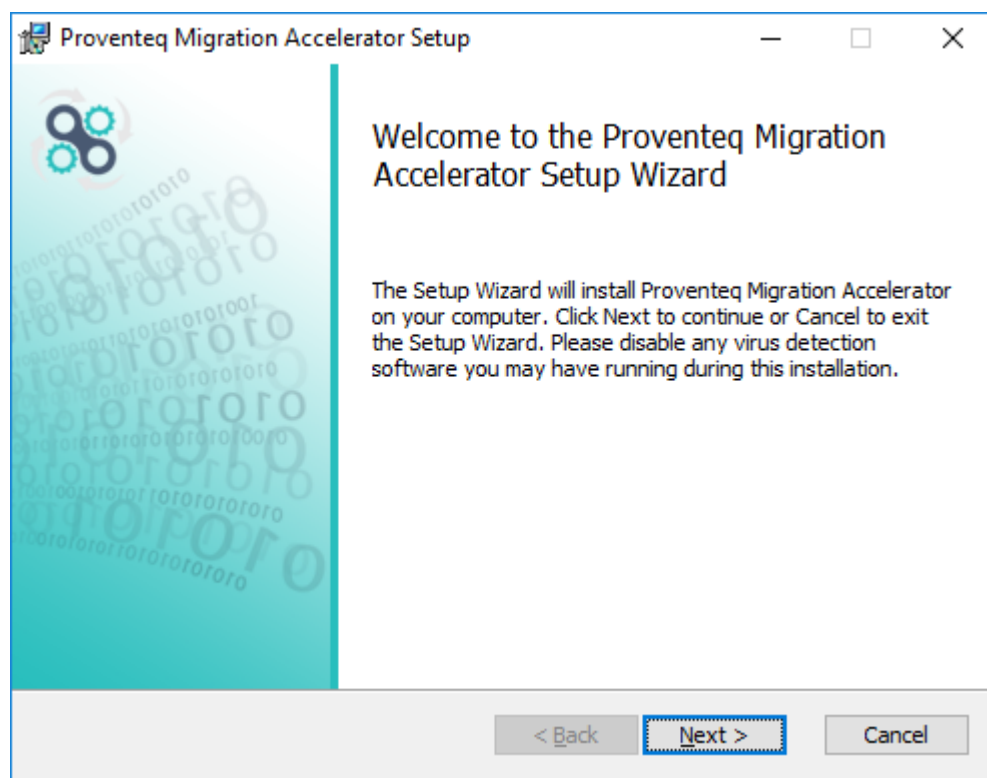
3.2 New Installation

Execute Proventeq.MigrationAccelerator.Setup.exe, with **“Run as administrator”** option. This will start the installer:

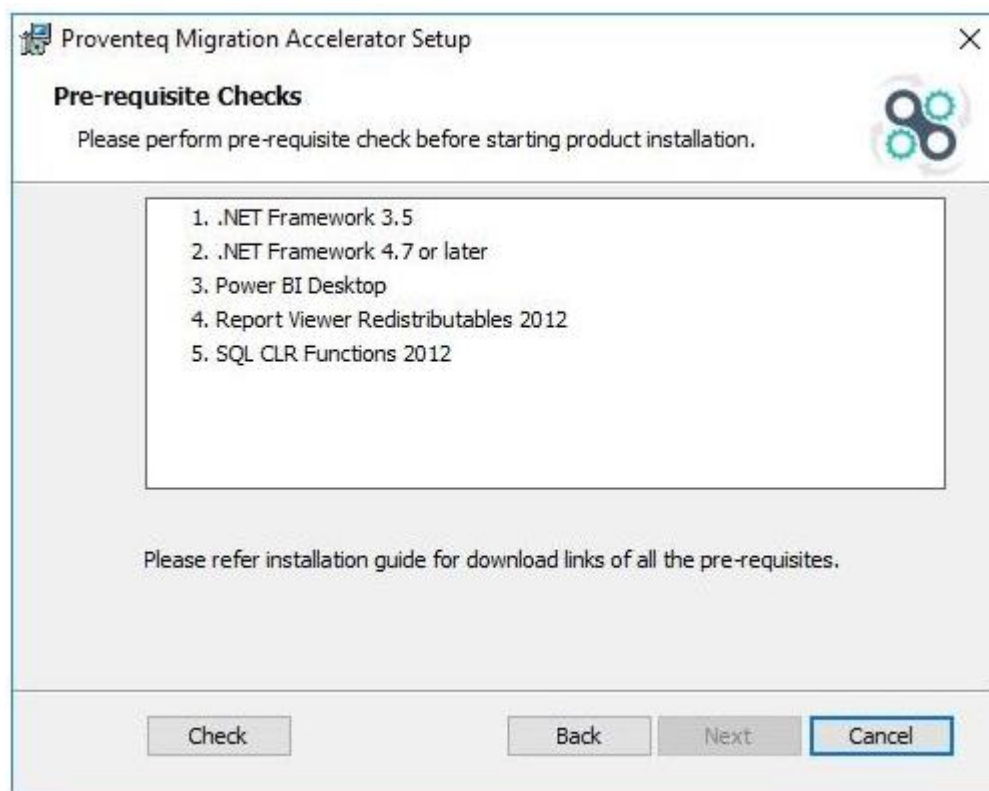


The "License Agreement" window will appear. You must select 'I agree to license terms and conditions' to continue.

3.3 Welcome screen

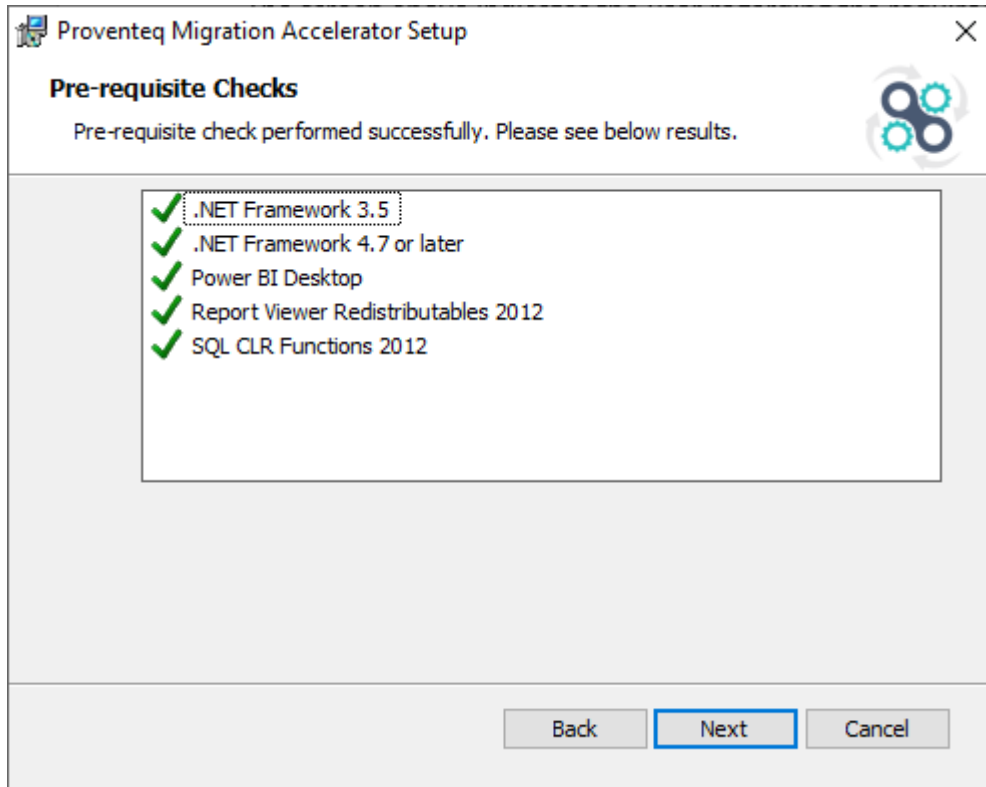


3.4 Pre-requisite Checks



The screen above indicates the user regarding the required supportive utilities should be present on the system and to confirm whether they are already installed, user needs to click on Check button.

