



# Proventeq Migration Accelerator User Guide for iManage Worksite to SharePoint

Version: 7.5

**Proventeq Ltd**

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## ABOUT THIS GUIDE

This document contains detailed instructions on how to configure Proventeq Migration Accelerator, version 7.1, for migrating content to SharePoint.

For additional information about the Training, Technical Support and feedback on the documentation, please contact [pma.support@proventeq.com](mailto:pma.support@proventeq.com) or [raise a support ticket](#).

## 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.

## RELATED DOCUMENTS

Title	Version
Proventeq Migration Accelerator – Worksite to SharePoint Installation Guide	7.5

# 1. INTRODUCTION

Proventeq Migration Accelerator is an end-to-end solution for migrating web content, documents, records and other digital assets into SharePoint 2010/2013/2016/2019 and SharePoint Online. This document describes the migration process of Worksite (iManage) to SharePoint Online.

Migration Accelerator has been designed with flexibility in mind, so it can be configured and/or extended to address any kind of content migration requirement. Migration Accelerator provides an interactive User Interface (UI) to verify and enhance the quality of migrated content.



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## 2. LAUNCH APPLICATION

### 2.1. Launch Migration Accelerator

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 the 'Run as Administrator' option.

### 2.2. Product Activation

When running Proventeq Migration Accelerator for very first time, the user will be prompted to activate the product online.

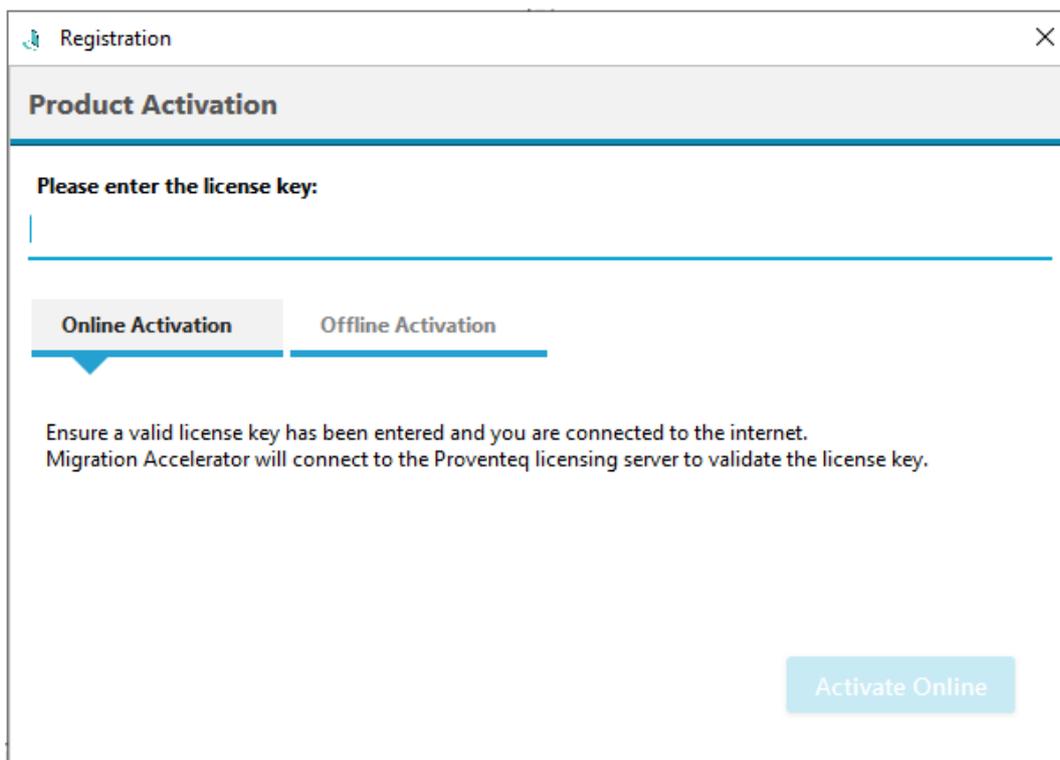
The product activation process verifies that the license key is valid and gives users the option to activate the product license online.

#### 2.2.1. Online Activation

On the Product Activation screen, enter License key provided and click on "Activate Online". This will authenticate the License key and register the product.

**Note:** Users must be connected to internet during product activation.

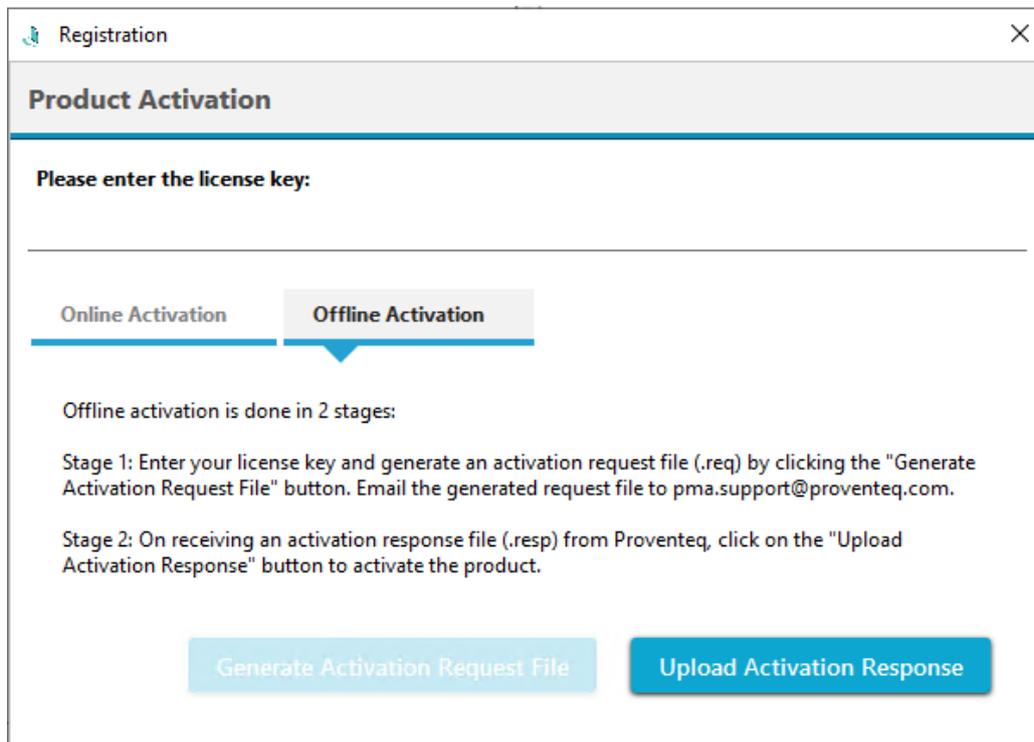
FIGURE 1 - ONLINE REGISTRATION



## 2.2.2. Offline Activation

On the Product Activation screen, select "Offline Activation" tab and follow the steps mentioned to activate the product offline.

FIGURE 2 - OFFLINE ACTIVATION

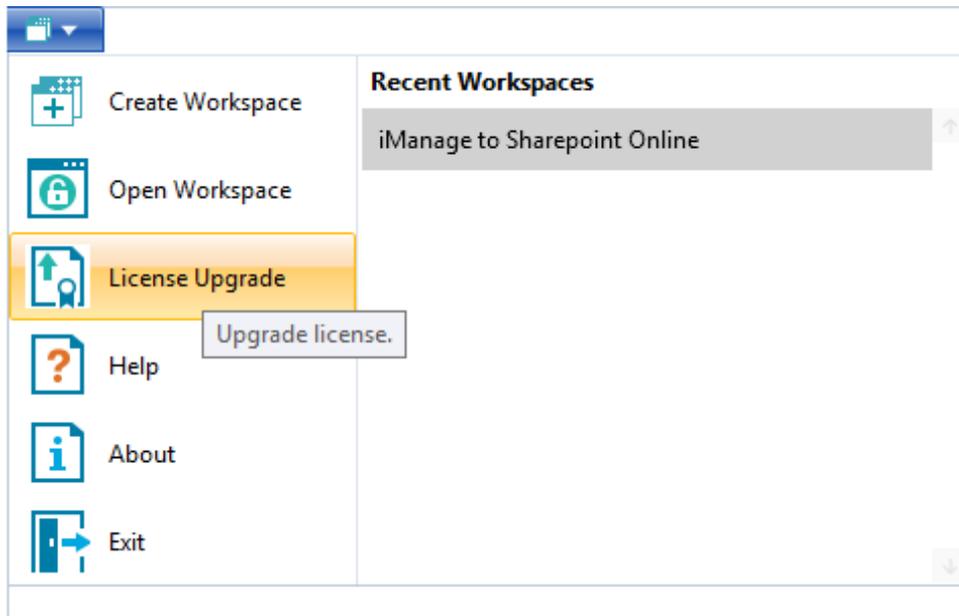


## 2.3. Upgrading License

If you have upgraded your license from trial version to a licensed copy, you can execute "Upgrade License" from the machine where the trial version of the Proventeq Migration Accelerator has been installed. You would need to uninstall the trial version and install the licensed version before you can upgrade the license.

After successful installation of the latest version of Proventeq Migration Accelerator, launch the application and navigate to 'License Upgrade' from the application menu.

FIGURE 3 - LICENSE UPGRADE



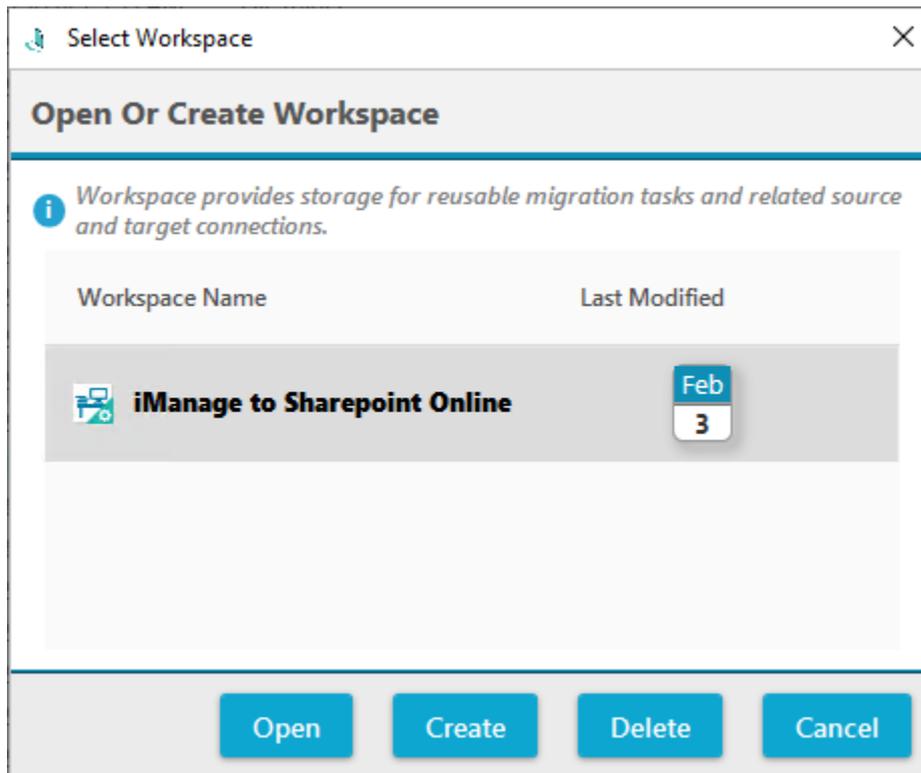
Clicking on “License Upgrade” will launch the “Registration” screen. The steps for License upgrade are the same as steps for product activation. Please refer to instruction in [Section 2.2](#) for completing the license upgrade.

## 3. WORKSPACE CONFIGURATION

Once registration is successful, Proventeq Migration Accelerator is ready for use and configuration.

### 3.1. Migration Workspace

FIGURE 4 - SELECT WORKSPACE

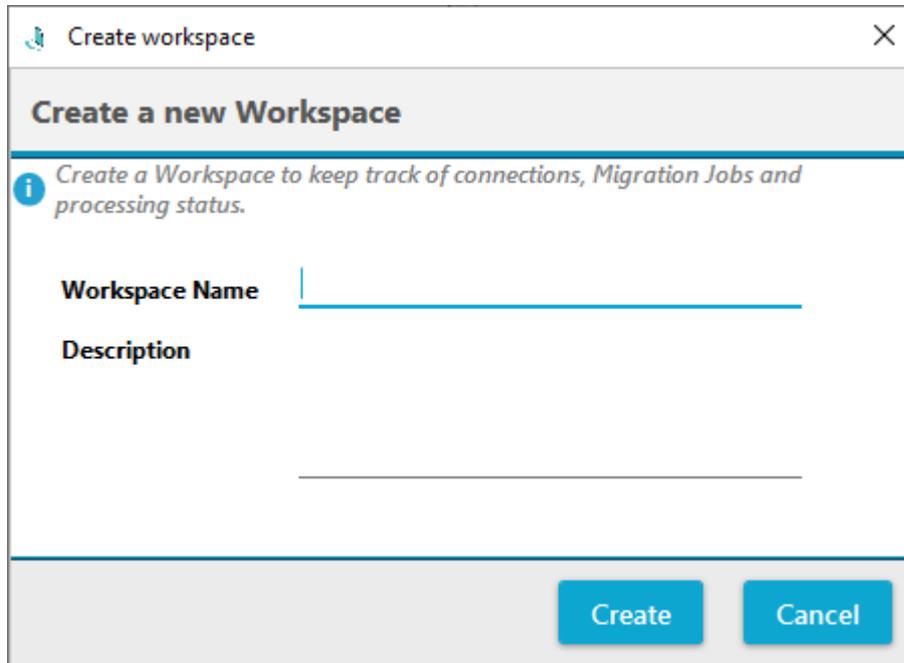


Migration workspace provides storage of reusable migration tasks and related source and target connections.

On launching Migration Accelerator, "Select Workspace" dialog is displayed, which allows you to create a new migration workspace or open an existing one. You can create workspace by clicking on "Create" button.

### 3.1.1. Create Workspace

FIGURE 5 - CREATE WORKSPACE



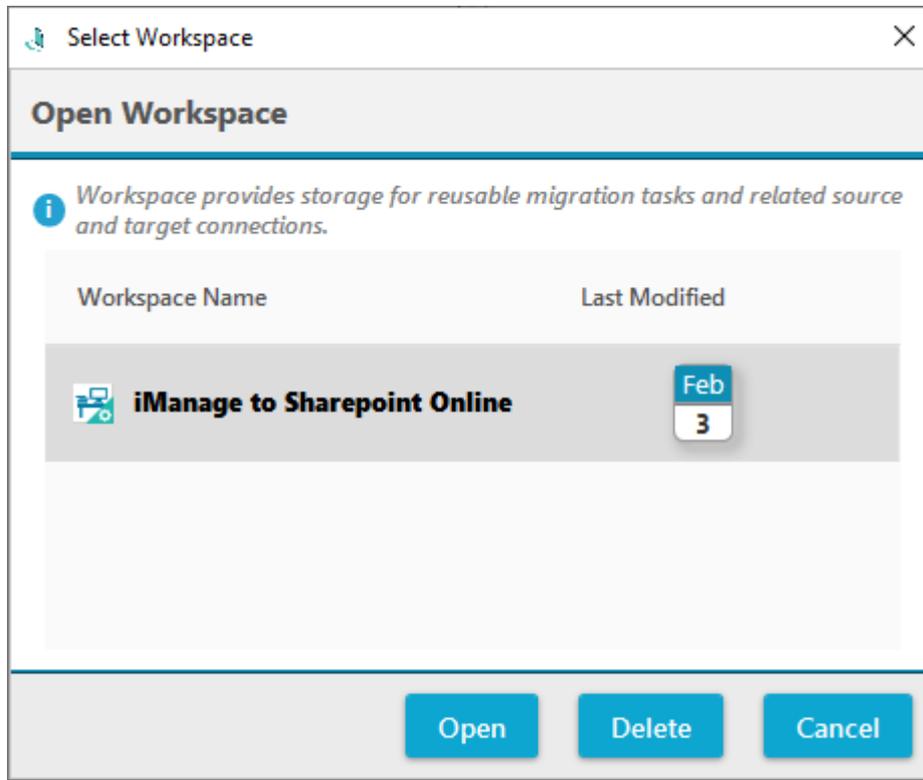
The Create Workspace screen allows you to enter a unique name for the Workspace and an optional Description. Clicking on “Create” in the “Create Workspace” screen will open Home screen of the newly created workspace, where you can add source connection(s) and target connection(s). Migration tasks can then be created using source and target connections.

**Note:** Only 50 characters are allowed in the “Workspace Name” field and less than 200 characters in description.

### 3.1.2. Open Workspace

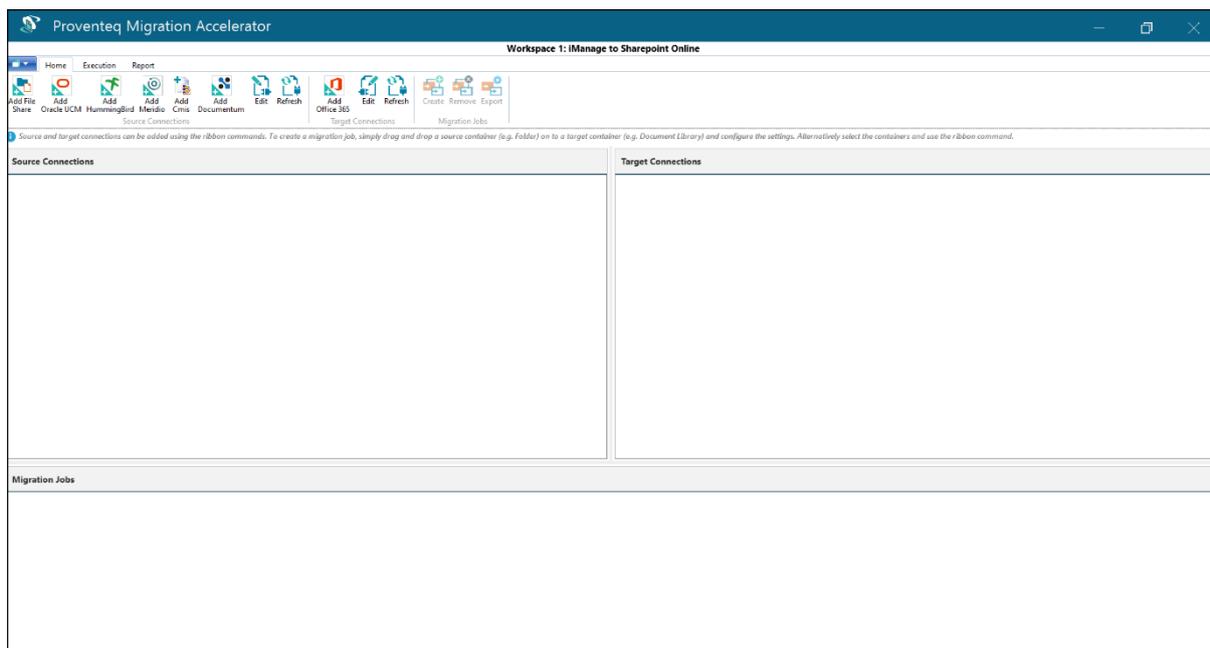
To open an existing workspace, select a workspace from the list on the “Select Workspace” screen and click “Open” button. This will open the “Home” tab of selected workspace.

FIGURE 6 - OPEN WORKSPACE FROM SELECT WORKSPACE SCREEN



In “Home” screen users can add source and target connections, create “Migration Tasks” by mapping source container to target container and configure migration task settings.

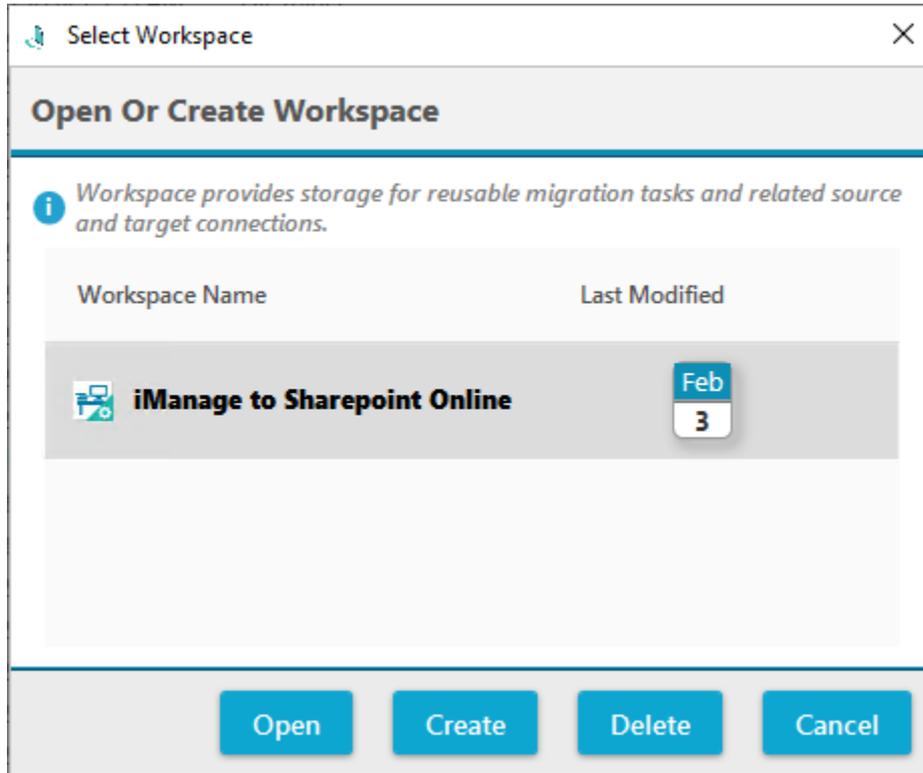
FIGURE 7 - WORKSPACE HOME SCREEN



### 3.1.3. Delete Workspace

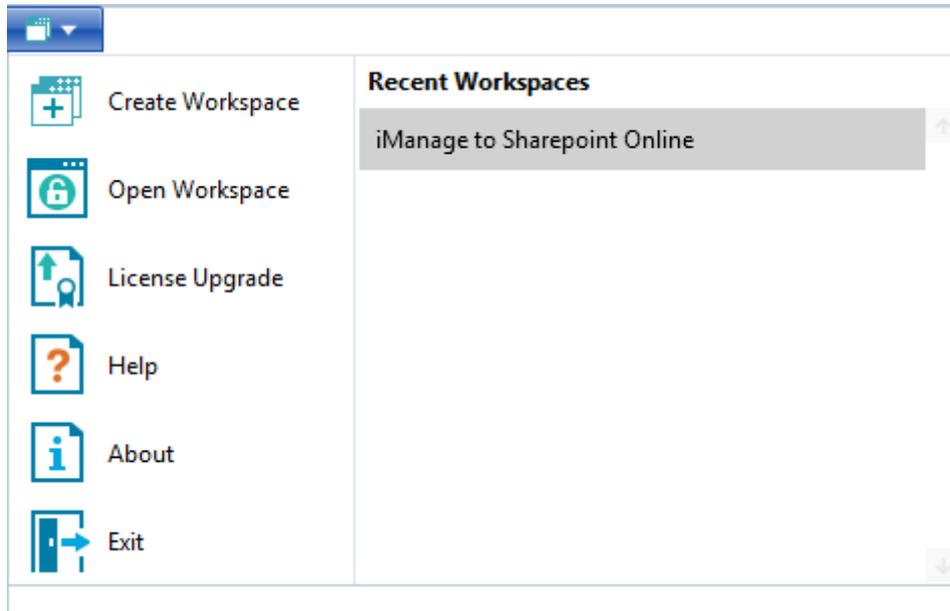
To delete an existing workspace, select a workspace from the list on the “Select Workspace” screen and click “Delete” button. This will pop up a dialogue box with the option to delete the Selected Workspace or cancel the delete operation.

FIGURE 8 - SELECT WORKSPACE FOR DELETE



## 3.2. Application Menu

FIGURE 9 - APPLICATION MENU



Application menu appears in the upper-left corner of the window. It includes commands for Workspace such as Open Workspace and Create Workspace. It also lists the recent workspaces.

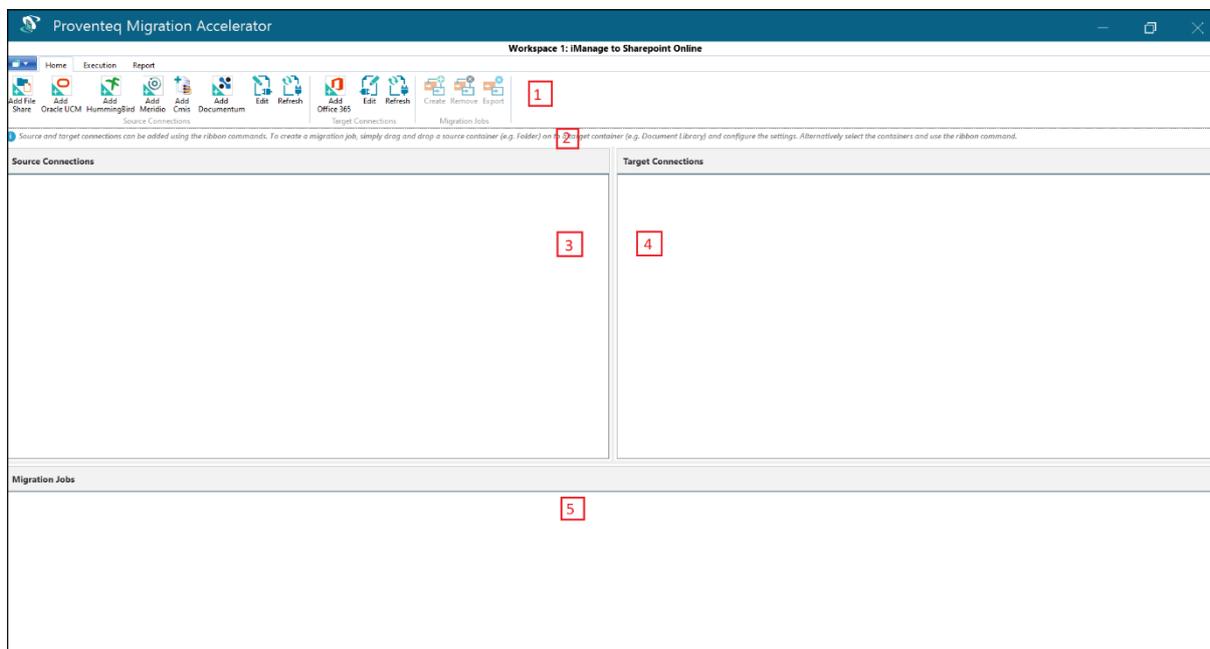
- Clicking on "Create Workspace" will allow you to create new workspace from application menu.
- Clicking on "Open Workspace" will allow you to switch between workspaces.
- Clicking on "License Upgrade" will allow you to upgrade or request for license. See [Section 2.3](#) for "License Upgrade".
- "Help" opens the User guide.
- "About" provides details of the installed product and the licensing details.
- "Exit" terminates all ongoing processes and closes the application.

## 4. WORKSPACE HOME SCREEN

The Home screen of Migration Accelerator consists of five panes as shown in the image below:

- (1) Ribbon
- (2) Information pane
- (3) Source Connections pane
- (4) Target Connections pane
- (5) Migration Tasks pane

FIGURE 10 - WORKSPACE HOME SCREEN



The controls within each pane are described in the following sections.

### 4.1. Ribbon

Proventeq Migration Accelerator provides use of fluent “Ribbon” interface. Within each ribbon tab, related controls are consolidated into one area for users’ ease of access. By default, the “Home” tab is selected when a workspace is opened. The other two tabs available for a workspace are:

- Execution and
- Report

FIGURE 11 - HOME TAB RIBBON

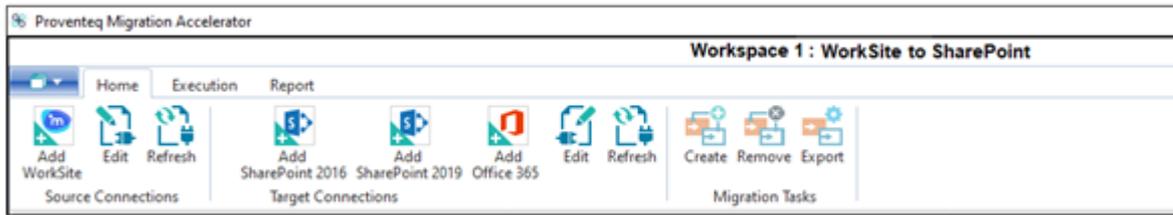
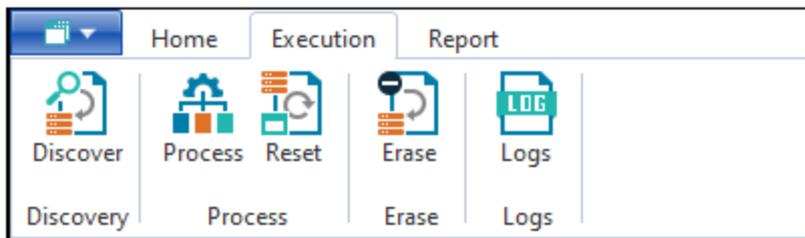


FIGURE 12 - EXECUTION TAB RIBBON



REPORT TAB



## 4.2. Information pane

It displays information for getting started with source and target configuration and migration task creation.

## 4.3. Source Connections

“Source Connections” pane is located at the left side of the main screen and is designed to display the added source connections along with the content hierarchy.

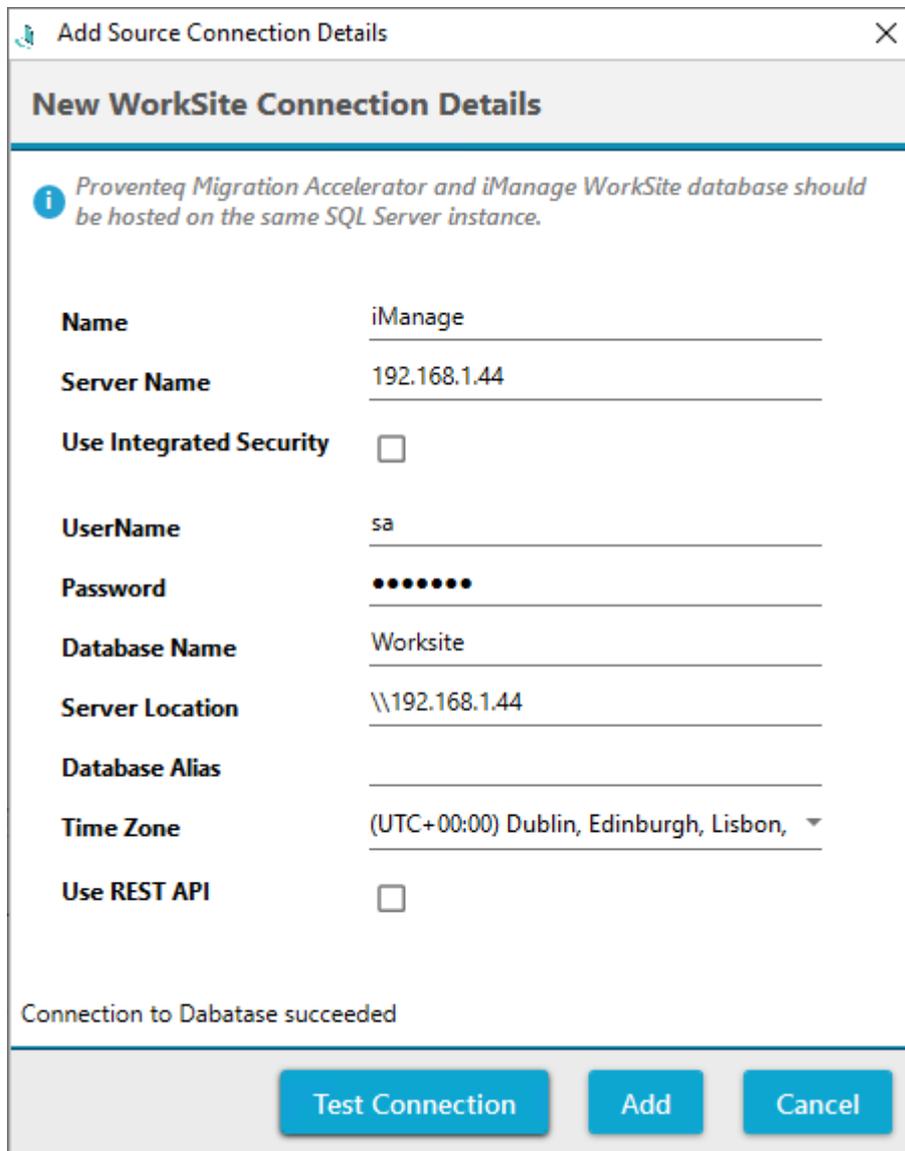
The following table lists the operations that are available in corresponding “Source connections” group present on ribbon.

**Note:** It is recommended that Proventeq Migration Accelerator staging server should be in the same Time-Zone as of source system timezone.

	Add Worksite	Adds a new Worksite source connection
	Edit Connection	Edits configuration of selected source connection
	Refresh Connection	Refreshes the content tree view for selected connection

### 4.3.1. Add Worksite Source Connection

FIGURE 13 - ADD WORKSITE CONNECTION



The Add Worksite icon, located in the Source Connections group of ribbon, allows the user to create a source connection pointing to a Worksite Library. Users can browse and select the Worksite Library using the Worksite Connection dialog. The source connection can then be used to create migration task(s).

The following fields need to be configured for a connection:

- **User REST API** – If iManage files are stored on cloud-hosted server instead of local intranet File share server, then use REST API options for **Name**: Name of connection, to uniquely identify the connection within the workspace.
- **Server Name**: Name of the database instance hosting the Worksite database. *Proventeq Migration Accelerator and Worksite database should be hosted on the same SQL Server instance.*

e.g. DBServer\Instance.

- **Use Integrated Security:** Checked the checked box to use the Integrated Security.
- **UserName:** The username for connecting to Worksite database. The user should be an Administrator for this database.
- **Password:** The password for the above-mentioned user.
- **Database Name:** - Database Name of the Worksite DM.
- **Server Location** – Full path of the location storing the iManage WorkSite Files.
- **Database Alias** - Name of iManage Database
- **Time Zone:** User needs to select the Time Zone from the drop down or by default the Time Zone being selected of the Server.
- performing migration.

FIGURE 14 - REST API SETTING

API Settings	
iManage URL	<input type="text" value="https://proventeq-mobility.imanage.work/"/>
iManage Username	<input type="text" value="admin"/>
iManage Password	<input type="password" value="....."/>

- **iManage URL** – Full API path to get the iManage files from cloud hosted server.
- **iManage Username** – The username for connecting to iManage cloud hosted server. The user should be an Administrator for this database.
- **iManage Password** – The password for the above-mentioned user.

Click on the "Test Connection" button to verify that the details entered are correct. Click on the "Add" button to add the Worksite connection.

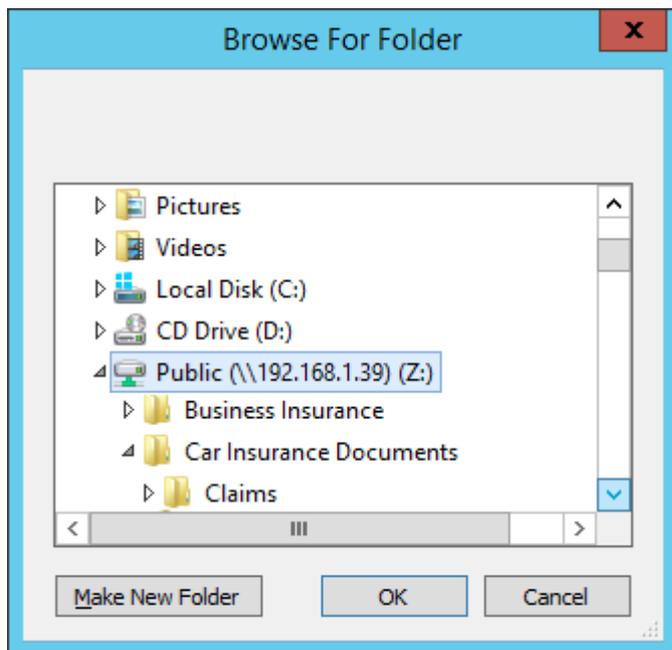
Users can check source and target containers by expanding them in Source and Target pane area as part of migration, though it is not a mandatory step.

Users can then either Edit Connection or Refresh Connection, but these steps are not mandatory.

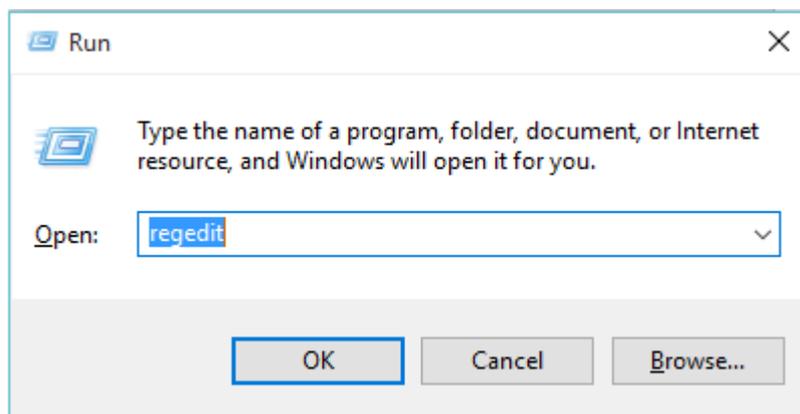
### 4.3.2. Configure UNC path to enable mapped/network drive connection:

While adding mapped/network user will not find the mapped/network drive in the source connection, the user needs to follow these steps to configure it:

FIGURE 15 - ADD FILE SHARE NETWORK DRIVE CONNECTION



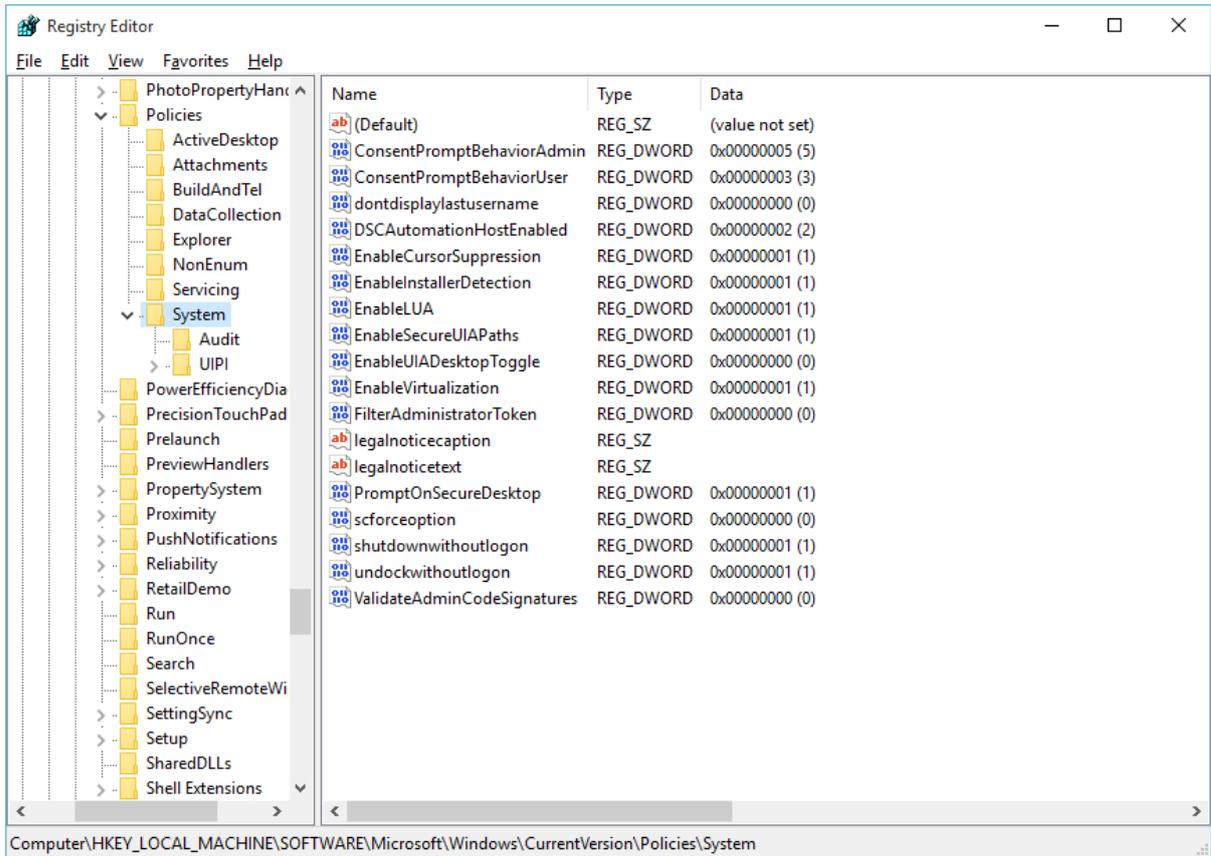
- 1) Open the "Run" prompt on windows ("Windows key + r" combination)
- 2) In the Run line, enter "regedit" to open windows registry



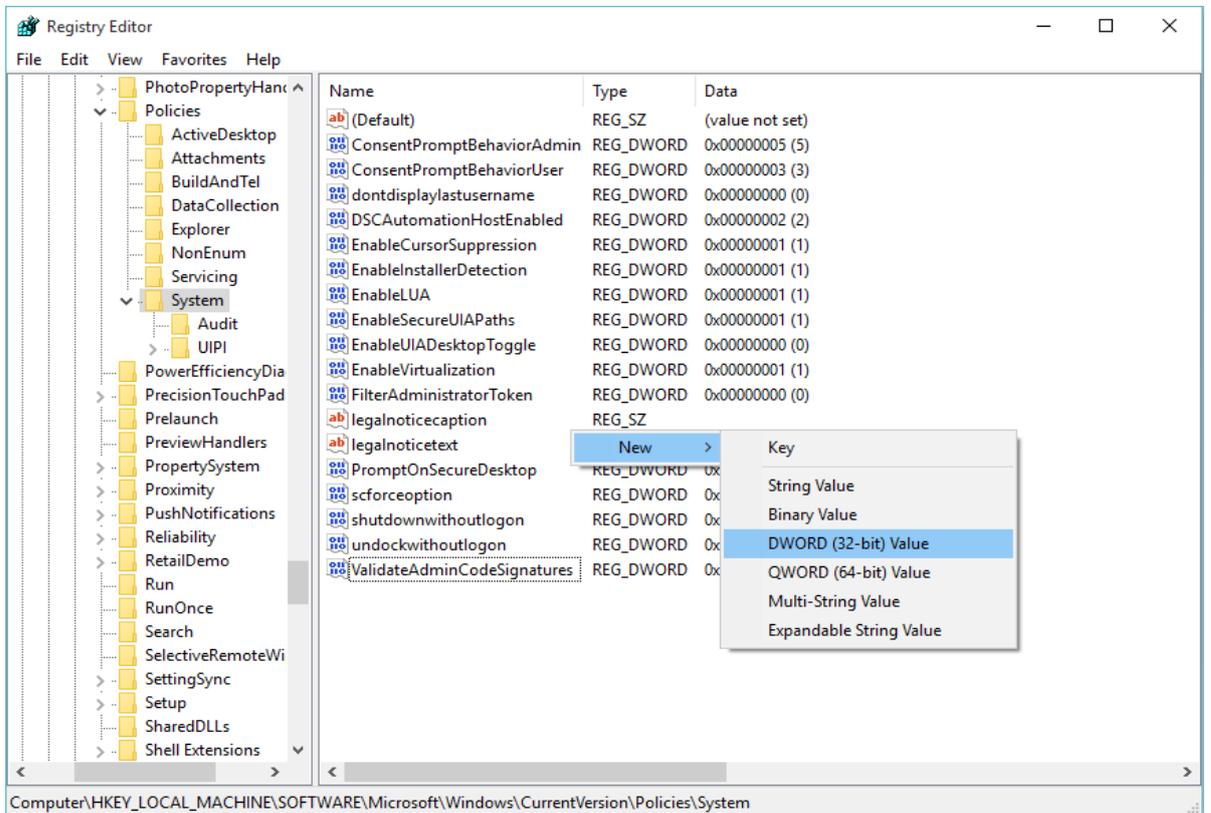
- 3) Click "OK"
- 4) User is presented with User Account Control (Windows Vista/7/8.x/10) window to make changes to machine configuration
- 5) Click on "Yes"
- 6) Regedit is a two-pane interface with keys in the left pane (key pane) and value names with the corresponding data in the right pane (value pane).

#### Locate the path in Key pane

HKEY\_LOCAL\_MACHINE/SOFTWARE/Microsoft/Windows/CurrentVersion/Policies/System

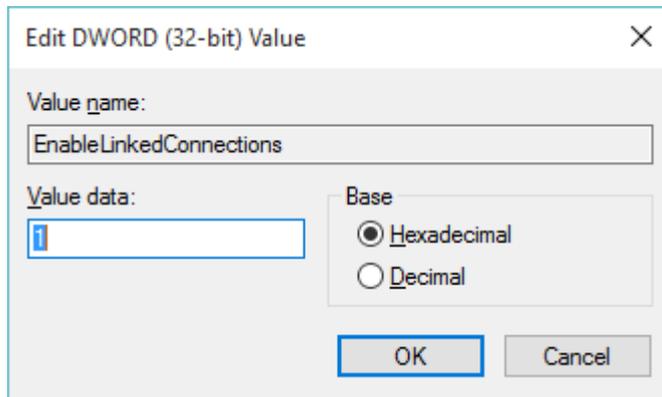


7) Right Click on Value Pane and Click on DWORD (32-bit) Value



8) Rename "New Value #1" to "EnableLinkedConnections"

9) Double click on **EnableLinkedConnections**



Value Data: **1**

Base: **Hexadecimal**

10) Exit from Registry Editor by pressing Alt + F4 key

11) Restart Computer

## 4.4. Target Connections

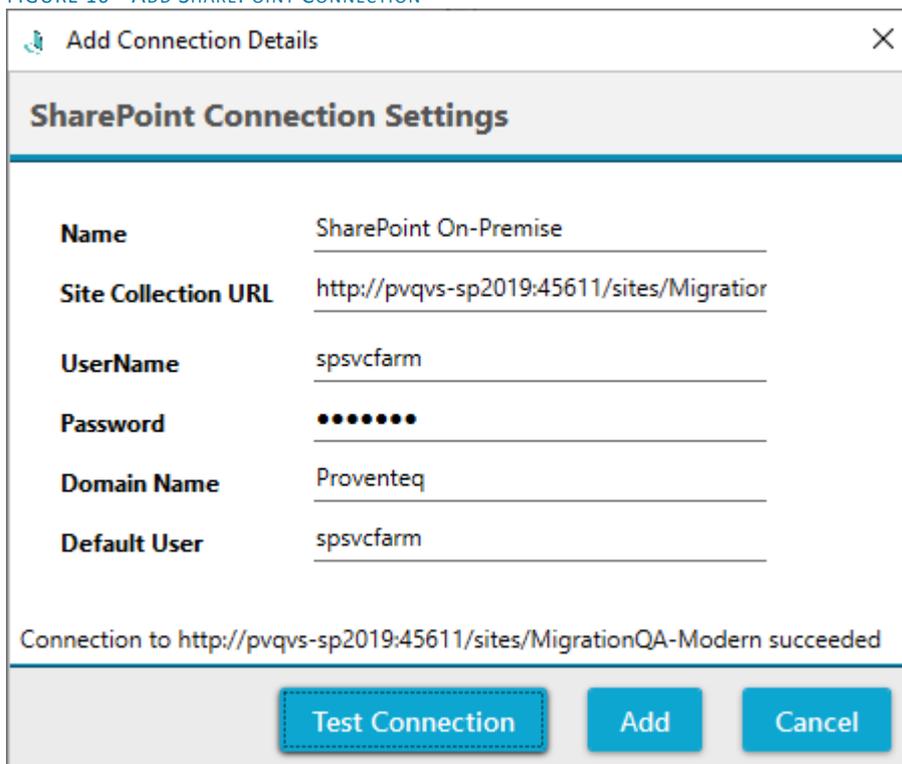
“Target Connections” pane is located at the right side of the main screen and is designed to display the user created Target connections and its content containers.