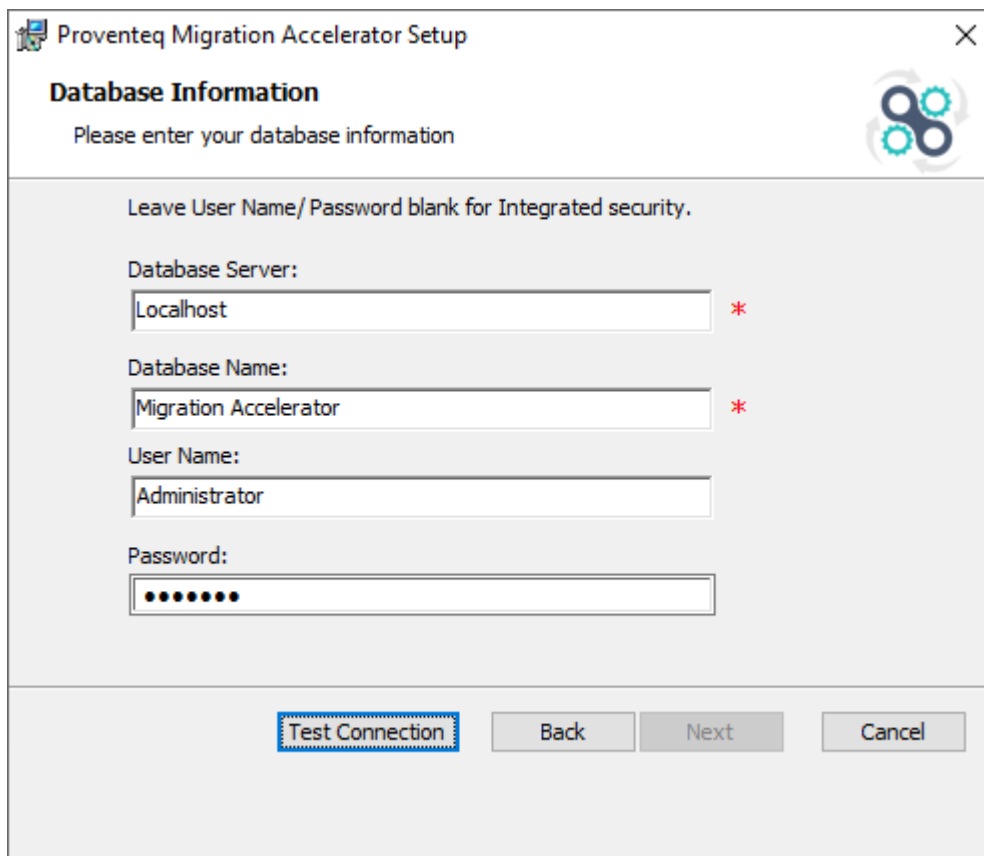
Once user clicks on Check button, the screen below will appear, which confirms that the required supportive utilities are already installed.



Click on Next button.

3.5 Database Information

Click Next to display the Database Information screen.

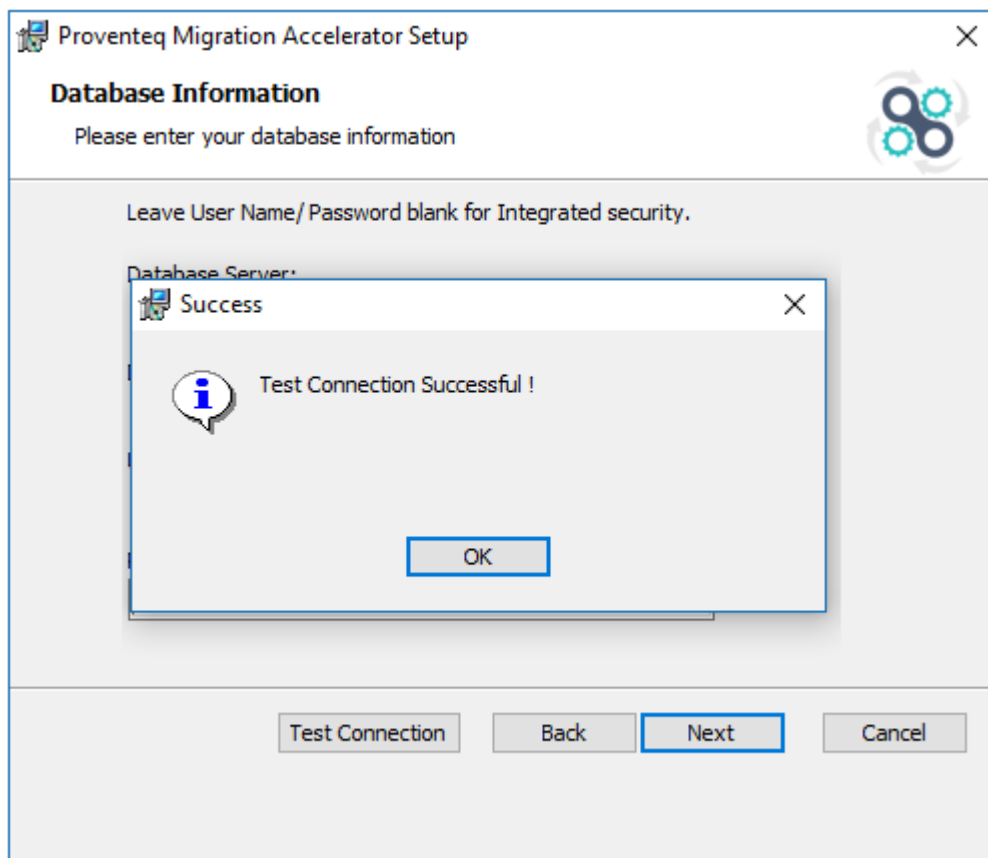


Enter the database server name and the database name for staging repository. Also use SQL Server authentication, by providing valid User Name and Password.

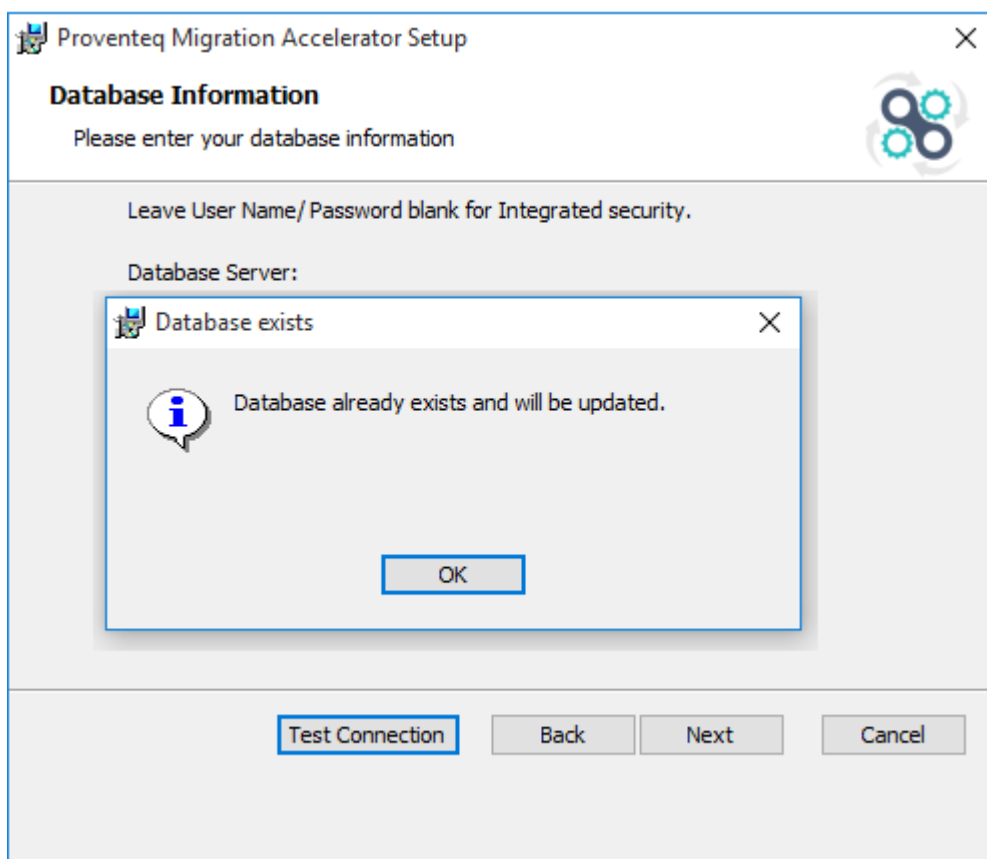
Note: In case of full release, entering previously created Database name will erase all the data from that database. Whereas in case of upgrade release, entering previously created Database name will update the existing database for any changes.