	Add Target SharePoint Online	Opens a dialog to add a new SharePoint Online Target connection
	Add SharePoint2016	Opens a dialog to add a new SharePoint2016 Target connection
	Add SharePoint2019	Opens a dialog to add a new SharePoint2019 Target connection
	Edit Target Connection	Edits configuration of selected target connection
	Refresh Target Connection	Refreshes the content tree view for selected connection

Click on  icon for SharePoint Online, or the  for SharePoint located in Target Connection ribbon group to create a target connection. This launches a new dialog.

### 4.4.1. SharePoint 2016/2019 Site Collection Connection

FIGURE 16 - ADD SHAREPOINT CONNECTION



The screenshot shows a dialog box titled "Add Connection Details" with a close button (X) in the top right corner. Below the title bar is a section titled "SharePoint Connection Settings". The settings are as follows:

- Name:** SharePoint On-Premise
- Site Collection URL:** http://pvqvs-sp2019:45611/sites/Migrator
- UserName:** spsvcfarm
- Password:** [Redacted with dots]
- Domain Name:** Proventeq
- Default User:** spsvcfarm

At the bottom of the dialog, there is a status message: "Connection to http://pvqvs-sp2019:45611/sites/MigrationQA-Modern succeeded". Below this message are three buttons: "Test Connection" (with a dashed border), "Add", and "Cancel".

The following fields need to be configured for a SharePoint Connection:

- **Name:** Name of connection to uniquely identify the connection within the workspace.
- **Site Collection URL:** URL of the target SharePoint Site Collection.
- **UserName:** Username for connecting to SharePoint. The user should be an administrator for the target Site Collection.
- **Password:** Password for the above-mentioned user.
- **Domain Name:** The domain name where the SharePoint user is created.
- **Default User:** The default user to be used for setting Author/Editor fields in the target Site Collection if the source user is not found. This field is optional.

Click on the "Test Connection" button to verify that the details entered are correct. Click on the "Add" button to add the SharePoint connection.

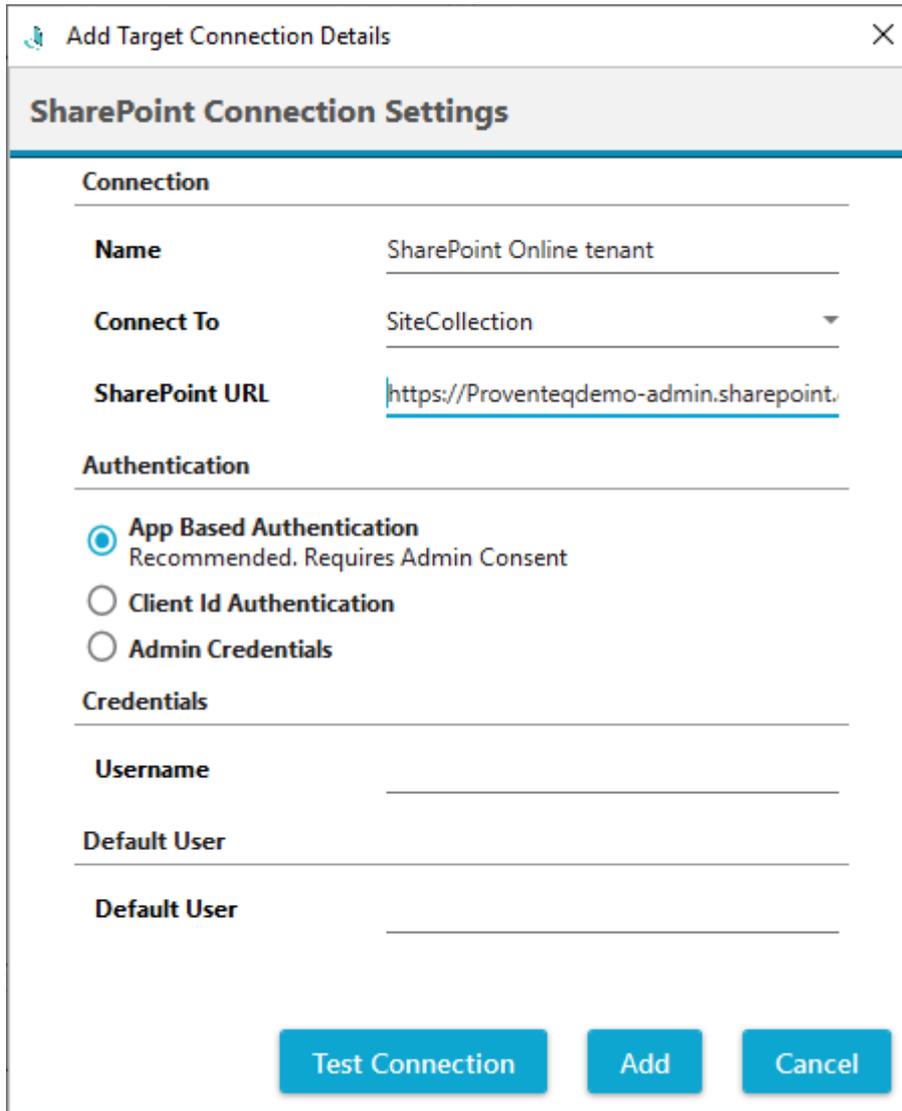
## 4.4.2. SharePoint Online Connection

### 4.4.2.1. SharePoint Online Connection Types

The following connection types are supported in SharePoint Online:

- **Tenant** – Add Office 365 tenant connection to migrate across site collections and OneDrive sites.
- **Site Collection** – Add site collection connection to migrate to a particular site collection.

FIGURE 17 - ADD SHAREPOINT ONLINE TENANT CONNECTION



The screenshot shows a dialog box titled "Add Target Connection Details" with a close button (X) in the top right corner. Below the title bar is a section header "SharePoint Connection Settings". The form is divided into three main sections: "Connection", "Authentication", and "Credentials".

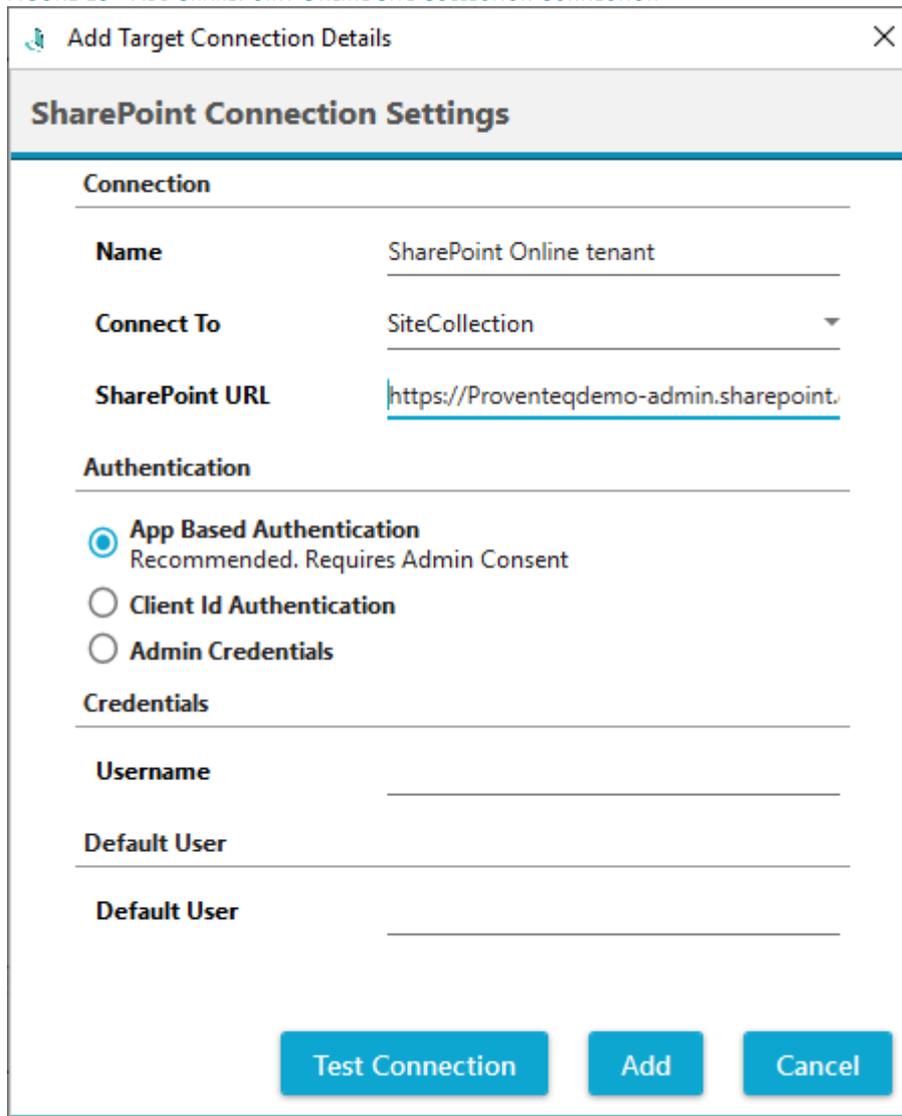
- Connection:**
  - Name:** SharePoint Online tenant
  - Connect To:** SiteCollection (dropdown menu)
  - SharePoint URL:** <https://Proventeqdemo-admin.sharepoint.com>
- Authentication:**
  - App Based Authentication**  
Recommended. Requires Admin Consent
  - Client Id Authentication**
  - Admin Credentials**
- Credentials:**
  - Username:** (empty text field)
  - Default User:** (empty text field)
  - Default User:** (empty text field)

At the bottom of the dialog are three buttons: "Test Connection", "Add", and "Cancel".

The following fields need to be configured for a SharePoint Connection:

- **Name:** Name of connection to uniquely identify the connection within the workspace.
- **Connect To:** Select **Tenant**.
- **SharePoint URL:** The SharePoint tenant admin URL.

FIGURE 18 - ADD SHAREPOINT ONLINE SITE COLLECTION CONNECTION



The screenshot shows a dialog box titled "Add Target Connection Details" with a close button (X) in the top right corner. Below the title bar is a section header "SharePoint Connection Settings". The form is divided into three main sections: "Connection", "Authentication", and "Credentials".

**Connection Section:**

- Name:** A text input field containing "SharePoint Online tenant".
- Connect To:** A dropdown menu with "SiteCollection" selected.
- SharePoint URL:** A text input field containing "https://Proventeqdemo-admin.sharepoint.com".

**Authentication Section:**

- App Based Authentication:** Selected with a radio button. Below it, the text "Recommended. Requires Admin Consent" is displayed.
- Client Id Authentication:** Unselected with a radio button.
- Admin Credentials:** Unselected with a radio button.

**Credentials Section:**

- Username:** An empty text input field.
- Default User:** An empty text input field.
- Default User:** A second empty text input field.

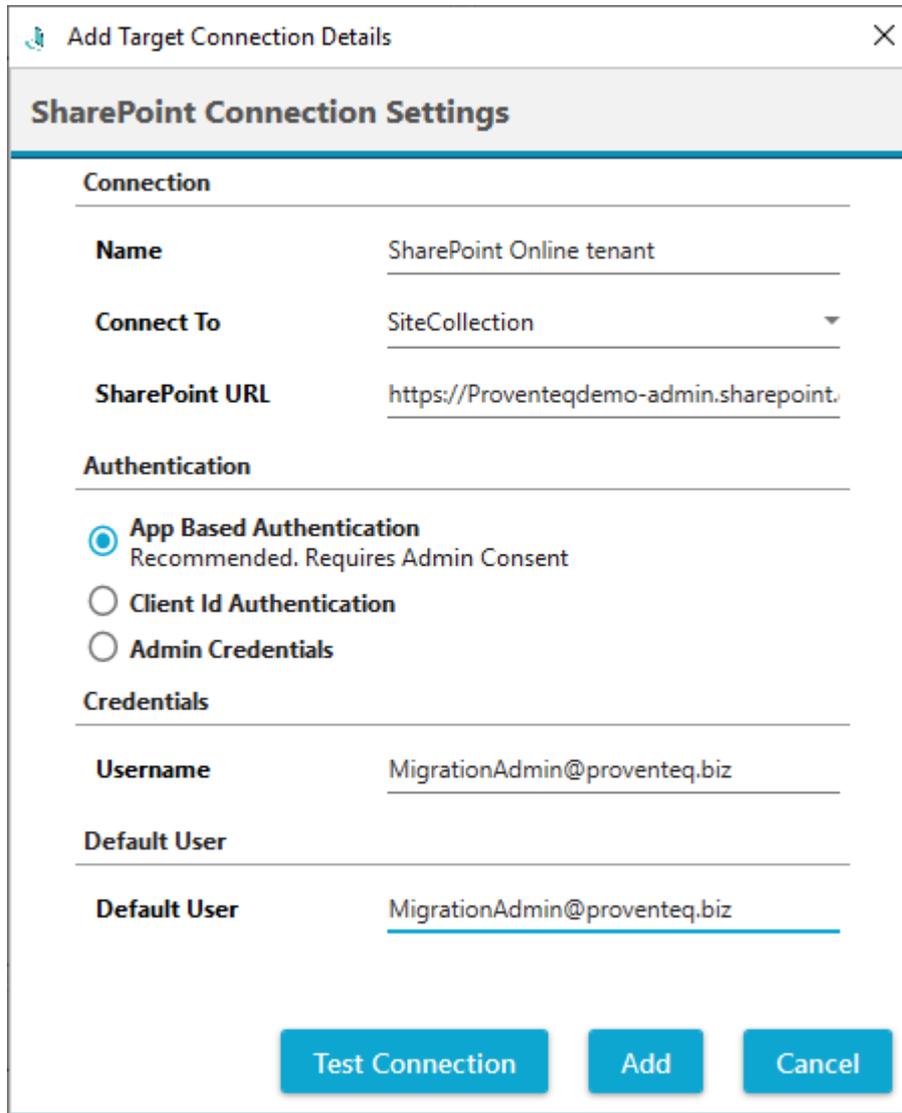
At the bottom of the dialog, there are three buttons: "Test Connection", "Add", and "Cancel".

The following fields need to be configured for a SharePoint Connection:

- **Name:** Name of connection, to uniquely identify the connection within the workspace.
- **Connection type:** Select **Site Collection**.
- **SharePoint URL:** URL of the target SharePoint Site Collection.

## 4.4.2.2. SharePoint Online App Only Authentication

FIGURE 19 - SHAREPOINT ONLINE APP BASED AUTHENTICATION



The screenshot shows a dialog box titled "Add Target Connection Details" with a close button (X) in the top right corner. The dialog is divided into several sections:

- SharePoint Connection Settings** (Section Header)
- Connection** (Section Header)
  - Name:** SharePoint Online tenant
  - Connect To:** SiteCollection (dropdown menu)
  - SharePoint URL:** https://Proventeqdemo-admin.sharepoint.com
- Authentication** (Section Header)
  - App Based Authentication**  
Recommended. Requires Admin Consent
  - Client Id Authentication**
  - Admin Credentials**
- Credentials** (Section Header)
  - Username:** MigrationAdmin@proventeq.biz
  - Default User:** MigrationAdmin@proventeq.biz

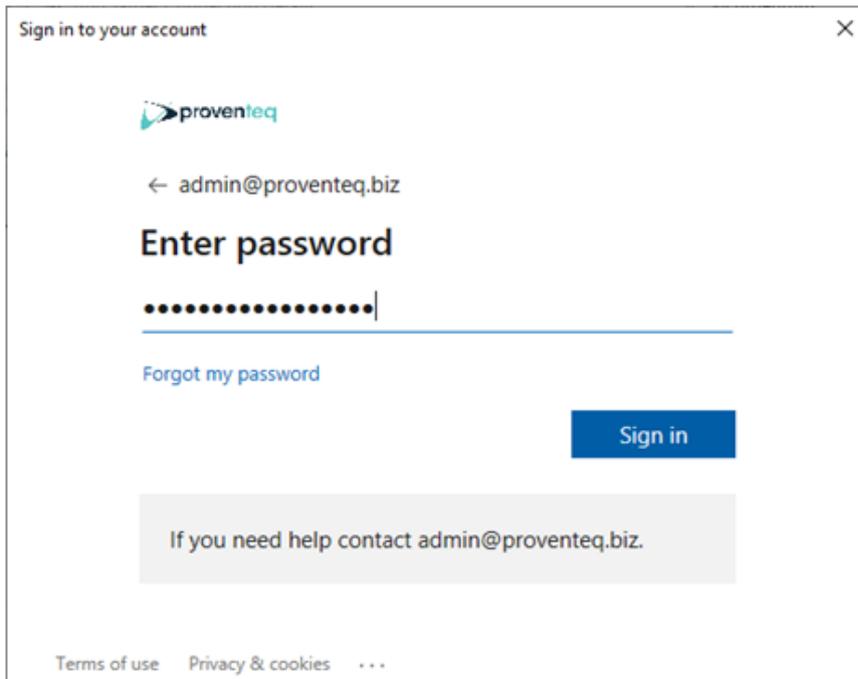
At the bottom of the dialog, there are three buttons: "Test Connection", "Add", and "Cancel".

### Admin Credentials Authentication Settings:

- **Username:** The Username for connecting to SharePoint. The user should be a site collection administrator for the target Site Collection or SharePoint Online Admin or Global Admin for the tenant level connection.
- **Default User:** The default user to be used for setting Author/Editor fields in the target Site Collection if the source user is not found. This field is optional.

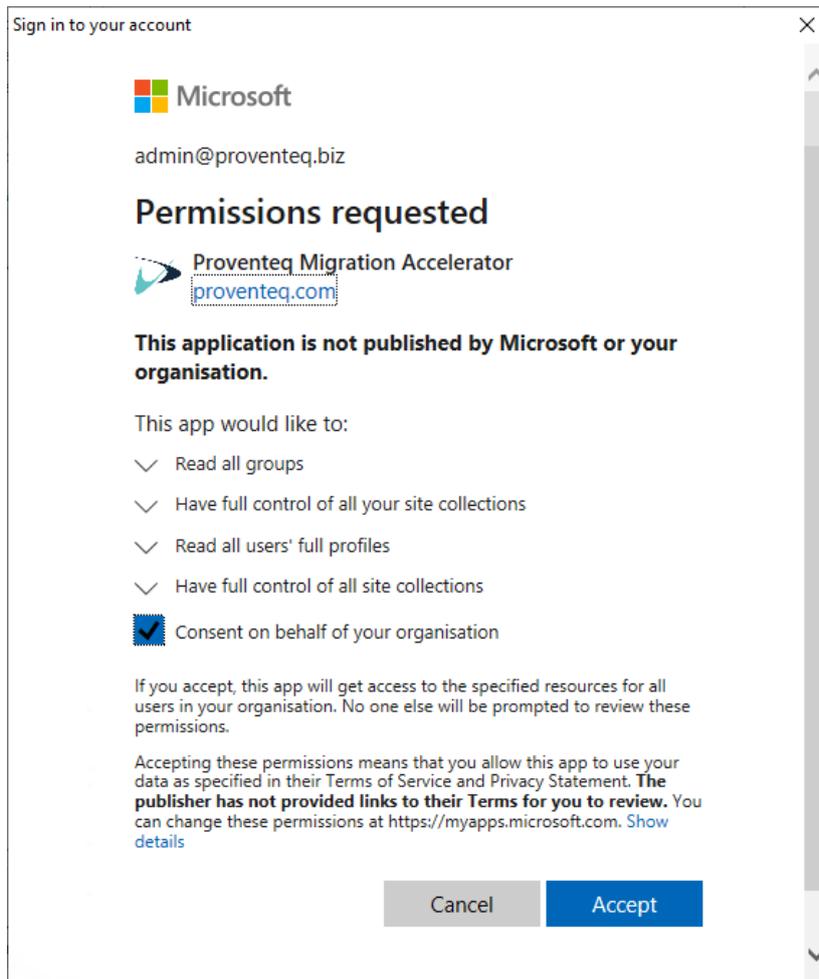
Click on the "Test Connection" button, a screen will pop-up to sign into the account of the whitelisted username by Microsoft.

FIGURE 20 - SIGN IN SCREEN FOR THE AUTHENTICATION



If user is Global admin user, then the user will get a consent screen and user will need to accept the consent.

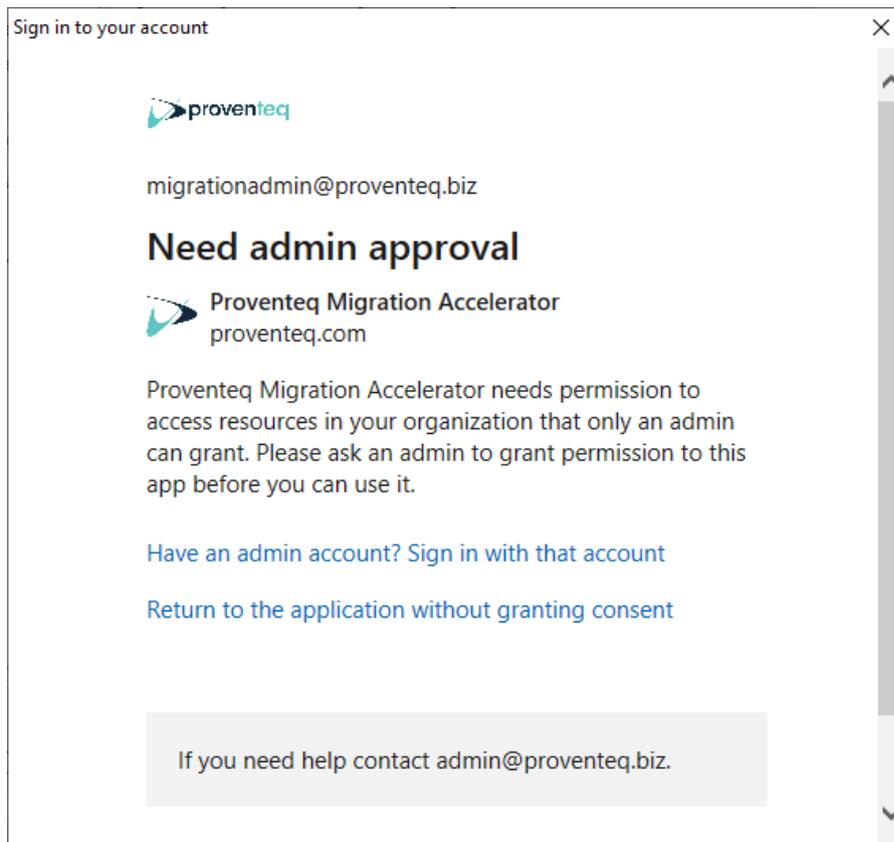
FIGURE 21 - CONSENT SCREEN FOR THE GLOBAL ADMIN USER AUTHENTICATION



Tick the checkbox for giving the consent on behalf of your organisation and click on the “Accept” button. This will redirect you back to Add Target Connection screen.

If user is not Global Admin, then user will need to request Admin user to login and accept the consent for Proventeq Migration Accelerator application.

FIGURE 22 - CONSENT SCREEN FOR THE SHAREPOINT ADMIN USER AUTHENTICATION



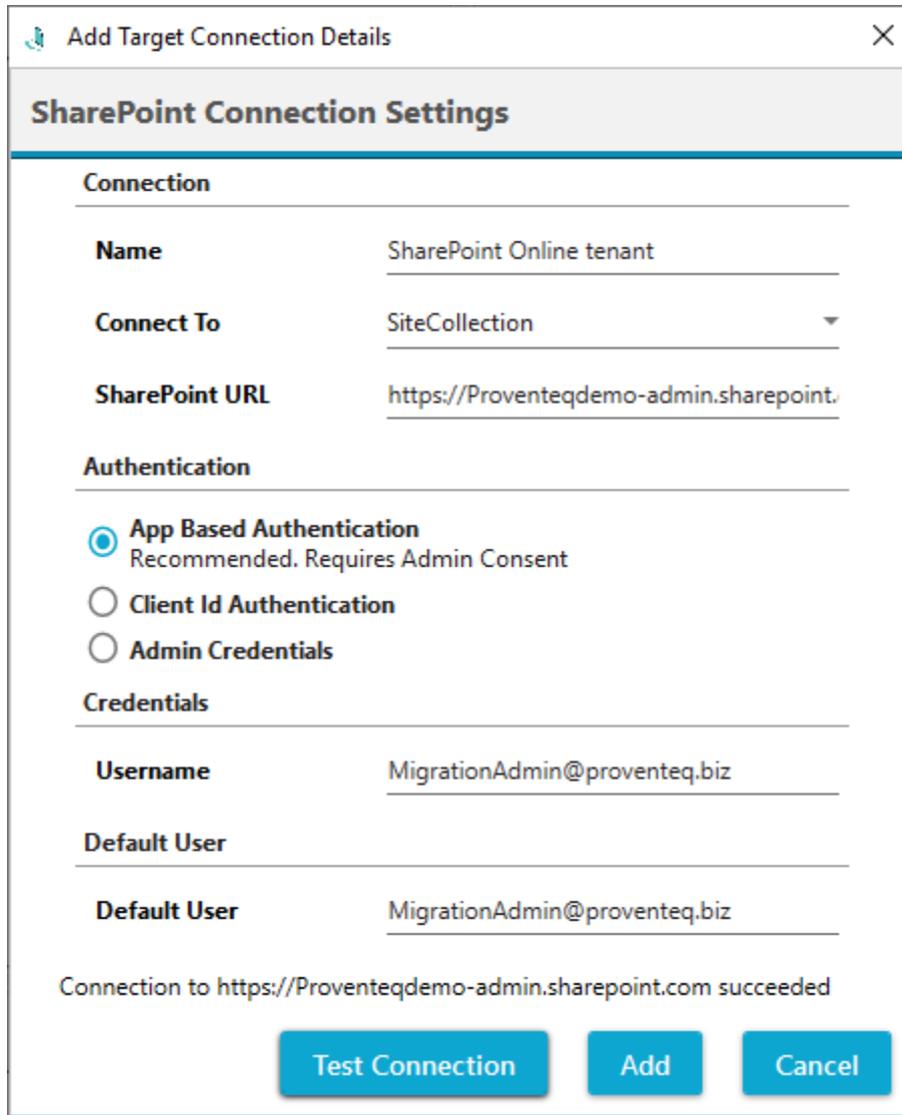
Alternatively, one can send below URL to Global Administrator to provide admin consent and return to the application without granting consent.

[https://login.microsoftonline.com/<TenantID>/adminconsent?client\\_id=d1e5e128-9660-4380-aabb-3e0061c1047c](https://login.microsoftonline.com/<TenantID>/adminconsent?client_id=d1e5e128-9660-4380-aabb-3e0061c1047c)

Refer below link to get tenant-id for your organisation and replace in above URL.

<https://docs.microsoft.com/en-us/onedrive/find-your-office-365-tenant-id>

FIGURE 23 - ADD TARGET CONNECTION



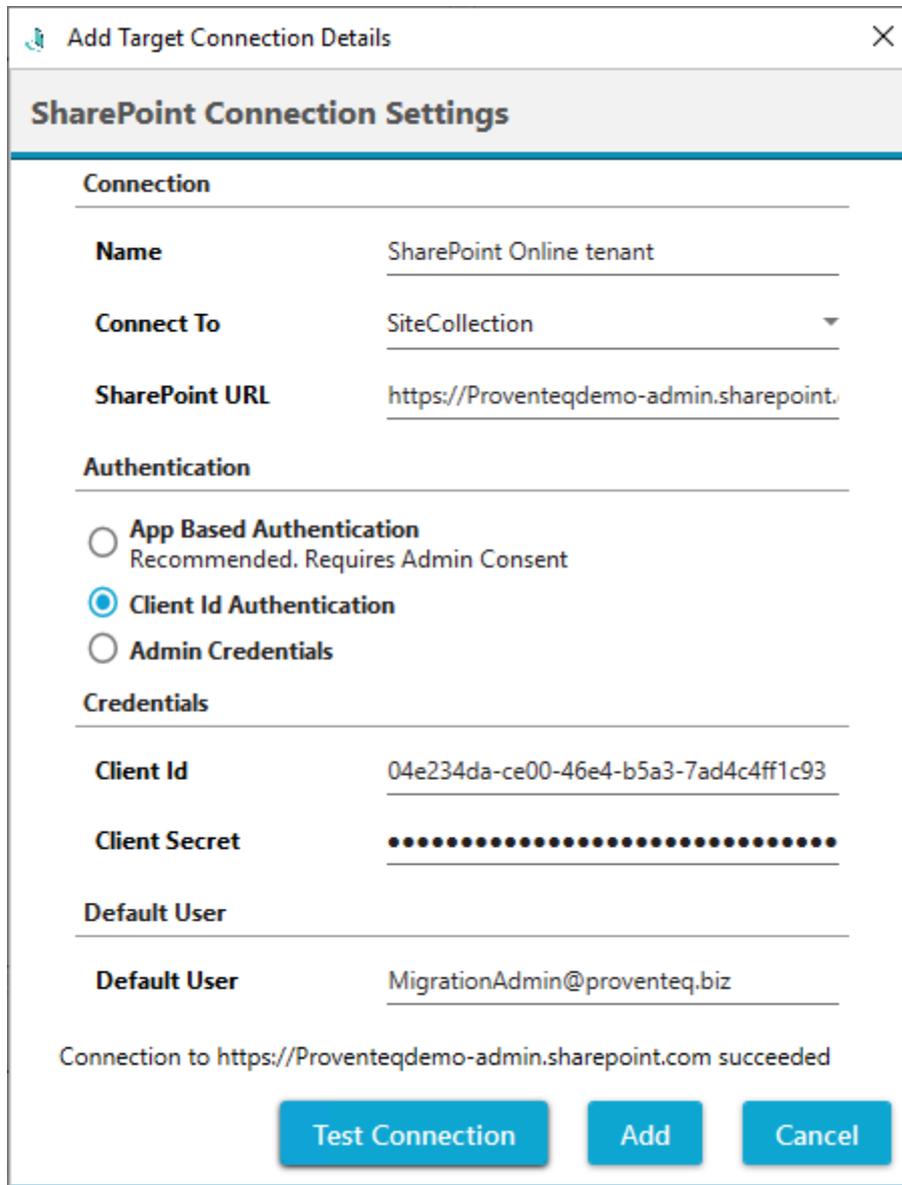
Click on the “Add” button to add the SharePoint connection.

Note: To know more about app only authentication in Microsoft identity platform endpoint. Please refer the below link:

<https://docs.microsoft.com/en-us/azure/active-directory/develop/v2-permissions-and-consent#admin-restricted-permissions>

### 4.4.2.3. SharePoint Online Client Id Authentication

FIGURE 24 - SHAREPOINT ONLINE CLIENT ID AUTHENTICATION



**Add Target Connection Details** [X]

**SharePoint Connection Settings**

**Connection**

**Name** SharePoint Online tenant

**Connect To** SiteCollection

**SharePoint URL** https://Proventeqdemo-admin.sharepoint.com

**Authentication**

App Based Authentication  
Recommended. Requires Admin Consent

Client Id Authentication

Admin Credentials

**Credentials**

**Client Id** 04e234da-ce00-46e4-b5a3-7ad4c4ff1c93

**Client Secret** .....

**Default User**

**Default User** MigrationAdmin@proventeq.biz

Connection to https://Proventeqdemo-admin.sharepoint.com succeeded

**Test Connection** **Add** **Cancel**

**Client Id Authentication Settings:**

- **Client ID:** The app-only principal Client ID.
- **Client Secret:** The app-only principal Client Secret.
- **Default User:** The default user to be used for setting Author/Editor fields in the target Site Collection if the source user is not found. This field is optional.

Click on the "Test Connection" button to verify that the details entered are correct. Click on the "Add" button to add the SharePoint connection.

Note: To set up app-only principal Client ID/Client Secret. Please refer the below link:  
<https://docs.microsoft.com/en-us/sharepoint/dev/solution-guidance/security-aponly-azureacs>

#### 4.4.2.4. SharePoint Online Admin Credentials Authentication

FIGURE 25 - SHAREPOINT ONLINE ADMIN CREDENTIALS AUTHENTICATION

Add Target Connection Details
✕

---

### SharePoint Connection Settings

---

**Connection**

**Name**

**Connect To**

**SharePoint URL**

**Authentication**

**App Based Authentication**  
Recommended. Requires Admin Consent

**Client Id Authentication**

**Admin Credentials**

**Credentials**

**Username**

**Password**

**Default User**

**Default User**

Connection to https://Proventeqdemo-admin.sharepoint.com succeeded

Test Connection
Add
Cancel

#### **Admin Credentials Authentication Settings:**

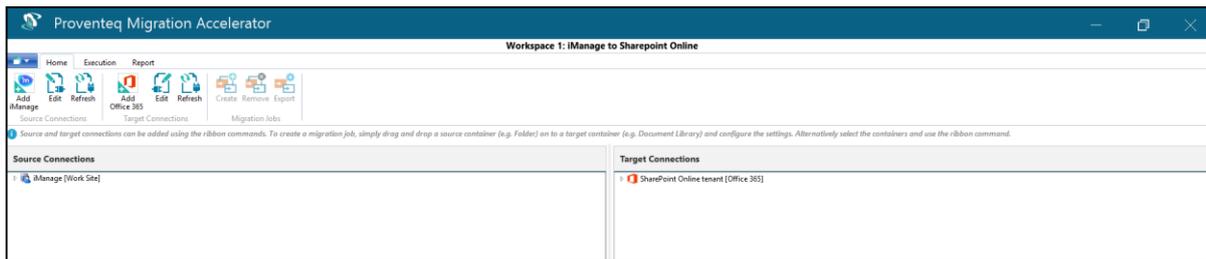
- **Username:** The Username for connecting to SharePoint. The user should be a site collection administrator for the target Site Collection or SharePoint Online Admin for the tenant level connection.
- **Password:** The Password for the above-mentioned user.
- **Default User:** The default user to be used for setting Author/Editor fields in the target Site Collection if the source user is not found. This field is optional.

Click on the "Test Connection" button to verify that the details entered are correct.  
Click on the "Add" button to add the SharePoint connection.

## 5. MIGRATION TASKS

To create migration task, select source container/folder and mapped it to target Site collection/Site/Library or folder and create migration task using create task menu on Ribbon or simple drag source folder/container and target site/library/folder. The migration tasks are located at the bottom of the main window and designed to display the mapped source and target containers.

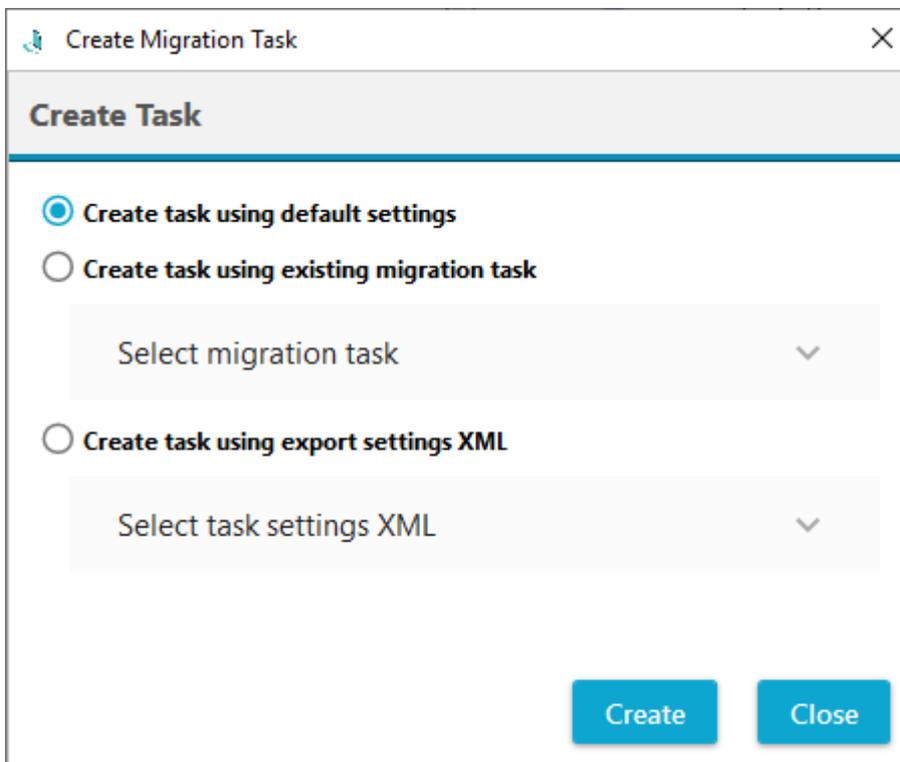
FIGURE 26 - CREATE MIGRATION FROM RIBBON



Create Migration Task screen shows different task settings, which will help users to

- 1) Create task using default task settings
- 2) Create Task using existing migration task
- 3) Create Task using exported tasks settings

FIGURE 27 - CREATE MIGRATION TASK SCREEN



## 5.1. Create Task Using Default Settings

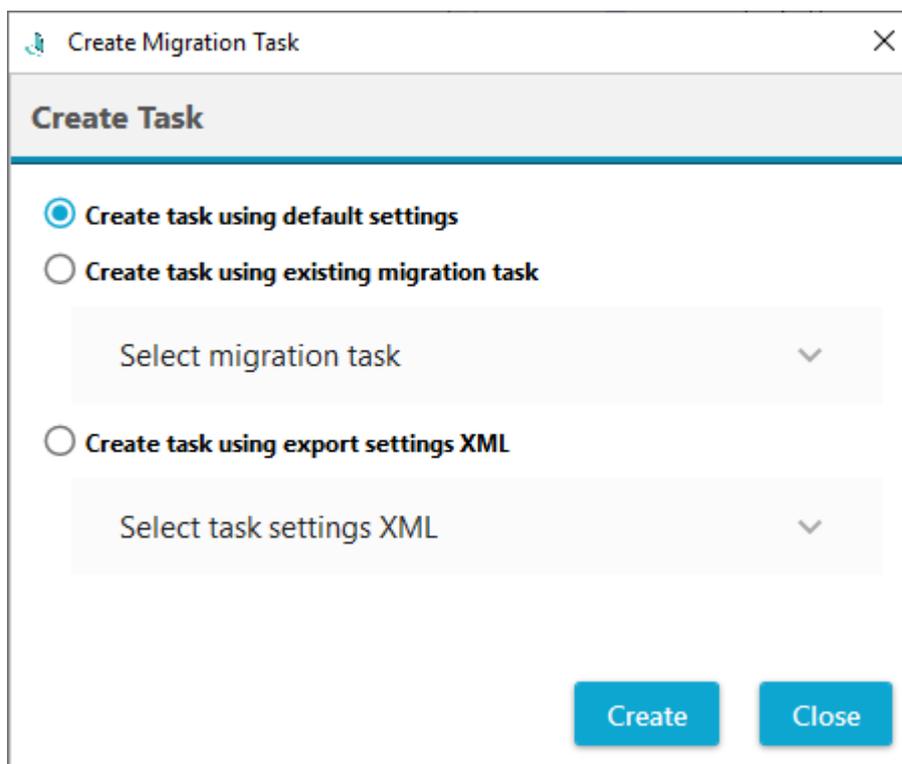
To create a new migration task, first select the source Worksite container that you wish to migrate. To select a Worksite container, expand the tree in “Source Connections” pane and select the folder/container you want to migrate.

Similarly expand the “Target Connections” tree and select the appropriate target container within which you want the source items to be migrated.

To create migration tasks, simply drag and drop a source container (e.g. Folder) on to a target container (e.g. Document library). Alternatively select the containers and use the ribbon

“Create”  command button. This will create a new migration task and launch the settings screen where you can specify settings like - content type mapping settings, metadata mapping settings, general settings, content type structure mapping settings and user mapping settings for that particular Migration Task.

FIGURE 28 - CREATE DEFAULT TASK



All the created migration tasks are listed in the "Migration Tasks" pane.

FIGURE 29 - MIGRATION TASKS - PANE

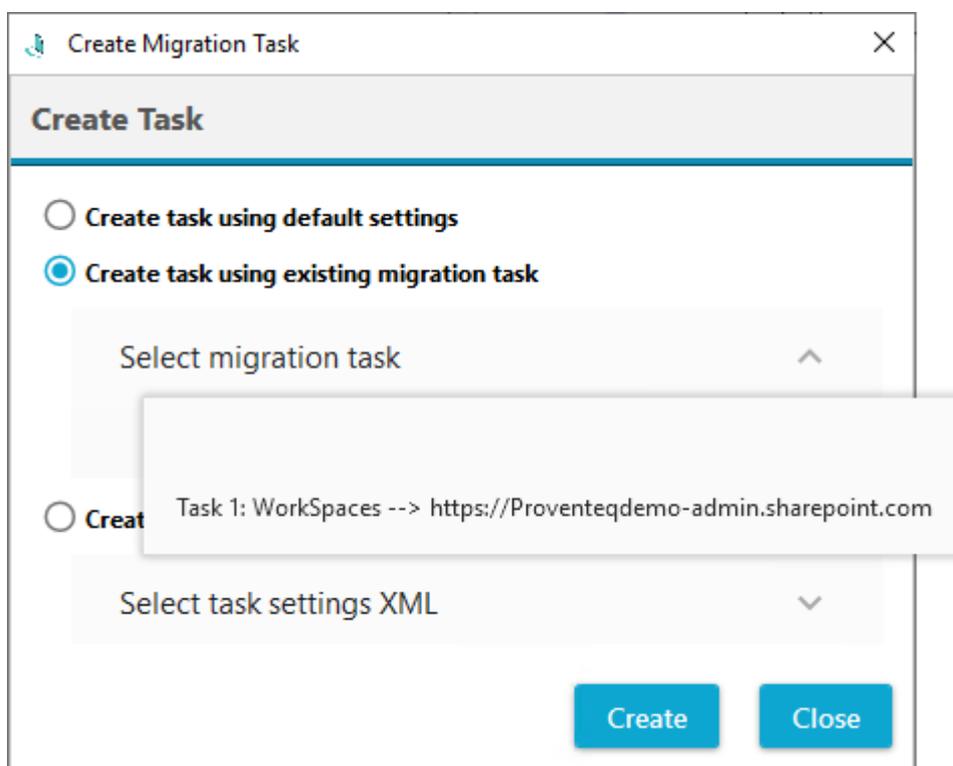
Job Name	Source Connection	Source Path	Target Connection	Target Path	Mapping Options	Settings	Execute
Job 3 WorkSpaces -> Documents	iManage	iManage [Work Site]	SharePoint Online tenant	/sites/SP_license/Shared Documents	Create		
Job 2 WorkSpaces -> https://Proventeqdemo...	iManage	iManage [Work Site]	SharePoint Online tenant	https://Proventeqdemo-admin.sharepoint.com	Create		
Job 1 WorkSpaces -> https://Proventeqdemo...	iManage	iManage [Work Site]	SharePoint Online tenant	https://Proventeqdemo-admin.sharepoint.com	Merge		

You can remove migration tasks by selecting a task from migration tasks pane and clicking on “Remove”  command button in the ribbon. This will delete all the records of that migration task from database.

The settings for an existing migration task can be edited by clicking on the Settings icon . To navigate to the Execution view, you can click on the Execute icon against a task. Alternatively, you can select the Execute tab on the ribbon control and then select the task in the Execution view. There should be at least one Migration Task should be created.

## 5.2. Create Task Using Existing Task

FIGURE 30 - MIGRATION TASKS – USING EXISTING TASK



To create a new migration task based on the existing task, first select the source Worksite container that you wish to migrate. To select a Worksite container, expand the tree in “Source Connections” pane and select the folder/container you want to migrate.

Similarly expand the “Target Connections” tree and select appropriate target container within which you want the source items to be migrated. Now user can select the ‘Create task using existing migration task’ option and select the existing task from the dropdown list, new task is created based on existing task configuration in the system.

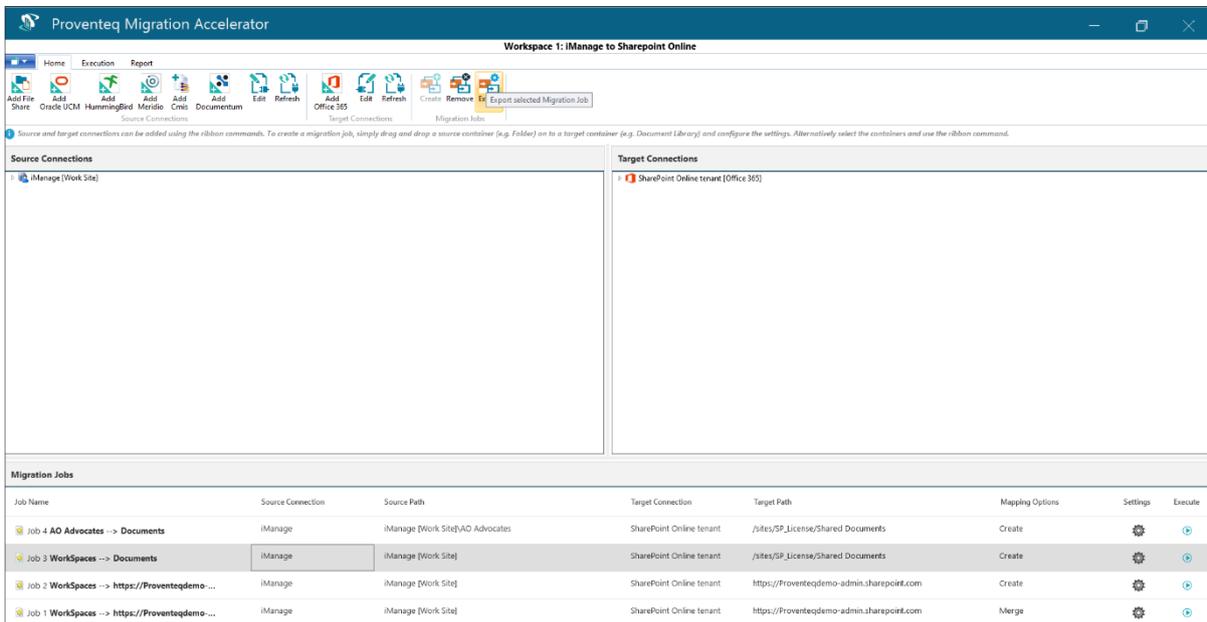
FIGURE 31 - MIGRATION TASKS – USING EXISTING TASK

Job Name	Source Connection	Source Path	Target Connection	Target Path	Mapping Options	Settings	Execute
Job 4 WorkSpaces -> Documents	iManage	iManage [Work Site]	SharePoint Online tenant	/sites/SP_License/Shared Documents	Create		
Job 3 WorkSpaces -> Documents	iManage	iManage [Work Site]	SharePoint Online tenant	/sites/SP_License/Shared Documents	Create		
Job 2 WorkSpaces -> https://Proventeqdemo-...	iManage	iManage [Work Site]	SharePoint Online tenant	https://Proventeqdemo-admin.sharepoint.com	Create		
Job 1 WorkSpaces -> https://Proventeqdemo-...	iManage	iManage [Work Site]	SharePoint Online tenant	https://Proventeqdemo-admin.sharepoint.com	Merge		

## 5.3. Export Task Settings

- 1) To create a task from exported task setting (XML file), first user selects the existing task from task pane and using export settings from Migration task menu export the task settings in XML format.

FIGURE 32 - MIGRATION TASKS – EXPORTING OF TASK SETTINGS

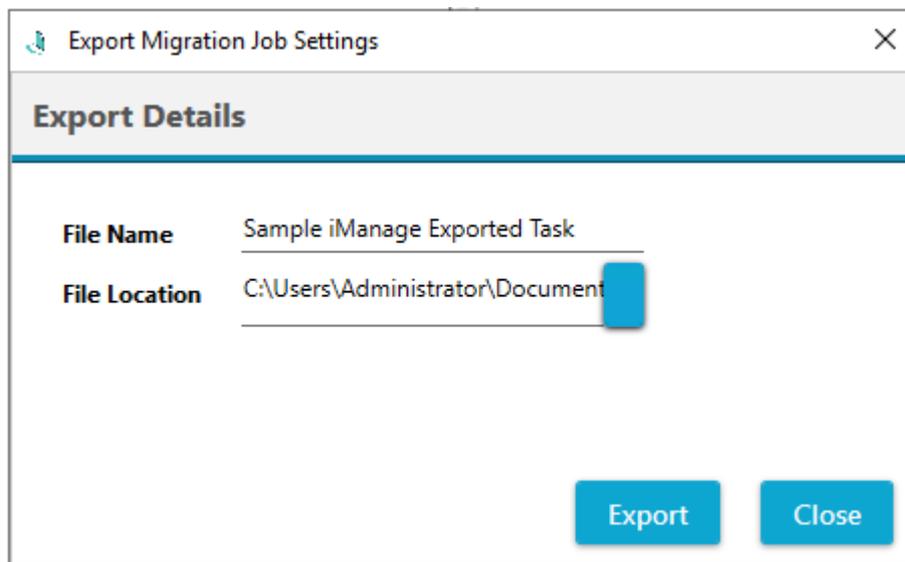


The screenshot shows the Proventeq Migration Accelerator interface. The ribbon includes options like 'Add File Share', 'Add Oracle UCM', 'Add HummingBird', 'Add Meridio', 'Add Crms', 'Documentum', 'Egis', 'Refresh', 'Egis', 'Refresh', 'Office 365', 'Egis', 'Refresh', 'Create', 'Remove', and 'Export selected Migration Job'. Below the ribbon, there are sections for 'Source Connections' (iManage [Work Site]) and 'Target Connections' (SharePoint Online tenant [Office 365]). At the bottom, a table lists migration jobs:

Job Name	Source Connection	Source Path	Target Connection	Target Path	Mapping Options	Settings	Execute
Job 4 AO Advocates -> Documents	iManage	iManage [Work Site]AD Advocates	SharePoint Online tenant	/sites/SP_License/Shared Documents	Create		
Job 3 WorkSpaces -> Documents	iManage	iManage [Work Site]	SharePoint Online tenant	/sites/SP_License/Shared Documents	Create		
Job 2 WorkSpaces -> https://Proventeqdemo-...	iManage	iManage [Work Site]	SharePoint Online tenant	https://Proventeqdemo-admin.sharepoint.com	Create		
Job 1 WorkSpaces -> https://Proventeqdemo-...	iManage	iManage [Work Site]	SharePoint Online tenant	https://Proventeqdemo-admin.sharepoint.com	Merge		

- 2) Export the existing task setting in XML format to local drive.

FIGURE 33 - MIGRATION TASKS – EXPORT TASK



The screenshot shows the 'Export Migration Job Settings' dialog box. Under the 'Export Details' section, there are two fields:

- File Name:** Sample iManage Exported Task
- File Location:** C:\Users\Administrator\Document

At the bottom of the dialog, there are two buttons: 'Export' and 'Close'.

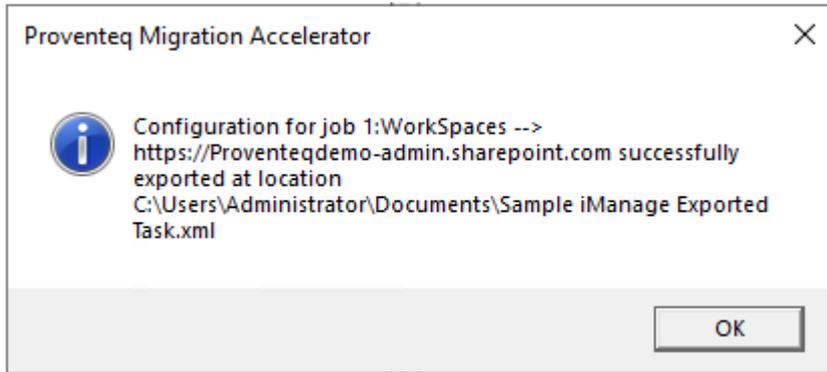


The following fields need to be configured:

- **File Name:** Name of exported task setting file
- **File Location:** Local drive path where exported task settings file gets saved

System will pop up the below confirmation screen to export the task settings.

FIGURE 34 - MIGRATION TASKS – EXPORT TASK CONFIRMATION



## 5.4. Create Task Using Exported Setting (Import task settings)

User can now import the existing task setting (exported XML file) to create a new task based on exported settings within the Workspace. Click on create to create new task from task settings.

FIGURE 35 - MIGRATION TASKS – IMPORT EXPORTED TASK SETTINGS

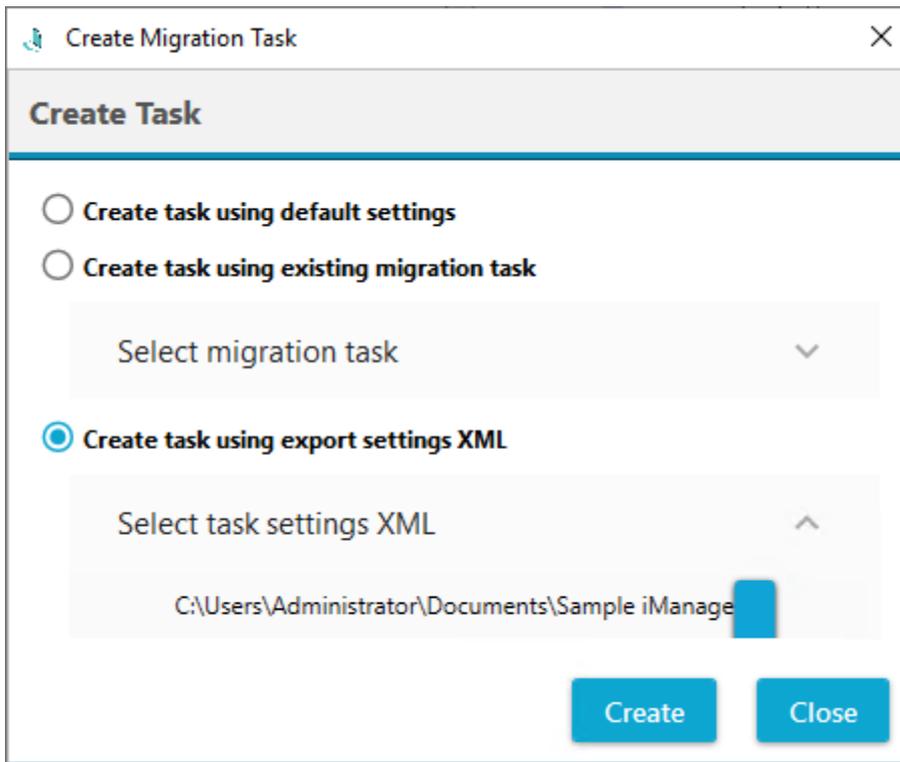


FIGURE 36 - MIGRATION TASKS – IMPORT EXPORTED TASK SETTINGS

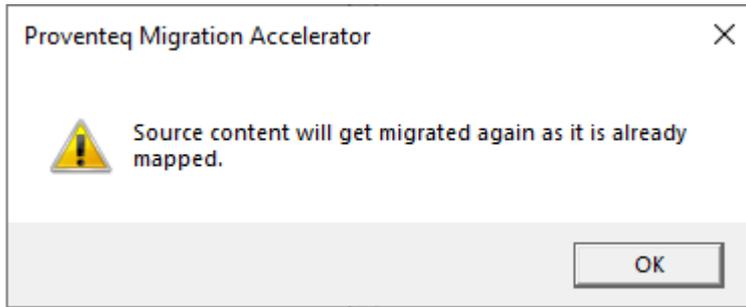


FIGURE 37 - MIGRATION TASKS – TASK CREATION FROM EXPORTED TASK SETTINGS

Migration Tasks							
Task Name	Source Connection	Source Path	Target Connection	Target Path	Mapping Options	Settings	Execute
Task 11 Unfiled Content --> Claims	Hummingbird Migration	Library\Unfiled Conte	Office365	/sites/demoteamsite/Claims	Merge		
Task 10 Content --> MigrationQA	Hummingbird Migration	Library\Public Folders	SharePoint	/sites/MigrationQA/Documents	Create		
Task 9 Planning --> Documents	Hummingbird Migration	Library\Public Folders	SharePoint	/sites/MigrationQA/Documents	Create		
Task 8 Unfiled Content --> Migration QA	Hummingbird Migration	Library\Unfiled Conte	SharePoint	https://proventeq365.sharepoint...	Create		
Task 7 Public Folders --> Documents	Hummingbird Migration	Library\Public Folders	SharePoint	/sites/MigrationQA/Documents	Create		

New task is created with all existing settings and will be added to migration task pane.

*Note: Migration Task using exported task will not work as expected in other workspace when we have PowerShell script/function mappings and we are passing variable to these scripts and functions.*

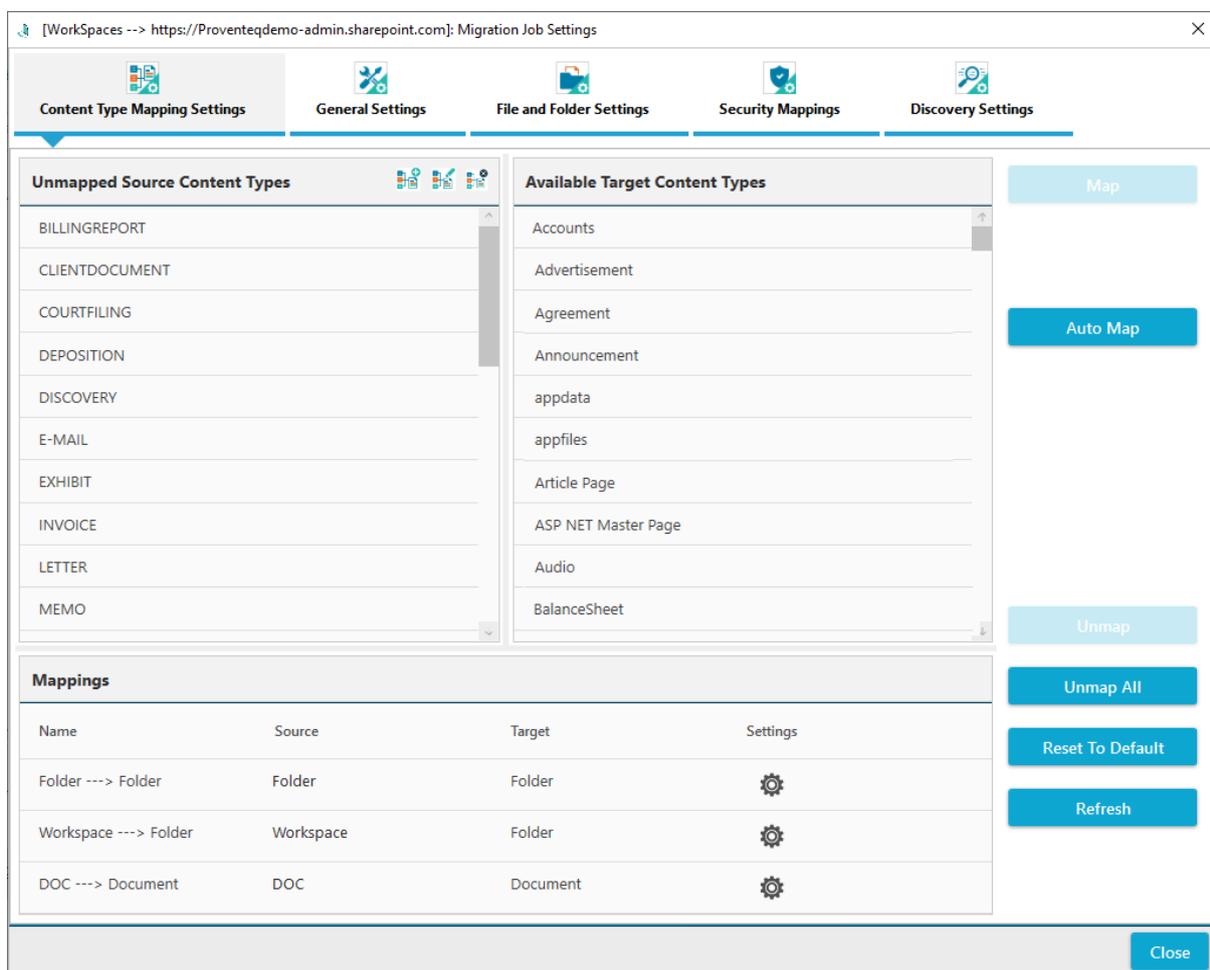
## 5.5. Migration Task Settings

The settings screen is automatically launched when a new migration task is created. The same settings screen can also be launched when desired by clicking on the Settings icon  of the migration task.

### 5.5.1. Content Type Mapping Settings

This screen displays the source Content types, which are available for mapping (i.e. not mapped already), the available Target Content Types and the default Content Type Mappings.

FIGURE 38 - CONTENT TYPE MAPPING SETTINGS SCREEN



[WorkSpaces --> https://Proventeqdemo-admin.sharepoint.com]: Migration Job Settings

Content Type Mapping Settings | General Settings | File and Folder Settings | Security Mappings | Discovery Settings

**Unmapped Source Content Types**

- BILLINGREPORT
- CLIENTDOCUMENT
- COURTFILING
- DEPOSITION
- DISCOVERY
- E-MAIL
- EXHIBIT
- INVOICE
- LETTER
- MEMO

**Available Target Content Types**

- Accounts
- Advertisement
- Agreement
- Announcement
- appdata
- appfiles
- Article Page
- ASP NET Master Page
- Audio
- BalanceSheet

**Mappings**

Name	Source	Target	Settings
Folder ---> Folder	Folder	Folder	
Workspace ---> Folder	Workspace	Folder	
DOC ---> Document	DOC	Document	

Map | Auto Map | Unmap | Unmap All | Reset To Default | Refresh | Close

**Note:** Migration Accelerator will automatically configure default mappings as per standard rules defined in the system. However, if an automatic mapping is not found e.g. for custom content types, then these need to be mapped manually.

Select Source Content Type and Target Content Type from the list and then click on Map Button to map the content types. This will bring up the Metadata mappings screen for the mapped content types.

**Note:** A source content type can only be mapped once. Mapping content types which are incompatible will result in errors during execution.

One can use below application configuration to retrieve specific number of source content types or doc types from iManage Worksite system. The default value 0 indicates to fetch all content types.

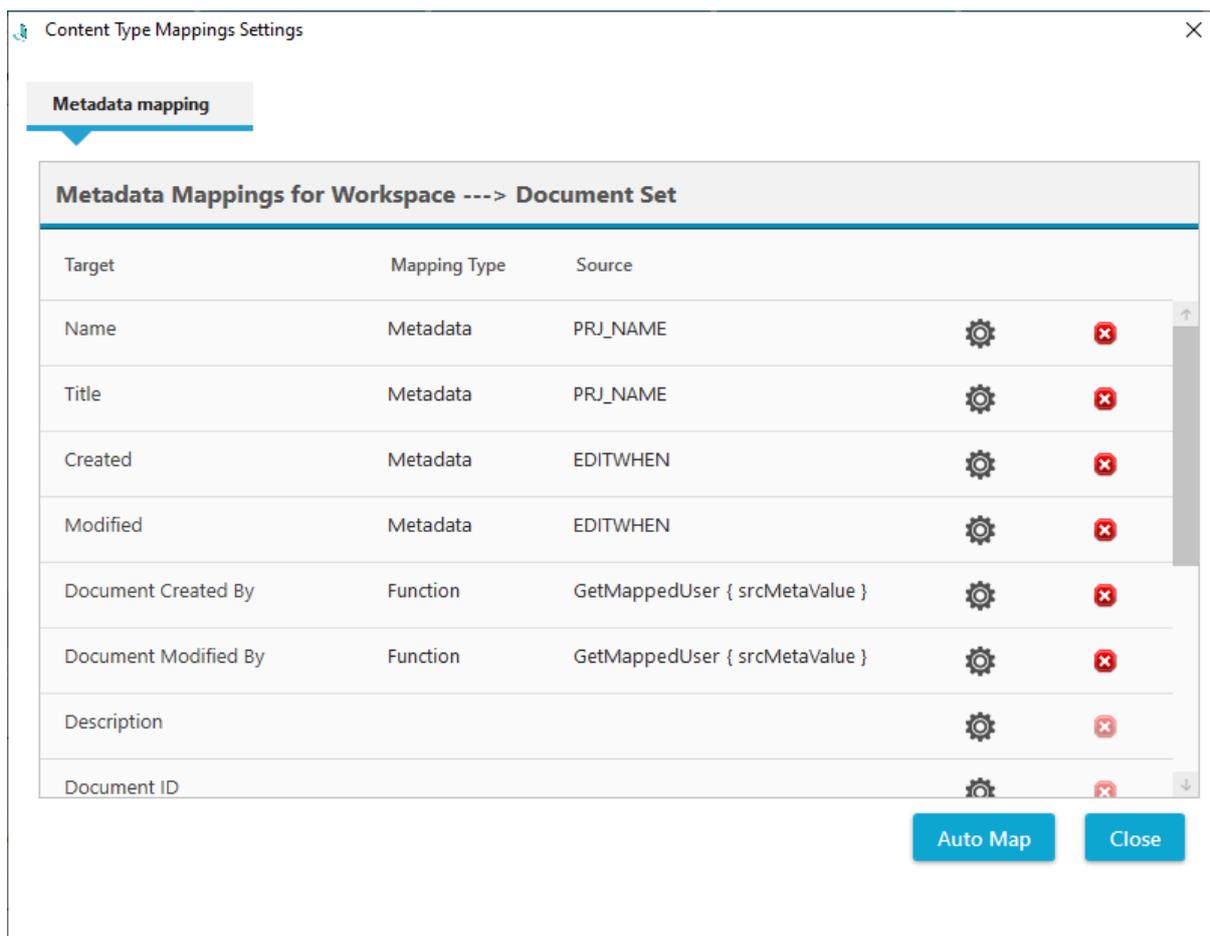
```
<add key="WorkSite.GetContentTypeCount" value="0"/>
```

Please note that the application configuration file is included in Proventeq Migration Accelerator installation directory (typically "C:\Program Files\Proventeq\Proventeq Migration Accelerator\Proventeq.MigrationAccelerator.exe.config")

### 5.5.1.1. Workspace Content Type Mapping

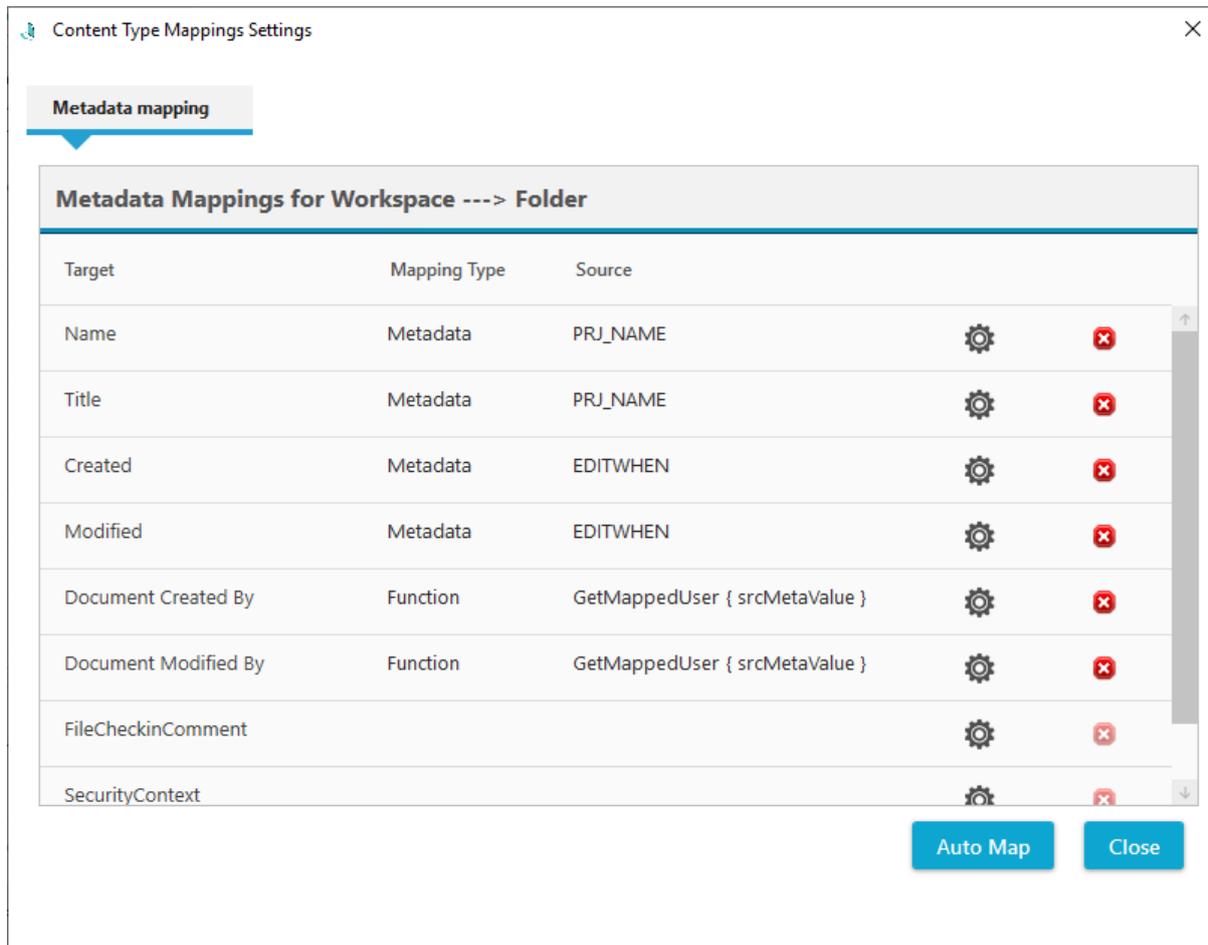
By default, Workspace container will be mapped to DocumentSet content type in SharePoint as shown below:

FIGURE 39 - WORKSPACE TO DOCUMENT SET CONTENT TYPE MAPPING SETTINGS SCREEN



Otherwise, Workspace container can be mapped to Folder content type in SharePoint as shown below:

FIGURE 40 - WORKSPACE TO FOLDER CONTENT TYPE MAPPING SETTINGS SCREEN



## 5.5.2. Metadata mapping

There are five types of metadata mappings:

- Target Metadata to Source Metadata
- Target Metadata to Constant
- Target Metadata to Custom Script
  - Iron Python Script and
  - Power Shell Script
- Target Metadata to Extension method
- Target Metadata to built-in Function

### Target Metadata to Source Metadata:

Selecting the 'Mapping Type' as 'Metadata', displays all the available source metadata in the drop down, one of which can be used for mapping.

*Note: Choosing incompatible metadata value may lead to load-failure.*

#### 5.5.2.1. Document Content Type Mapping

After container content type mapping, user has to map different document content types mappings. Below figure explains Document -> Document content type mapping. Similarly

user can map other document content types to respective document content types in SharePoint system.

FIGURE 41 - CONTENT TYPE MAPPING SETTINGS SCREEN

Content Type Mappings Settings
✕

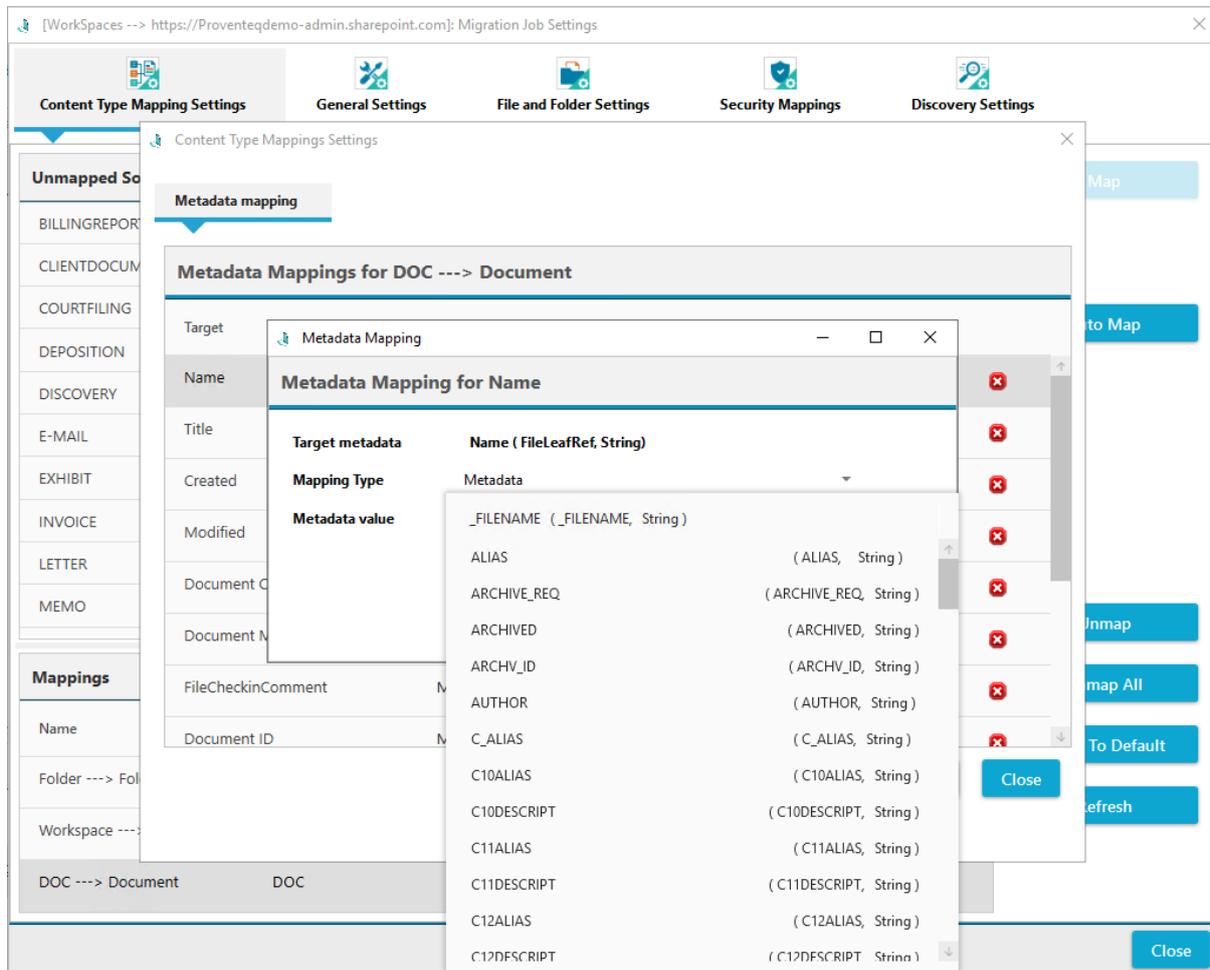
**Metadata mapping**

**Metadata Mappings for DOC ---> Document**

Target	Mapping Type	Source		
Name	Metadata	_FILENAME		
Title	Metadata	DOCNAME		
Created	Metadata	ENTRYWHEN		
Modified	Metadata	EDITWHEN		
Document Created By	Function	GetMappedUser { srcMetaValue }		
Document Modified By	Function	GetMappedUser { srcMetaValue }		
FileCheckinComment	Metadata	COMMENTS		
Document ID	Metadata	DOCNUM		

Auto Map
Close

FIGURE 42 - METADATA MAPPING



Target Metadata	Mapping Type	Metadata Value
Name	Function	SourceltemValue (ItemName)
Title	Metadata	DocName
Created	Metadata	EntryWhen
Modified	Metadata	EditWhen
CreatedBy	Function	GetMappedUser (Author)
ModifiedBy	Function	GetMappedUser (LastUser)

If one would like to inherit the metadata for documents from its parent container then below application settings needs to be used. The metadata can be inherited from either Workspace, Folder or None.

```
<add key="WorkSiteToSharePoint.InheritMetadataFrom" value="Workspace"/>
```

Further, in order to override the documents own metadata (if exists) with container metadata below configuration can be used.

```
<add key="WorkSiteToSharePoint.OverrideItemMetadata" value="true"/>
```

Please note that the application configuration file is included in Proventeq Migration Accelerator installation directory (typically "C:\Program Files\Proventeq\Proventeq Migration Accelerator\Proventeq.MigrationAccelerator.exe.config")

### 5.5.2.2. SharePoint Document ID Metadata Mapping

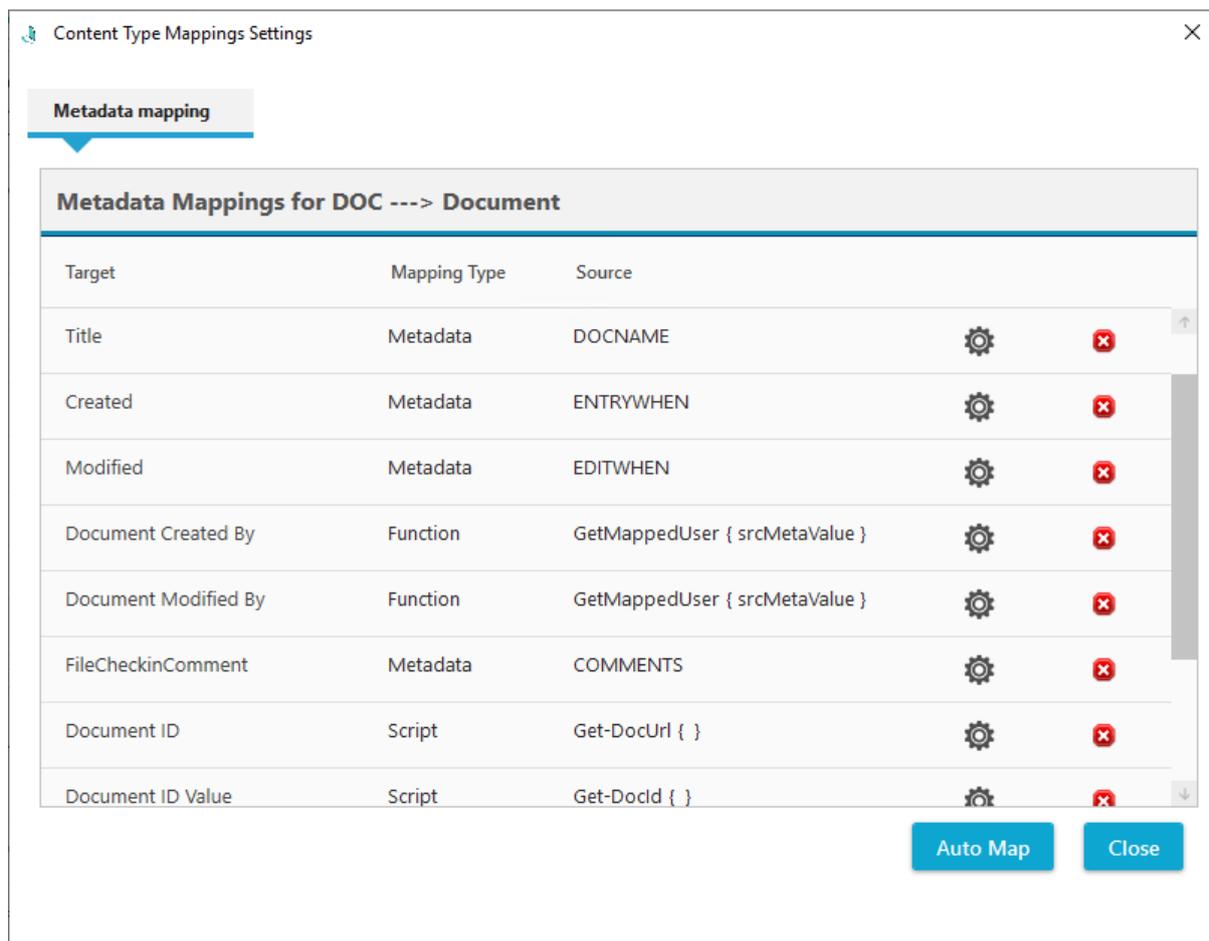
If the target SharePoint site has Document ID service feature enabled, then Proventeq Migration Accelerator will also allow to map Document Id and Document ID URL fields during migration.

To add metadata mapping for Document ID and Document ID URL fields follow the steps given below:

- Open the content type mapping Settings.
- Select any document content type mapping.
- Select Document ID field and map it to equivalent unique source metadata field E.g. DocNum in iManage. Alternatively, one can write a PowerShell function or script to generate unique Document Id for each document.
- Document ID URL field mapping is optional. But one can write a script to generate unique Document Id URL for each document by adhering to below SharePoint Document ID URL format.

***http://xxx.sharePoint.com/\_layouts/15/DocIdRedir.aspx?ID=<DocId>, <DocId>***

FIGURE 43 - DOCUMENT ID MAPPING



The screenshot shows the 'Content Type Mappings Settings' window with the 'Metadata mapping' tab selected. The window title is 'Content Type Mappings Settings'. The main heading is 'Metadata Mappings for DOC ---> Document'. Below this is a table with columns: Target, Mapping Type, Source, and two action icons (gear and red X).

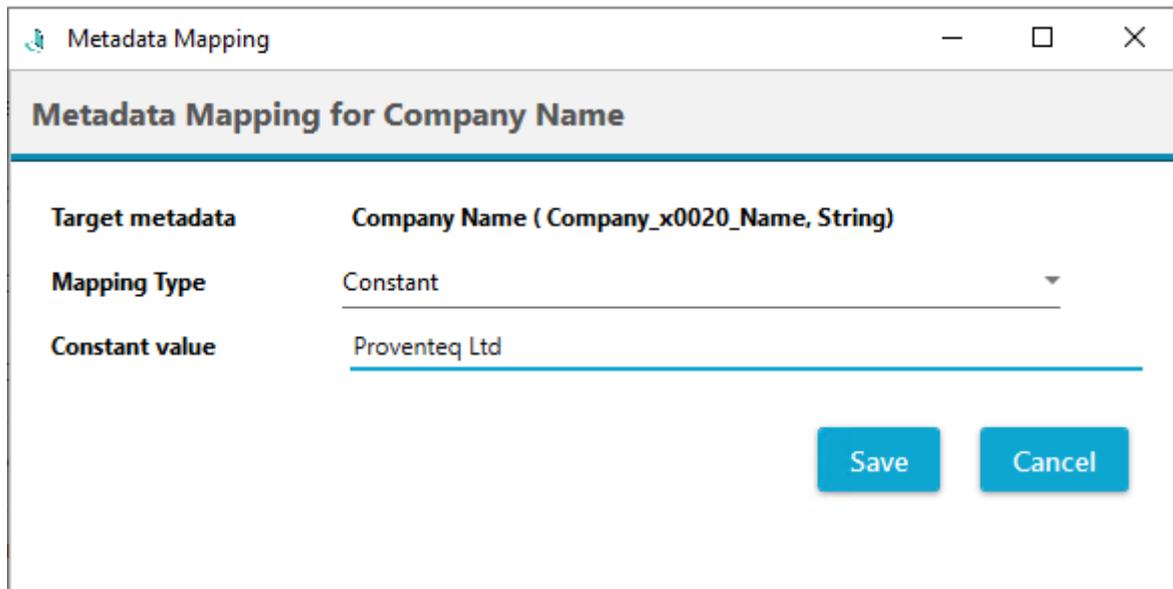
Target	Mapping Type	Source		
Title	Metadata	DOCNAME		
Created	Metadata	ENTRYWHEN		
Modified	Metadata	EDITWHEN		
Document Created By	Function	GetMappedUser { srcMetaValue }		
Document Modified By	Function	GetMappedUser { srcMetaValue }		
FileCheckinComment	Metadata	COMMENTS		
Document ID	Script	Get-DocUrl { }		
Document ID Value	Script	Get-DocId { }		

At the bottom right of the window, there are two buttons: 'Auto Map' and 'Close'.

### Target Metadata to Constant Value:

If Constant mapping type is selected, user is given an option to specify a constant value that will be set in the target metadata.

FIGURE 44 - CONSTANT MAPPING



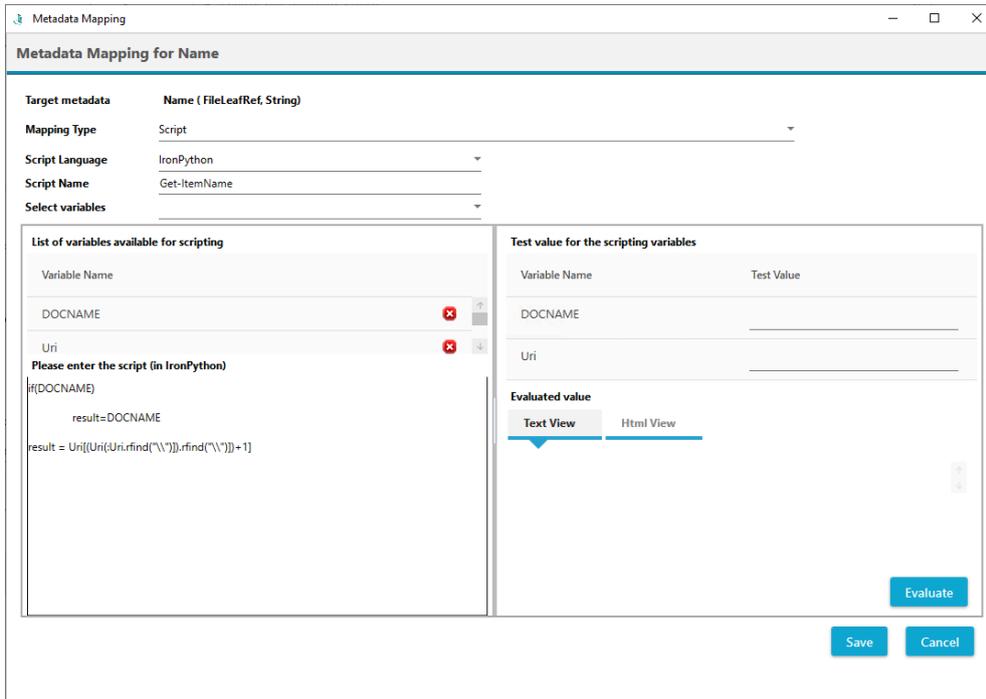
The screenshot shows a dialog box titled "Metadata Mapping" with a subtitle "Metadata Mapping for Company Name". It contains three fields: "Target metadata" with the value "Company Name ( Company\_x0020\_Name, String)", "Mapping Type" with a dropdown menu set to "Constant", and "Constant value" with a text input field containing "Proventeq Ltd". At the bottom right, there are "Save" and "Cancel" buttons.

<b>Target metadata</b>	Company Name ( Company_x0020_Name, String)
<b>Mapping Type</b>	Constant
<b>Constant value</b>	Proventeq Ltd

### Target Metadata to Runtime Script:

This option is for advanced users. You can either write IRON Python scripts or PowerShell scripts which will be executed during transformation. Typically, the scripts will modify the value in source metadata fields, which can be passed as inputs to the scripts using variable names provided in the drop down.

FIGURE 45 - IRON PYTHON SCRIPT MAPPING



**Metadata Mapping for Name**

Target metadata: Name ( FileLeafRef, String)

Mapping Type: Script

Script Language: IronPython

Script Name: Get-ItemName

Select variables: [Dropdown]

List of variables available for scripting	
Variable Name	
DOCNAME	<input checked="" type="checkbox"/>
Uri	<input checked="" type="checkbox"/>

Please enter the script (in IronPython)

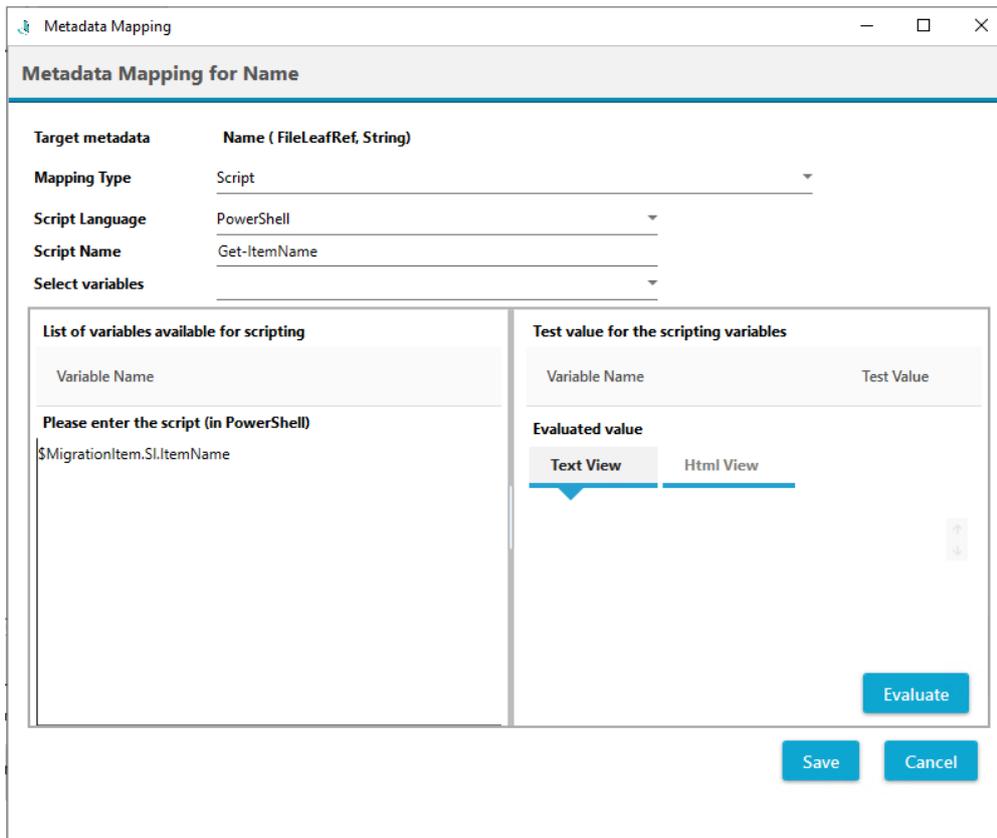
```
if(DOCNAME)
    result=DOCNAME
result = Uri[[Uri(Uri.rfind("\\"),rfind("\\"))+1]]
```

Test value for the scripting variables	
Variable Name	Test Value
DOCNAME	<input type="text"/>
Uri	<input type="text"/>

Evaluated value

Text View  Html View

FIGURE 46 - POWERSHELL SCRIPT MAPPING



**Metadata Mapping for Name**

Target metadata: Name ( FileLeafRef, String)

Mapping Type: Script

Script Language: PowerShell

Script Name: Get-ItemName

Select variables: [Dropdown]

List of variables available for scripting	
Variable Name	
\$MigrationItem.SI.ItemName	<input type="checkbox"/>

Please enter the script (in PowerShell)

```
$MigrationItem.SI.ItemName
```

Test value for the scripting variables	
Variable Name	Test Value
\$MigrationItem.SI.ItemName	<input type="text"/>

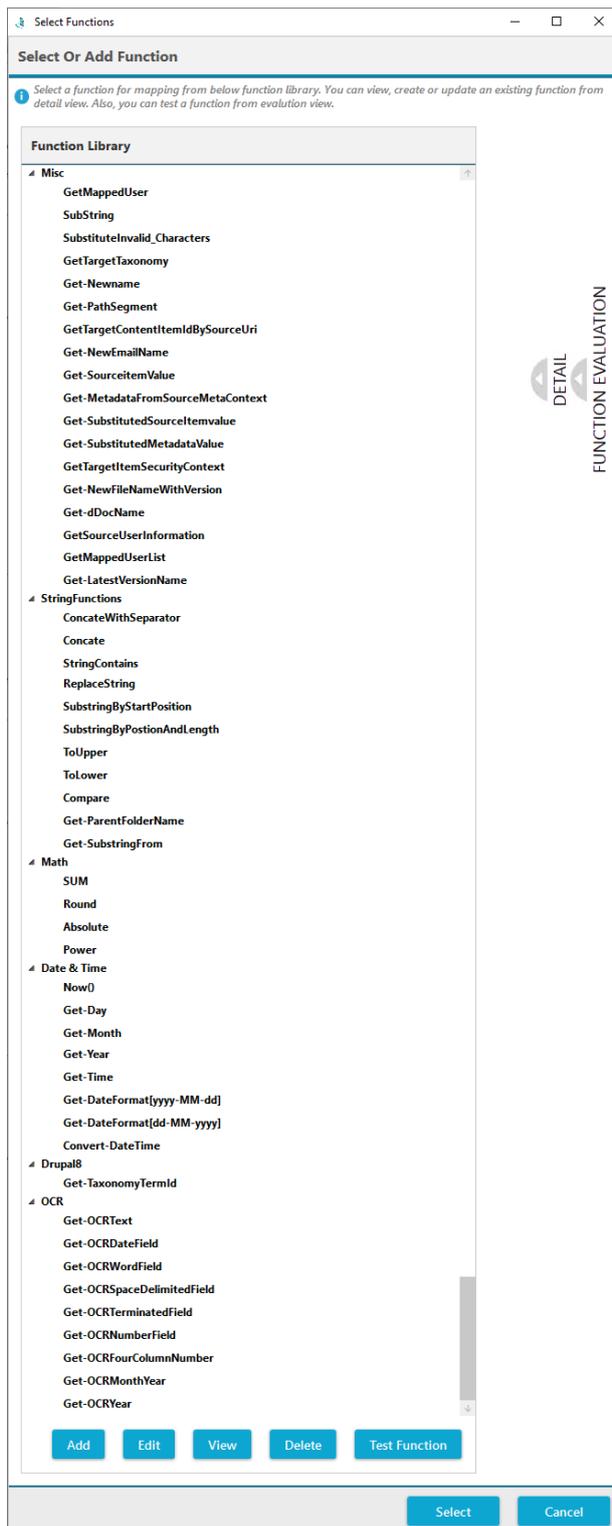
Evaluated value

Text View  Html View

## Target Metadata to Function:

This option is for advanced users. If Function mapping type is selected, user can add inbuilt Functions. For example: Created by and Modified by metadata can be mapped to Function as shown below. Also, you need to import a user mapping using a csv file from the User Mappings screen. Refer [User Mappings](#) for more detail.