Once click on “Test Connection” button, the screen below will appear.

In case of full release, provide a new database name, which will show below Test Connection message.



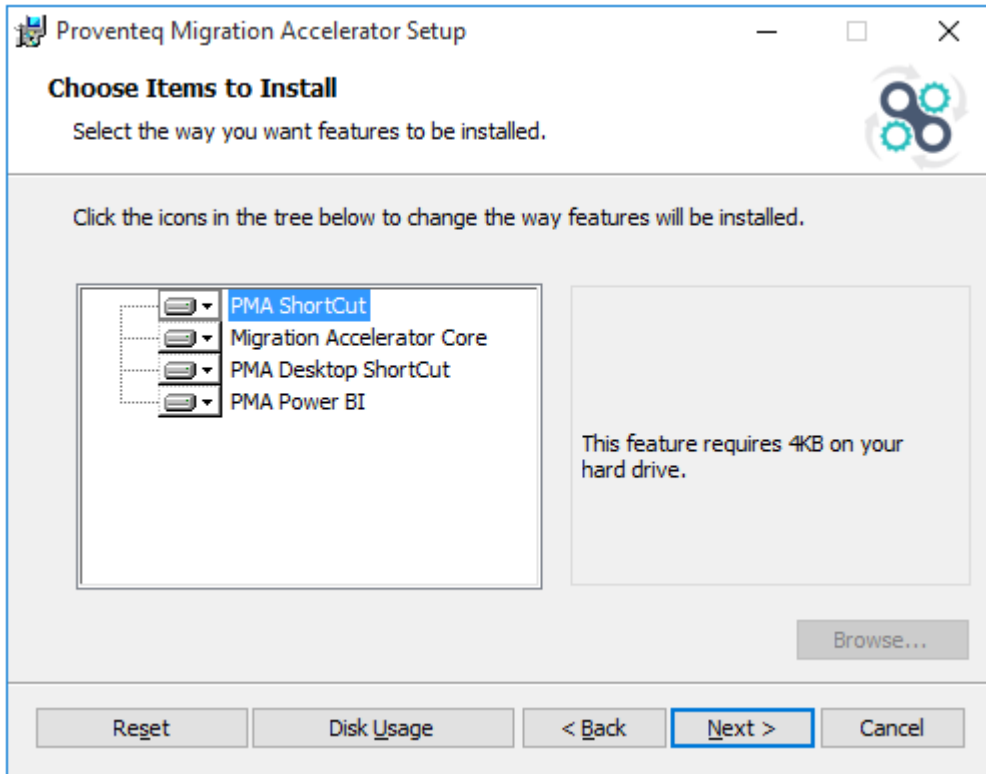
In case of upgrade release, we will provide an existing database name, which will show below Test Connection message.



Click on Next button.