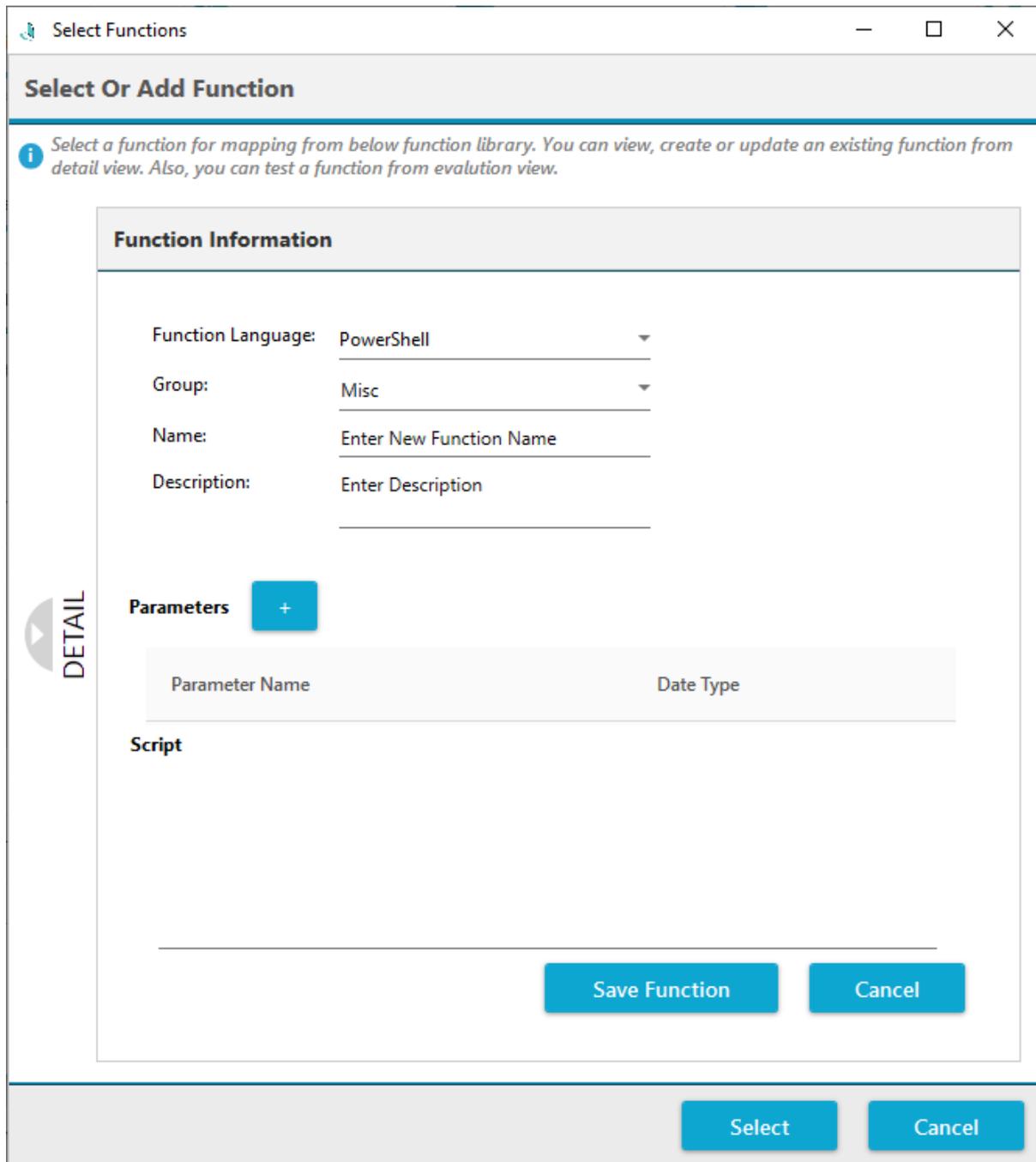
FIGURE 47 - SELECT FUNCTION SCREEN



## Add Function

Besides the built-in functions, the user can create own set of functions based on requirements. To Create New Function user needs to provide Function Language, Group (Optional), Name, Description (Optional), List of Parameters and respective Script for selected language.

FIGURE 48 - ADD NEW FUNCTION SCREEN



Select Functions

### Select Or Add Function

Select a function for mapping from below function library. You can view, create or update an existing function from detail view. Also, you can test a function from evaluation view.

#### Function Information

Function Language: PowerShell

Group: Misc

Name: Enter New Function Name

Description: Enter Description

Parameters +

Parameter Name	Date Type

Script

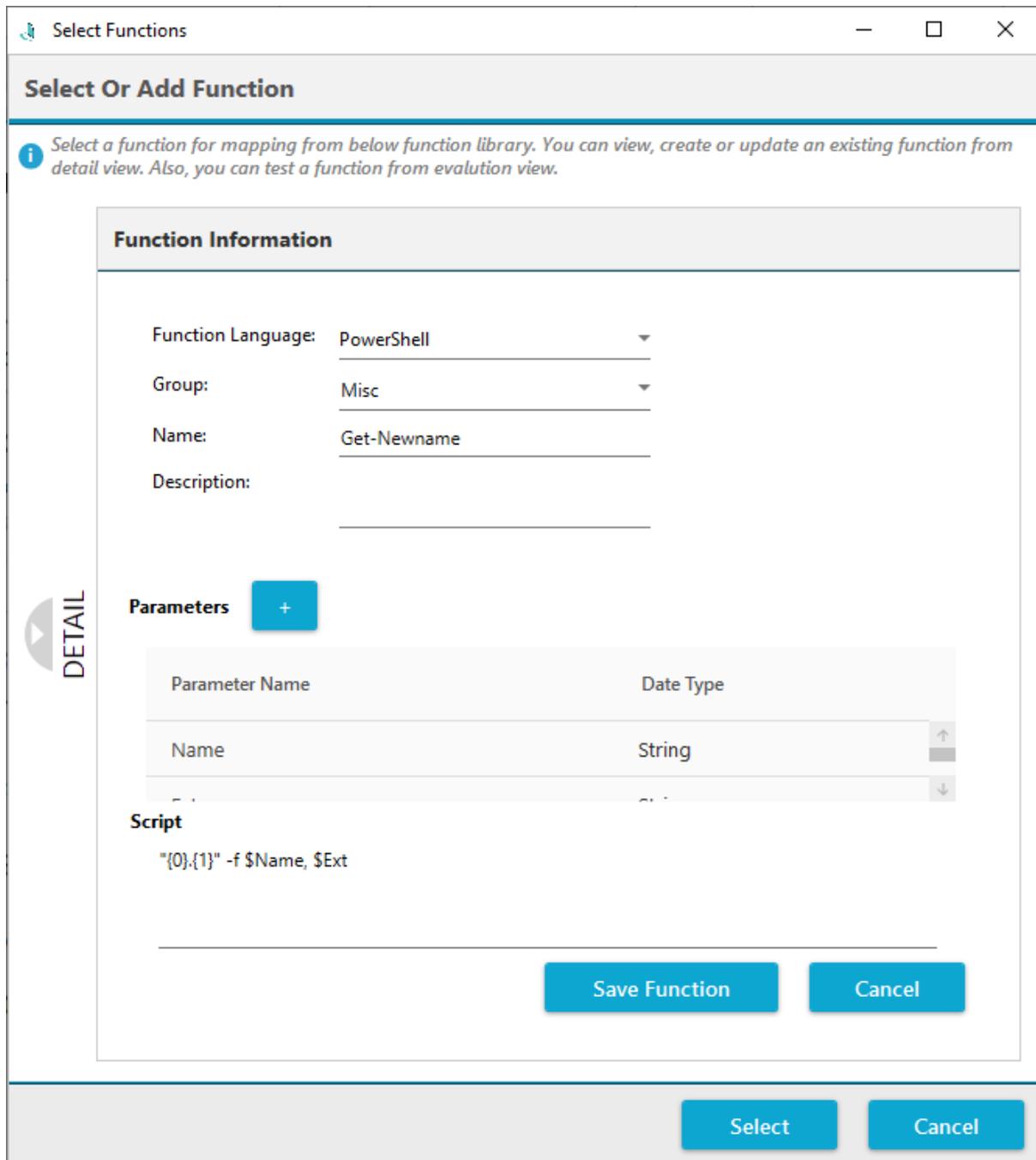
Save Function Cancel

Select Cancel

## Edit Function

User can edit the properties of the function in the Edit Functions Dialog. The image below shows how this Dialog looks like.

FIGURE 49 - EDIT FUNCTION SCREEN



Select Functions

**Select Or Add Function**

*Select a function for mapping from below function library. You can view, create or update an existing function from detail view. Also, you can test a function from evaluation view.*

**Function Information**

Function Language: PowerShell

Group: Misc

Name: Get-Newname

Description:

**Parameters** +

Parameter Name	Date Type
Name	String

**Script**

```
"{0}.{1}" -f $Name, $Ext
```

Save Function Cancel

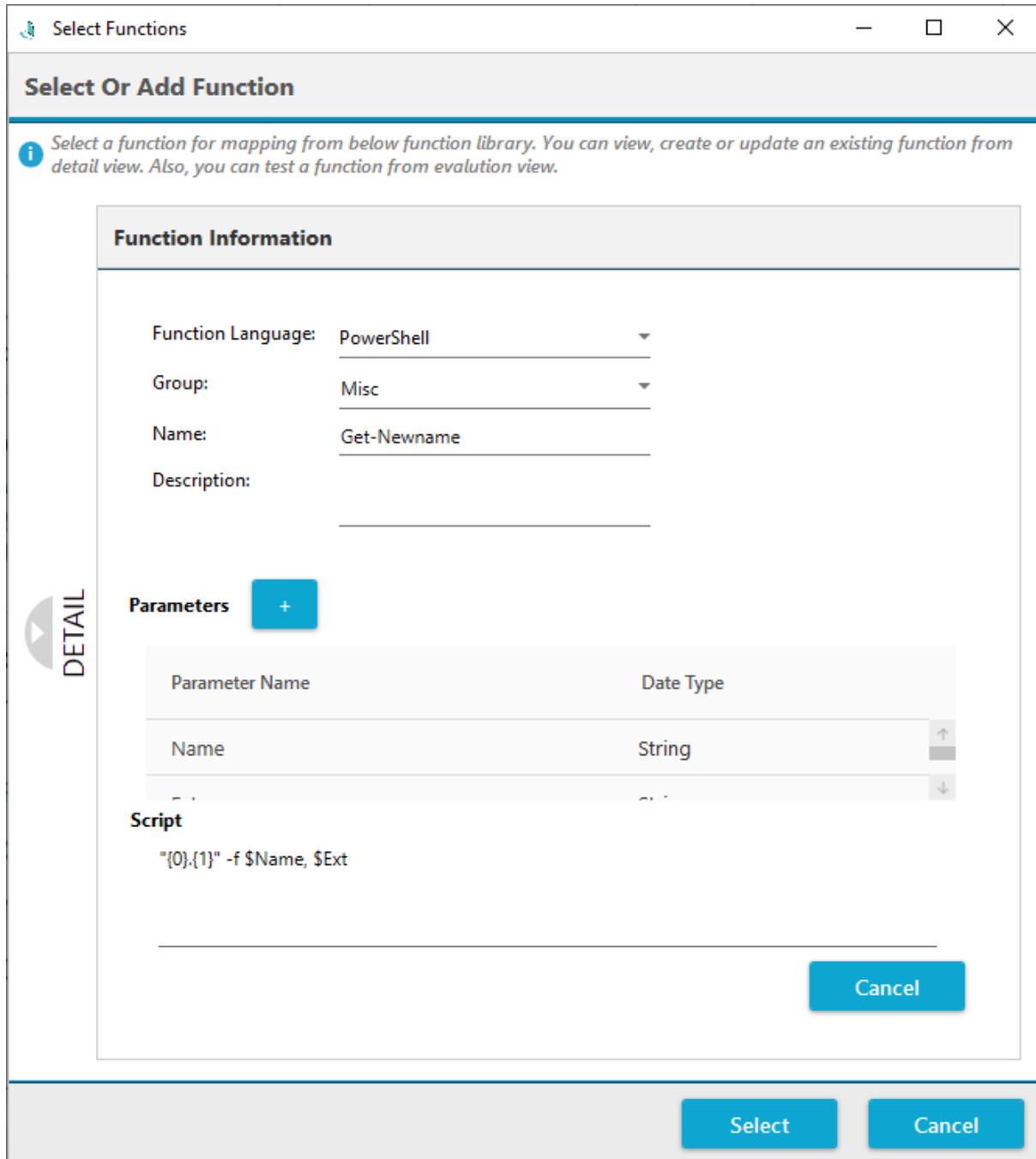
DETAIL

Select Cancel

## View Function

User can view the properties of the function in the view Functions Dialog. The image below shows how this Dialog looks like.

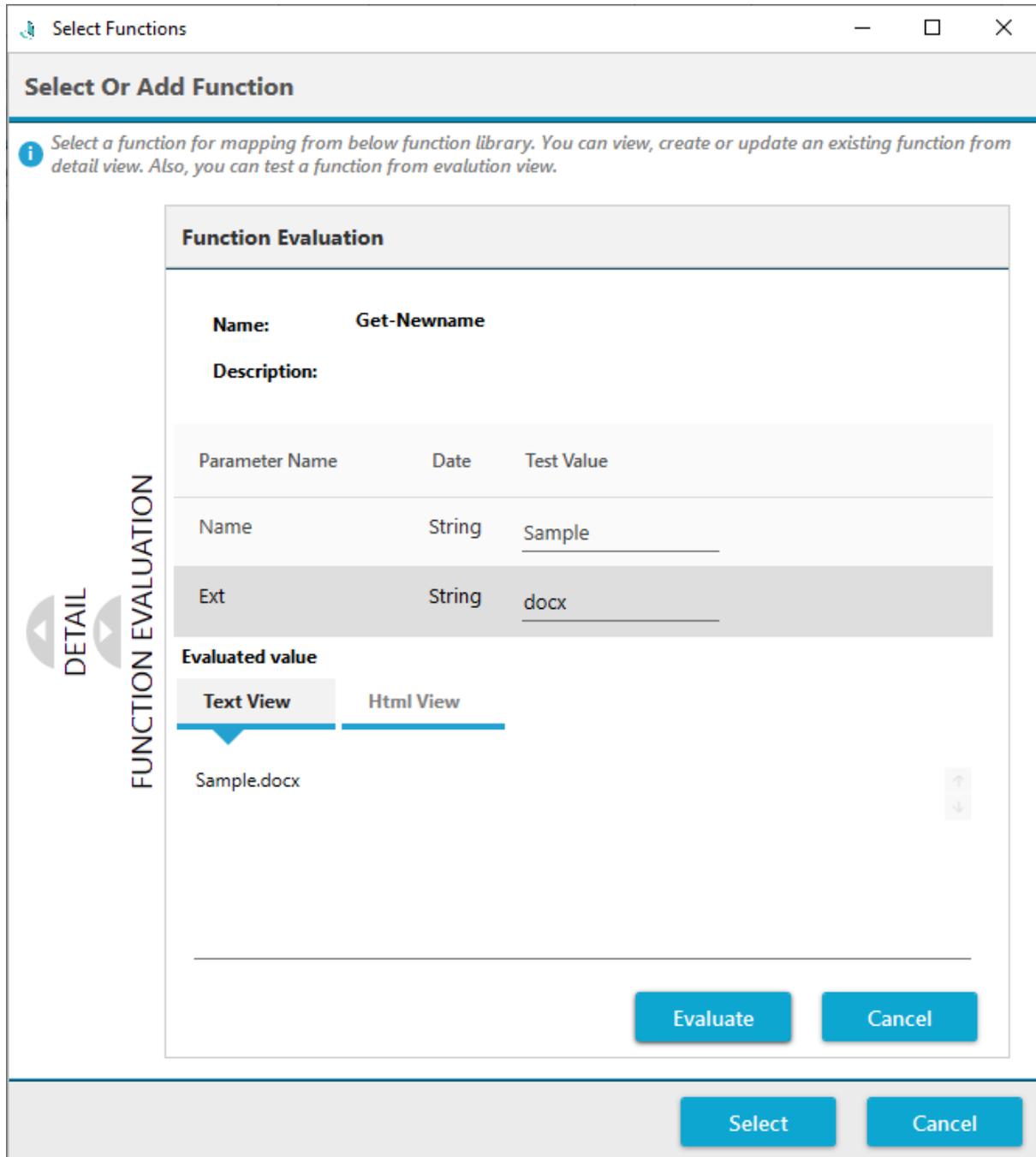
FIGURE 50 - VIEW FUNCTION SCREEN



## Test Function

User can test the script of the function in the evaluation Functions Dialog. The image below shows how this Dialog looks like.

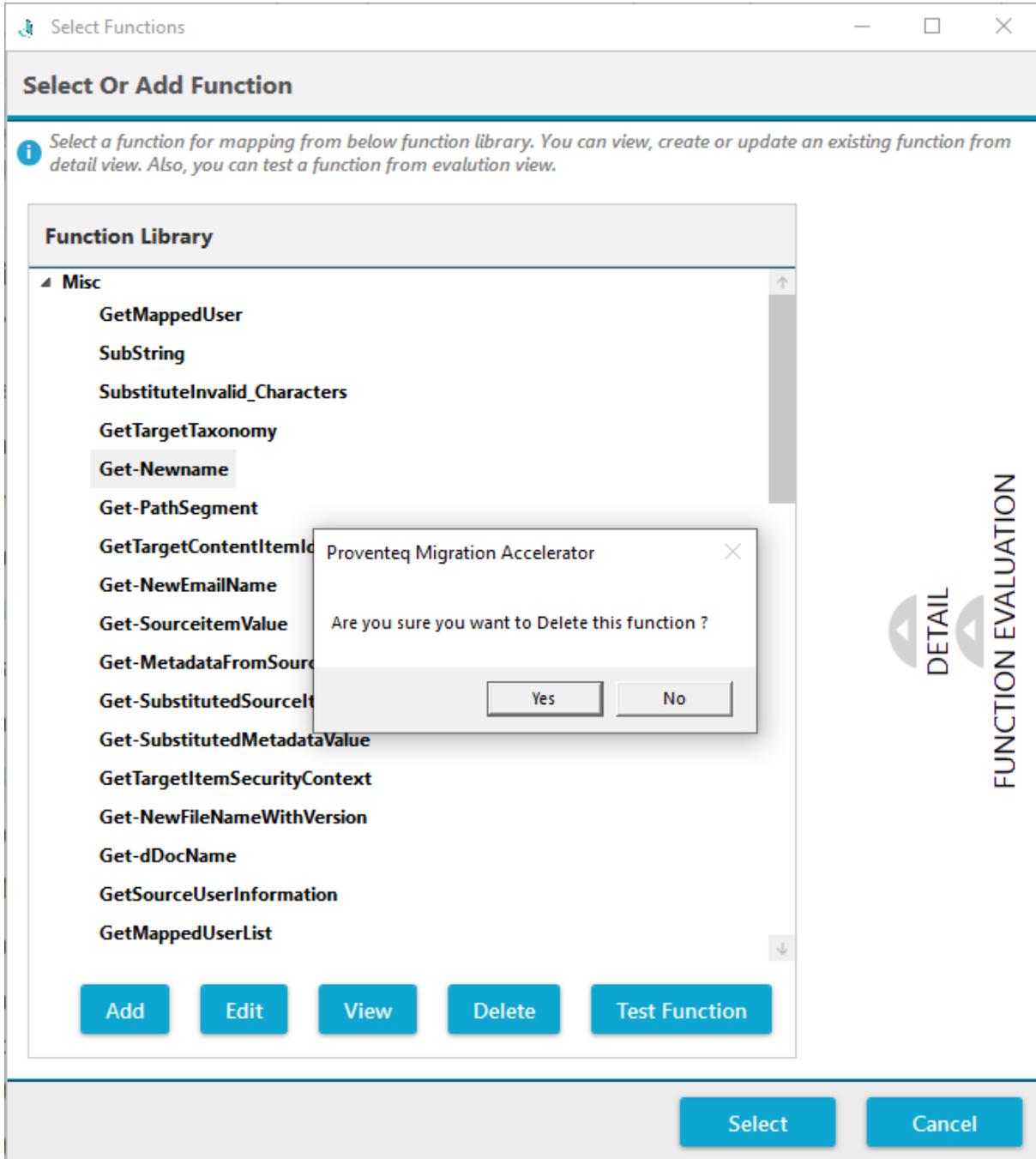
FIGURE 51 - TEST FUNCTION SCREEN



## Delete an existing Function

User can delete the function. The image below shows how this Dialog looks like.

FIGURE 52 - DELETE FUNCTION SCREEN



*Note: - Be careful when Deleting functions.*

### 5.5.3. PowerShell Extensions

Proventeq Migration Accelerator comes with a default PowerShell module called *Proventeq.MigrationAccelerator.PowerShell.Module*, which is delivered using the module manifest file *Proventeq.MigrationAccelerator.PowerShell.Module.psd1*. This has a default sub-module, called *Proventeq.MigrationAccelerator.PowerShell.DefaultModule.psm1*, which is an empty module (with one sample function).

In additions to writing PowerShell rules in the client UI, Proventeq Migration Accelerator provides the option to import custom PowerShell modules. This can be done in the following ways

#### 5.5.3.1. Upgrading the default module

Any custom functions and scripts can be written in the *Proventeq.MigrationAccelerator.PowerShell.DefaultModule.psm1*. These scripts and functions will be available in the Rule editor window in the client UI. Variables that are needed in the script during execution should be declared as a global variable e.g. *\$global:MyVariable*

#### 5.5.3.2. Creating new modules

A new PowerShell module can be created and included in the Proventeq Migration Accelerator Module manifest file as a nested module.

1. Create a new PowerShell module file (.PSM1 file)
2. Create new functions and scripts in this module file
3. Update the *NestedModule* property of *Proventeq.MigrationAccelerator.PowerShell.Module.psd1* file to include this new module (e.g. *MyModule.psm1*).

```
NestedModules =
@ ("Proventeq.MigrationAccelerator.SharePointModule.psm1", "Proventeq.Migratio
nAccelerator.PowerShellModule.psm1", "MyModule.psm1")
```

#### 5.5.3.3. Importing metadata from CSV file

Metadata can be imported into Proventeq Migration Accelerator using the method specified in “Upgrading the default module” section.

Create a CSV file with a unique Item ID column, and columns for all the metadata associated with the item. Ensure the CSV file has headers.

ID,	Metadata_1,	Metadata_2,	Metadata_3
0001,	M1_value_1,	M2_Value_1,	M3_Value_1
0002,	M1_value_2,	M2_Value_2,	M3_Value_2
0003,	M1_value_3,	M2_Value_3,	M3_Value_3

Create a global variable and import the CSV

```
$global:CSVMetadata = Import-CSV -path '<My csv path>' -Key '<the key column name>'
```

In the Script mapping dialog, access the metadata by selecting the appropriate row by filtering it on the unique ID.

```
$meta = $global:CSVMetadata | ?{$_ .ID -eq <My unique ID>}  
$meta.Metadata_1
```

### 5.5.3.4. Testing PowerShell Functions

It is recommended to test any changes made to the PowerShell module prior to launching PMA. The following steps can be executed to validate the changes,

- Open PowerShell console and import the Proventeq PowerShell module

```
"C:\Program Files\Proventeq\Proventeq Migration Accelerator\PowerShell\Proventeq.MigrationAccelerator.Module.psd1" -Force
```

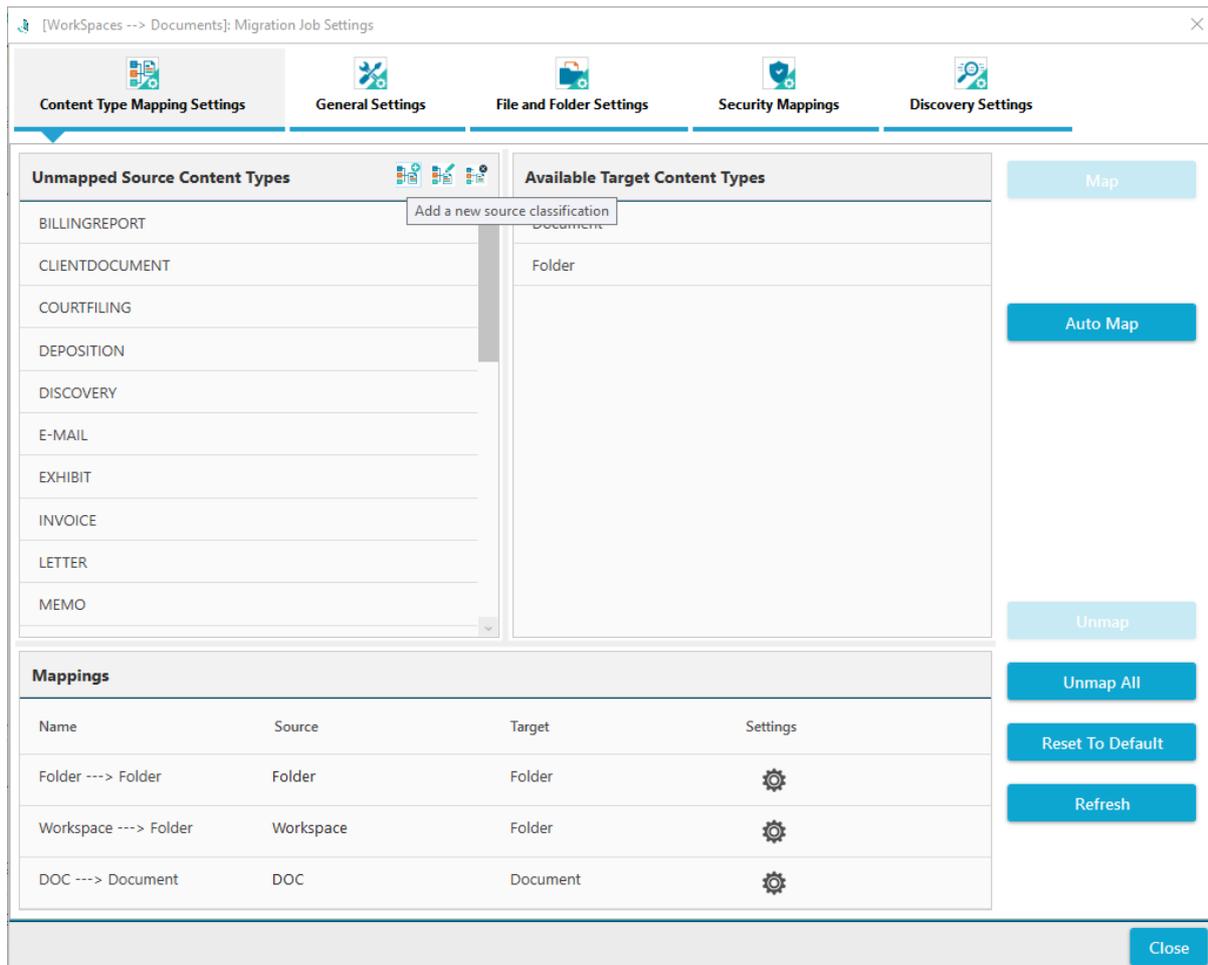
- Invoke the custom function. If a CSV was imported into a custom variable, check the value stored in the variable by typing the variable name in the console. If the values from the CSV are available in the hash table, then the module is ready to be used by Migration Accelerator.

## 5.5.4. Custom Content Type (Source Classification)

### 5.5.4.1. Add Source Classification

You can add and map Custom Source Content types (Source Classification) by clicking on "Add a new source classification"  icon. Each classification has its own unique set of metadata, which can be mapped to appropriate target content type.

FIGURE 53 - ADD NEW SOURCE CLASSIFICATION

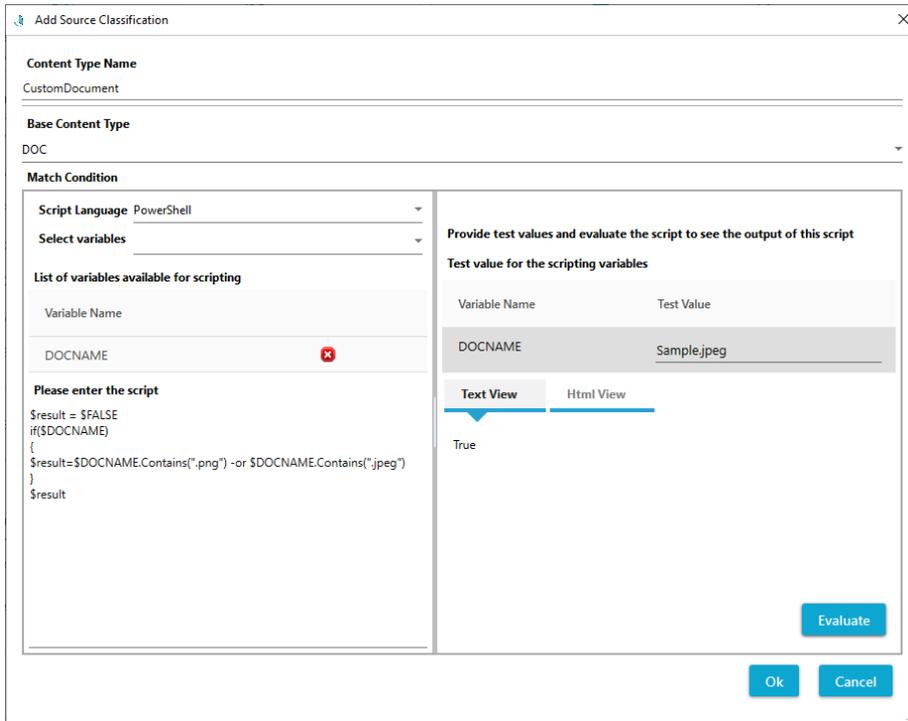


The "Add Source Classification" screen has a "Script Evaluation Area". This can be used to evaluate the added scripts to verify whether they are correct.

**Note:** The "Add source classification" script should evaluate to "True" for custom content type to work properly. Anything that evaluates to "False" will skip the added source classification settings. Users can use any source metadata variable from the drop-down list.

See below snapshot for example:

FIGURE 54 - ADD NEW SOURCE CLASSIFICATION USING POWER SHELL SCRIPT



**Add Source Classification**

**Content Type Name**  
CustomDocument

**Base Content Type**  
DOC

**Match Condition**

**Script Language** PowerShell

**Select variables**

**List of variables available for scripting**

Variable Name
DOCNAME

**Please enter the script**

```
$result = $FALSE
if($DOCNAME)
{
$result=$DOCNAME.Contains(".png") -or $DOCNAME.Contains(".jpeg")
}
$result
```

**Provide test values and evaluate the script to see the output of this script**

**Test value for the scripting variables**

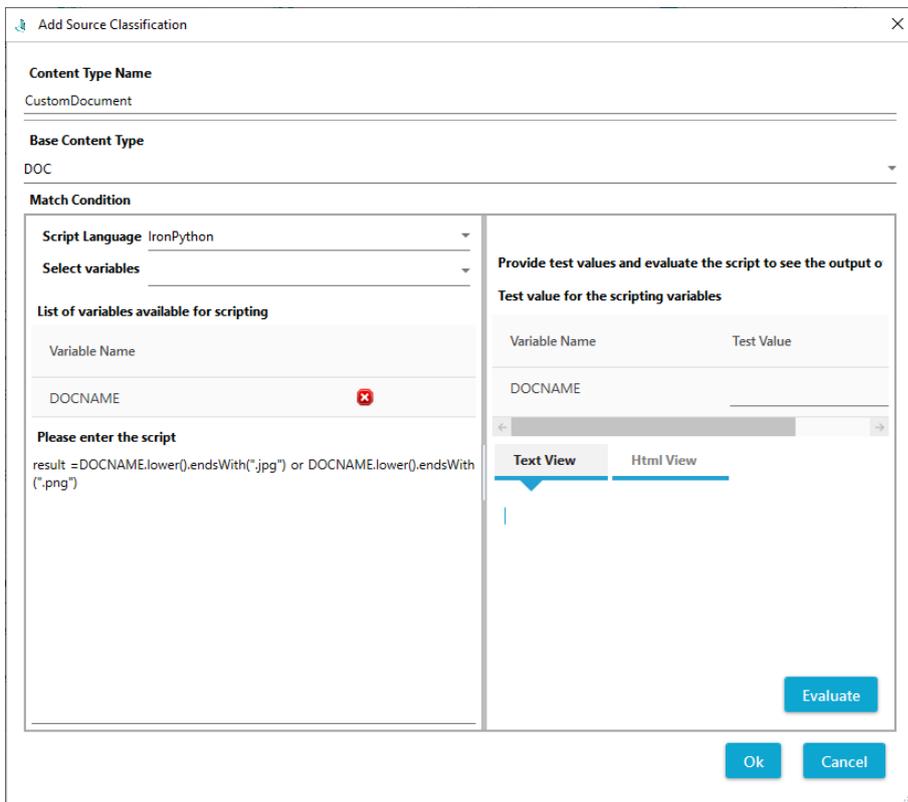
Variable Name	Test Value
DOCNAME	Sample.jpeg

**Text View** | **Html View**

True

**Evaluate** **Ok** **Cancel**

FIGURE 55 - ADD NEW SOURCE CLASSIFICATION USING IRON PYTHON SCRIPT



**Add Source Classification**

**Content Type Name**  
CustomDocument

**Base Content Type**  
DOC

**Match Condition**

**Script Language** IronPython

**Select variables**

**List of variables available for scripting**

Variable Name
DOCNAME

**Please enter the script**

```
result =DOCNAME.lower().endsWith(".jpg") or DOCNAME.lower().endsWith(
".png")
```

**Provide test values and evaluate the script to see the output o**

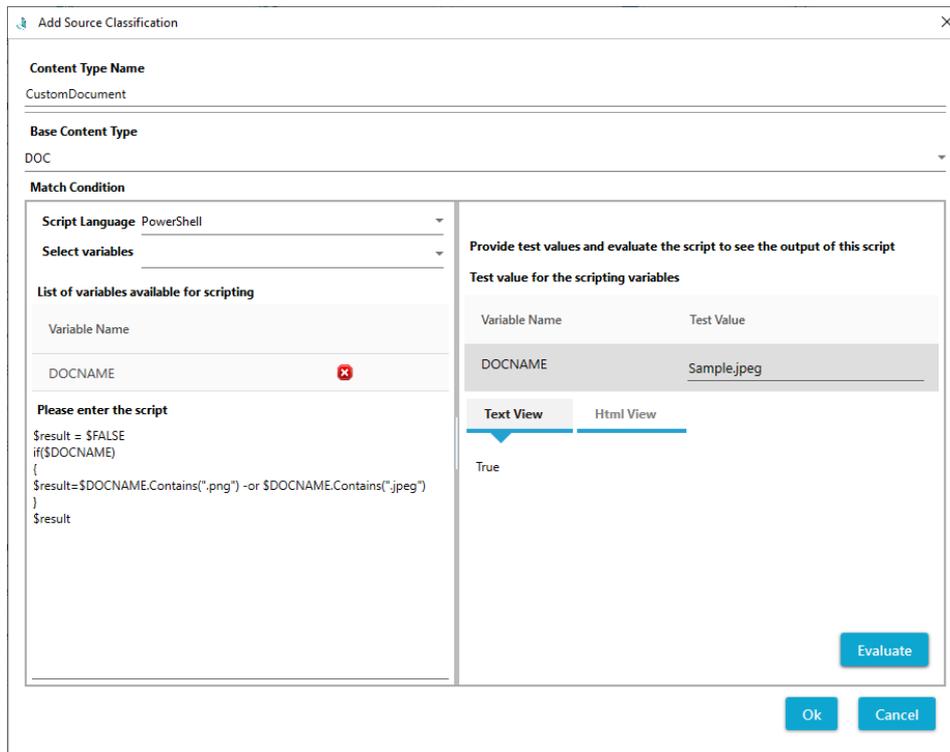
**Test value for the scripting variables**

Variable Name	Test Value
DOCNAME	

**Text View** | **Html View**

**Evaluate** **Ok** **Cancel**

FIGURE 56 - EVALUATE SCRIPT



The given below script is specifically belongs to create Custom Content Type.

1. Select “Add a New Source Classification” button from respective Migration Task Setting Window.
2. Add Source Classification window should pop up; you need to provide following details to create a new source classification.
  - a. Please Enter, Content Type Name.
  - b. Please Select, respective Base Content Type.
  - c. Script Language should be PowerShell.
  - d. Script Name, it is optional, so you can give any suitable name, if desired
  - e. Script Variables, this is optional too, and still if you desire to select any defined variable name from the drop-down list, it mainly helps you to get the value out of it at runtime.
  - f. You could see two panels. Left panel allow you to write IronPython/PowerShell Script, and the Right panel is for Script Evaluation.
  - g. Copy the script provided below, which you need to paste into script area at left panel.

```

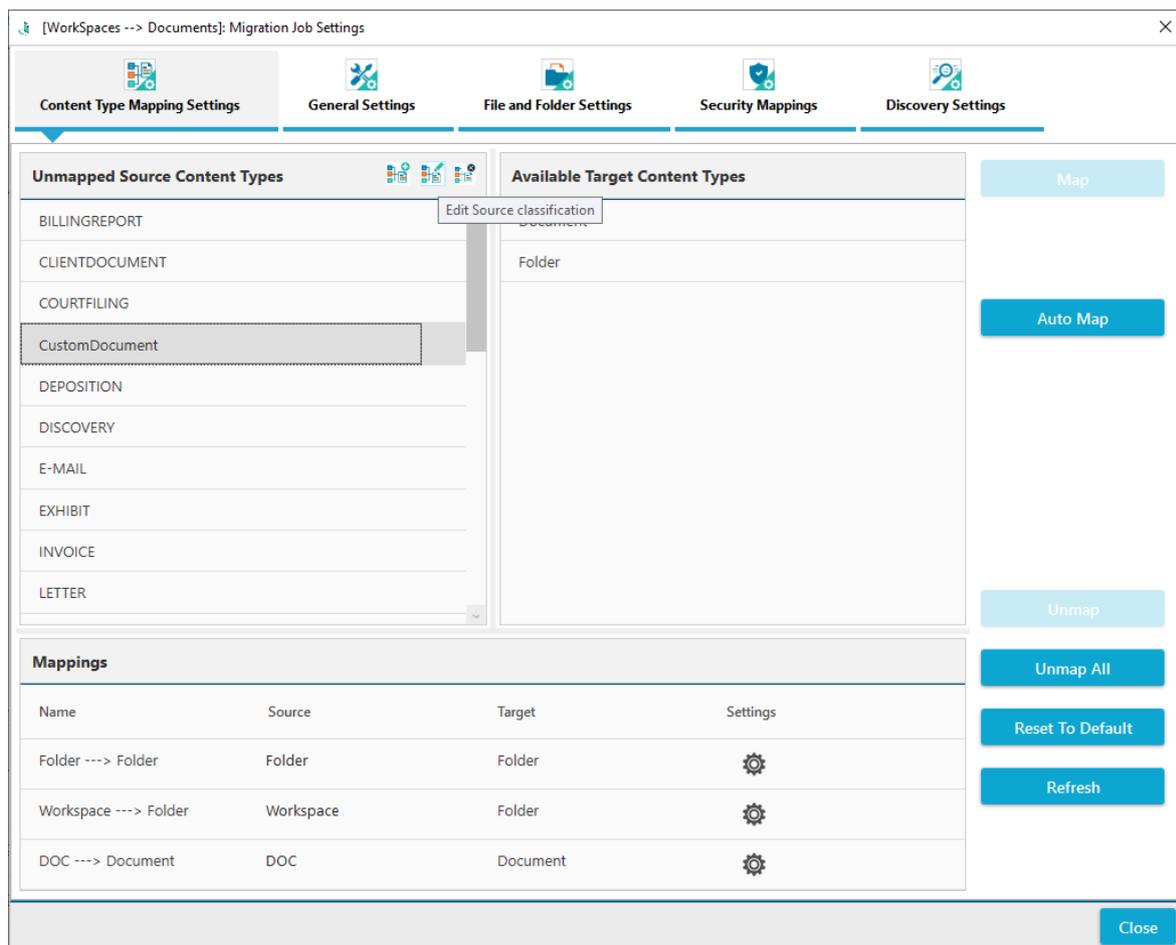
$result = $FALSE
if($MigrationItem.SI.ItemName)
{
    $result = $MigrationItem.SI.ItemName.Contains(".png") -or
    $MigrationItem.SI.ItemName.Contains(".jpeg") -or $MigrationItem.SI.ItemName
    (".jpg") -or $MigrationItem.SI.ItemName (".tiff") -or $MigrationItem.SI.ItemName
    (".bmp")
}
$result

```

Click on Ok button. Newly created content type should be available in Unmapped Source Content Type.

### 5.5.4.2. Edit Source Classification

FIGURE 57 - EDIT SOURCE CLASSIFICATION ICON:



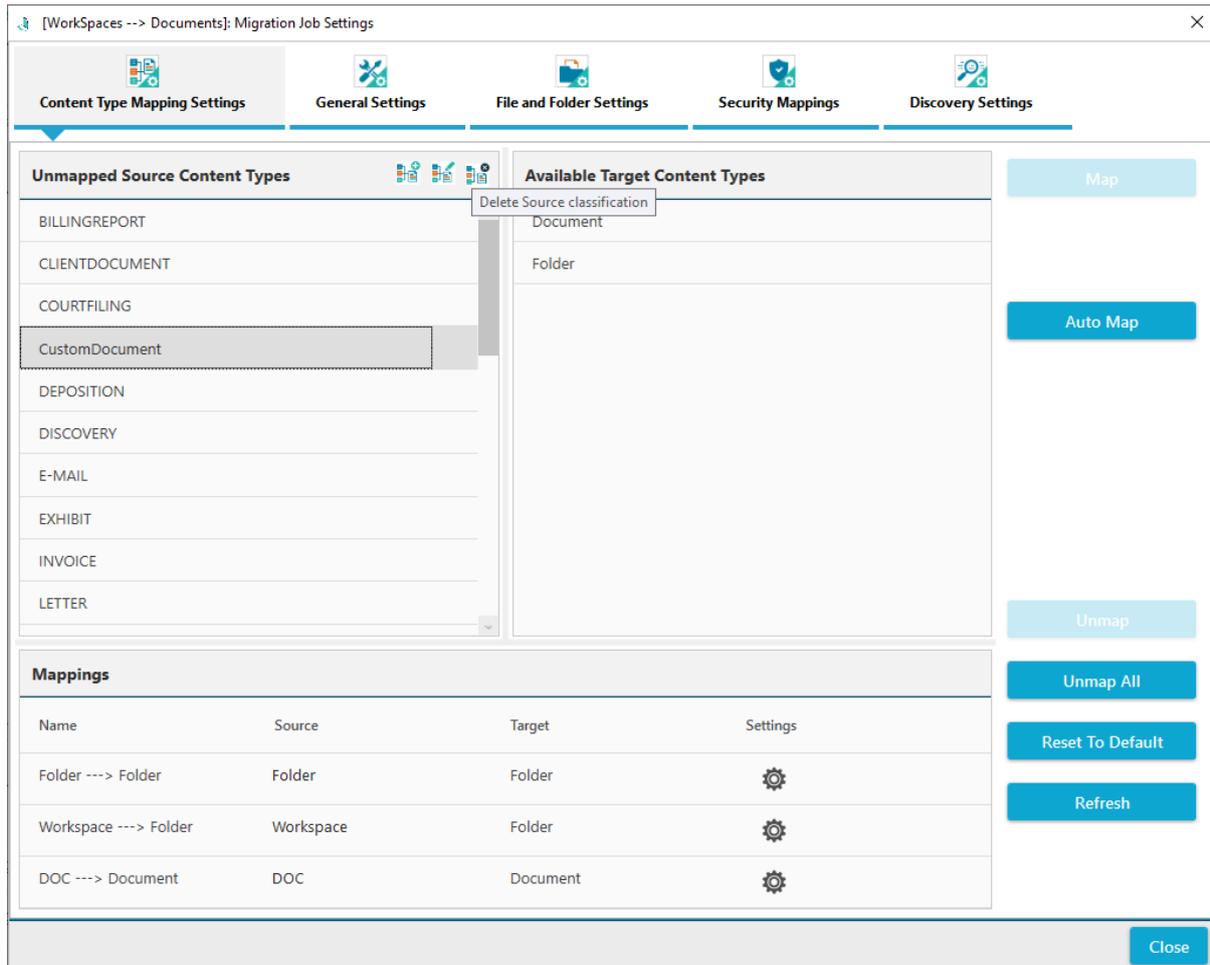
Also, there is a provision to edit the custom source classifications added by users. You can select the added source classification and click on “*Edit source classification*”  icon to edit the script or change the base content type. This step is not mandatory.

*Note: Some fields are disabled in edit mode. You may need to select the variable again if you are editing the source classification.*

User can then use the custom source classification to map to an appropriate target content type (e.g. Image) and map appropriate metadata(s) to target metadata(s). See [Section 5.5.2](#) for metadata mapping.

### 5.5.4.3. Delete Source Classification

FIGURE 58 - REMOVE CUSTOM SOURCE CLASSIFICATION



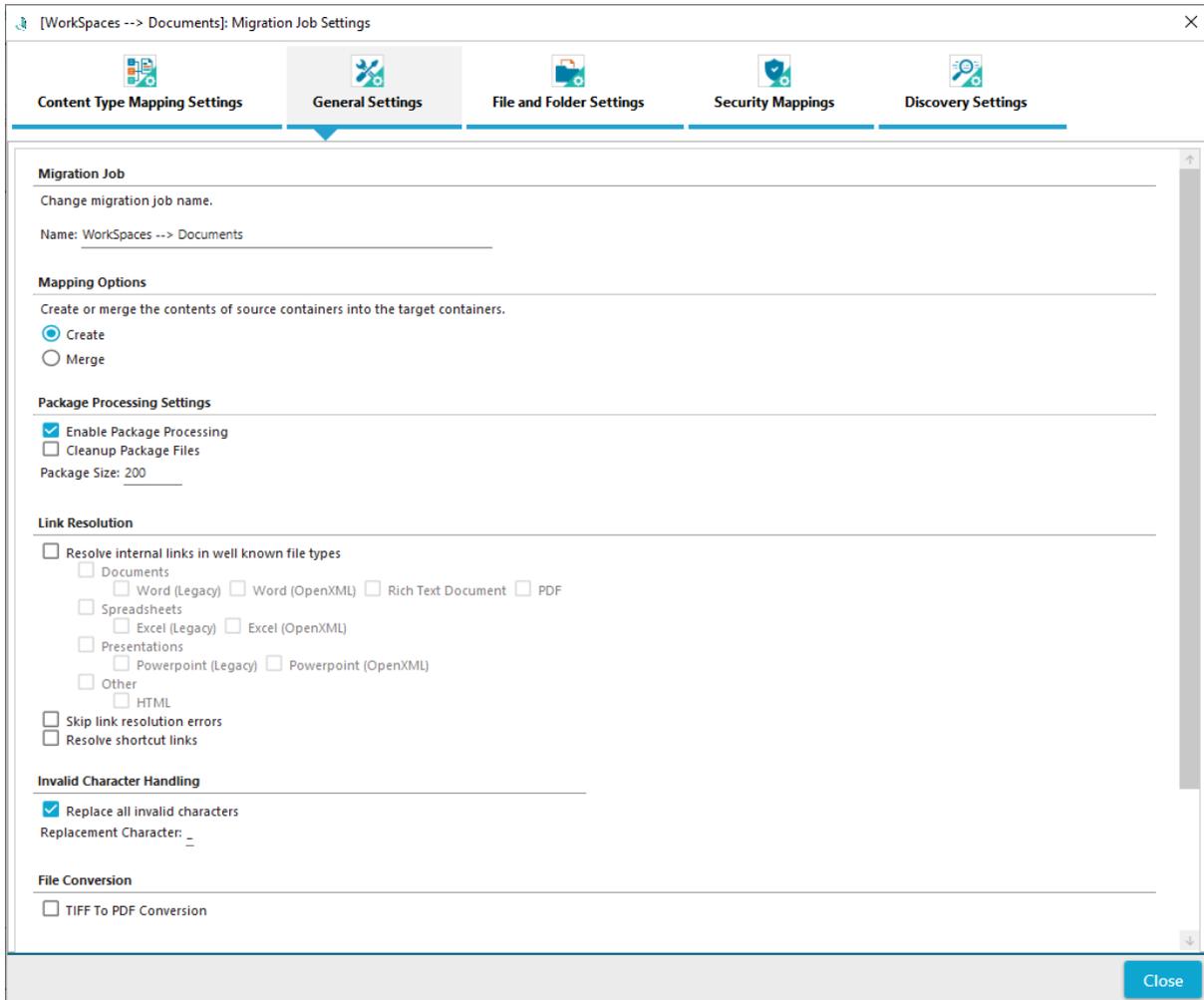
You can also remove a custom content type, which is not mapped by clicking on “Delete Source Classification”  icon as shown in image above.

### 5.5.5. General Settings

These general settings are provided for the "Mapping option" and "Invalid Characters Handling".

You can navigate to “General Settings” screen by clicking on “Settings” icon  of a Migration Task and then on “General Settings” tab on the “Migration Task Settings” screen.

FIGURE 59 - GENERAL SETTINGS SCREEN

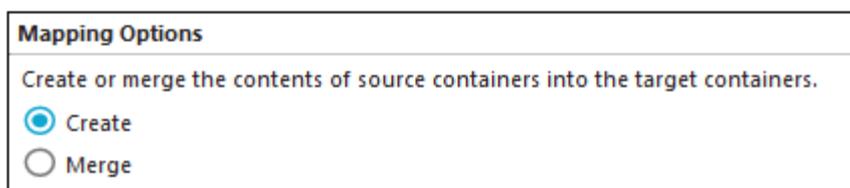


### 5.5.5.1. Mapping Options

Mapping option allows users to specify whether to “Create” or “Merge” source contents into selected target container during migration task creation.

*For example, if source folder “A” is mapped to source folder “B” (A --> B) of target then “Create” mapping option will create folder “A” under “B” library. “Merge” mapping option will only load items of folder excluding folder “A” under “B” library.*

FIGURE 60 - MAPPING OPTION



### 5.5.5.2. Package Processing Settings

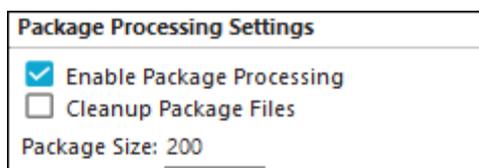
The package processing settings allows users to migrate content and metadata to SharePoint Online site by using Azure package-processing mechanism (SharePoint Online Migration API). The packaging mechanism works as explained below:

- I. First Migration Accelerator will package contents and metadata in temporary XML files.
- II. Then it will perform bulk upload of package and contents to Windows Azure cloud data storage in respective SharePoint Online tenant.
- III. Then it creates and schedules Azure data migration job in respective site collection.
- IV. Finally, Azure data migration job will load the packaged content and metadata into selected SharePoint Online target site or library.

This configuration section has below configuration options:

- **Enable Package Processing** – Enables package processing.
- **Clean-up Package Files** – To clean up temporary package files created on migration server. This option should be selected to free up size by deleting data files and binary files stored in temp path or path configured in application configuration.
- **Package Size** – Number of items to be included in a single package for bulk upload. This should be an optimal figure to be recommended by Proventeq team.

FIGURE 61 - PACKAGE PROCESSING SETTINGS



The screenshot shows a configuration window titled "Package Processing Settings". It contains three settings: "Enable Package Processing" with a checked checkbox, "Cleanup Package Files" with an unchecked checkbox, and "Package Size: 200" with a text input field containing the value 200.

### 5.5.5.3. Link Resolution in Different File Types

Link resolution is an important feature used to re-establish hyperlinks in well-known source file contents with new location of linked files in target container while performing migration activity.

This feature is not mandatory for migrating content from source to target, but if required, the user can select "Link Resolution" option on "General Settings" tab and then select the file types that require link resolution, while creating a migration task.

FIGURE 62 - LINK RESOLUTION

**Link Resolution**

Resolve internal links in well known file types

- Documents
  - Word (Legacy)  Word (OpenXML)  Rich Text Document  PDF
- Spreadsheets
  - Excel (Legacy)  Excel (OpenXML)
- Presentations
  - Powerpoint (Legacy)  Powerpoint (OpenXML)
- Other
  - HTML

Skip link resolution errors

Resolve shortcut links

The link resolution settings allow the user to select the well-known file types (with implied their extensions), that will be modified during migration. The available settings are:

1. Word – .rtf, .doc and .docx
2. Excel - .xls and .xlsx
3. PowerPoint - .ppt and .pptx
4. PDF - .pdf
5. HTML - .html, .htm and .mht

This link resolution feature works as follows:

1. First one need to update the regular expression patterns in the application configuration file based on the link patterns in Worksite system. E.g. DOCID
2. Following is the regular expression key, which the user needs to update.

```
<add key="Transformation.Regex_GroupIdBasedLink" value="(?!&lt;=objectId/).*$" />
```

Please note that the application configuration file is included in Proventeq Migration Accelerator installation directory (typically "C:\Program Files\Proventeq\Proventeq Migration Accelerator\Proventeq.MigrationAccelerator.exe.config")

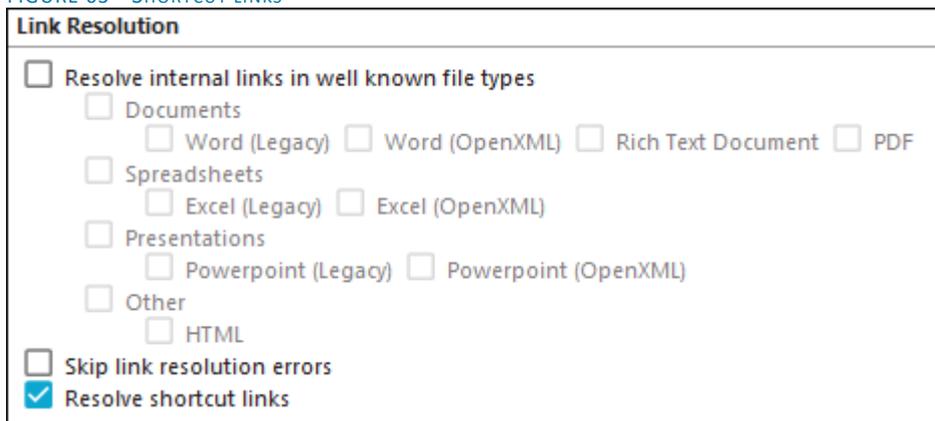
3. The user needs to perform Process up to stage Transformation, where it computes information for all the items necessary to determine the target links for respective migration item.
4. The user needs to verify transformed metadata and links against metadata configuration and target location configuration.
5. Finally, the user needs to Process up to stage Load to migrate the files to target system after resolving links within files.

**Please note that the Skip link resolution errors setting will skip the errors during link processing so that it will not affect migration of other items/links.**

### 5.5.5.4. Shortcut Link Resolution

The shortcut links resolution is an important feature used to re-establish shortcut links of documents with new location of files in target system while performing migration activity. This feature is not mandatory for migrating content from source to target, but if required, the user can select “Resolve Shortcut Links” option from “General Settings” tab.

FIGURE 63 - SHORTCUT LINKS



The shortcut link resolution feature works as follows:

1. Shortcut Links resolution occurs only if the setting is enabled for respective migration task.
2. The Shortcut Link processing occurs in Post Process, where it computes information for all the items necessary to determine the new link in the first step (Process), and then loads the updated files or links in the second step (Post Process - Refer section [6.2 Post Processing](#)).

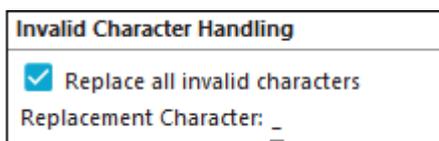
Skip shortcut links pointing to other iManage instance. Added in below app setting, which user can update to provide the database/application alias name, so that the links will be discovered from given iManage alias only.

```
<add key="Worksite.DatabaseAlias" value="Live"/>
```

### 5.5.5.5. Invalid Characters Handling

SharePoint allows only a certain set of characters in its folder name and filename. Note that they are not the same as the rules for use in a Windows File System. The suggested approach is to search for and substitute illegal characters using some rules. The user can proceed with the default settings from this window.

FIGURE 64 - INVALID CHARACTER HANDLING



Suppose a source file name is “**Help & information.txt**” then by adding script for metadata “**Name**” of content type “**Documents**”, above invalid character “**&**” in the file

*name will be replaced by an underscore “\_” according to above settings and file will be loaded to target as “**Help \_ information.txt**”. “\_” character in the settings can be changed to any desired custom character(s) which is valid in SharePoint naming conventions.*

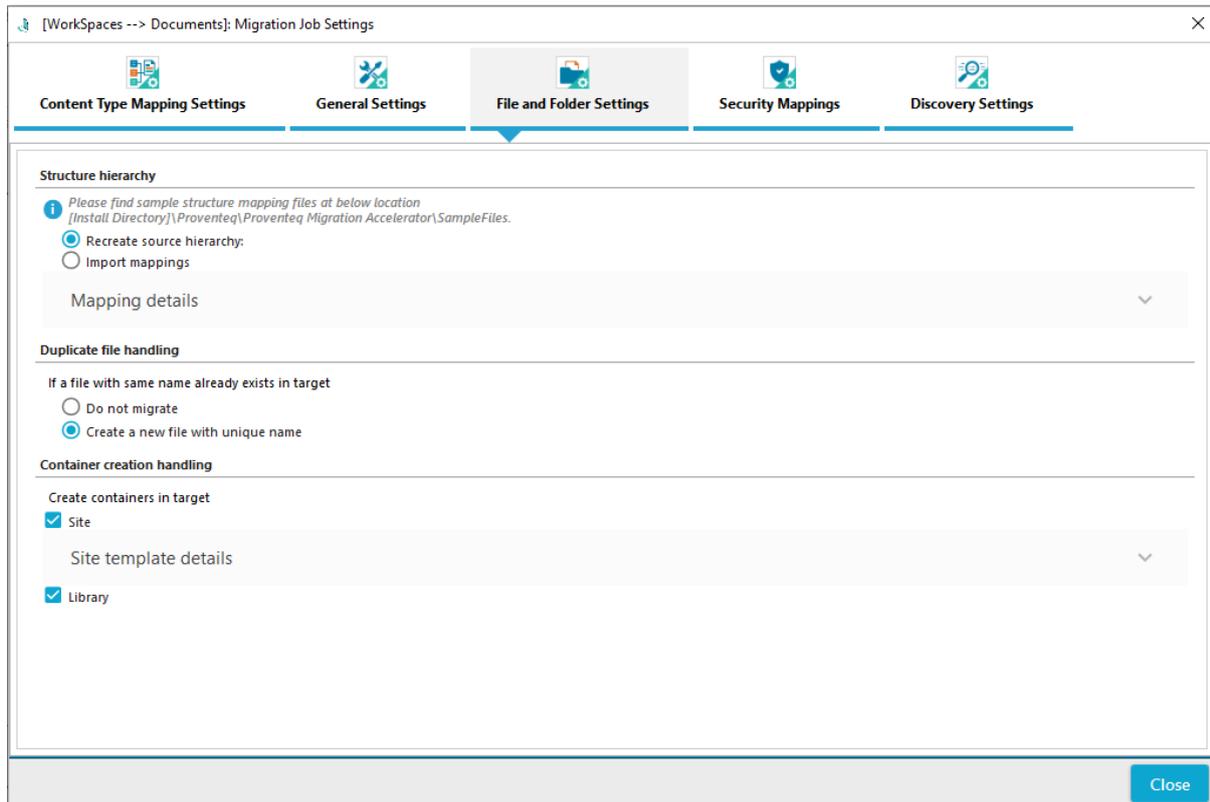
## 5.5.6. File and Folder Settings

### 5.5.6.1. Recreate Source Hierarchy

The File and Folder settings are used to configure structure hierarchy of items that will be loaded to target.

The user can proceed with the default settings from this window or import structured mapping csv file.

FIGURE 65 - RECREATE SOURCE HIERARCHY



### 5.5.6.2. Create a new Structured Hierarchy using Import Mappings

Structured Mapping or Import Mappings is an extensive feature used to create a new hierarchy on target, which may or may not follow the source hierarchy. Here you can load child items/folders at an entirely different new location specified by you. Also, if child items structure mapping is not present / given by you then they will inherit the mapping of the parent.

Note that import structure mapping is mandatory for target container, which is mapped at site-collection or site level.

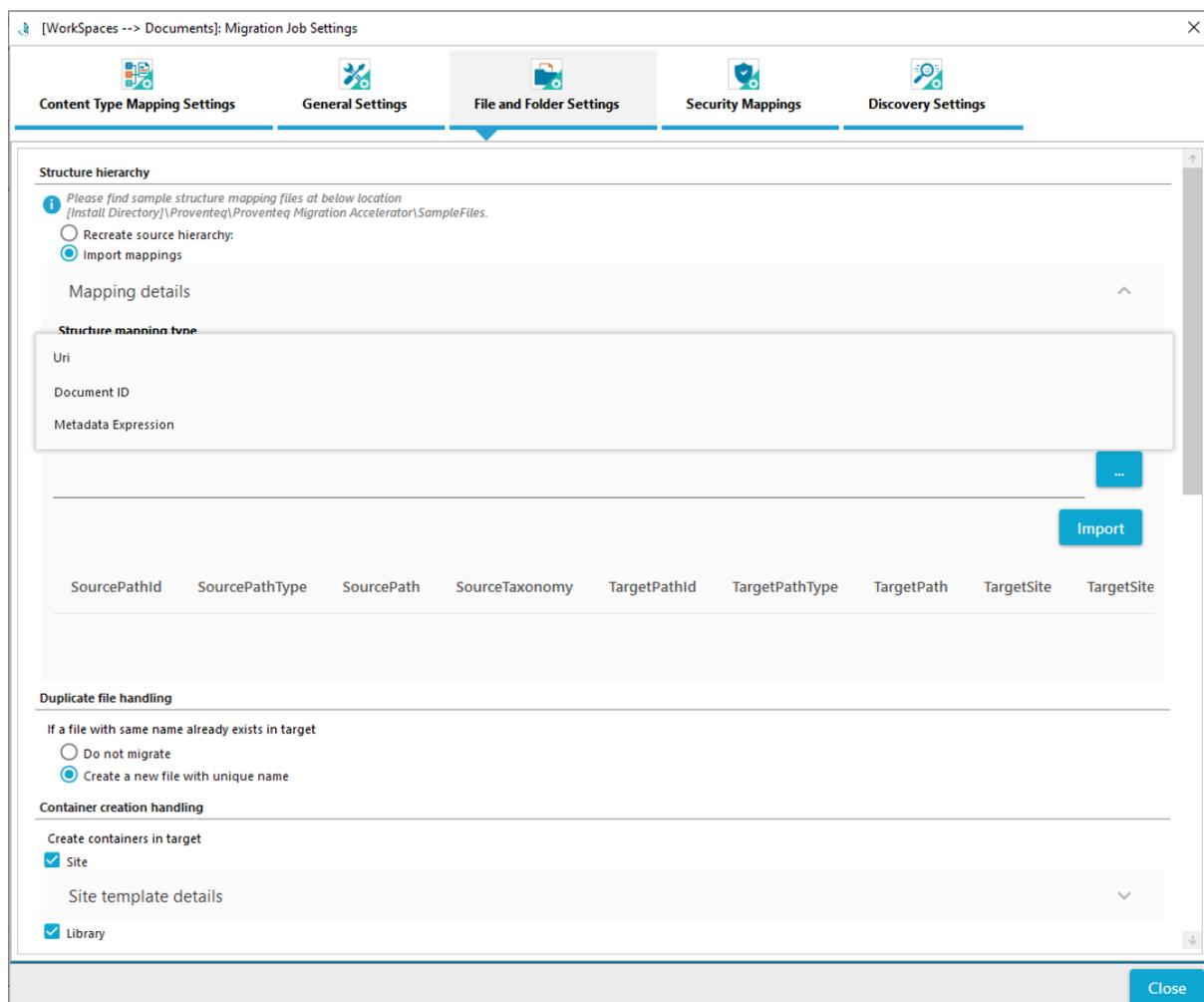
This feature is although not mandatory for migrating content from source to target. In this case, the user can map source container to a Document library or folder directly.

## Worksite Virtual Containers:

A virtual container is parent or root container, which holds list of items like a collection of Workspaces, User Matters and Unfiled Content. Please find the below details of virtual containers, which can be referred to create a root item Structure mapping based on source container selected in migration task.

Name	URI	ID
WORKSITE	/	-1
WORKSPACES	/	-2
USERMATTERS	/	-3
UNFILED CONTENT	/UNFILED	-4

FIGURE 66 - IMPORT MAPPINGS



[WorkSpaces --> Documents]: Migration Job Settings

Content Type Mapping Settings    General Settings    **File and Folder Settings**    Security Mappings    Discovery Settings

**Structure hierarchy**

Please find sample structure mapping files at below location  
 [Install Directory]\Proventeq\Proventeq Migration Accelerator\SampleFiles.

Recreate source hierarchy:  
 Import mappings

Mapping details

Structure mapping type

Uri  
 Document ID  
 Metadata Expression

...

Import

SourcePathId	SourcePathType	SourcePath	SourceTaxonomy	TargetPathId	TargetPathType	TargetPath	TargetSite	TargetSite
--------------	----------------	------------	----------------	--------------	----------------	------------	------------	------------

**Duplicate file handling**

If a file with same name already exists in target

Do not migrate  
 Create a new file with unique name

**Container creation handling**

Create containers in target

Site  
 Library

Site template details

Close

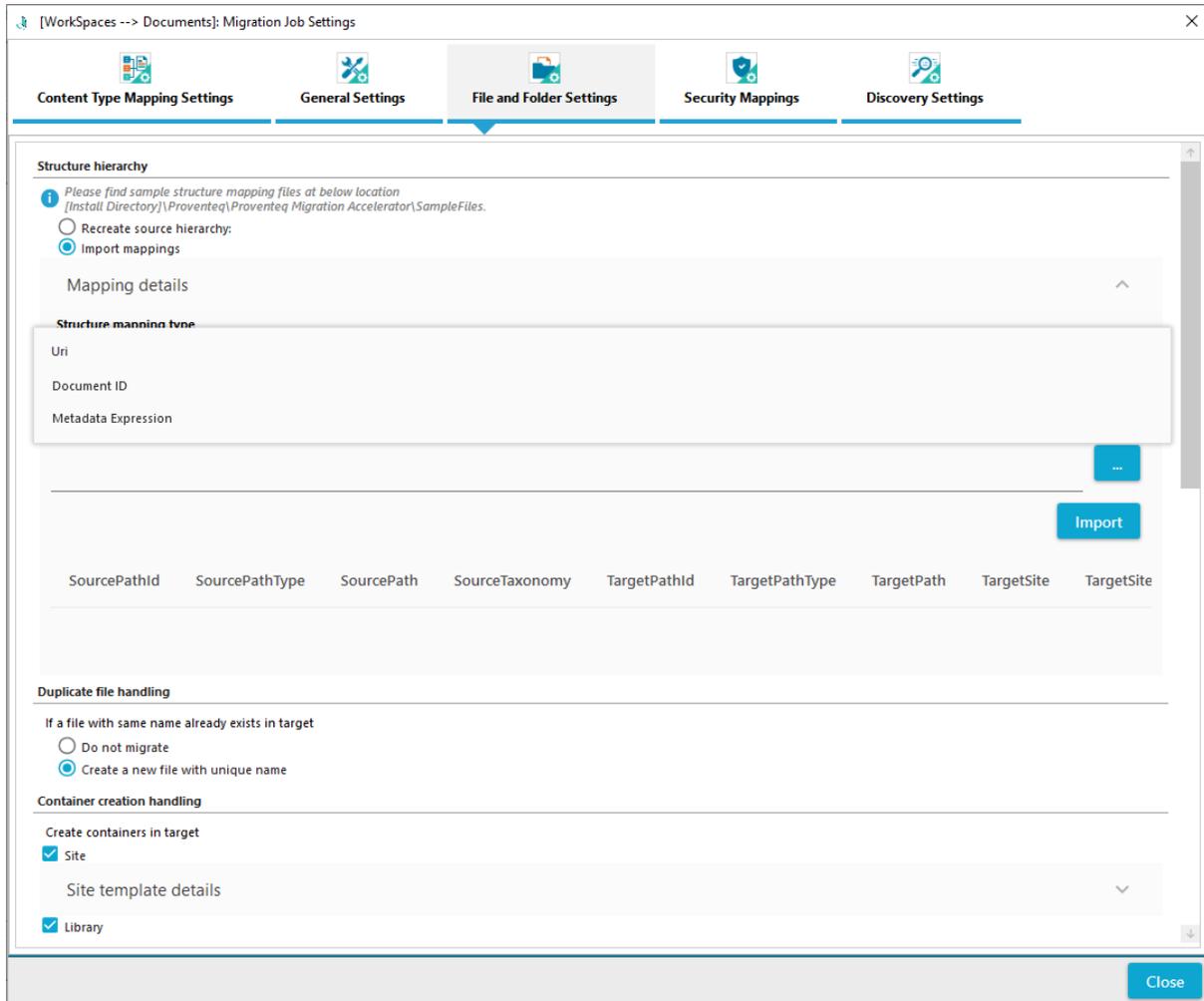
To import a Structure mapping csv, you need to create a comma delimited CSV file with following columns as header –

1. **SourcePathId** - Source Path Value will be DOCID
2. **SourcePathType** - Blank
3. **SourcePath** – Source URI Path /Blank
4. **SourceTaxonomy** - Blank
5. **TargetPathId** - Blank
6. **TargetPathType** - Blank
7. **TargetPath** - Site Collection URL (For Tenant level migration task only)
8. **TargetSite** – Site Name (System Name or Name in URL)
9. **TargetSiteSettings** – Blank
10. **TargetLibrary** – Library Name (System Name or Name in URL)
11. **TargetLibrarySettings** – Blank
12. **TargetFolder** – Path of the folder hierarchy under which item will be loaded.
13. **TargetFolderSettings** - Blank
14. **TargetPathMetadata** - Blank
15. **TargetTaxonomy** - Blank
16. **TaxonomyMappingType** - Blank
17. **PathMappingType** - Blank
18. **MappingSettings** – Specify either “Create” or “Merge” to either create or merge source item in target library or folder.

PMA supports different type of structure mapping to facilitate user requirements such as maintaining source hierarchy or to recreate target hierarchy.

1. Based on URI (Default Settings)
2. Based on DocumentID
3. Based on Metadata Expression

FIGURE 67 - DIFFERENT STRUCTURE MAPPING OPTION



User can select the structure mapping type from dropdown list based on their requirements.

Please note that the sample Structure Mapping CSV files are included in Proventeq Migration Accelerator installation directory (typically C:\Program Files\Proventeq\Proventeq Migration Accelerator\SampleFiles)

FIGURE 68 - SAMPLE STRUCTURE MAPPING FILE USING URI

SourcePathId	SourcePathType	SourcePath	SourceTaxonomy	TargetPathId	TargetPathType	TargetPath	TargetSite	TargetSiteSettings	TargetLibrary	TargetLibrarySettings	TargetFolder	TargetFolderSettings	TargetPathMetadata	TargetTaxonomy	TaxonomyMappingType	PathMappingType	MappingSettings
	/	/unfiled				/			Insurance		/						Create
	/Insurance/Car	/Insurance/Car Insurance				/			Insurance		Health						Create
	/Insurance/Travel	/Insurance/Travel Insurance				/			Insurance		Car						Create
	/Insurance/Health	/Insurance/Health Insurance/Claims			subsite	/			Insurance		Travel						Create
	/Insurance/Car	/Insurance/Car Insurance/Claims				/			Claims		Health/Claims Docs						Create
	/Insurance/Travel	/Insurance/Travel Insurance/Claims				/			Claims		Car/Claims Docs						Create
	/Insurance/Insurance	/Insurance/Insurance Archive			Archive	/			Archive		Travel/Claims Docs						Create
	/Insurance/Others				Archive	/			Archive		Archive Docs						Merge
																	Create

FIGURE 69 - SAMPLE STRUCTURE MAPPING FILE USING DOCID

SourcePathID	SourcePathType	SourcePath	SourceTaxonomy	TargetPathID	TargetPathType	TargetPath	TargetSite	TargetSiteSettings	TargetLibrary	TargetLibrarySettings	TargetFolder	TargetLibrarySettings	TargetFolder	TargetFolderSettings	TargetPathMetadata	TargetTaxonomy	TaxonomyMappingType	PathMappingType	MappingSettings
-1									Shared Documents										Create
-2									Shared Documents										Create
-3									Shared Documents										Create
-4									Shared Documents										Create
P-2018									Home Insurance										Create
P-2019									Personal Insurance										Create

**Note:** This structure mapping type expects workspaces, or folders project Id (**PRJ\_ID** in Worksite) to be specified in **SourcePathID** column with prefix as **P-XXX** E.g. P-1223. Similarly, it expects document id (**DOCNUM** in Worksite) to be specified in **SourcePathID** column to migrate document in SharePoint site and library.

FIGURE 70 - SAMPLE STRUCTURE MAPPING FILE USING METADATA EXPRESSION

SourcePat	SourcePat	SourcePath	SourceTax	TargetPatI	TargetPatI	TargetPatI	TargetSite	TargetSite	TargetLibrary	TargetLibr	TargetFolc	TargetFolc	TargetPatI	TargetTax	Taxonomy	PathMap	MappingSettings	
		SourceContentType='Folder'					/		Folder		/							Merge
		SourceContentType='Document'					/		Document		/							Merge
		SourceContentType='Policies'					/		Policies		/							Merge
		SourceContentType='Claims'					/		Claims		/							Merge

FIGURE 71 - SAMPLE STRUCTURE MAPPING FILE USE FOR TENANT LEVEL MIGRATION

SourcePathType	SourcePath	SourceTaxonomy	TargetPathID	TargetPathType	TargetPath	TargetSite	TargetSiteSettings	TargetFolder	TargetLibrarySettings	TargetPathMetadata	TargetTaxonomy	TaxonomyMappingType	PathMappingType	MappingSettings
/	/				https://proventeqdemo.sharepoint.com/sites/Insurance	/	/							Create
/Unfiled	/Unfiled				https://proventeqdemo.sharepoint.com/sites/Insurance	/	/	Health						Create
/Insurance/Car Insurance	/Insurance/Car Insurance				https://proventeqdemo.sharepoint.com/sites/Insurance	/	/	Car						Create
/Insurance/Travel Insurance	/Insurance/Travel Insurance				https://proventeqdemo.sharepoint.com/sites/Insurance	/	/	Travel						Create
/Insurance/Health Insurance/Claims	/Insurance/Health Insurance/Claims				https://proventeqdemo.sharepoint.com/sites/Insurance	SubSite	/	Health/Claims Docs						Create
/Insurance/Car Insurance/Claims	/Insurance/Car Insurance/Claims				https://proventeqdemo.sharepoint.com/sites/Insurance	/	/	Car/Claims Docs						Create
/Insurance/Travel Insurance/Claims	/Insurance/Travel Insurance/Claims				https://proventeqdemo.sharepoint.com/sites/Insurance	/	/	Travel/Calims Docs						Create
/Insurance/Insurance Archive	/Insurance/Insurance Archive				https://proventeqdemo.sharepoint.com/sites/Insurance	Archive	/	Archive Docs						Merge
/Insurance/Others	/Insurance/Others				https://proventeqdemo.sharepoint.com/sites/Insurance	Archive	/							Create

FIGURE 72 - SAMPLE STRUCTURE MAPPING FILE USE FOR SUB SITE LEVEL MIGRATION UNDER SITE COLLECTION

SourceF	SourcePath	SourceTax	TargetPi	TargetPi	TargetF	TargetSite	TargetSi	TargetLibrary	TargetL	TargetFolder	TargetF	TargetPa	TargetTa	Taxonon	PathMaj	MappingSe
\FileSystem Test Data\Insurance	\FileSystem Test Data\Insurance					SubSite/Subsite-1/Subsite-2		Insurance		/						Merge
\FileSystem Test Data\Insurance\Health Insurance	\FileSystem Test Data\Insurance\Health Insurance					SubSite/Subsite-1/Subsite-2		Insurance		Health						Create
\FileSystem Test Data\Insurance\Car Insurance	\FileSystem Test Data\Insurance\Car Insurance					SubSite/Subsite-1/Subsite-2		Insurance		Car						Create
\FileSystem Test Data\Insurance\Travel Insurance	\FileSystem Test Data\Insurance\Travel Insurance					SubSite/Subsite-1/Subsite-2		Insurance		Travel						Create
\FileSystem Test Data\Insurance\Health Insurance\Claims	\FileSystem Test Data\Insurance\Health Insurance\Claims					SubSite/Subsite-1		Claims		Health/Claims Docs						Create
\FileSystem Test Data\Insurance\Car Insurance\Claims	\FileSystem Test Data\Insurance\Car Insurance\Claims					SubSite/Subsite-1		Claims		Car/Claims Docs						Create
\FileSystem Test Data\Insurance\Travel Insurance\Claims	\FileSystem Test Data\Insurance\Travel Insurance\Claims					SubSite/Subsite-1		Claims		Travel/Calims Docs						Create
\FileSystem Test Data\Insurance\Insurance Archive	\FileSystem Test Data\Insurance\Insurance Archive					SubSite/Subsite-1/Subsite-2		Archive		Archive Docs						Create
\FileSystem Test Data\Insurance\Others	\FileSystem Test Data\Insurance\Others					SubSite/Subsite-1/Subsite-2		Archive		/						Create

**Note:** PMA support multi level subsites creation (any level) and can migrate items to existing sub site by specifying the existing subsite names. E.g. Site Collection>Site A>Site B>Site C

### 5.5.6.3. Duplicate File Handling

In Source system, there could be multiple documents with same name in the same folder. Such documents can be handled by selecting one of the options in File & Folder Settings:-

#### 5.5.6.3.1. Discard Files with Duplicate names

Such Items will be marked as failed and will not be migrated

FIGURE 73 - FIGURE 59 - FILE AND FOLDER SETTINGS– DO NOT MIGRATE

Duplicate file handling
<p>If a file with same name already exists in target</p> <p><input checked="" type="radio"/> Do not migrate</p> <p><input type="radio"/> Create a new file with unique name</p>

#### 5.5.6.3.2. Creating New File with Unique Names

PMA will create a unique document name by appending auto incremental numbers as a file name suffix. This is the default option selected in PMA.

FIGURE 74 - FILE AND FOLDER SETTINGS– CREATE A NEW FILE WITH UNIQUE NAME

Duplicate file handling
<p>If a file with same name already exists in target</p> <p><input type="radio"/> Do not migrate</p> <p><input checked="" type="radio"/> Create a new file with unique name</p>

E.g. If we have total 3 files with same name as “Proventeq User Guide.pdf” then PMA will create unique names for them like below:

Proventeq User Guide.pdf

Proventeq User Guide (1).pdf

Proventeq User Guide (2).pdf

### 5.5.6.4. Container Creation Handling

Migration Accelerator allows container creation at modern site level. For this there is a default provisioning in migration accelerator to assign a template for creating containers in target.

FIGURE 75 - GENERATE TEMPLATE OPTION-EXPORT

Container creation handling
<p>Create containers in target</p> <p><input checked="" type="checkbox"/> Site</p>
<p>Site template details</p>
<p><input checked="" type="checkbox"/> Library</p>

Note: The site template name in site template details is set to “STS#0” by default for migration task. One needs to change it to “STS#3” to allow container creation in target for SharePoint Online modern site.

### 5.5.7. Security Mappings

Migration Accelerator allows items to be migrated with their security. Since source security model and entities (e.g. users and groups) might not be compatible with the target, it is essential to map these prior to commencing the migration. The user/group and permission mappings can be imported into Migration Accelerator.

***If there is no requirement to migrate container or item level security, but to migrate only user creation and modification information (E.g. “Created By” and “Modified By” Fields), then the user can import and configure User Mappings only.***

Users can import Security Mapping by following below steps:

1. Users need to enter profile name. E.g. User Mapping
2. Select the respective profile type (User, Group & Permission) accordingly.
3. Select “Generate Template” to export the User Mapping, Group Mapping and Permission Mapping values from migration staging database i.e. user need to perform discovery and then use “Generate Template” to export the security mappings.

FIGURE 76 - GENERATE TEMPLATE OPTION-EXPORT

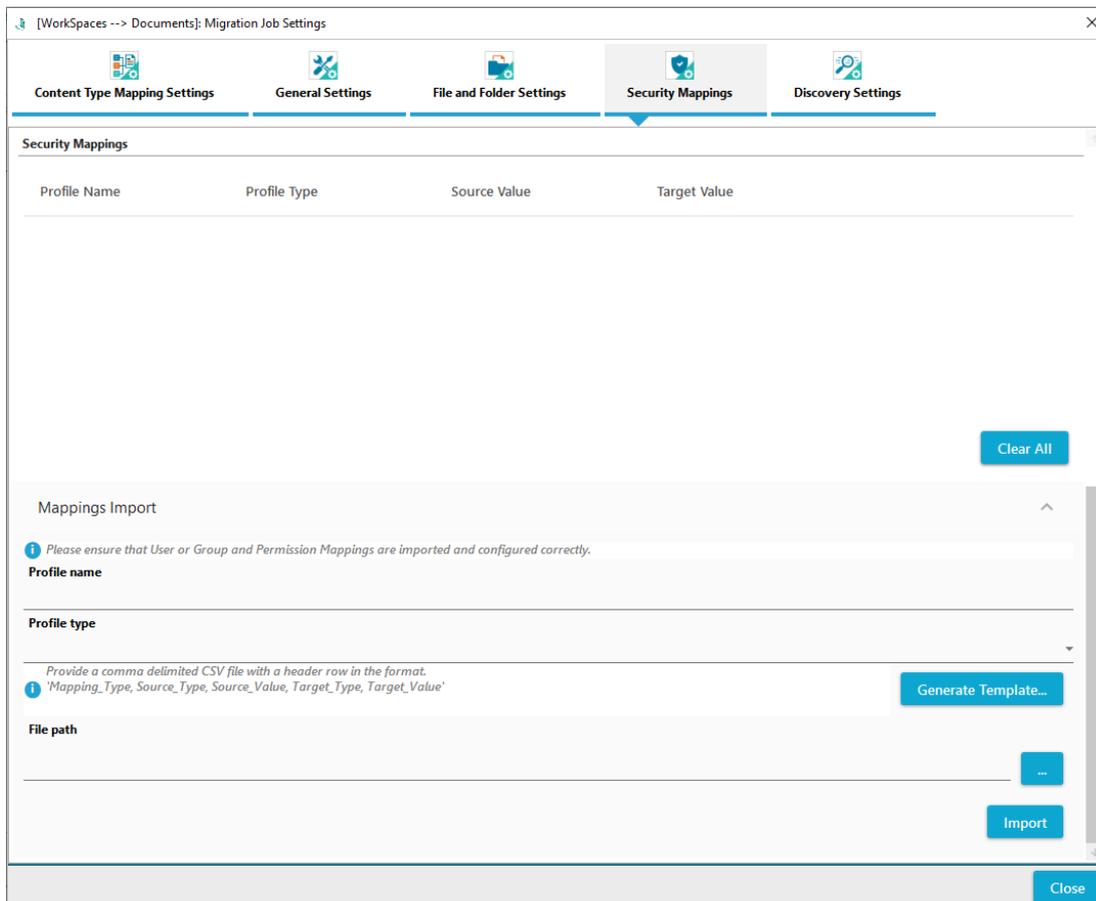
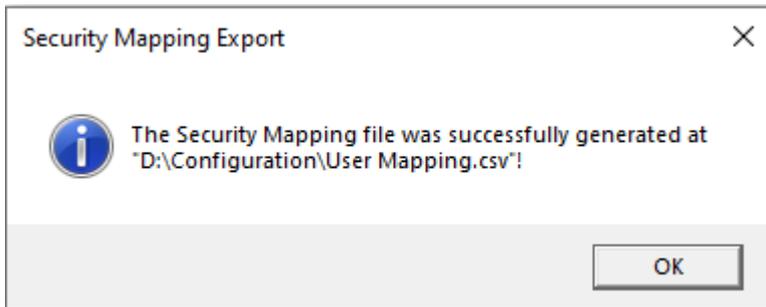


FIGURE 77 - GENERATE TEMPLATE OPTION



6. Then add target values in respective exported CSV mapping rows to complete the user, group and permission mappings.
7. The CSV should contain columns with a header row in the format:

Mapping\_Type, Source\_Type, Source\_Value, Target\_Type, Target\_Value

FIGURE 78 - SAMPLE USER MAPPINGS

Mapping_Type	Source_Type	Source_Value	Target_Type	Target_Value
User	User	admin	User	admin@proventeq.com
User	User	owner	User	owner@proventeq.com
User	User	report_user	User	reportuser@proventeq.com

FIGURE 79 - SAMPLE GROUP MAPPING

Mapping_Type	Source_Type	Source_Value	Target_Type	Target_Value
Group	Group	Express_User	Group	Express User Group
Group	Group	Admin Group	Group	Administrator Group
Group	Group	Members Group	Group	Migration QA Members

FIGURE 80 - SAMPLE PERMISSION MAPPING

Mapping_Type	Source_Type	Source_Value	Target_Type	Target_Value
Permission	AccessRights	FullControl:AccessPermit	PermissionLevel	Full Control
Permission	AccessRights	Delete:AccessPermit	PermissionLevel	View Only
Permission	AccessRights	Read:AccessPermit	PermissionLevel	Read
Permission	AccessRights	Write:AccessPermit	PermissionLevel	Edit

Please note that the sample User Mapping file is included in Proventeq Migration Accelerator installation directory (typically C:\Program Files\Proventeq\Proventeq Migration Accelerator\SampleFiles)

8. Click on “Browse” button  to select comma delimited CSV file of respective mapping.
9. Finally, one need to click on “Import Mappings” button  which will import all the values in the spreadsheet and display the respective mappings in “Mappings” pane.

FIGURE 81 - SECURITY MAPPINGS SCREEN – USER MAPPINGS

[WorkSpaces --> Documents]: Migration Job Settings

Content Type Mapping Settings    General Settings    File and Folder Settings    **Security Mappings**    Discovery Settings

**Security Mappings**

Profile Name	Profile Type	Source Value	Target Value
User	User	admin	emily@Proventeq.biz
User	User	Doc_User	don@Proventeq.biz
User	User	Report_User	tblair@Proventeq.biz

[Clear All](#)

Mappings Import ^

**i** Please ensure that User or Group and Permission Mappings are imported and configured correctly.

**Profile name**  
User

**Profile type**  
User

**i** Provide a comma delimited CSV file with a header row in the format.  
'Mapping\_Type, Source\_Type, Source\_Value, Target\_Type, Target\_Value'

[Generate Template...](#)

**File path**  
D:\Configuration\User Mapping.csv ...

[Import](#)

[Close](#)

FIGURE 82 - SECURITY MAPPINGS SCREEN – GROUP MAPPINGS

[WorkSpaces --> Documents]: Migration Job Settings

Content Type Mapping Settings    General Settings    File and Folder Settings    **Security Mappings**    Discovery Settings

**Security Mappings**

Profile Name	Profile Type	Source Value	Target Value
User	User	admin	emily@Proventeq.biz
User	User	Doc_User	don@Proventeq.biz
User	User	Report_User	tblair@Proventeq.biz
Group	Group	Express_Users	Express_Users
Group	Group	Admin_Group	Admin_Group

Clear All

**Mappings Import**

*Please ensure that User or Group and Permission Mappings are imported and configured correctly.*

**Profile name**  
Group

**Profile type**  
Group

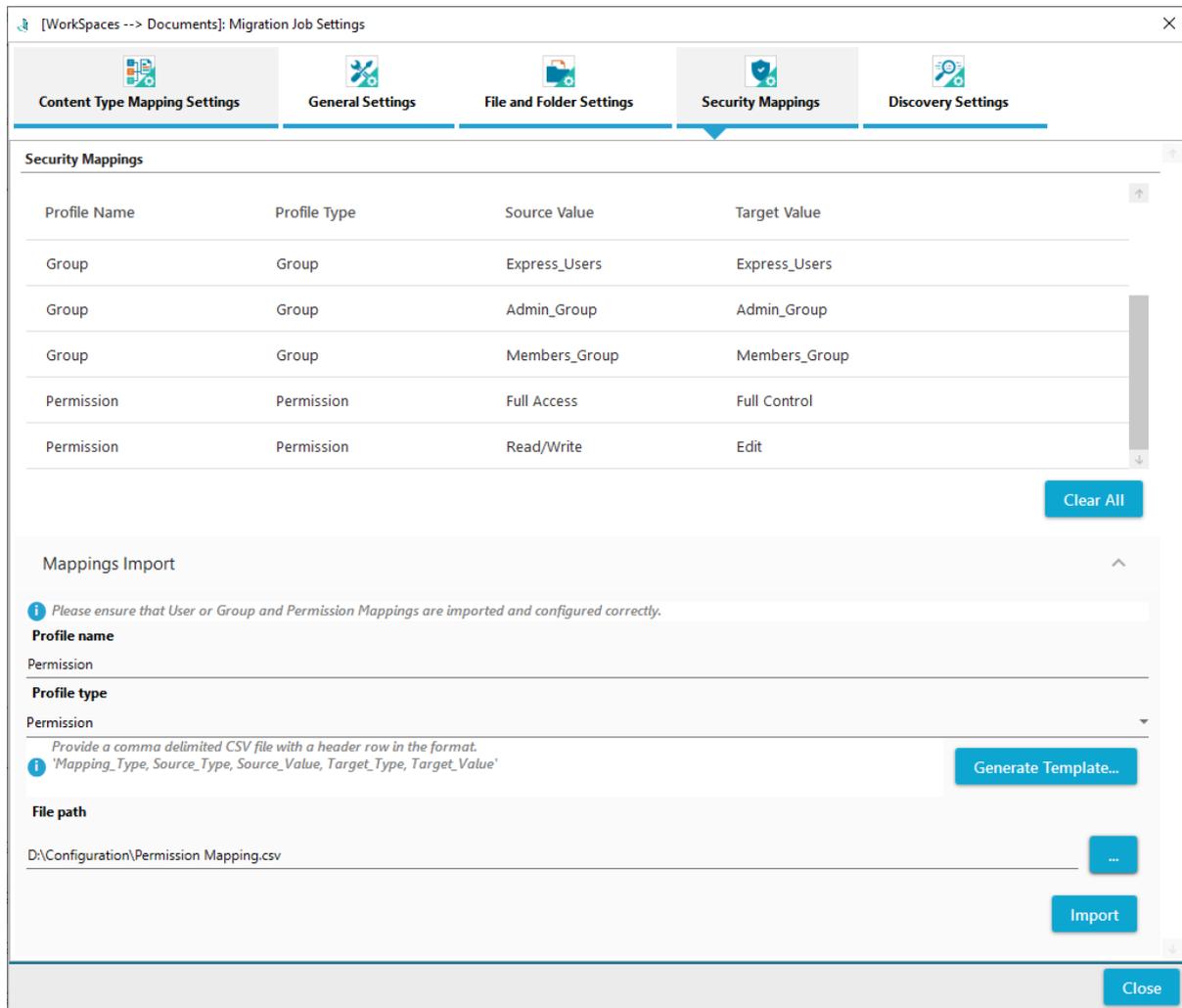
*Provide a comma delimited CSV file with a header row in the format.  
'Mapping\_Type, Source\_Type, Source\_Value, Target\_Type, Target\_Value'*

**File path**  
D:\Configuration\Grup Mapping.csv

Generate Template...    Import

Close

FIGURE 83 - SECURITY MAPPINGS SCREEN – PERMISSION MAPPINGS

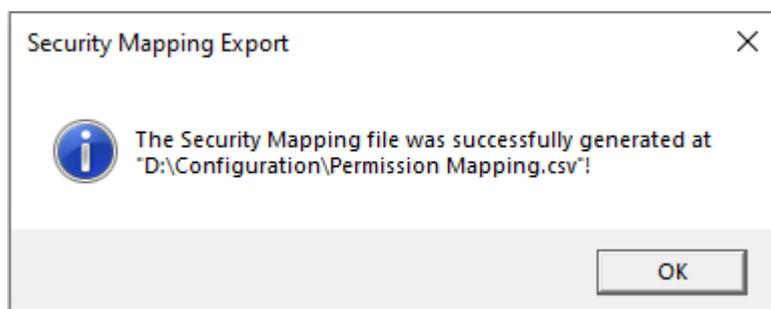


The screenshot shows the 'Security Mappings' tab in the 'Migration Job Settings' application. The interface includes a navigation bar with tabs for 'Content Type Mapping Settings', 'General Settings', 'File and Folder Settings', 'Security Mappings', and 'Discovery Settings'. The 'Security Mappings' section contains a table with the following data:

Profile Name	Profile Type	Source Value	Target Value
Group	Group	Express_Users	Express_Users
Group	Group	Admin_Group	Admin_Group
Group	Group	Members_Group	Members_Group
Permission	Permission	Full Access	Full Control
Permission	Permission	Read/Write	Edit

Below the table is a 'Clear All' button. The 'Mappings Import' section includes a warning message: 'Please ensure that User or Group and Permission Mappings are imported and configured correctly.' It features input fields for 'Profile name' (containing 'Permission') and 'Profile type' (set to 'Permission'). A 'Generate Template...' button is present, along with a 'File path' field containing 'D:\Configuration\Permission Mapping.csv' and an 'Import' button. A 'Close' button is located at the bottom right of the window.

FIGURE 84 - INFORMATION MESSAGE FOR SECURITY MAPPING



The screenshot shows a 'Security Mapping Export' dialog box with a close button (X) in the top right corner. It contains an information icon (i) and the following text: 'The Security Mapping file was successfully generated at "D:\Configuration\Permission Mapping.csv"!'. An 'OK' button is located at the bottom center of the dialog.

PMA will display above information message to import the correct combination of mappings to configure it correctly.

## 5.5.8. Discovery Settings

Proventeq Migration Accelerator allows Users to discover item based on the criteria given in the discovery filter.

### 5.5.8.1. Dynamic Filter

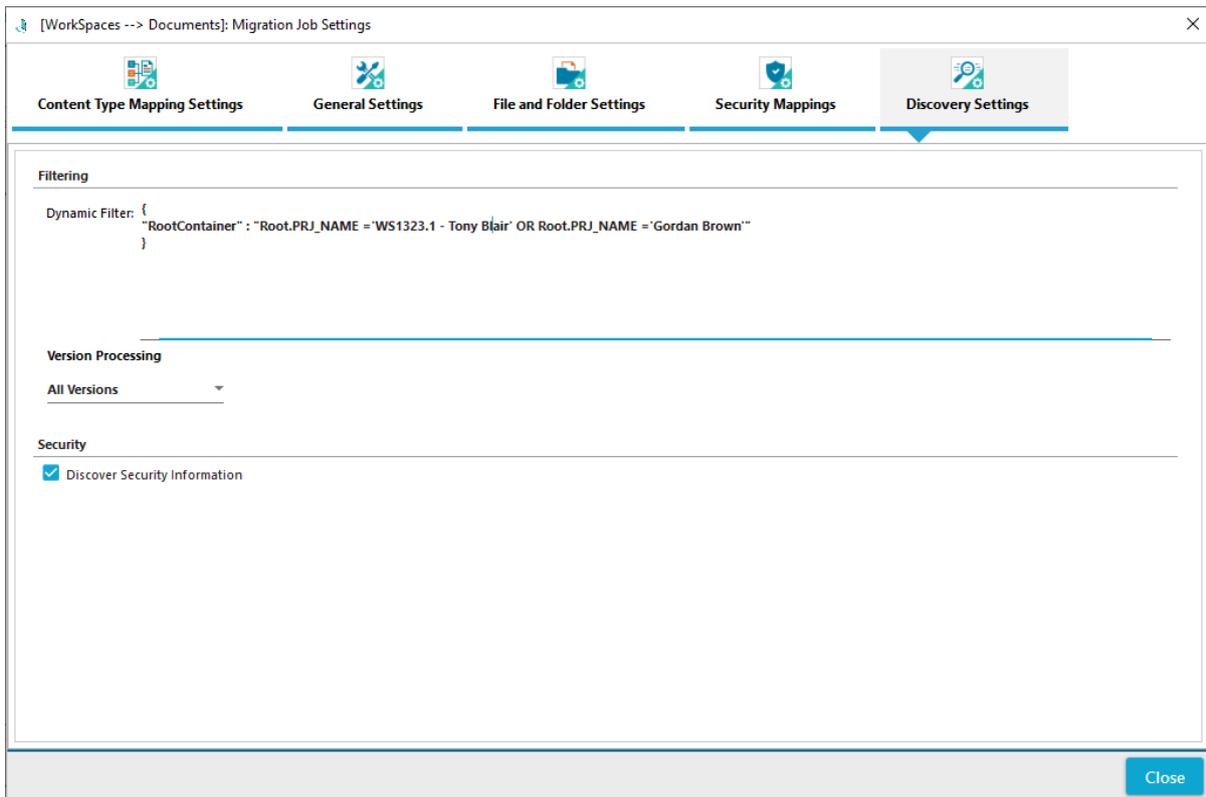
PMA allows to filter out documents and folders based on a variety of criteria like Root Container, Container & Items.