3.6 Choose Items to Install

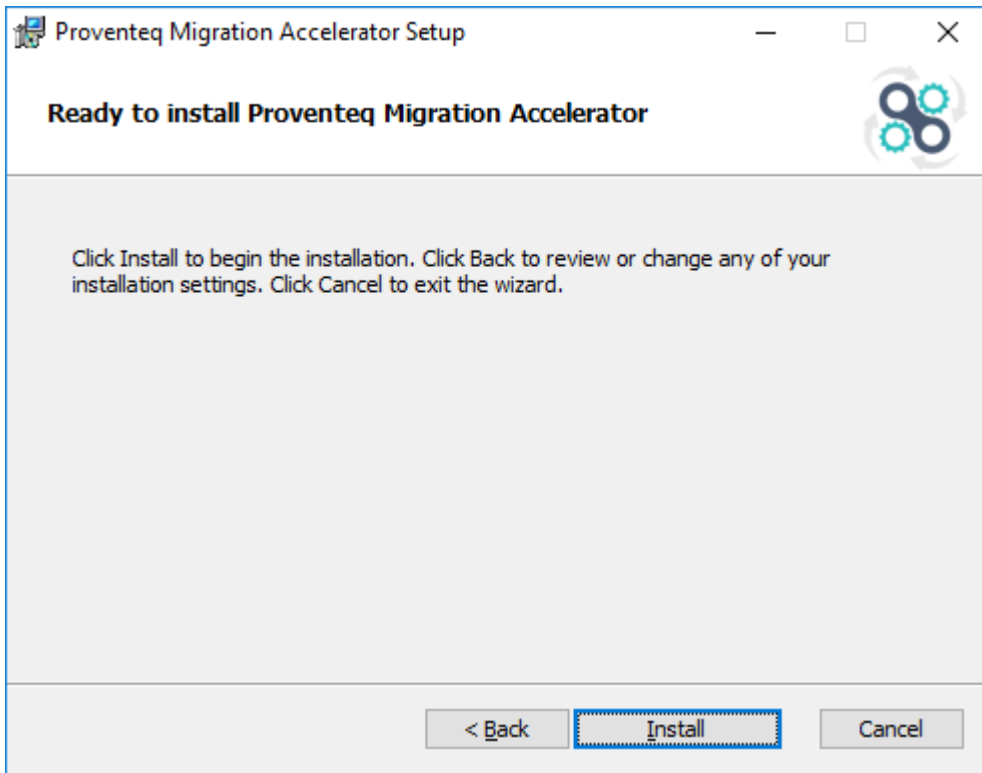
Click Next to display the Choose Items to Display screen



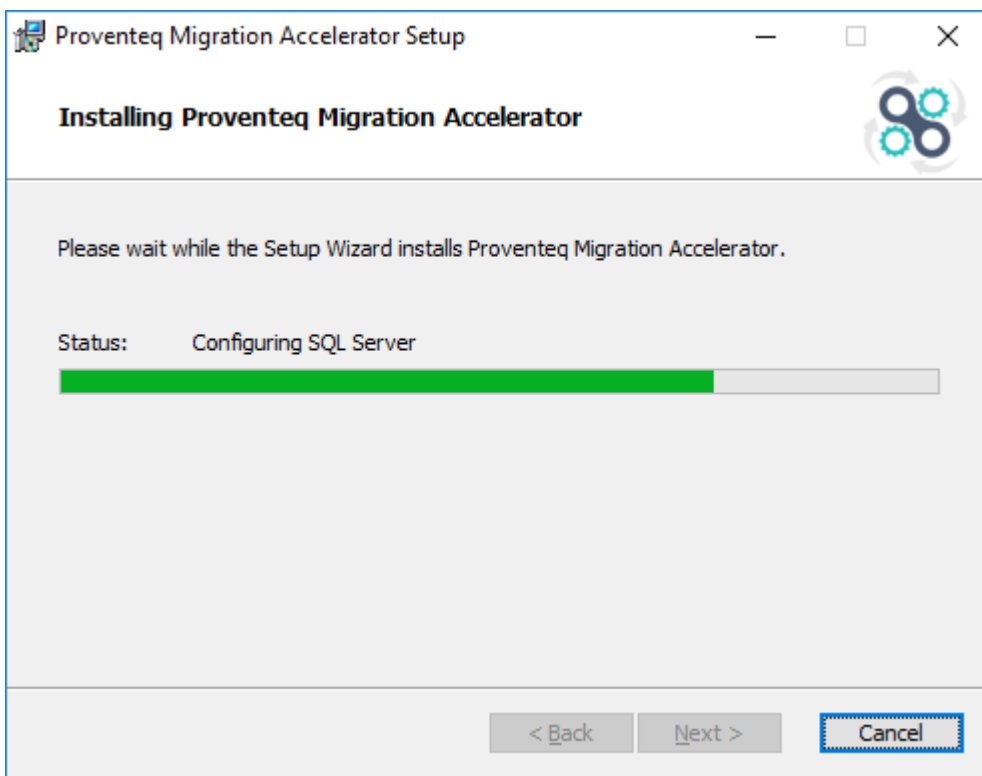
If required change location for feature(s) to install by clicking on Browse button, the default is normally fine.