So, to discover specific workspace, documents and folders, user need to provide the SQL clause filter string as explained below:

Filter Type	Explanation	Filter String
ROOT CONTAINER (WORKSPACE)	TO FILTER PARTICULAR WORKSPACE	<code>{"RootContainer" : "Root.PRJ_NAME = '&lt;Workspace Name&gt;'"} </code>
	TO FILTER MULTIPLE WORKSPACES	<code>{"RootContainer" : "Root.PRJ_NAME in ('&lt;Workspace Name&gt;', '&lt;Workspace Name2&gt;')"} </code>
CONTAINER	TO FILTER SPECIFIC FOLDER.	<code>{"RootContainer" : "Root.PRJ_NAME = '&lt;Workspace Name&gt;'", "Container" : "(Container.ItemName = '&lt;Folder Name&gt;' AND Container.EntityType = 'Folder')"} </code>
ITEM	TO FILTER SPECIFIC ITEM INSIDE THE SPECIFIC FOLDER.	<code>{"RootContainer" : "Root.PRJ_NAME = '&lt;Workspace Name&gt;'", "Container" : "(Container.ItemName = '&lt;Folder Name&gt;' AND Container.EntityType = 'Folder')", "Item" : "Item.DocName = '&lt;Document Name&gt;'"} </code>

The **<Workspace Name>**, **<Folder Name>** and **<Document Name>** should be replaced with the respective names as mentioned in above query.

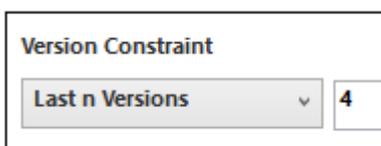
FIGURE 85 - DYNAMIC FILTER



### 5.5.8.2. Version Constraint

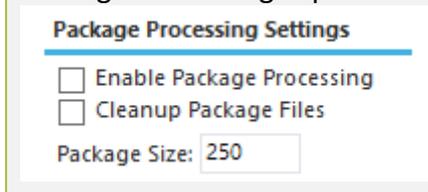
PMA supports version filtering by retrieving the latest top N versions from source system to limit the versions that are migrated to target system.

If user want to discover only the latest top N versions, they just need to put value in text box as shown below.



For example, if Last n versions value is 4, then only the latest 4 versions of documents will be discovered and migrated.

**Note:** As SharePoint Online does not supports branched versions (like **4.1.1.0**), so WorkSite branched versions will fail in package processing. To process these failures, one need to reprocess them without Package Processing option by removing “Enable Package Processing” option in General Settings tab as shown below.



Also make sure below application setting is enabled to process the branched versions after disabling package processing.

```
<add key="SharePoint.ProcessMinorVersions" value="True" />
```

### 5.5.8.3. Security

To discover the document and folder level security, users need to select the Discover Security Information checkbox under Security heading. This ensure all the security information of source system is captured.

FIGURE 86 - SECURITY SETTINGS

Security
<input checked="" type="checkbox"/> Discover Security Information

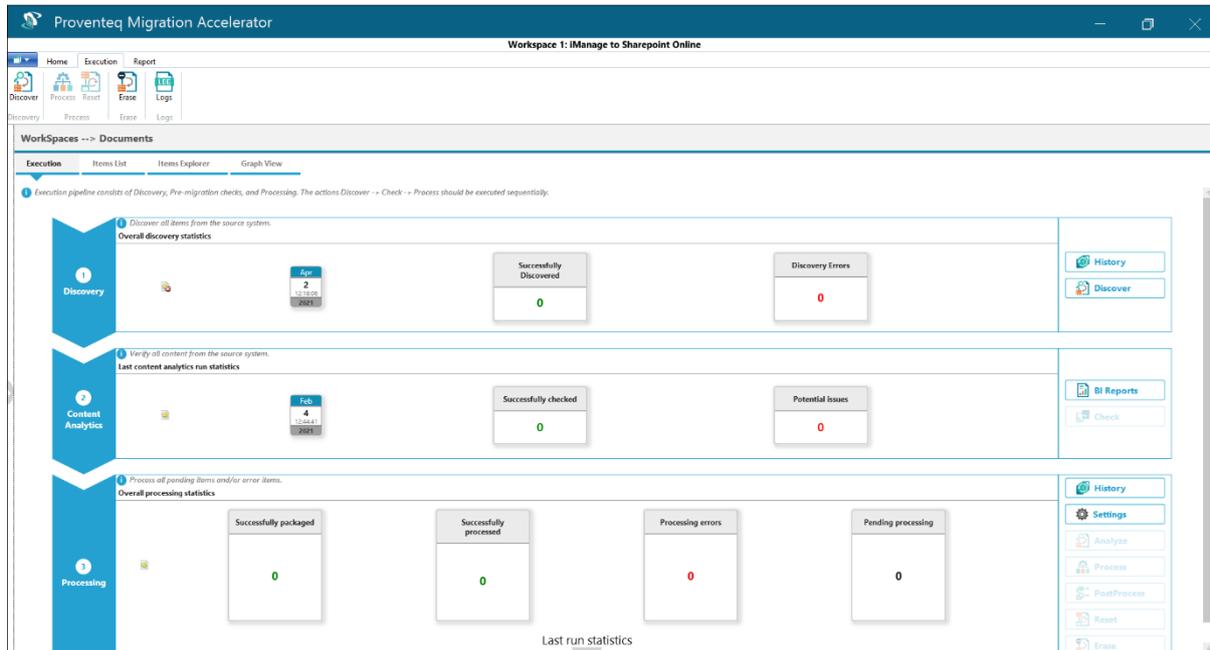
## 6. EXECUTION

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The Execution view is divided into 2 sections

1. **Migration Tasks** – where all the user created migration tasks are visible with the number of items to be processed in each task. The count will be 0 prior to discovery but will show the total items discovered post discovery.
2. **Task details** – This section shows the details of the selected migration task. This section is split into four distinct areas
  - a. **Execution** - This Execution screen parted into:
    - i. *Discovery* - to discover what is on the source system. This is the first step in migration. Once the item discovery is complete, the items can be verified by clicking on “Items Explorer” button.
    - ii. *Pre-Migration Check* - to check erroneous items/contents from discovery
    - iii. *Process* - to process the items and load them onto the target system. This step can be executed only after the Discovery has been run at least once and at least one item has been discovered.
    - iv. *Post Process* – to perform post-processing actions on items to be migrated. This will be mainly used to process shortcut links or resolve links based on items migrated in Process stage.
    - v. *Reset* – To reset the items uploaded to target system, so that they can be reprocessed.
    - vi. *Erase* – To delete the items migration-staging database. Ideally, it should be done after Reset if items are processed. After Erase the user has to redo Discovery of the items in order to migrate them.
  - b. **Items List**
  - c. **Items Explorer**
  - d. **Show Graph**

FIGURE 87 - EXECUTION SCREEN

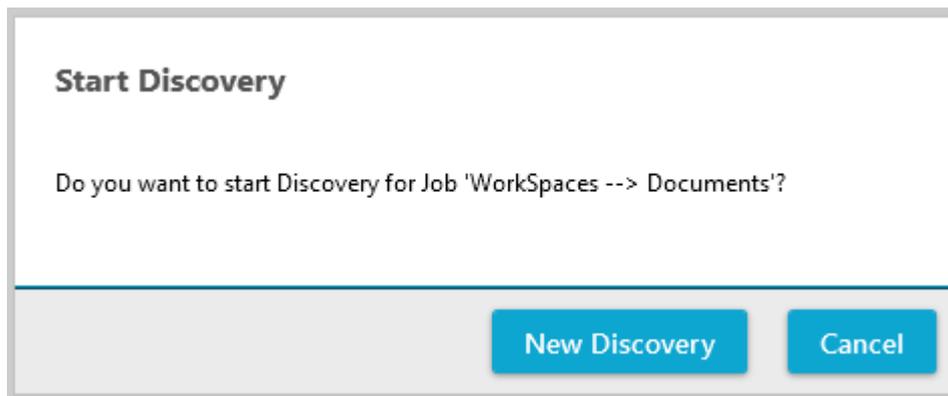


## 6.1. Discovery and Analysis

### 6.1.1. Discover Items

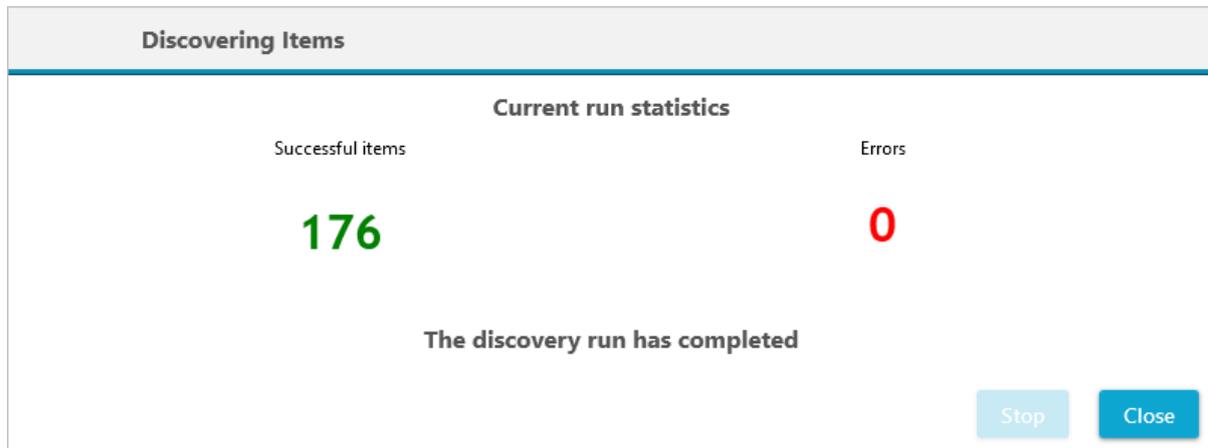
Select a migration task from the 'Migration Tasks' panel on the left. Click the "Discover" button in the 'Discovery' area.

FIGURE 88 - START DISCOVERY FOR SOURCE ITEMS



If the task is being discovered for the first time, then the user can click on "New Discovery" Migration Accelerator will start discovering items from the source system and record their status in the staging database repository.

FIGURE 89 - DISCOVERY FOR SOURCE ITEMS



*Note: Any modification done to source items after discovery is done will not reflect in Migration Accelerator unless the Discovery is run again. Once a Discovery has been run, the subsequent Discovery runs will add new items and identify the deleted/renamed items. Subsequent Processing will then apply the changes.*

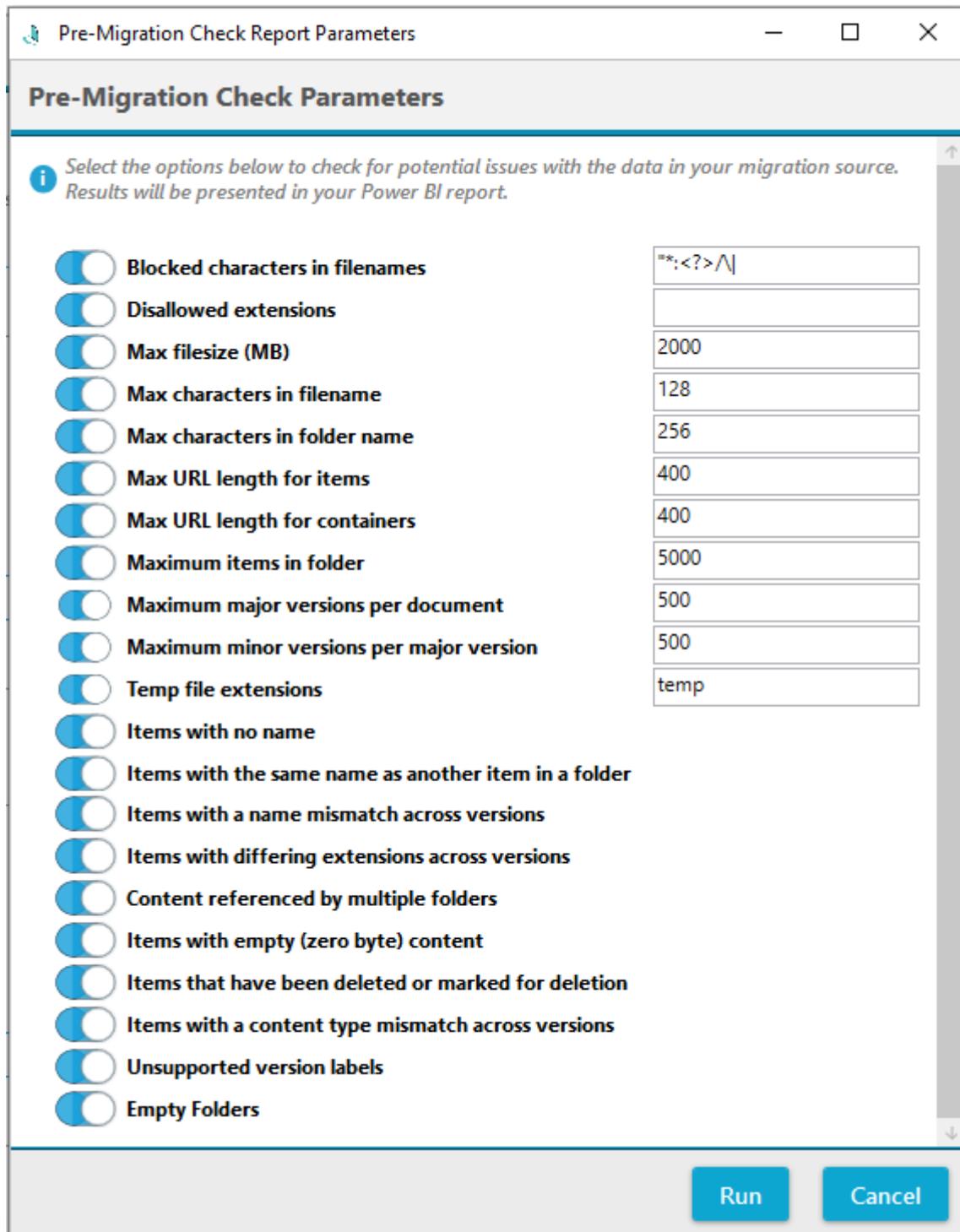
*Note: If one would like to discover deleted documents in iManage then below application setting needs to be used. Where user can change to **True** to discover deleted documents.*

**<add key="Worksite.DiscoverDeletedItems" value="False"/>**

## 6.1.2. Pre-migration Checks

Pre-migration Check feature ensure and confirms erroneous items before actual migration. Users can click on Run button to start the pre-migration check for selected task.

FIGURE 90 - PRE-MIGRATION CHECKS



**Pre-Migration Check Parameters**

Select the options below to check for potential issues with the data in your migration source. Results will be presented in your Power BI report.

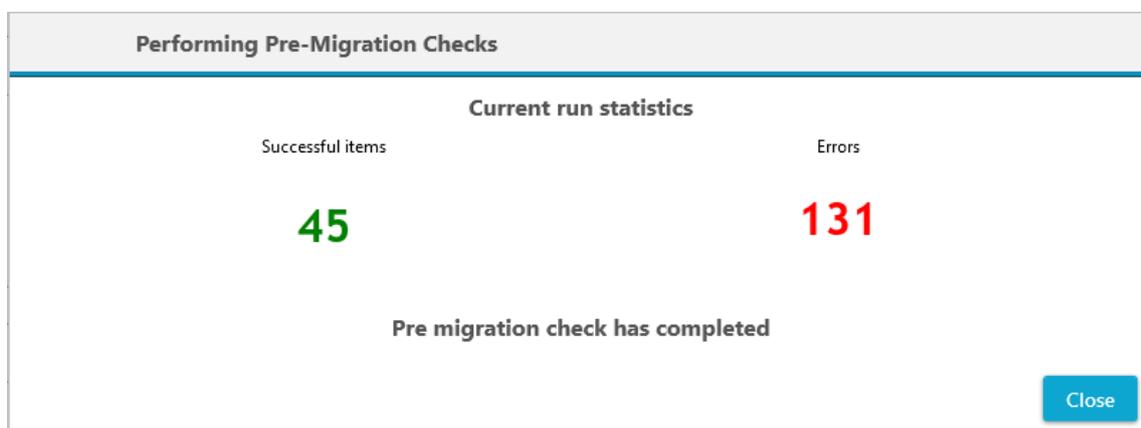
- Blocked characters in filenames
- Disallowed extensions
- Max filesize (MB)
- Max characters in filename
- Max characters in folder name
- Max URL length for items
- Max URL length for containers
- Maximum items in folder
- Maximum major versions per document
- Maximum minor versions per major version
- Temp file extensions
- Items with no name
- Items with the same name as another item in a folder
- Items with a name mismatch across versions
- Items with differing extensions across versions
- Content referenced by multiple folders
- Items with empty (zero byte) content
- Items that have been deleted or marked for deletion
- Items with a content type mismatch across versions
- Unsupported version labels
- Empty Folders

**Run** **Cancel**

This feature performs the following checks against SharePoint Site Collection configuration based on the rule:

1. **Blocked Characters in Filenames** – Checks for illegal characters in source file/folder name
2. **Disallowed Extensions** – Checks whether the file type is blocked by SharePoint/SharePoint Online configuration. Extensions such as .asp, .hta, .lnk etc will result in an error.
3. **Max File Size** – Checks whether the file size exceeds the maximum file size for SharePoint/SharePoint Online.
4. **Max characters in filename** – Checks whether the length of item name exceeds the SharePoint/SharePoint Online limits
5. **Max characters in folder name** - Checks whether the length of folder name exceeds the SharePoint/SharePoint Online limits
6. **Max URL length for items** - Checks whether the length of parent container exceeds the SharePoint 2013 limits. Container length is associated with folder (name) length only.
7. **Max URL length for containers** - URL length of the item with or more than +400 chars will be excluded from load and will result as erroneous item.
8. **Maximum items in folder** – Checks whether the folder contains more items than what is permitted within SharePoint/SharePoint Online Document Library folders.
9. **Items with no name** - Checks whether the Item Name is blank.
10. **Items with same name as another item in a folder**- Checks whether the Item Name is duplicate.
11. **Items with name mismatch across version** - Checks whether the versions Item Name is different.
12. **Items with differing extensions across versions** – Checks whether the versions Item Name extension is different.
13. **Content referenced by multiple folders** Check whether the Item is present in multiple folders.
14. **Items with empty (zero byte) content** - Checks whether the Item size is zero KB.
15. **Items that have been deleted or marked for deletion** – Checks whether the Item is marked as deleted in the source system.
16. **Items with content type mismatch across versions** – Checks whether the versioned items having different content type.

FIGURE 91 - PRE-MIGRATION CHECK WINDOW



### 6.1.3. Power BI Reports

Power BI Reports harnesses the power of Microsoft Power BI and the wealth of information stored in the Migration Accelerator staging database to provide intuitive and interactive drill down reports.

To view the reports for a task, select the “Power BI Report” from the ‘Select a Report’ dropdown. Select the task for which the reports need to be generated and click ‘Run’. This will launch Power BI with information related to that particular task. To view a complete report for the entire source system, run this report on a task that has the source mapped at the top level.

#### 6.1.3.1. Power BI Desktop Install

A prerequisite for this report is the installation of Microsoft Power BI Desktop. Install Microsoft *Power BI Desktop* from the Microsoft site <https://powerbi.microsoft.com/en-us/desktop/>

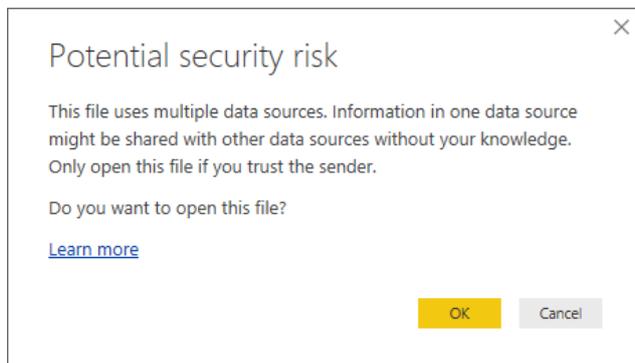
Install the product in its default location. If the product is installed in a custom location, please contact Proventeq support for help with configuring the Migration Accelerator for custom path.

#### 6.1.3.2. Set up security

When the file is launched for the first time the privacy level dialog comes up.

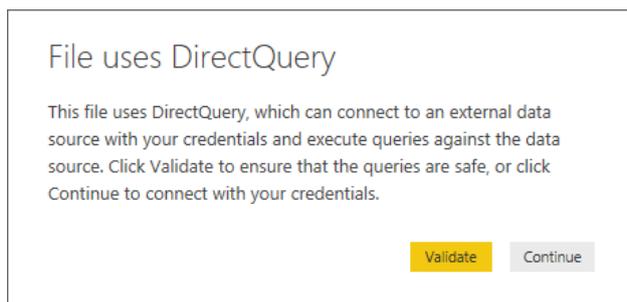
1. Click ok to trust the sender.

FIGURE 92 - POWER BI POTENTIAL SECURITY RISK



2. Click Validate to continue with respective credentials.

FIGURE 93 - CLICK VALIDATE SO FILE USES DIRECT QUERY.



3. Select the file drive and the database to have the same privacy level, e.g. Organizational

FIGURE 94 - POWER BI – SECURITY SETUP



### 6.1.3.3. General Distribution of Content

This report shows the general distribution of content within the system. This includes content type distribution, mime type distribution, version documents and documents under folders.

FIGURE 95 - POWER BI - GENERAL CONTENT DISTRIBUTION

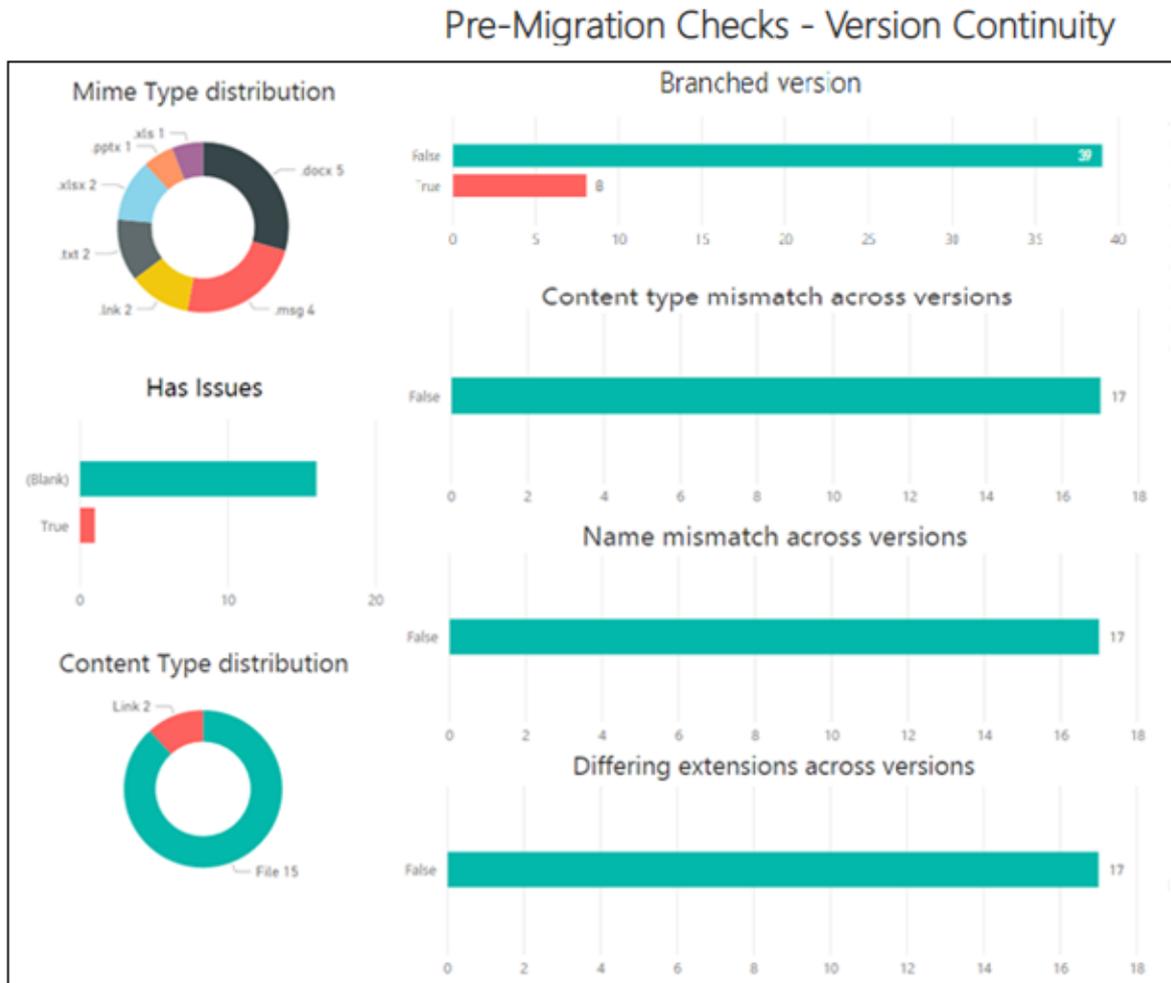


To navigate different reports using Navigation, Please use CTRL+CLICK on the menu button on the left Menu panel.

### 6.1.3.4. Pre-Migration Checks- Version Continuity

Power BI Version Continuity Reports shows the items which are qualified in different categories where Proventeq will apply certain rule and configuration to resolve these target constraints.

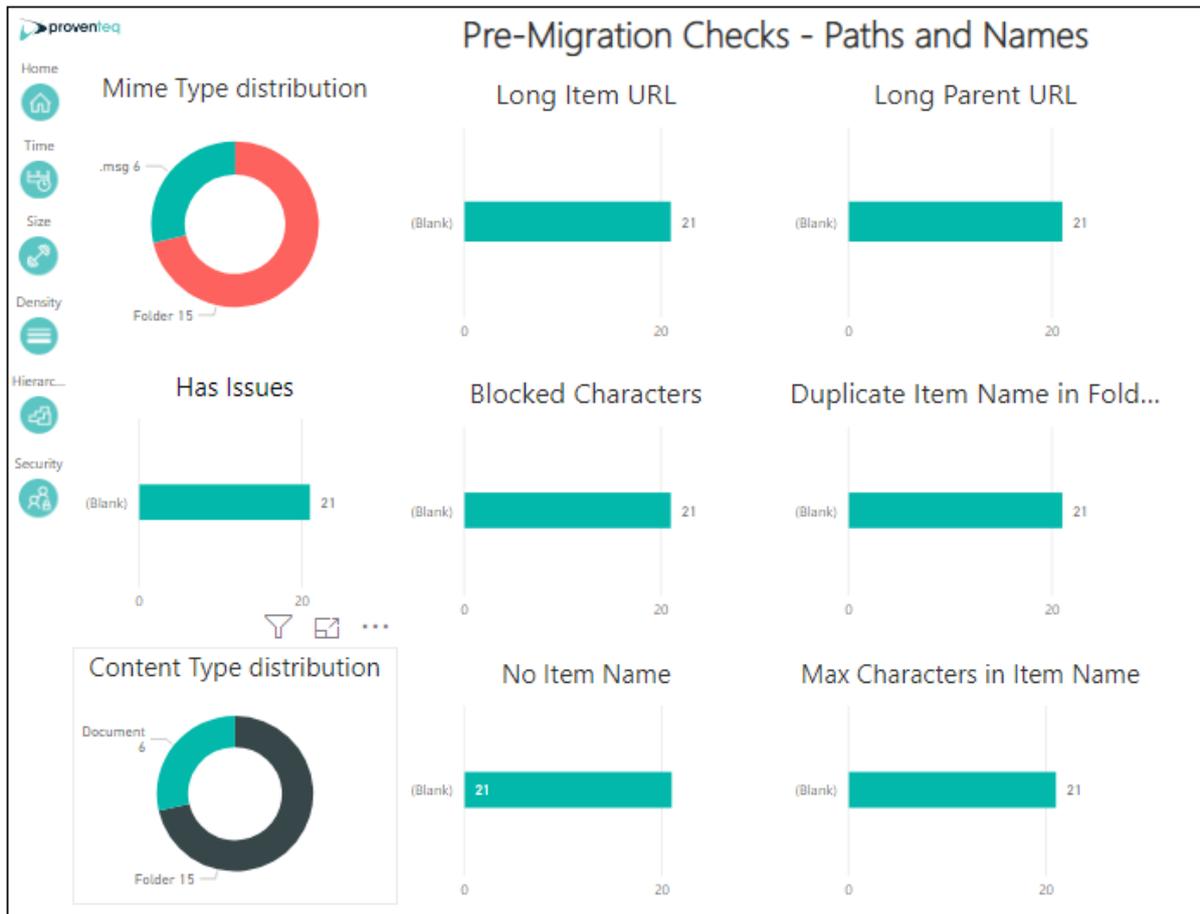
FIGURE 96 - POWER BI – PRE-MIGRATION CHECK – VERSION CONTINUITY



### 6.1.3.5. Pre-Migration Checks- Paths and Names

Power BI Paths and Names Reports shows the items which are qualified in different categories where Proventeq will apply certain rule and configuration to resolve these target constraints.

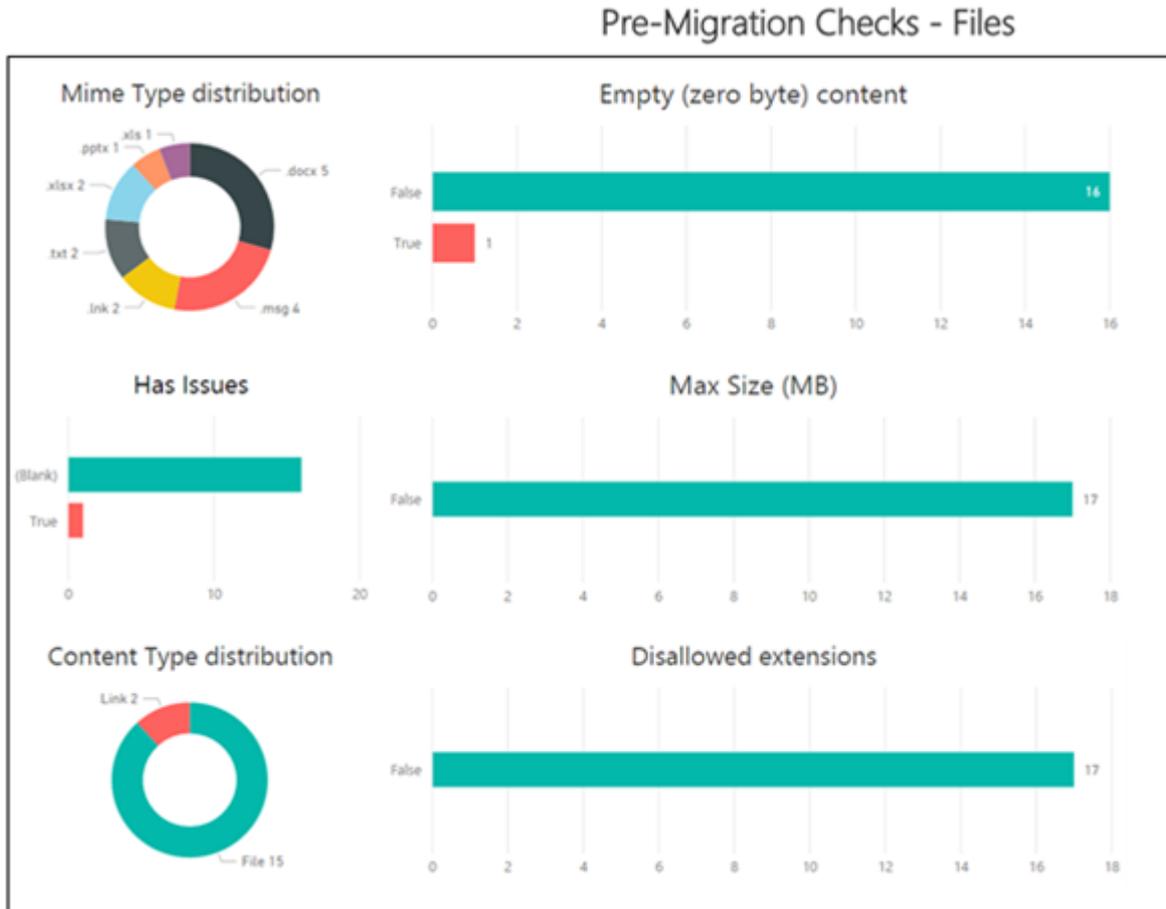
FIGURE 97 - POWER BI – PATHS AND NAMES



### 6.1.3.6. Pre-Migration Check - Files

Power BI Files Items Reports shows the items which are qualified in different categories where Proventeq will apply certain rule and configuration to resolve these target constraints.

FIGURE 98 - POWER BI – PRE-MIGRATION CHECK – FILES

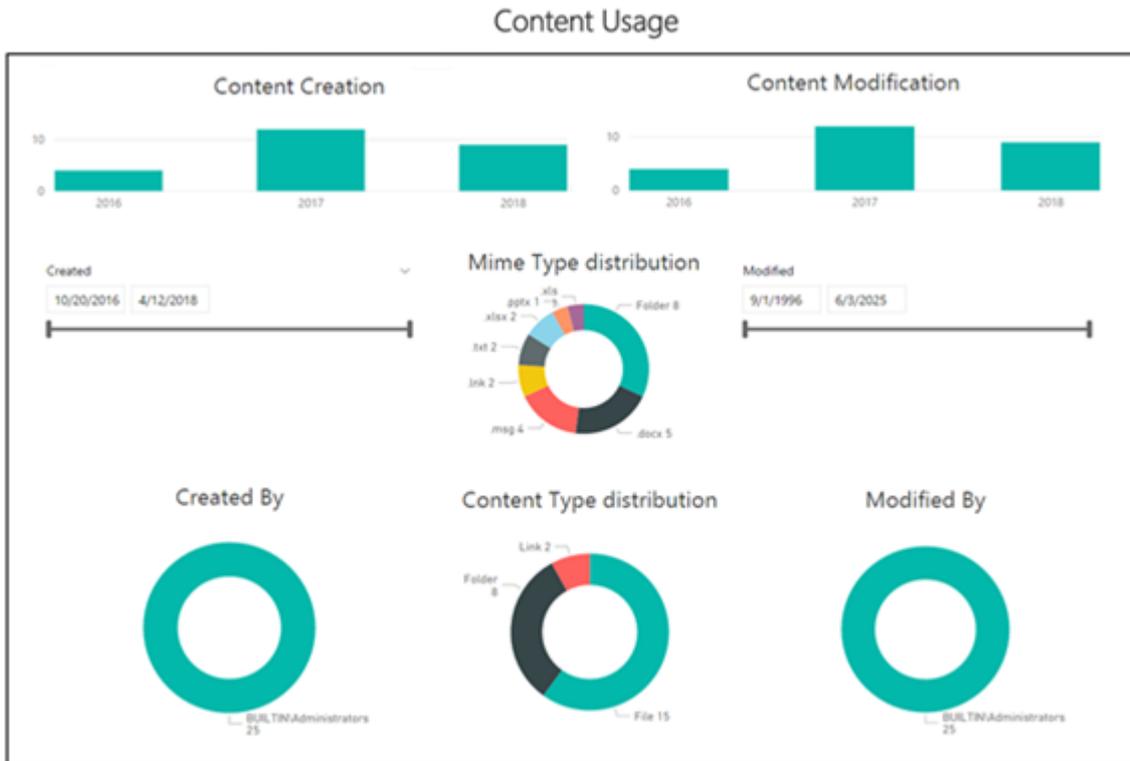


**Note:** This report will highlight Max Sized files, as Migration Accelerator supports migration up to 15 GB sized file.

### 6.1.3.7. General Usage of Content

Power BI usage report shows the history of documents such as- when it has been created, modified, created date range, modified date range, created by and modified by users.

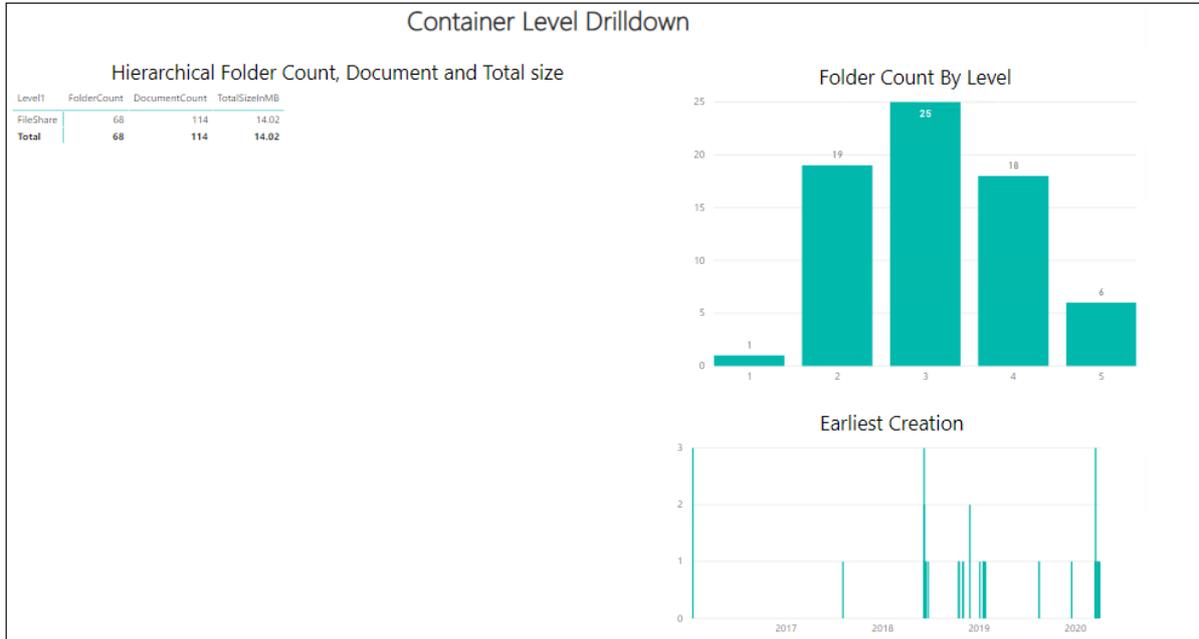
FIGURE 99 - POWER BI – USAGE OF CONTENT



### 6.1.3.8. Container Analysis

Power BI Container report shows the hierarchy of the Source system.

FIGURE 100 - POWER BI – CONTAINER



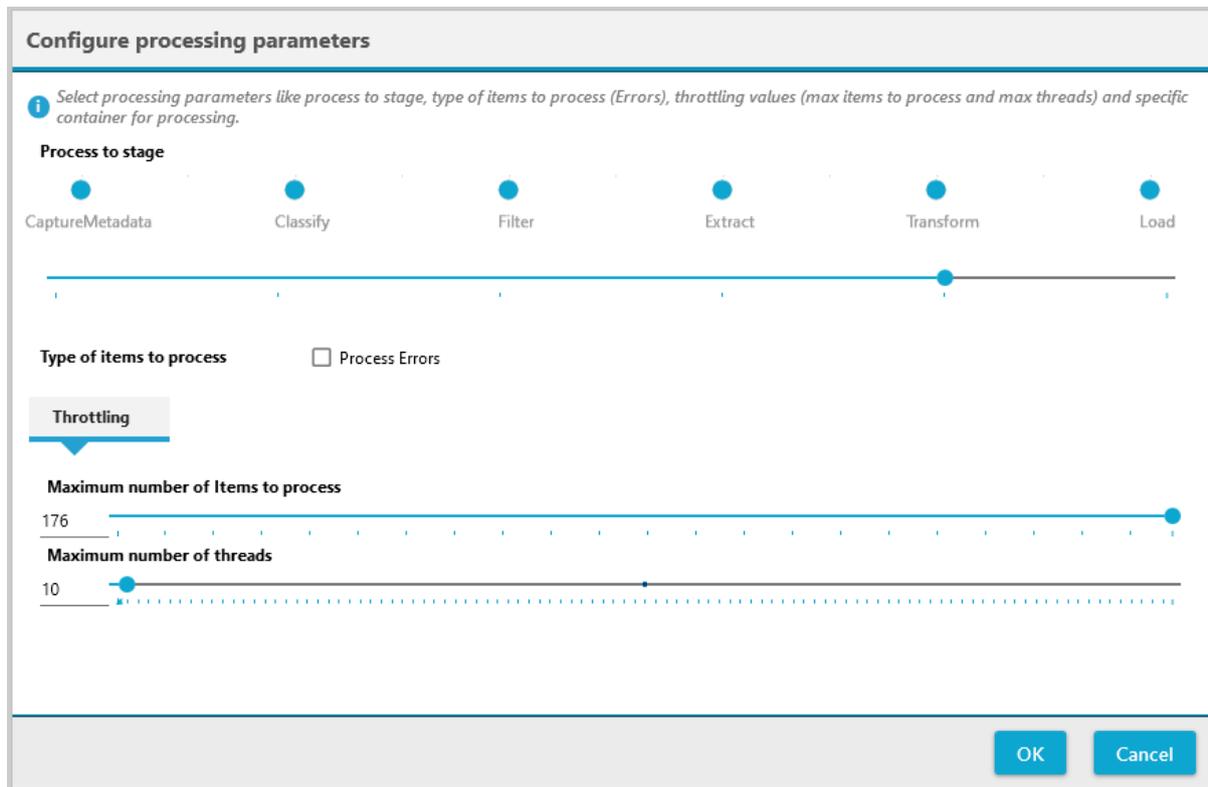
As container analysis is bit heavy and complex operation, it's been disabled by default. But one can enable it by changing below application setting.

```
<add key="PerformContainerAnalysis" value="false" />
```

## 6.2. Processing

After successful discovery of all items present in the source system, click the "Process" button in the 'Processing area' in order start migration of content. It will launch below processing parameters popup window to select different processing parameters.

FIGURE 101 - CONFIGURE PROCESSING PARAMETERS



**Configure processing parameters**

Select processing parameters like process to stage, type of items to process (Errors), throttling values (max items to process and max threads) and specific container for processing.

**Process to stage**

CaptureMetadata    Classify    Filter    Extract    **Transform**    Load

**Type of items to process**     Process Errors

**Throttling**

**Maximum number of Items to process**

176

**Maximum number of threads**

10

OK    Cancel

### 6.2.1. Pre-Processing Check

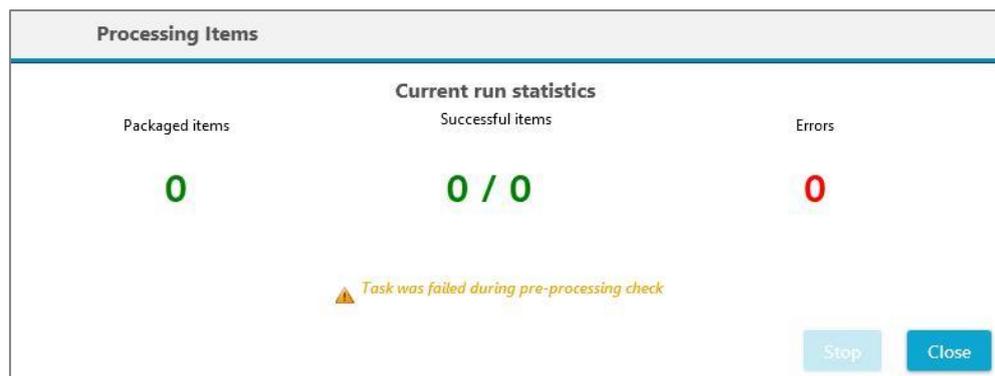
Migration Accelerator allows to perform any custom pre-processing check before we start processing or migration.

Follow the steps given below to add any custom pre-processing logic before starting the processing:

1. Open PowerShell folder from installation location "**C:\Program Files\Proventeq\Proventeq Migration Accelerator\PowerShell**"
2. Open default module file **Proventeq.MigrationAccelerator.DefaultModule.psm1**.
3. Locate PowerShell function **Invoke-PVQPreProcessingCheck** and refer below details to modify it as per pre-processing check requirement.
  - Update this function to have custom PowerShell logic to perform pre-processing checks. E.g. Perform target system readiness check or Perform transformation verifications by calling SQL script or procedure etc.

- This function has access to **TargetStage** parameter (selected from above **Processing to stage** slider option) based on which one can write a custom logic. E.g. Execute custom logic only if target stage is Load, otherwise skip it.
- This function should return **true** if pre-processing check is successful to continue the processing.
- This function should return **false** if pre-processing check is failed to stop the processing.

FIGURE 102 - PRE-PROCESSING CHECK FAILURE



4. Save and Close file **Proventeq.MigrationAccelerator.DefaultModule.psm1**.

## 6.2.2. Process up to Stage

This popup screen will allow select below processing parameters before starting migration of content:

1. **Process to stage** – The migration goes through below processing stages, so one has to select appropriate target processing stage from below list:
  - a. Capture Metadata** – This stage captures metadata of all the items from source system.
  - b. Classify** – This stage performs content classification of all items based on content type mapping defined in migration task settings. This stage may retrieve content if required in order to perform content classification.
  - c. Filter** – This stage applies item filter rule in order to skip certain items in migration.
  - d. Extract** – This stage performs an extract operation on source metadata if any.
  - e. Transform** – This stage mainly transforms source metadata to target metadata by executing different metadata mapping rules. This stage may retrieve content if required in order to perform transformation.
  - f. Load** – This stage retrieves content if not obtained in earlier stages and performs upload of content and metadata on target system.

**Note:** To process internal links within document it is mandatory to do transformation first then load.

## 2. Type of items to process

This option allows to select type of items to process. E.g. Whether to process Error items, which may have failed in earlier processing attempts.

## 3. Throttling parameters

This section allows to select below throttling parameters to be referred during processing.

a. Maximum number of items to process – Allows to select maximum number of items to process in current processing run.

b. Maximum number of threads – Allows to select maximum number of threads to be created to perform parallel processing in order to achieve necessary through-put. Once all processing parameters are selected, click on “**OK**” button to start the migration or click “**Cancel**” button to cancel the processing.

Clicking on “**OK**” button, the Migration Accelerator will start processing each item based on the mapping rules defined. It will display the progress of migration in below screen.

FIGURE 103 - PROCESSING ITEMS COUNT

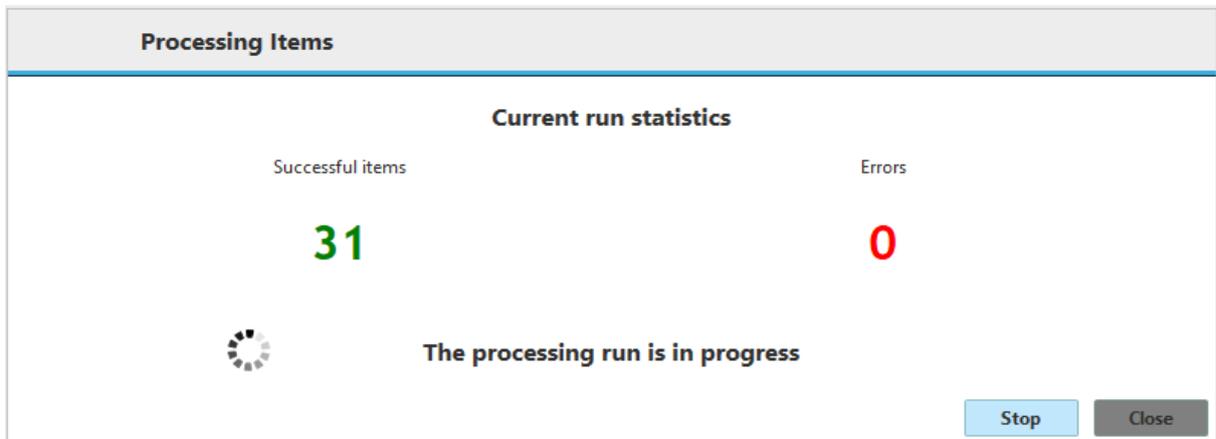
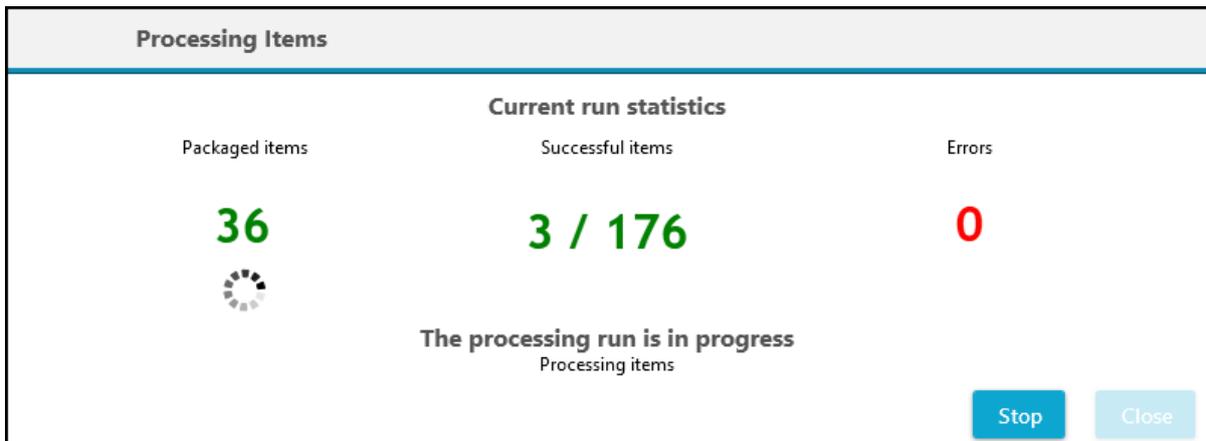


FIGURE 104 - PROCESSING COUNT OF SOURCE ITEMS USING PRIME API



Please note that for errors to avoid retransformation of items metadata. We have added below app setting, which you can change to **False** to avoid retransformation during errors processing for Load failed items.

```
<add key="Processing.ReTransformFailedItems" value="True"/>
```

Note: Added iManage API Authorization/Token throttling and caching configuration. Please refer below app settings to enable and configure iManage API throttling and caching mechanism. We would like to suggest to configure and test these settings in your Dev/Test environment before enabling on Production environment.