3.7 Confirm and Complete Installation

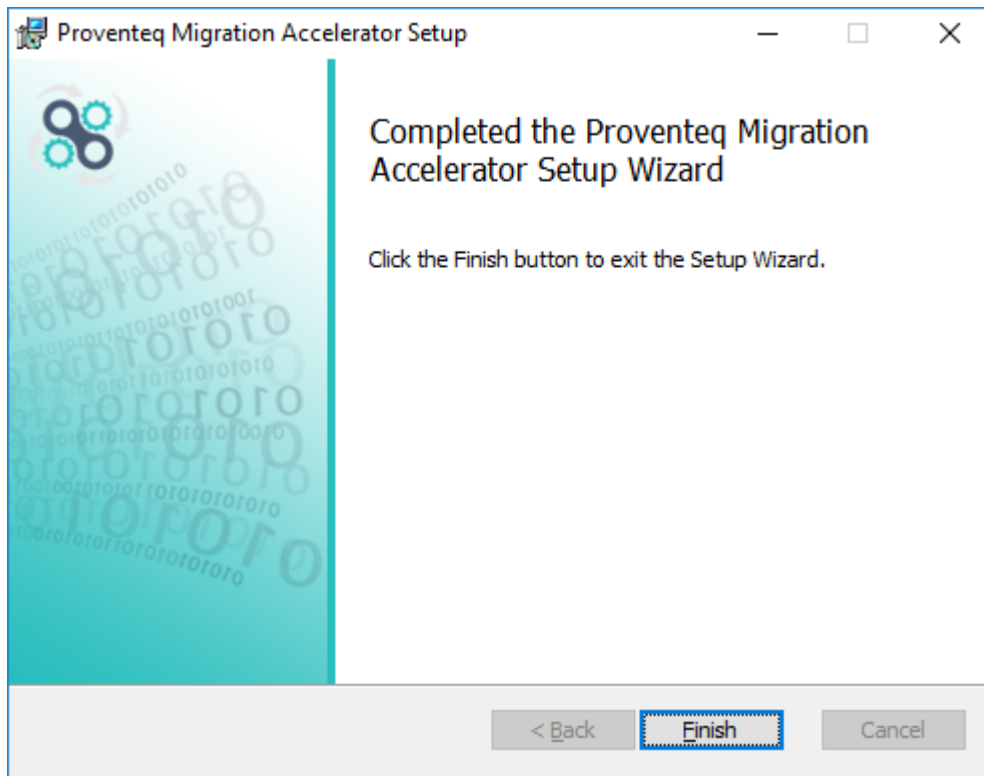
Click Next to display the Ready to install Proventeq Migration Accelerator screen