**<add key="Worksite.ThrottlingRetryCount" value="3"/>** - No. of retries in case of failures while getting authorisation token.

**<add key="Worksite.NoOfSessionAllowed" value="-1"/>** - No. of sessions allowed in caching queue. Negative value will disable the iManage caching and throttling mechanism.

**<add key="Worksite.MaxAgeFactor" value="24"/>** - Expiry time for authorisation token (in hours) after which it will be regenerated.

**<add key="Worksite.ConcurrentRequestOnOneToken" value="false"/>** -To allow concurrent requests on one token i.e. change this to True if you want to allow this.

### 6.2.3. Queue Processing

New queue processing mode allows user to perform faster transformation and load, as it uses in memory queue mechanism to process the items efficiently. To enable Queue processing mode, follow the steps given below:

1. Close Proventeq Migration Accelerator application if running.
2. Search and update below app setting in the application configuration file.

```
<add key="Processing.UseProcessingQueue" value="True" />
```

### 3. Launch Proventeq Migration Accelerator application

*Please note that Queue Processing setting would work only for SharePoint Site Collection level connections due to constraints imposed by Migration API and will be ignored for Tenant level connections. So, user will be able to get its performance benefits for Site Collection level connection and related migration tasks only.*

## 6.2.4. Post Processing

Post processing is the process where the user can perform post-processing actions (e.g. processing shortcut links) by clicking of Post Process button.

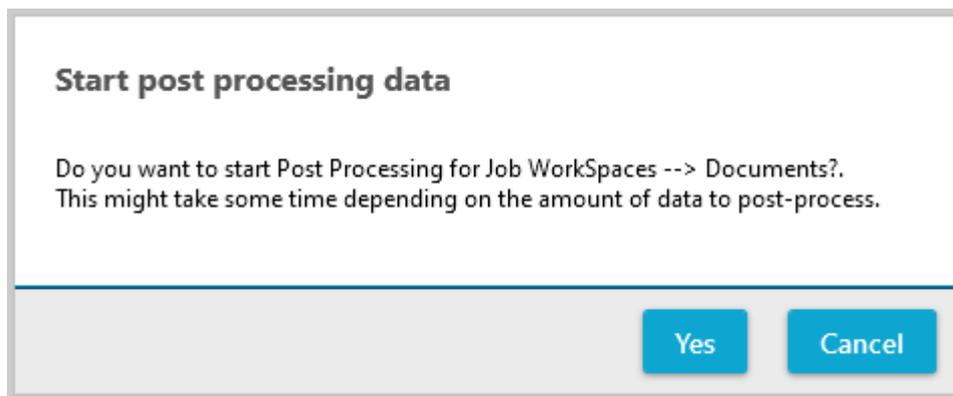
Pre-requisites:

5. Users should have completed with processing up to load stage and there should be some pending items or actions for post processing. E.g. on Items List tab users can see Status Message for the shortcut links as: “Link item skipped during load phase. These need to be processed using post load”.
6. Before attempting the Post Process for shortcut links, we have to make sure that necessary custom content type and metadata mappings are done. Refer section [5.4.4 Custom Content Type \(Source Classification\)](#)

Then can follow below steps to perform post processing:

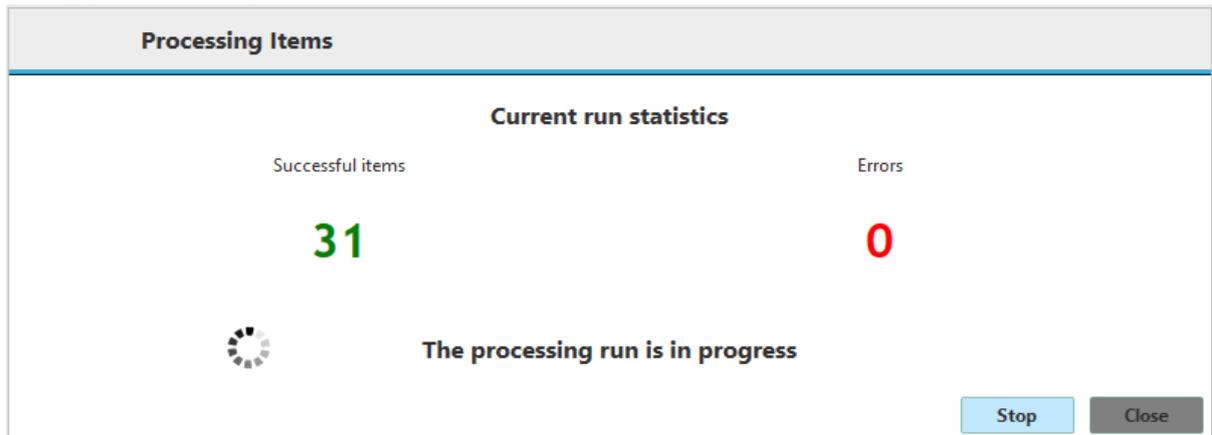
7. Click on the Post Process button to Post Process the shortcut links.
8. The system will show confirmation to start the post processing. Click on ‘Yes’ button.

FIGURE 105 - POST PROCESSING CONFIRMATION



9. After click on ‘Yes’ button Migration Accelerator will start performing post processing actions like processing the shortcut links. It will show success and failure count of post processing items.

FIGURE 106 - POST PROCESSING COUNT



- Once post process is completed, users can go to Items List tab and check the status of items being post processed. E.g., the shortcut links items will now show the status message as: *"File checked in successfully."*

### 6.2.5. Synchronization or Delta Processing

Proventeq Migration Accelerator supports one-way synchronization from iManage WorkSite to SharePoint/SharePoint Online.

If source contents are changed after task is discovered and/or processed, then user need to re-discover the same task to synchronize the updated items on the source system. Then users need to do pre-migration checks followed by processing and post processing on newly added or modified items. Please refer below table for different delta scenarios and expected results.

Sr. No.	Delta Scenario	Expected Result
1	New Folder is added	New Folder would be created on target location.
2	Folder is modified/renamed	New folder would be created in modified/renamed name and original folder will remain in the same target location, which is migrated earlier.
3	Folder is moved/re-parented to different location	New Folder would be created in moved/re-parent location and original folder will remain in the same target location which is migrated earlier.
4	Folder is deleted	Folder would not be deleted from target location.
5	New File is added	New File would be created on target location.
6	File is modified	Modified File would be created by deleting the original file in the target in the first delta processing

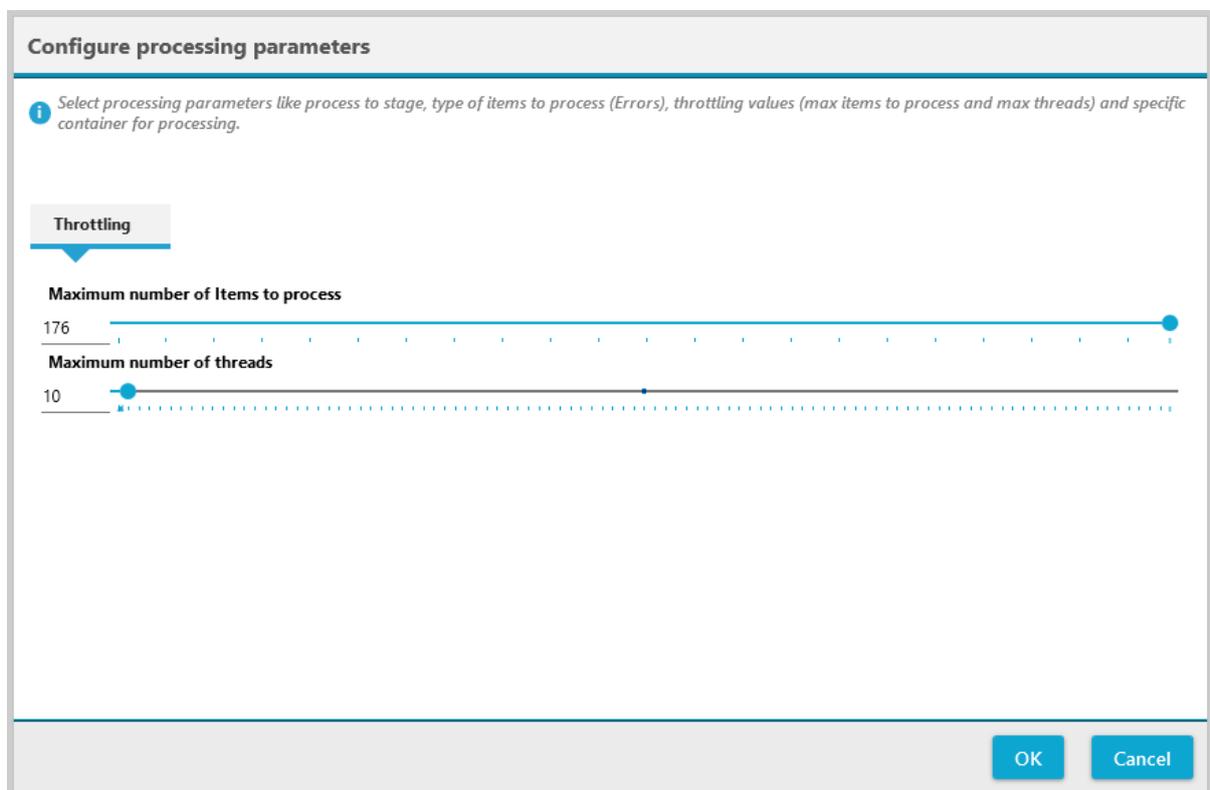
		attempt and then it will be migrated in subsequent attempt.
7	File is renamed	New file would be created in renamed name and original file will remain in the same target location which is migrated earlier.
8	File is moved/re-parented to different location	New file would be created in moved/re-parent location and original file will remain in the same target location which is migrated earlier.
9	Files is deleted	File would not be deleted from target location.

### 6.2.6. Reset Items

The 'Reset' functionality is available to remove items loaded on to the target system by Proventeq Migration Accelerator.

From the 'Processing' area, click the 'Reset' button. This will pop up a "Configure Processing Defaults" screen where users can select the item, thread, and click on "OK" button.

FIGURE 107 - RESET OF ITEMS



After clicking on "OK" button reset, reset process will remove all the items from target system.

FIGURE 108 - RESET TARGET ITEMS

**Processing Items**

---

**Current run statistics**

Successful items	Errors
<b>176</b>	<b>0</b>

**The reset run has completed**

Stop
Close

**Warning:** This will delete all the content loaded by Migration Accelerator and is not recoverable. Users will have to re-run the load. This will not delete any items that were not originally loaded by Proventeq Migration Accelerator.

## 6.2.7. Erase

Clicking on “Erase” button deletes all the discovered items related to the selected Migration Task from database. Any data loaded to target will remain as it is. “Erase” will not delete items from target system. Users may either require to “Reset” loaded items from target before clicking on “Erase” button or delete items from target manually, if “Erase” has already been done.

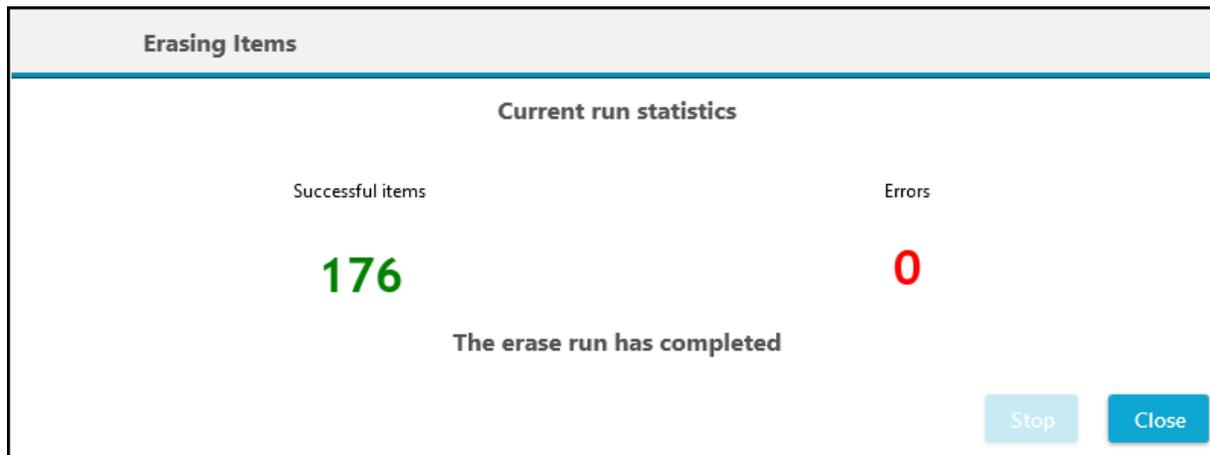
FIGURE 109 - ERASE OF TARGET ITEMS

**Start Erasing Processed Data**

Do you want to Erase items for Job WorkSpaces --> Documents?  
The User will be responsible for deleting any data that is loaded in Target.

Yes
Cancel

FIGURE 110 - ERASE ITEMS



### 6.2.8. History

A 'History' button is available on each area for Discovery and Processing. Clicking on this button brings up a screen that list all the actions that were performed on that migration task along with date the action was performed and the outcome of that particular action.

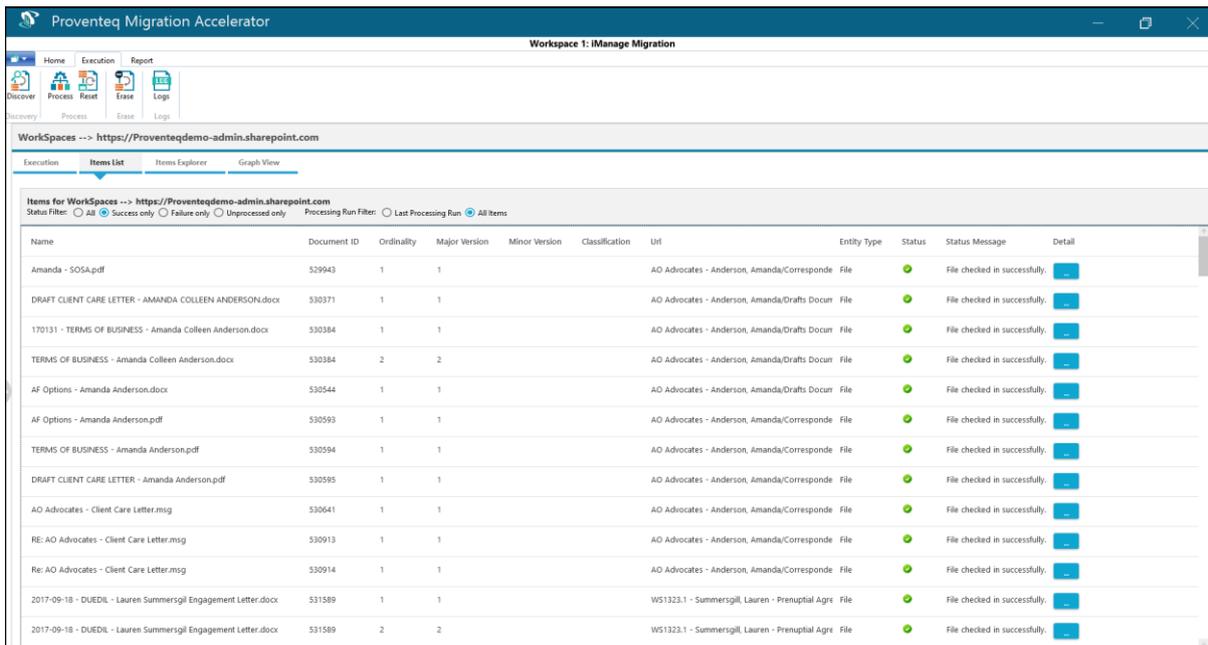
### 6.3. Items List tab

Clicking on 'Items List' tab allows users to view the complete list of items for a migration task, along with its Status Filter and Processing Run Filter. Items can be filtered on the following filter criteria:

1. All – Shows all items in the migration task. This option is also the default option when none of the filters are selected.
2. Success only – Shows all successfully processed items
3. Failure only – Shows only the items with errors
4. Unprocessed only – Shows items that have not yet been processed.

The "Items List" screen is shown below:

FIGURE 111 - ITEMS LIST SCREEN

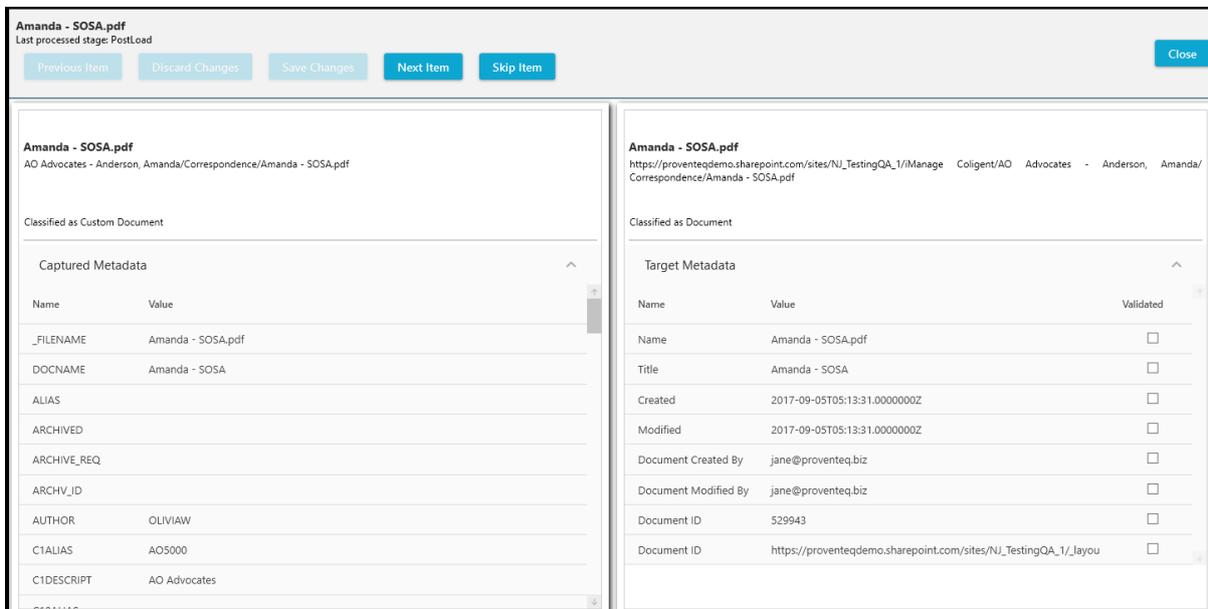


Additionally, Processing Run filters are provided:

1. Last Processing Run - Shows item from last processing run based on the Status Filter.
2. All Items - Shows items from all processed run based on the Status Filter.

Easy effort has been made with "**Detail**" button to cross check each source and target metadata in the product itself along with the source and target links.

FIGURE 112 - ITEMS LIST SCREEN



PMA supports keyboard shortcuts which helps users to improve their efficiency in transformation verification and editing to document properties before migrating documents to SharePoint Site.

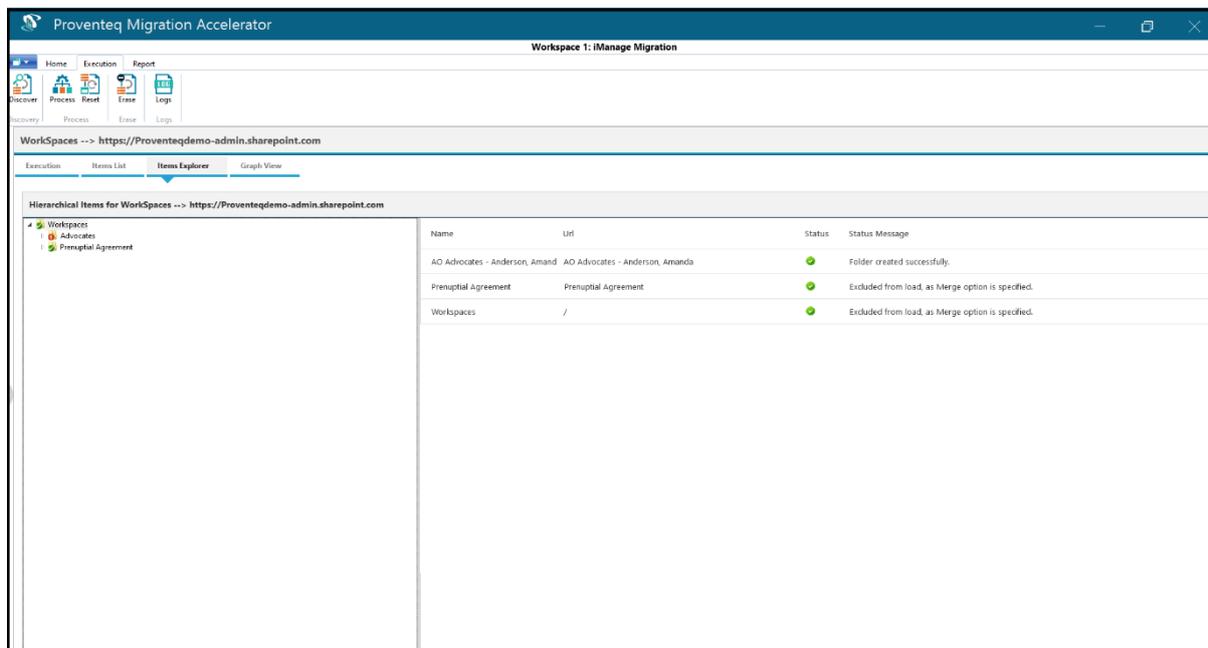
SL No.	Shortcut Keys	Description
--------	---------------	-------------

1.	Ctrl + (Right Arrow)	GO TO NEXT ITEM
2.	Ctrl + (Left Arrow)	GO TO PREVIOUS ITEM
3.	Ctrl + S	SAVE CHANGES TO METADATA FIELDS
4.	Ctrl + D	DISCARD CHANGES TO METADATA FIELDS
5.	Ctrl + F	SKIP ITEM FOR PROCESSING

## 6.4. Items Explorer

This feature gives powerful interface for Worksite contents and a hierarchical view of item status based on the discover/process from the execution screen

FIGURE 113 - ITEMS EXPLORER



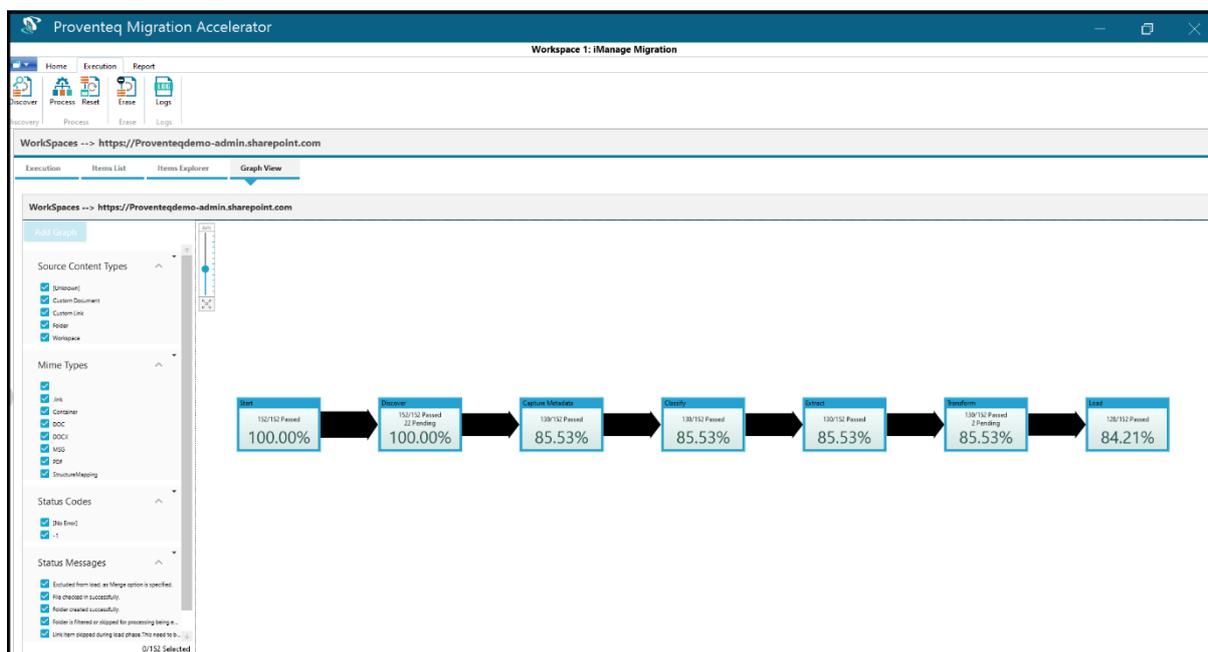
## 6.5. Show Graph

Clicking on Show Graphs presents a graphical representation of the progress of the items and the failures. Users can also filter results based on "Error Codes", "Error Messages", "Mime Types" and "Source Content Types".

Apart from analysing items in different phases like "Start", "Discover", "Transform" and "Load" users can also add graphs to each phase.

Users can add graph by either selecting a particular desired phase and clicking on "Add Graph" button, or by right clicking on the phase and selecting the desired graph type.

FIGURE 114 - GRAPH VIEW



## 7. REPORTING

Migration Accelerator provides several reports where users can do in-depth analysis of the migration tasks.

Clicking on the 'Reporting' tab provides access to all available reports. To generate a report, select the report and the migration task and click the 'Run' button. The generated report can be exported as Excel, PDF or printed copy.

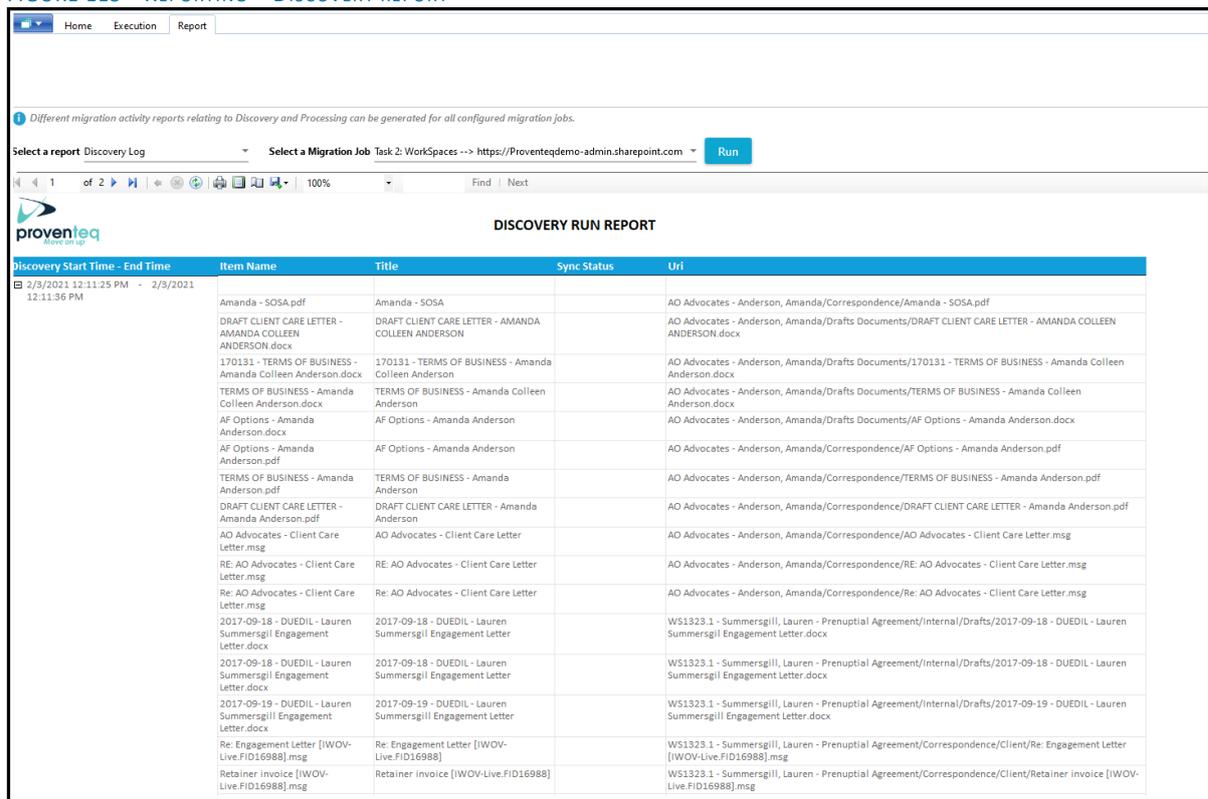
### 7.1. Discovery Log Report

Every time, users discovers items, a snapshot of the source system is recorded in the staging repository. This report gives full detail of items discovered in each discovery process.

To generate Discovery report, select "Discovery Log" from "Select a report" drop down and select one of the Mapping for which the report has to be generated. Then click on "Run".

Discovery run report will show latest run statistics for every Synchronized task. Below are meaning and description of the status messages from discovery log.

FIGURE 115 - REPORTING – DISCOVERY REPORT



Discovery Start Time - End Time	Item Name	Title	Sync Status	Uri
2/3/2021 12:11:25 PM - 2/3/2021 12:11:36 PM	Amanda - SOSA.pdf	Amanda - SOSA		AO Advocates - Anderson, Amanda/Correspondence/Amanda - SOSA.pdf
	DRAFT CLIENT CARE LETTER - AMANDA COLLEEN ANDERSON.docx	DRAFT CLIENT CARE LETTER - AMANDA COLLEEN ANDERSON		AO Advocates - Anderson, Amanda/Drafts Documents/DRAFT CLIENT CARE LETTER - AMANDA COLLEEN ANDERSON.docx
	170131 - TERMS OF BUSINESS - Amanda Colleen Anderson.docx	170131 - TERMS OF BUSINESS - Amanda Colleen Anderson		AO Advocates - Anderson, Amanda/Drafts Documents/170131 - TERMS OF BUSINESS - Amanda Colleen Anderson.docx
	TERMS OF BUSINESS - Amanda Colleen Anderson.docx	TERMS OF BUSINESS - Amanda Colleen Anderson		AO Advocates - Anderson, Amanda/Drafts Documents/TERMS OF BUSINESS - Amanda Colleen Anderson.docx
	AF Options - Amanda Anderson.docx	AF Options - Amanda Anderson		AO Advocates - Anderson, Amanda/Drafts Documents/AF Options - Amanda Anderson.docx
	AF Options - Amanda Anderson.pdf	AF Options - Amanda Anderson		AO Advocates - Anderson, Amanda/Correspondence/AF Options - Amanda Anderson.pdf
	TERMS OF BUSINESS - Amanda Anderson.pdf	TERMS OF BUSINESS - Amanda Anderson		AO Advocates - Anderson, Amanda/Correspondence/TERMS OF BUSINESS - Amanda Anderson.pdf
	DRAFT CLIENT CARE LETTER - Amanda Anderson.pdf	DRAFT CLIENT CARE LETTER - Amanda Anderson		AO Advocates - Anderson, Amanda/Correspondence/DRAFT CLIENT CARE LETTER - Amanda Anderson.pdf
	AO Advocates - Client Care Letter.msg	AO Advocates - Client Care Letter		AO Advocates - Anderson, Amanda/Correspondence/AO Advocates - Client Care Letter.msg
	RE: AO Advocates - Client Care Letter.msg	RE: AO Advocates - Client Care Letter		AO Advocates - Anderson, Amanda/Correspondence/RE: AO Advocates - Client Care Letter.msg
	Re: AO Advocates - Client Care Letter.msg	Re: AO Advocates - Client Care Letter		AO Advocates - Anderson, Amanda/Correspondence/Re: AO Advocates - Client Care Letter.msg
	2017-09-18 - DUEDIL - Lauren Summersgill Engagement Letter.docx	2017-09-18 - DUEDIL - Lauren Summersgill Engagement Letter		WS1323.1 - Summersgill, Lauren - Prenuptial Agreement/Internal/Drafts/2017-09-18 - DUEDIL - Lauren Summersgill Engagement Letter.docx
	2017-09-18 - DUEDIL - Lauren Summersgill Engagement Letter.docx	2017-09-18 - DUEDIL - Lauren Summersgill Engagement Letter		WS1323.1 - Summersgill, Lauren - Prenuptial Agreement/Internal/Drafts/2017-09-18 - DUEDIL - Lauren Summersgill Engagement Letter.docx
	2017-09-19 - DUEDIL - Lauren Summersgill Engagement Letter.docx	2017-09-19 - DUEDIL - Lauren Summersgill Engagement Letter		WS1323.1 - Summersgill, Lauren - Prenuptial Agreement/Internal/Drafts/2017-09-19 - DUEDIL - Lauren Summersgill Engagement Letter.docx
	Re: Engagement Letter [WVOV-Live.FID16988].msg	Re: Engagement Letter [WVOV-Live.FID16988]		WS1323.1 - Summersgill, Lauren - Prenuptial Agreement/Correspondence/Client/Re: Engagement Letter [WVOV-Live.FID16988].msg
	Retainer invoice [WVOV-Live.FID16988].msg	Retainer invoice [WVOV-Live.FID16988]		WS1323.1 - Summersgill, Lauren - Prenuptial Agreement/Correspondence/Client/Retainer invoice [WVOV-Live.FID16988].msg

#### Status message

#### Description

New Discovery from Source

Item which is newly added

<b>Deleted on Source</b>	This indicates that an item has been deleted since one of the previous discoveries. The deleted items are listed against the Discovery run which last successfully discovered the item.
<b>Blank</b>	File was new in previous discovery and has not been processed
	Same item has been added back after deletion

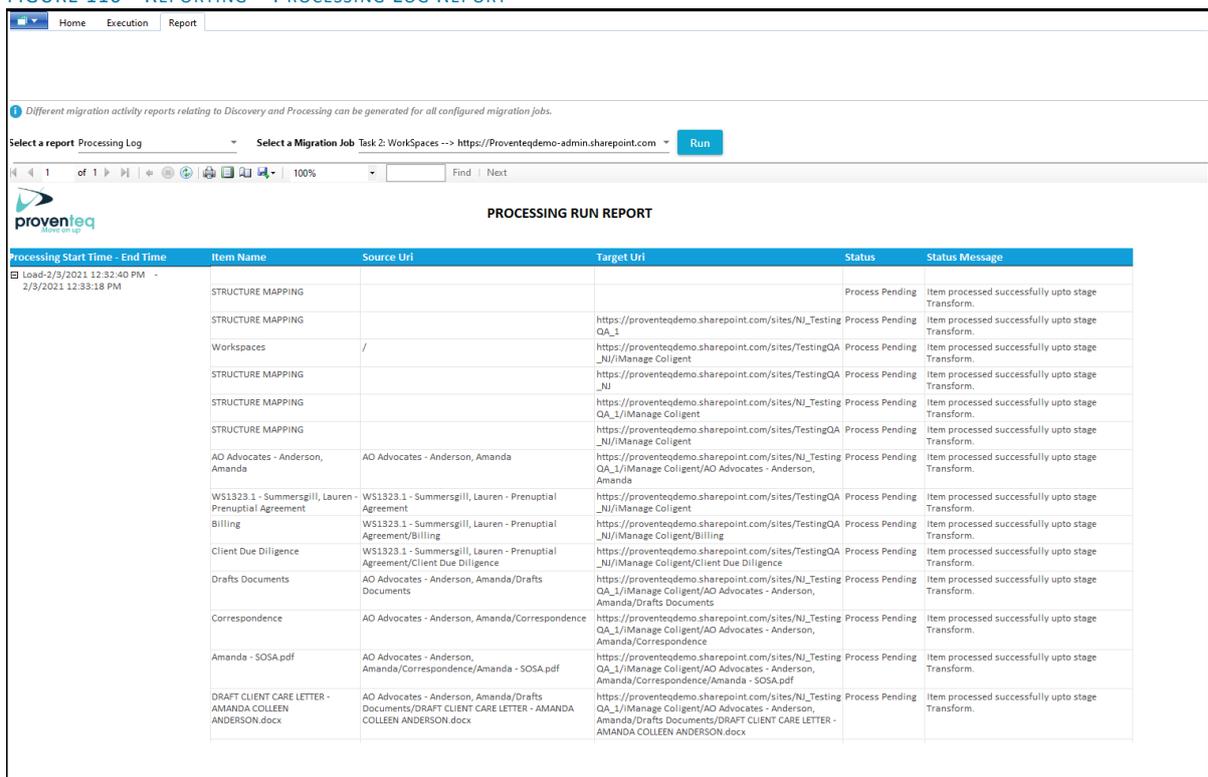
## 7.2. Processing Log Report

Every time users process items, an audit of the processing actions is recorded along with the outcome of the action. This report gives full detail of items loaded or failure in each migration processing run.

To generate the Processing Log report, select “Processing Log” from “Select a report” drop down and select one of the migration tasks for which the report has to be generated. Then click on “Run”.

Similarly, you can generate other reports like Items Report, Mime Type Summary report and Tagging report and Process Work Item Link Reports.

FIGURE 116 - REPORTING – PROCESSING LOG REPORT

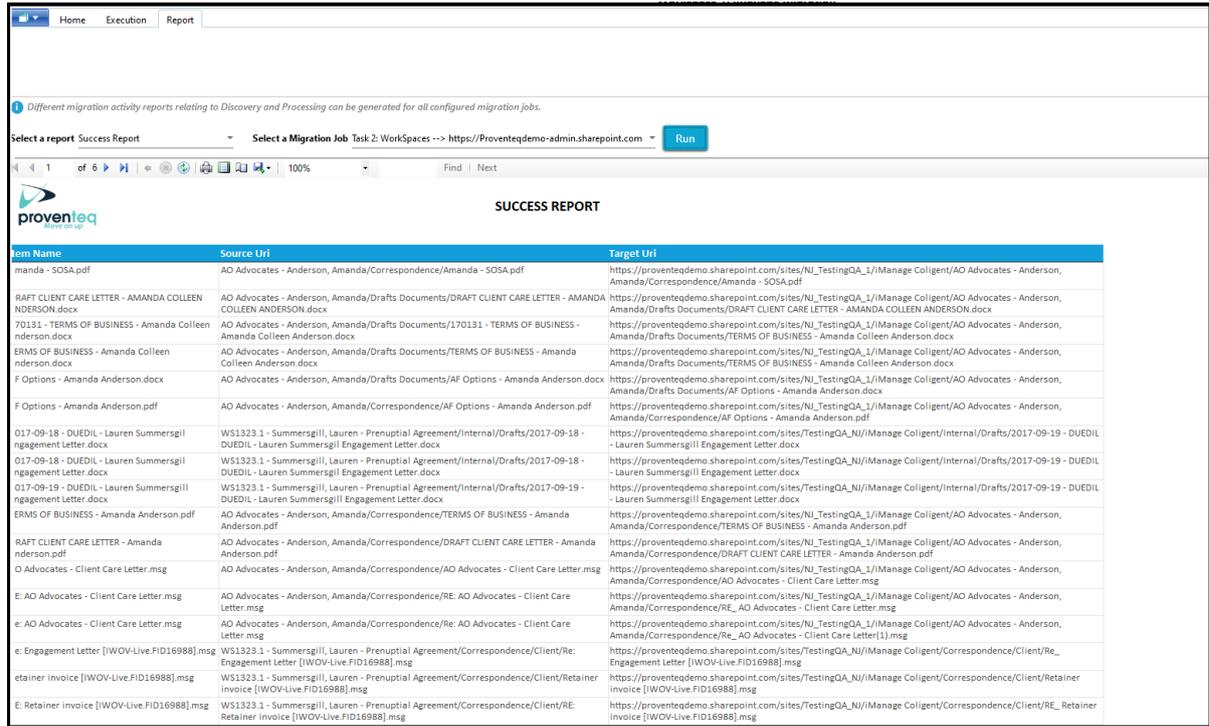


Processing Start Time - End Time	Item Name	Source Uri	Target Uri	Status	Status Message
Load-2/3/2021 12:32:40 PM - 2/3/2021 12:38:18 PM	STRUCTURE MAPPING			Process Pending	Item processed successfully upto stage Transform.
	STRUCTURE MAPPING		https://proventeqdemo.sharepoint.com/sites/NL_TestingQA_1	Process Pending	Item processed successfully upto stage Transform.
	Workspaces	/	https://proventeqdemo.sharepoint.com/sites/TestingQA_1/Manage Coligent	Process Pending	Item processed successfully upto stage Transform.
	STRUCTURE MAPPING		https://proventeqdemo.sharepoint.com/sites/TestingQA_1/	Process Pending	Item processed successfully upto stage Transform.
	STRUCTURE MAPPING		https://proventeqdemo.sharepoint.com/sites/NL_TestingQA_1/Manage Coligent	Process Pending	Item processed successfully upto stage Transform.
	STRUCTURE MAPPING		https://proventeqdemo.sharepoint.com/sites/TestingQA_1/Manage Coligent	Process Pending	Item processed successfully upto stage Transform.
	AO Advocates - Anderson, Amanda	AO Advocates - Anderson, Amanda	https://proventeqdemo.sharepoint.com/sites/NL_TestingQA_1/Manage Coligent/AO Advocates - Anderson, Amanda	Process Pending	Item processed successfully upto stage Transform.
	WS1323.1 - Summersgill, Lauren Prenuptial Agreement	WS1323.1 - Summersgill, Lauren - Prenuptial Agreement	https://proventeqdemo.sharepoint.com/sites/TestingQA_1/Manage Coligent	Process Pending	Item processed successfully upto stage Transform.
	Billing	WS1323.1 - Summersgill, Lauren - Prenuptial Agreement/Billing	https://proventeqdemo.sharepoint.com/sites/TestingQA_1/Manage Coligent/Billing	Process Pending	Item processed successfully upto stage Transform.
	Client Due Diligence	WS1323.1 - Summersgill, Lauren - Prenuptial Agreement/Client Due Diligence	https://proventeqdemo.sharepoint.com/sites/TestingQA_1/Manage Coligent/Client Due Diligence	Process Pending	Item processed successfully upto stage Transform.
	Drafts Documents	AO Advocates - Anderson, Amanda/Drafts Documents	https://proventeqdemo.sharepoint.com/sites/NL_TestingQA_1/Manage Coligent/AO Advocates - Anderson, Amanda/Drafts Documents	Process Pending	Item processed successfully upto stage Transform.
	Correspondence	AO Advocates - Anderson, Amanda/Correspondence	https://proventeqdemo.sharepoint.com/sites/NL_TestingQA_1/Manage Coligent/AO Advocates - Anderson, Amanda/Correspondence	Process Pending	Item processed successfully upto stage Transform.
	Amanda - SOSA.pdf	AO Advocates - Anderson, Amanda/Correspondence/Amanda - SOSA.pdf	https://proventeqdemo.sharepoint.com/sites/NL_TestingQA_1/Manage Coligent/AO Advocates - Anderson, Amanda/Correspondence/Amanda - SOSA.pdf	Process Pending	Item processed successfully upto stage Transform.
	DRAFT CLIENT CARE LETTER - AMANDA COLLEEN ANDERSON.docx	AO Advocates - Anderson, Amanda/Drafts Documents/DRAFT CLIENT CARE LETTER - AMANDA COLLEEN ANDERSON.docx	https://proventeqdemo.sharepoint.com/sites/NL_TestingQA_1/Manage Coligent/AO Advocates - Anderson, Amanda/Drafts Documents/DRAFT CLIENT CARE LETTER - AMANDA COLLEEN ANDERSON.docx	Process Pending	Item processed successfully upto stage Transform.

## 7.3. Success Report

Success report gives the list of items, which were successfully loaded. To generate a Success report, select “Success Report” from “Select a report” drop down and select one of the Mapping for which report has to be generated. Then click on “Run”.

FIGURE 117 - REPORTING - SUCCESS REPORT



The screenshot shows the Proventeq Success Report interface. At the top, there are navigation tabs for Home, Execution, and Report. Below this, a message states: "Different migration activity reports relating to Discovery and Processing can be generated for all configured migration jobs." A dropdown menu is set to "Success Report" and a "Run" button is visible. The main content area displays a table titled "SUCCESS REPORT" with the following columns: Item Name, Source Uri, and Target Uri. The table lists various document and message files, such as "SOSA.pdf", "DRAFT CLIENT CARE LETTER - AMANDA COLLEEN ANDERSON.docx", and "70131 - TERMS OF BUSINESS - Amanda Colleen Anderson.docx", along with their source and target SharePoint URLs.