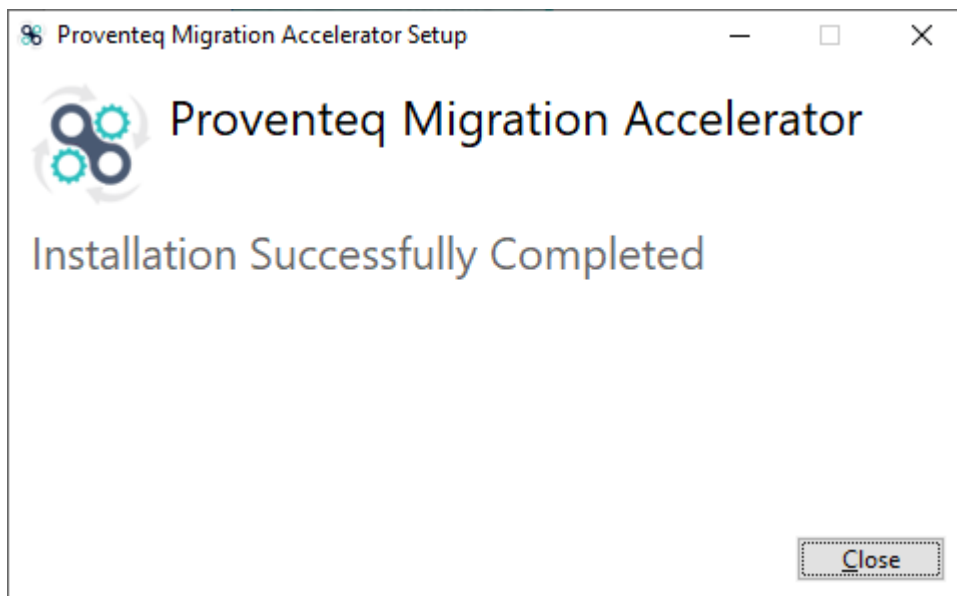
Click on Install to begin installation



On completion of Installation below setup completion screen will be displayed



Click Finish.



Click Close.

This completes the installation process.

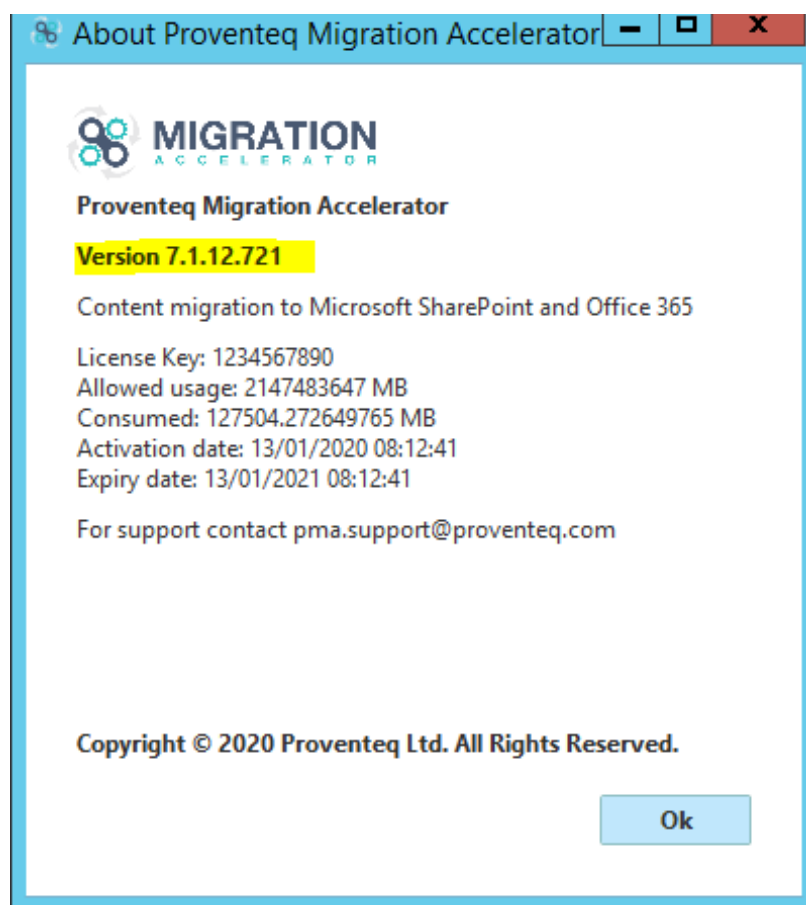
4. LAUNCH APPLICATION

Now, launch the application from **Desktop** by double clicking Proventeq Migration Accelerator icon

OR

Click from **Start -> All Programs -> Proventeq Migration Accelerator -> Proventeq Migration Accelerator**

Note: It is recommended that - Proventeq Migration Accelerator application is launched using "Run as administrator" option.



5. UNINSTALL THE SOFTWARE

5.1 Uninstall Software

This procedure removes the Proventeq Migration Accelerator.

To uninstall the Proventeq Migration Accelerator:

1. Close all applications and windows before proceeding with the un-installation.
2. Select **Start -> Control Panel**
3. Click on **“Uninstall a program” under Programs option**. Note: If you receive the message stating that you need administrator rights or privileges, log off of the computer, then log on again as a user with administrator privileges.
4. Select Proventeq Migration Accelerator from control panel.
5. Click Change/Remove. The un-installation wizard starts up.

At the prompt, click OK to confirm uninstall.