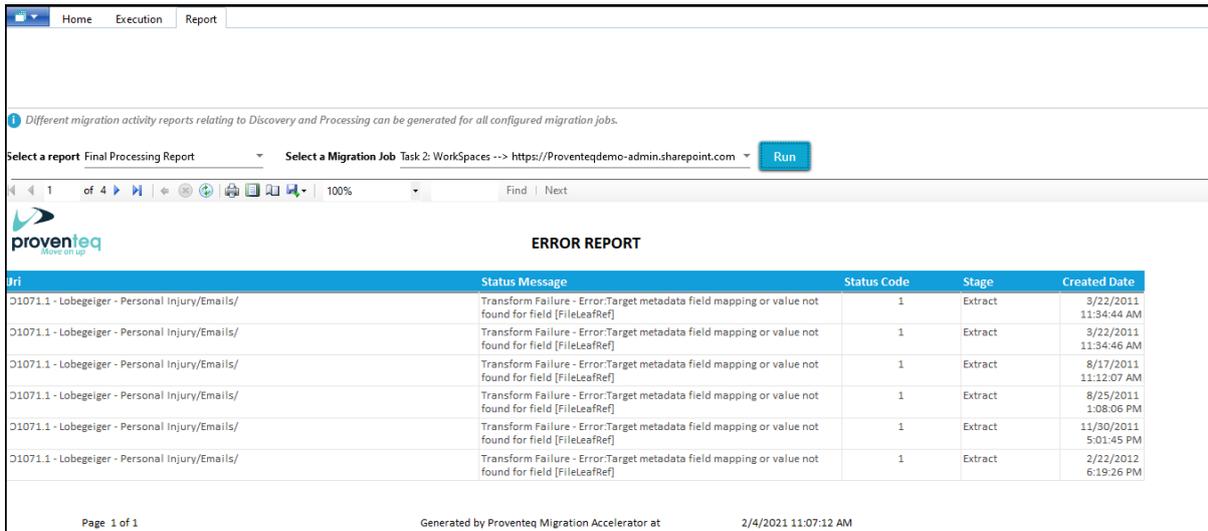
Item Name	Source Uri	Target Uri
amanda - SOSA.pdf	AO Advocates - Anderson, Amanda/Correspondence/Amanda - SOSA.pdf	https://proventeqdemo.sharepoint.com/sites/NI_TestingQA_1/Manage Colligent/AO Advocates - Anderson, Amanda/Correspondence/Amanda - SOSA.pdf
DRAFT CLIENT CARE LETTER - AMANDA COLLEEN ANDERSON.docx	AO Advocates - Anderson, Amanda/Drafts Documents/DRAFT CLIENT CARE LETTER - AMANDA COLLEEN ANDERSON.docx	https://proventeqdemo.sharepoint.com/sites/NI_TestingQA_1/Manage Colligent/AO Advocates - Anderson, Amanda/Drafts Documents/DRAFT CLIENT CARE LETTER - AMANDA COLLEEN ANDERSON.docx
70131 - TERMS OF BUSINESS - Amanda Colleen Anderson.docx	AO Advocates - Anderson, Amanda/Drafts Documents/170131 - TERMS OF BUSINESS - Amanda Colleen Anderson.docx	https://proventeqdemo.sharepoint.com/sites/NI_TestingQA_1/Manage Colligent/AO Advocates - Anderson, Amanda/Drafts Documents/TERMS OF BUSINESS - Amanda Colleen Anderson.docx
TERMS OF BUSINESS - Amanda Colleen Anderson.docx	AO Advocates - Anderson, Amanda/Drafts Documents/TERMS OF BUSINESS - Amanda Colleen Anderson.docx	https://proventeqdemo.sharepoint.com/sites/NI_TestingQA_1/Manage Colligent/AO Advocates - Anderson, Amanda/Drafts Documents/TERMS OF BUSINESS - Amanda Colleen Anderson.docx
AF Options - Amanda Anderson.docx	AO Advocates - Anderson, Amanda/Drafts Documents/AF Options - Amanda Anderson.docx	https://proventeqdemo.sharepoint.com/sites/NI_TestingQA_1/Manage Colligent/AO Advocates - Anderson, Amanda/Drafts Documents/AF Options - Amanda Anderson.docx
AF Options - Amanda Anderson.pdf	AO Advocates - Anderson, Amanda/Correspondence/AF Options - Amanda Anderson.pdf	https://proventeqdemo.sharepoint.com/sites/NI_TestingQA_1/Manage Colligent/AO Advocates - Anderson, Amanda/Correspondence/AF Options - Amanda Anderson.pdf
017-09-18 - DUEIDL - Lauren Summersgill Engagement Letter.docx	WS1323.1 - Summersgill, Lauren - Prenuptial Agreement/Internal/Drafts/2017-09-18 - DUEIDL - Lauren Summersgill Engagement Letter.docx	https://proventeqdemo.sharepoint.com/sites/TestingQA_NU/Manage Colligent/Internal/Drafts/2017-09-18 - DUEIDL - Lauren Summersgill Engagement Letter.docx
017-09-18 - DUEIDL - Lauren Summersgill Engagement Letter.docx	WS1323.1 - Summersgill, Lauren - Prenuptial Agreement/Internal/Drafts/2017-09-18 - DUEIDL - Lauren Summersgill Engagement Letter.docx	https://proventeqdemo.sharepoint.com/sites/TestingQA_NU/Manage Colligent/Internal/Drafts/2017-09-18 - DUEIDL - Lauren Summersgill Engagement Letter.docx
017-09-19 - DUEIDL - Lauren Summersgill Engagement Letter.docx	WS1323.1 - Summersgill, Lauren - Prenuptial Agreement/Internal/Drafts/2017-09-19 - DUEIDL - Lauren Summersgill Engagement Letter.docx	https://proventeqdemo.sharepoint.com/sites/TestingQA_NU/Manage Colligent/Internal/Drafts/2017-09-19 - DUEIDL - Lauren Summersgill Engagement Letter.docx
TERMS OF BUSINESS - Amanda Anderson.pdf	AO Advocates - Anderson, Amanda/Correspondence/TERMS OF BUSINESS - Amanda Anderson.pdf	https://proventeqdemo.sharepoint.com/sites/NI_TestingQA_1/Manage Colligent/AO Advocates - Anderson, Amanda/Correspondence/TERMS OF BUSINESS - Amanda Anderson.pdf
DRAFT CLIENT CARE LETTER - Amanda Anderson.pdf	AO Advocates - Anderson, Amanda/Correspondence/DRAFT CLIENT CARE LETTER - Amanda Anderson.pdf	https://proventeqdemo.sharepoint.com/sites/NI_TestingQA_1/Manage Colligent/AO Advocates - Anderson, Amanda/Correspondence/DRAFT CLIENT CARE LETTER - Amanda Anderson.pdf
AO Advocates - Client Care Letter.msg	AO Advocates - Anderson, Amanda/Correspondence/AO Advocates - Client Care Letter.msg	https://proventeqdemo.sharepoint.com/sites/NI_TestingQA_1/Manage Colligent/AO Advocates - Anderson, Amanda/Correspondence/AO Advocates - Client Care Letter.msg
E: AO Advocates - Client Care Letter.msg	AO Advocates - Anderson, Amanda/Correspondence/RE: AO Advocates - Client Care Letter.msg	https://proventeqdemo.sharepoint.com/sites/NI_TestingQA_1/Manage Colligent/AO Advocates - Anderson, Amanda/Correspondence/RE_ AO Advocates - Client Care Letter.msg
e: AO Advocates - Client Care Letter.msg	AO Advocates - Anderson, Amanda/Correspondence/Re: AO Advocates - Client Care Letter.msg	https://proventeqdemo.sharepoint.com/sites/NI_TestingQA_1/Manage Colligent/AO Advocates - Anderson, Amanda/Correspondence/Re_ AO Advocates - Client Care Letter(1).msg
e: Engagement Letter [IWOV-Live.FID16988].msg	WS1323.1 - Summersgill, Lauren - Prenuptial Agreement/Correspondence/Client/Re: Engagement Letter [IWOV-Live.FID16988].msg	https://proventeqdemo.sharepoint.com/sites/TestingQA_NU/Manage Colligent/Correspondence/Client/Re_ Engagement Letter [IWOV-Live.FID16988].msg
Retainer Invoice [IWOV-Live.FID16988].msg	WS1323.1 - Summersgill, Lauren - Prenuptial Agreement/Correspondence/Client/Retainer Invoice [IWOV-Live.FID16988].msg	https://proventeqdemo.sharepoint.com/sites/TestingQA_NU/Manage Colligent/Correspondence/Client/Retainer Invoice [IWOV-Live.FID16988].msg
E: Retainer Invoice [IWOV-Live.FID16988].msg	WS1323.1 - Summersgill, Lauren - Prenuptial Agreement/Correspondence/Client/RE: Retainer Invoice [IWOV-Live.FID16988].msg	https://proventeqdemo.sharepoint.com/sites/TestingQA_NU/Manage Colligent/Correspondence/Client/RE_ Retainer Invoice [IWOV-Live.FID16988].msg

## 7.4. Error Log Report

Error report gives the list of items failed during migration progress. To generate Error report, select “Error Report” from “Select a report” drop down and select one of the migration tasks for which report has to be generated. Then click on “Run”.

This report will give you all the failed items in which stage they failed and the reason, this will help to do error analysis for failure items and take corrective action to fix them.

FIGURE 118 - REPORTING - ERROR REPORT



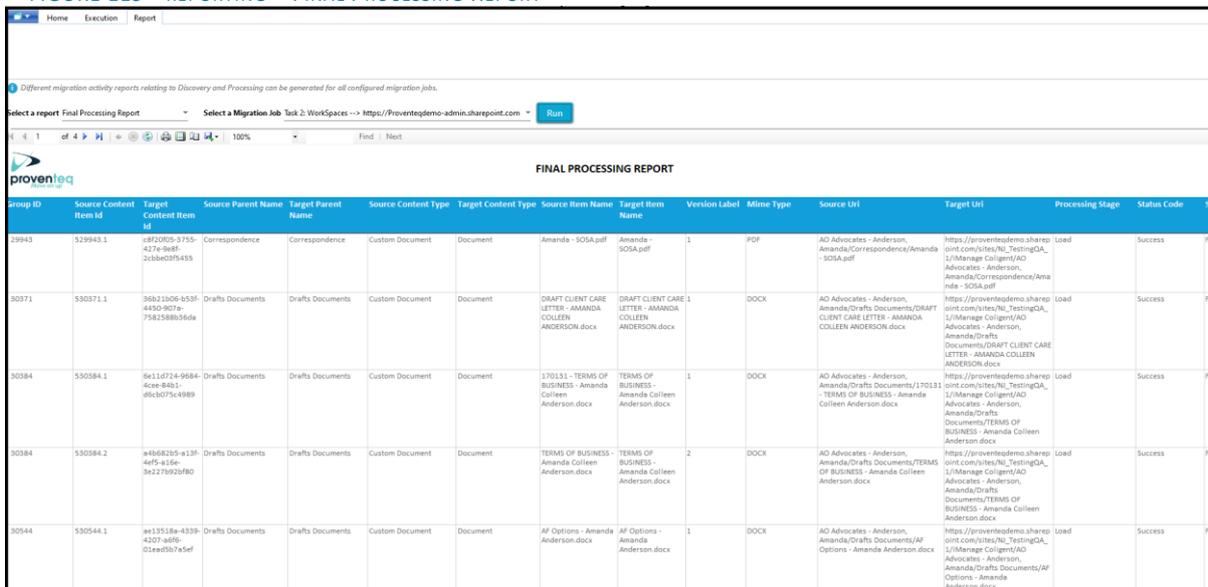
Jri	Status Message	Status Code	Stage	Created Date
D1071.1 - Lobegeiger - Personal Injury/Emails/	Transform Failure - Error: Target metadata field mapping or value not found for field [FileLeafRef]	1	Extract	3/22/2011 11:34:44 AM
D1071.1 - Lobegeiger - Personal Injury/Emails/	Transform Failure - Error: Target metadata field mapping or value not found for field [FileLeafRef]	1	Extract	3/22/2011 11:34:46 AM
D1071.1 - Lobegeiger - Personal Injury/Emails/	Transform Failure - Error: Target metadata field mapping or value not found for field [FileLeafRef]	1	Extract	3/17/2011 11:12:07 AM
D1071.1 - Lobegeiger - Personal Injury/Emails/	Transform Failure - Error: Target metadata field mapping or value not found for field [FileLeafRef]	1	Extract	3/25/2011 1:08:06 PM
D1071.1 - Lobegeiger - Personal Injury/Emails/	Transform Failure - Error: Target metadata field mapping or value not found for field [FileLeafRef]	1	Extract	11/30/2011 5:01:45 PM
D1071.1 - Lobegeiger - Personal Injury/Emails/	Transform Failure - Error: Target metadata field mapping or value not found for field [FileLeafRef]	1	Extract	2/22/2012 6:19:26 PM

## 7.5. Final Processing Report

Final Processing Report is the report, which gives you the details of all the items that are processed, pending to process etc.

To generate this report, select “Final Processing Report’ from “Select a report” drop down and select one of the migration tasks for which report has to be generated. Then click on “Run”.

FIGURE 119 - REPORTING – FINAL PROCESSING REPORT



Group ID	Source Content Item ID	Target Content Item ID	Source Parent Name	Target Parent Name	Source Content Type	Target Content Type	Source Item Name	Target Item Name	Version Label	Mime Type	Source Uri	Target Uri	Processing Stage	Status Code
39943	529943.1	c8f2005-3755-427e-9d9f-26bb609f5455	Correspondence	Correspondence	Custom Document	Document	Amanda - SOSA.pdf	Amanda - SOSA.pdf	1	PDF	AO Advocates - Anderson, Amanda/Correspondence/Amanda - SOSA.pdf	https://proventeqdemo.sharepoint.com/sites/NI_TestingDA_1/Manage/Colliem/AD - Advocates - Anderson, Amanda/Correspondence/Amanda - SOSA.pdf	Load	Success
30371	530371.1	30523006-653f-4950-907e-7582588b366a	Drafts Documents	Drafts Documents	Custom Document	Document	DRAFT CLIENT CARE LETTER - AMANDA COLLEEN ANDERSON.docx	DRAFT CLIENT CARE LETTER - AMANDA COLLEEN ANDERSON.docx	1	DOCK	AO Advocates - Anderson, Amanda/Drafts Documents/DRAFT CLIENT CARE LETTER - AMANDA COLLEEN ANDERSON.docx	https://proventeqdemo.sharepoint.com/sites/NI_TestingDA_1/Manage/Colliem/AD - Advocates - Anderson, Amanda/Drafts Documents/DRAFT CLIENT CARE LETTER - AMANDA COLLEEN ANDERSON.docx	Load	Success
30384	530384.1	6e11d724-9684-4ee-84b1-86c6075c4989	Drafts Documents	Drafts Documents	Custom Document	Document	170151 - TERMS OF BUSINESS - Amanda Colleen Anderson.docx	TERMS OF BUSINESS - Amanda Colleen Anderson.docx	1	DOCK	AO Advocates - Anderson, Amanda/Drafts Documents/170151 - TERMS OF BUSINESS - Amanda Colleen Anderson.docx	https://proventeqdemo.sharepoint.com/sites/NI_TestingDA_1/Manage/Colliem/AD - Advocates - Anderson, Amanda/Drafts Documents/TERMS OF BUSINESS - Amanda Colleen Anderson.docx	Load	Success
30384	530384.2	a4b68265-a13f-4ef5-a15e-3e227992b7f0	Drafts Documents	Drafts Documents	Custom Document	Document	TERMS OF BUSINESS - Amanda Colleen Anderson.docx	TERMS OF BUSINESS - Amanda Colleen Anderson.docx	2	DOCK	AO Advocates - Anderson, Amanda/Drafts Documents/TERMS OF BUSINESS - Amanda Colleen Anderson.docx	https://proventeqdemo.sharepoint.com/sites/NI_TestingDA_1/Manage/Colliem/AD - Advocates - Anderson, Amanda/Drafts Documents/TERMS OF BUSINESS - Amanda Colleen Anderson.docx	Load	Success
30544	530544.1	a613518a-4339-4207-a89f-02ee9b7a5ef	Drafts Documents	Drafts Documents	Custom Document	Document	AF Options - Amanda Anderson.docx	AF Options - Amanda Anderson.docx	1	DOCK	AO Advocates - Anderson, Amanda/Drafts Documents/AF Options - Amanda Anderson.docx	https://proventeqdemo.sharepoint.com/sites/NI_TestingDA_1/Manage/Colliem/AD - Advocates - Anderson, Amanda/Drafts Documents/AF Options - Amanda Anderson.docx	Load	Success

## 8. SCHEDULING

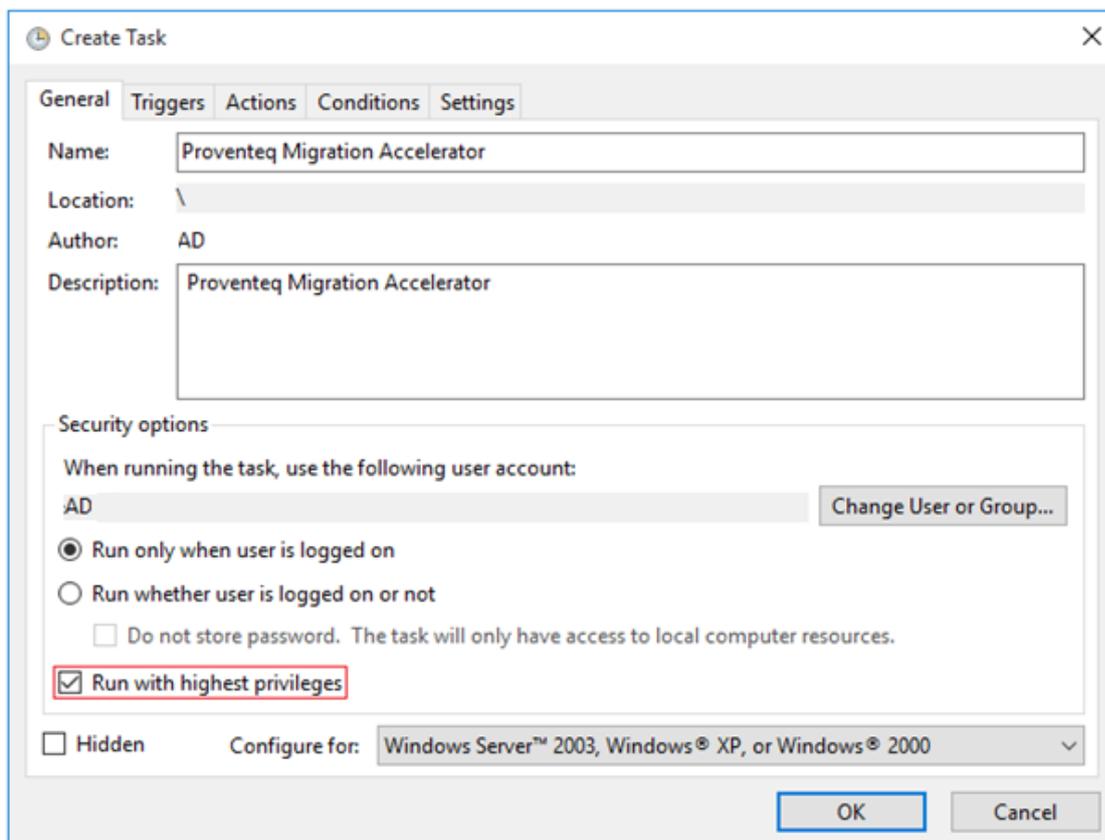
Proventeq Migration Accelerator can be scheduled to execute migration task actions within a workspace by using Windows Task scheduler. It will execute below actions in sequential manner for given migration task:

- Discovery
- Premigration Checks
- Processing

Following steps need to be performed for creating a scheduled task for Migration Accelerator:

1. Open Task scheduler
2. Go to Action -> Create Tasks
3. Enter below mentioned details:
  - I. General Tab
    - Give task Name
    - Tick '**Run with highest privileges**' option from Security Options pane
    - Select **Configure for** respective Windows Server

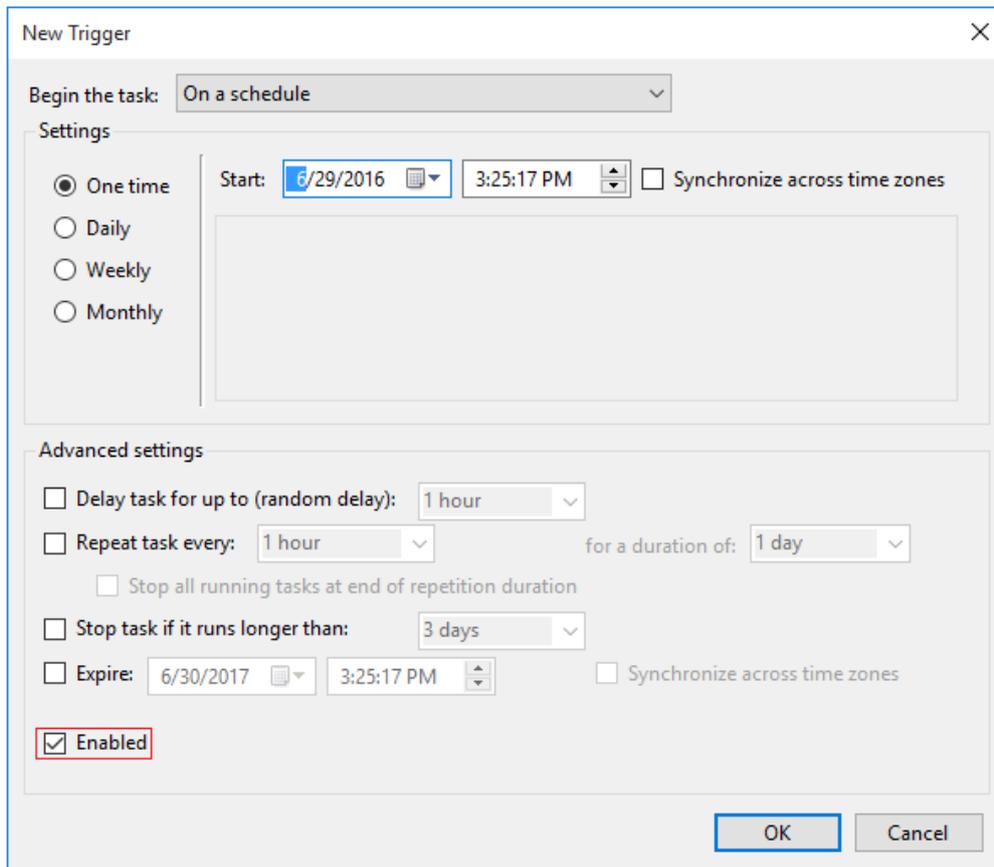
FIGURE 120 - TASK SCHEDULER GENERAL TAB



- II. Trigger Tab

- Click on New and add appropriate Settings, click synchronize across time zones and make sure you tick 'Enabled' option from Advanced Settings pane

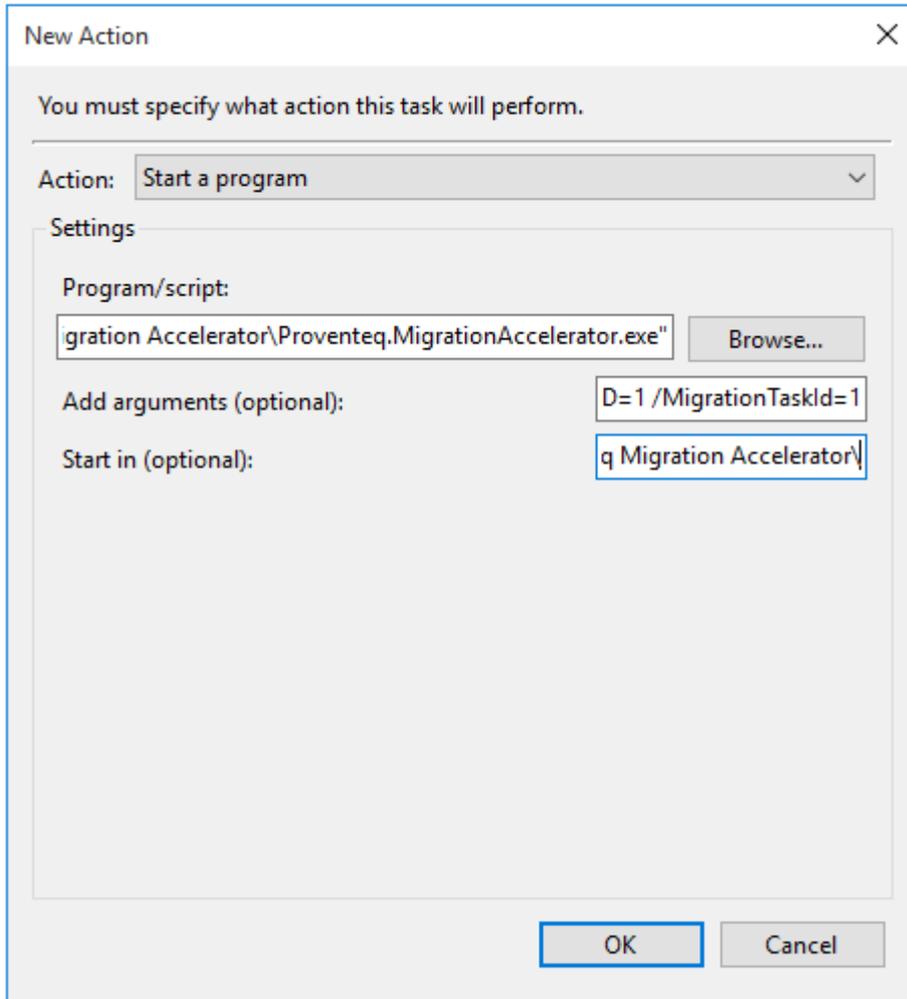
FIGURE 121 - TASK SCHEDULER TRIGGERS



### III. Actions Tab

- Click on New and select 'Start a Program' from Action dropdown
- Browse and add PMA executable file (.exe) from desktop or installation path.
- Add arguments = Sync /WorkspaceID=@WID /MigrationTaskId=@TaksID. The Workspace ID is displayed on the ribbon Title, alongside the workspace name in Migration Accelerator and MigrationTaskId is Migration Task Number(s).  
Eg: Sync /WorkspaceID=1 /MigrationTaskId=1
- For the "Start in", enter the path to the folder where PMA is installed.  
*Example: "C:\Program Files (x86)\Proventeq\Proventeq Migration Accelerator\" See below screenshot for details.*

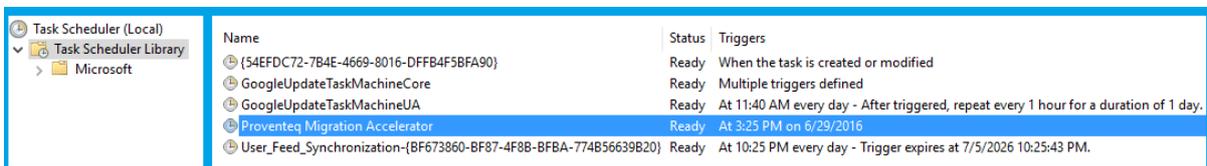
FIGURE 122 - TASK SCHEDULER ACTION



4. Click on “OK” - and save settings and user should be able to see the newly created scheduled task under 'Task Scheduler Library'.

*Note: You should make sure that Proventeq Migration Accelerator is closed and that you have entered correct Workspace ID and Migration Task Id.*

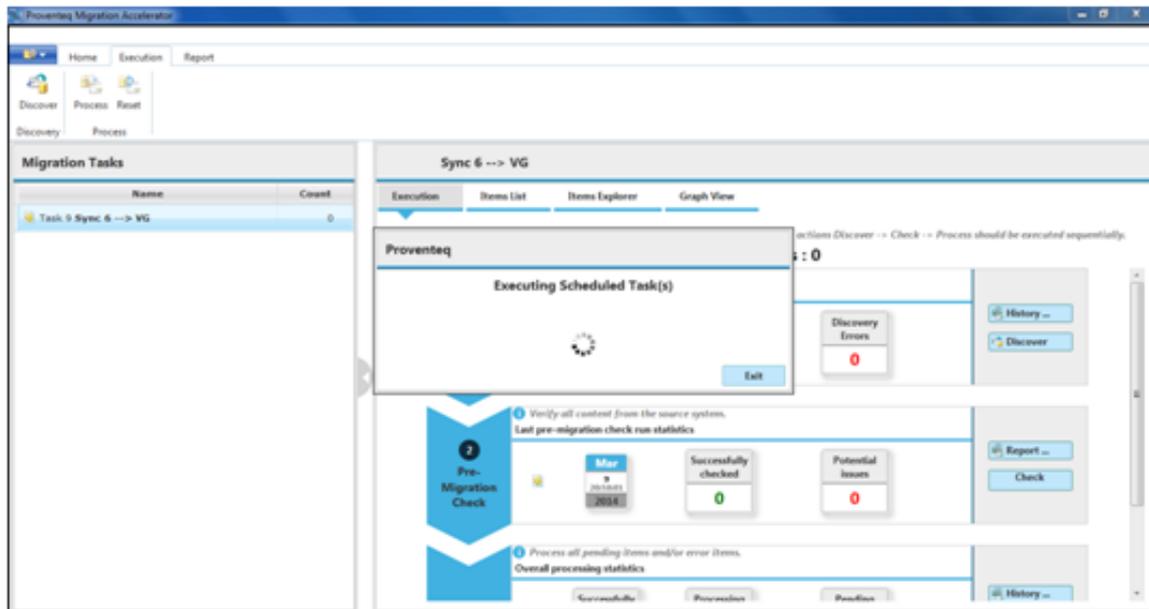
FIGURE 123 - TASK SCHEDULER LIBRARY



User can end, disable, or delete the Scheduled task as per request.

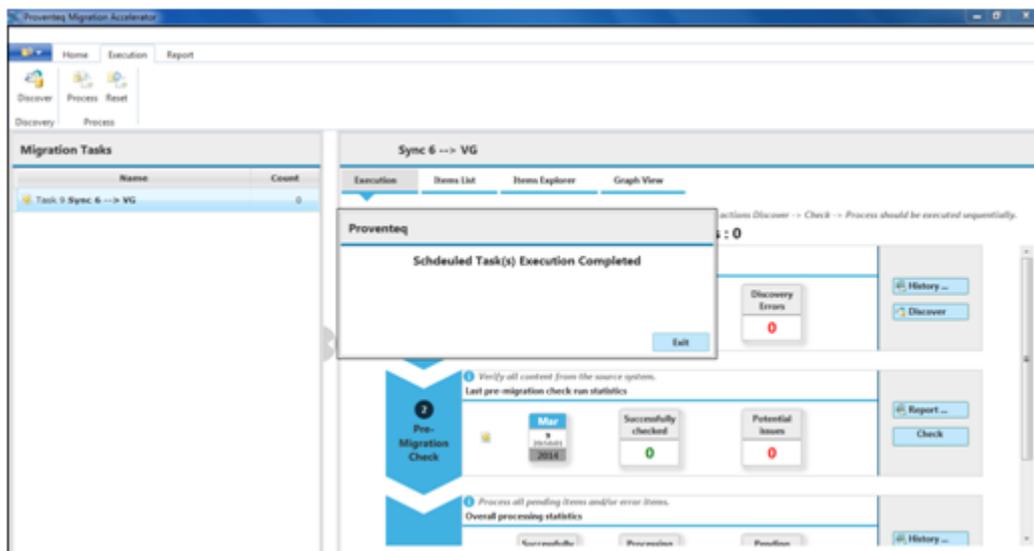
When task is ready to 'Run', it launches Proventeq Migration Accelerator which will then run-in scheduled mode. The following screen is displayed when PMA is running in scheduled mode. The user cannot perform any other tasks in PMA when the application is running in scheduled mode. Clicking on “Exit” will abort the execution of scheduled tasks and close the application.

FIGURE 124 - SCHEDULED TASK AUTO-EXECUTION



Once the task execution finishes, the message 'Scheduled Task(s) Execution Completed' is displayed on the modal window. The status of the task's execution can be verified by exiting the scheduled mode and re-launching the application in normal mode.

FIGURE 125 - SCHEDULED TASK EXECUTION COMPLETED



**Note:** PMA Windows Task Scheduler mode will always perform Discovery, Premigration Checks and Processing actions for given task. If you want to perform subsequent error processing, then user must use the application in normal mode only. Also Post Processing action is not supported in Windows Task Scheduler mode.

## 9. MIGRATION ACCELERATOR POWERSHELL API

Migration Accelerator provides PowerShell API to invoke important Migration Accelerator operations from remote machine. This feature involves two API interfaces:

1. Migration Accelerator Service
2. PowerShell Client Module

### 9.1. Migration Accelerator Service

This new service feature will be included in the Migration Accelerator application itself i.e., it will be hosted as a service when the application is up and running. Below are the Migration Accelerator app settings, which needs to be updated for migration server IP address and port number to configure this service.

```
<add key="Coligent.API.Server.Host" value="<IP Address>" />
<add key="Coligent.API.Server.Port" value="<Port Number>" />
```

### 9.2. PowerShell Client Module

PowerShell Client module will include the commands to perform different migration activities from remote machine. This module will be packaged in the Migration Accelerator application itself. This module folder needs to be copied on client/remote machine to connect and invoke migration accelerator functionality. Please follow the steps given below to start using PowerShell Client Module and different commands.

1. Copy the PowerShell module folder “**C:\Program Files\Proventeq\Proventeq Migration Accelerator\Proventeq.MigrationAccelerator.PowerShell**” to the client/remote machine at location “**C:\Program Files\WindowsPowerShell\Modules**”.

Please refer below screenshots for these module folder’s installation location and target location on client machine.

FIGURE 126 - POWERSHELL MODULE INSTALLATION LOCATION

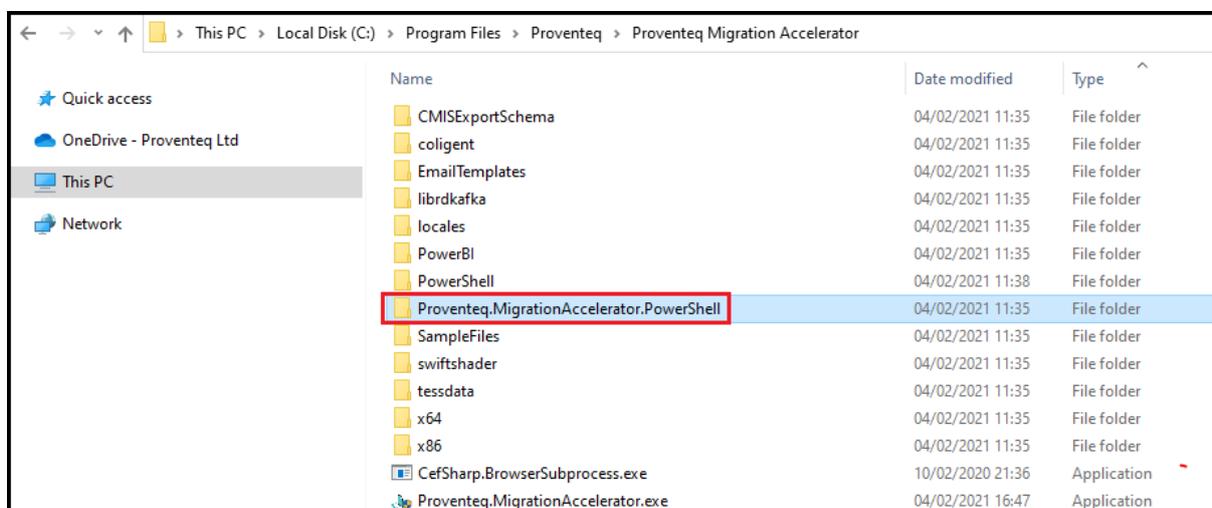
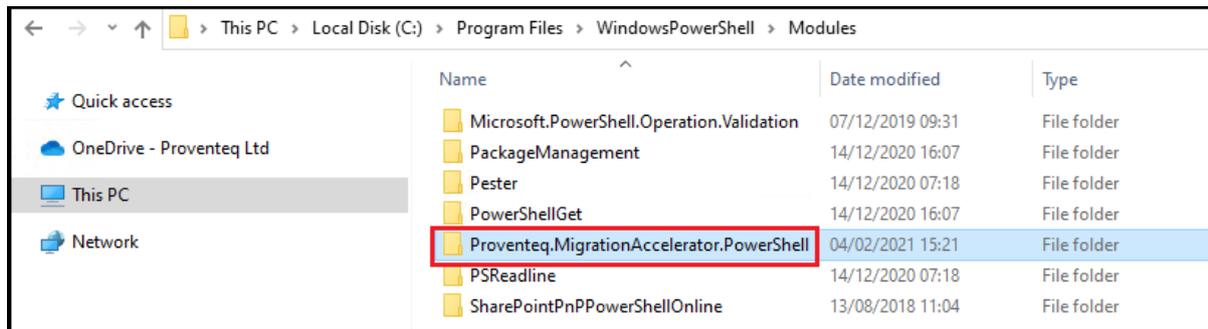


FIGURE 127 - POWERSHELL MODULE CLIENT LOCATION



2. Open Windows PowerShell and load PowerShell module by using below command.

```
Import-Module -Name "Proventeq.MigrationAccelerator.PowerShell.psd1" -Force
```

3. Connect to Migration Accelerator by using below command.

```
Connect-FVQMigrationAccelerator -Url http://<IP Address >:<Port Number>
```

4. Then start executing Migration Accelerator operations remotely by referring the command list given in the section **9.3 PowerShell Commands** below.

**Note:** Please refer **Test-PMA-PS.ps1** script file present in the **Proventeq.MigrationAccelerator.PowerShell** folder for the examples of PowerShell Commands invocation.



### 9.3. PowerShell Commands

Migration Accelerator provides below PowerShell commands to manage the end-to-end migration.

Sr. No.	Function Name	Parameters	Description	Example
1	Get-MigrationAcceleratorConnection		Returns the http endpoint of the current PMA connection	<code>Get-MigrationAcceleratorConnection</code>
2	New-ConnectionForWorkSite	Name, ServerName, UseIntegratedAuth, DatabaseCredential, DatabaseName, ServerLocation, UseRestApi IManageURL ,ImanageApiCredential	To create a new source connection in the Proventeq Migration Accelerator.	<pre><b>New-ConnectionForWorkSite</b> -Name 'WorkSite con ' -ServerName '&lt;iManageDB Server&gt;' -UseIntegratedAuth 0 - DatabaseCredential (Get-Credential - UserName &lt;UserName&gt; -Message "Enter username / pwd") -DatabaseName '&lt;iManage DB Name&gt;' -ServerLocation '&lt;FileSharePath&gt;' -UseRestApi 0 - IManageURL '&lt;iManage FileShare API Sever Path&gt;' -ImanageApiCredential (Get-Credential -UserName '' -Message "Enter username / pwd")</pre>



3	Update-PVQWorkSiteSourceConnection	Name,ServerName, UseIntegratedAuth, DatabaseCredential, DatabaseName, ServerLocation, UseRestApi, IManageURL, ImanageApiCredential	Update an existing PMA Source connection with the path specified. This cmdlet returns a Source Connection Id. A connection must already be in place to the PMA installation using Connect-PVQMigratonAccelerator.	<pre> <b>Update-PVQWorkSiteSourceConnection</b> - Name 'WorkSite con ' -ServerName '&lt;iManageDB Server&gt;' -UseIntegratedAuth 0 -DatabaseCredential (Get-Credential - UserName &lt;UserName&gt; -Message "Enter username / pwd") -DatabaseName '&lt;iManage DB Name&gt;' -ServerLocation '&lt;FileSharePath&gt;' -UseRestApi 0 - IManageURL '&lt;iManage FileShare API Sever Path&gt;' -ImanageApiCredential (Get-Credential -UserName '' -Message "Enter username / pwd") </pre>
4	New-PVQTargetConnection	Name, Url, Credentials, DefaultUser	Creates a new target connection in the Proventeq Migration Accelerator.	<pre> <b>New-PVQTargetConnection</b> -Url https://mytenant.sharepoint.com/sites/d ocuments -Credentials \$MyCredentials - Name 'SharePoint Online Documents' - DefaultUser admin@mytenant.com </pre>
5	Update-PVQTargetConnection	Url, Credentials, Name, DefaultUser, Type	Updates an existing PMA Target connection with the specified details. This cmdlet returns a target Connection Id. A connection must already be in place to the PMA installation using Connect-PVQMigratonAccelerator.	<pre> <b>Update-PVQTargetConnection</b> 'SharePoint Online Documents1' https://mytenant.sharepoint.com/sites/d ocuments (Get-Credential -Message 'Enter you SharePoint Online connection details') admin@mytenant.com -SystemId 1 </pre>



6	New-PVQMigrationTask	SourceConnectionId, SourceContainerPath, TargetConnectionId, TargetContainerPath, TaskName	Creates a new migration task in PMA with the source and target paths as the end points. This cmdlet returns the migration task Id	<pre><b>New-PVQMigrationTask</b> - SourceConnectionId 1 - SourceContainerPath '\\netShare\RootFolder\Folder to migrate' -TargetConnectionId 1 - TargetContainerPath 'https://mytenant.sharepoint.com/sites/ documents/Migrated from NetShare'</pre>
7	New-PVQMigrationTaskUsingExistingTask	SourceContainerPath, TargetConnectionId, TargetContainerPath, TaskName, MigrationTaskId	Creates a new migration task in PMA with the source and target paths as the end points using the settings from an existing migration task. This cmdlet returns the migration task Id	<pre><b>New-PVQMigrationTaskUsingExistingTask</b> - SourceConnectionId 3 - SourceContainerPath '\\netShare\RootFolder\Folder to migrate' -TargetConnectionId 4 - TargetContainerPath 'https://mytenant.sharepoint.com/sites/ documents/Migrated from NetShare' - MigrationTaskId 1</pre>
8	New-PVQMigrationTaskUsingImportXml	SourceConnectionId, SourceContainerPath, TargetConnectionId, TargetContainerPath, TaskName,ImportXmlPath	Creates a new migration task in PMA with the source and target paths as the end points using the settings from an Import Xml. This cmdlet returns the migration task Id	<pre><b>New-PVQMigrationTaskUsingImportXml</b> - SourceConnectionId 3 - SourceContainerPath '\\netShare\RootFolder\Folder to migrate' -TargetConnectionId 4 - TargetContainerPath 'https://mytenant.sharepoint.com/sites/ documents/Migrated from NetShare' - XmlPath 'C:\Users\XYZ\Desktop\MT_Export14122020 .xml'</pre>
9	Import-PVQStructureMapping	MigrationTaskId, StructureMappingType, ImportMappingFilePath,	Import/Append structure mapping in PMA with migration task id, mapping type, mappings from csv file and IsAppend as the end points using the settings from File and Folders Settings.	<pre><b>Import-PVQStructureMapping</b> - MigrationTaskId 1 -StructureMappingType 'Uri' -ImportMappingFilePath 'C:\Users\XYZ\Desktop\URI_Based_Structure Mapping.csv' -IsAppend \$True</pre>



		IsAppend	This cmdlet returns success and failure. StructureMappingType is one the Structure Mapping Type and it should have one type from 'Uri', 'GroupId' and 'MetadataExpression' profile mapping type	
10	Import-PVQSecurityMapping	MigrationTaskId, MappingProfileType, ImportMappingFilePath, ProfileName	Import security mapping in PMA with migration task id, profile mapping type, mappings from csv file and ProfileName as the end points using the settings from File and Folders Settings. This cmdlet returns success/ensure and failure message. MappingProfileType is one the Mapping Profile Type and it should have one type from 'User', 'Group' and 'Permission' profile mapping type.	<pre> <b>Import-PVQSecurityMapping -</b> MigrationTaskId 1 -MappingProfileType 'User' -ImportMappingFilePath 'C:\Users\XYZ\Desktop\User_Mapping.csv' -ProfileName 'TestUserMappings' </pre>
11	Clear-PVQSecurityMapping	MigrationTaskId	Clear security mapping in PMA with migration task id as the end point from existing migration task. This cmdlet returns success/ensure and failure message.	<pre> <b>Clear-PVQSecurityMapping -</b> MigrationTaskId 1 </pre>
12	Invoke-PVQDiscovery	MigrationTaskId	This cmdlet starts the discovery of an already created PMA migration task which will catalogue the source.	<pre> <b>c</b> </pre>
13	Invoke-PVQPreMigrationCheck	MigrationTaskId	This cmdlet starts the pre-migration checks of an already created PMA migration task which checks the compatibility of the source content with the target.	<pre> <b>Invoke-PVQPreMigrationCheck 1</b> </pre>



14	Invoke-PVQProcessing	MigrationTaskId, ProcessingStage	This cmdlet starts the processing of an already created PMA migration task which creates the content in the target. Processing migration upto certain stage like 'CaptureMetadata','Classify','Extract','Transform','Load'.	<b>Invoke-PVQProcessing</b> 1
15	Invoke-PVQPostProcessing	MigrationTaskId	This cmdlet starts the post processing of an already created PMA migration task which creates the content in the target	<b>Invoke-PVQPostProcessing</b> 1
16	Invoke-PVQReset	MigrationTaskId	This cmdlet will instigate a reset of the PMA migration task, which removes the content from the target	<b>Invoke-PVQReset</b> 1
17	Clear-PVQMigrationTask	MigrationTaskId	This cmdlet will instigate an erase of the PMA migration task, which clear the discovered item of the PMA migration task.	<b>Clear-PVQMigrationTask</b> 1
18	Get-PVQMigrationTaskStatus	MigrationTaskId	This cmdlet will return the current processing status of the PMA migration task.	<b>Get-MigrationTaskStatus</b> 1
19	Get-PVQExecutionStats	MigrationTaskId	This cmdlet will return the current processing status of the PMA migration task.	<b>Get-PVQExecutionStats</b> 1
20	Stop-PVQMigrationTask	MigrationTaskId	This cmdlet will stop the PMA migration task, which stops the execution of the current Migration Task.	<b>Stop-PVQMigrationTask</b> 1

## 10. APPENDIX

### 10.1. Metadata Mapping Function List

Migration Accelerator provides built in functions for transforming source metadata and/or generating metadata values as part of migration. In addition to built-in functions, custom functions can be added using PowerShell or IronPython.

#### 10.1.1. String Functions

Sr.No.	Function Name	Parameters	Description
1	ConcatWithSeparator	Separator, stringOne, stringTwo	This function allows you to combine two different string with your separator.
2	Concat	stringOne, stringTwo	This function will join two strings.
3	StringContains	stringToCheck, orgString	This function will check one string contains other supplied string or not. It will return value in true or false.
4	ReplaceString	orgString, wantToReplace, replaceString	This function will replace sting.
5	SubstringByStartPosition	orgString, startPosition	This function will return sting from your supplied position.
6	SubstringByPostionAndLength	orgString, startPosition, length	This function will return sting from your supplied position and length.
7	ToUpper	Name	Changing text case to upper
8	ToLower	Name	Changing text case to lower
9	Compare	stringOne, stringTwo	Comparing two string values

## 10.1.2. Math Functions

Sr.No.	Function Name	Parameters	Description
1	SUM	stringOne, stringTwo	This function will return sum of given two numbers.
2	Round	Value, RoundUpto	Returning a decimal value to the nearest integral value
3	Absolute	Value	Returning the absolute value of a Decimal number
4	Power	Value, PowerUpto	Returning a specified number raised to the specified power

## 10.1.3. Date Functions

Sr.No.	Function Name	Parameters	Description
1	Now()		This function will return current datetime value.
2	Get-Day	Date	This function will return day value from given date.
3	Get-Month	Date	This function will return month value from given date.
4	Get-Year	Date	This function will return year value from given date.
5	Get-Time	Date	This function will return time value from given date.
6	Get-DateFormat[yyyy-MM-dd]	Date	This function will return given date in yyyy-MM-dd format.
7	Get-DateFormat[dd-MM-yyyy]	Date	This function will return given date in dd-MM-yyy format.

## 10.1.4. Misc. Functions

Sr.No.	Function Name	Parameters	Description
1	GetMappedUser	srcMetaValue	This function will give target mapped for given source user based on user mapping.

2	Substitute_Invalid_Characters	inputString	This function will substitute invalid characters in given input string that are not supported by target system.
3	GetTargetTaxonomy	sourceTaxonomy	This function will give target taxonomy value for given source taxonomy value.
4	Get-Newname	Name, Ext	This function will return a new name after combining name and extension of file.
5	Get-PathSegment	Url, SegmentNumber	This function will return path segment from given Url.
6	GetTargetContentItemIdBySourceUri	srcMetaValue	This function will return target content item id based on source item Uri.

## 10.2. PMA Metadata Mapping PowerShell API

To assist with writing powerful script and custom functions, Proventeq Migration Accelerator provides some built-in variables and helper module instances.

### 10.2.1. Pre-defined variables

The following variables are available to all scripts/custom functions:

#### 11. MigrationItem

- **SI** - The source representation of the item
  - **ItemName** - The name of the item as shown in the user interface.
  - **MimeType** - The file extension of the item.
  - **Uri** - The logical path of the item.
  - **AlternateUri** - The path to the binary if the item is a file.
  - **GroupId** - The document identifier that is common across all document versions.
  - **VersionLabel** - The major version.
  - **SubVersionLabel** - The minor version.
  - **EntityCategory** - 0 for containers, 1 for files and links.
  - **EntityType** - File, Link or Folder.
  - **ContentType** - The content type classification of the item.
  - **ItemSize** - The size of the binary in bytes.
  - **Level** - The depth of the item in the folder tree.
  - **HasUniqueSecurity** - Whether the item has security, information assigned.
- **SIC** - The source metadata exposed as an XML document.
- **Content** – This is the actual content corresponding to the item in source. The type of variable is byte []. This is typically used for transforming XML or HTML content. For example, if the source item were an Xml file, it would be the UTF-8 encoded binary of the XML. Note: This variable contains value only during the processing stage. It would contain a null value when in script editing mode.
- **ContentType (string)** – This variable contains the ContentType captured for the migration item during the Discovery stage.
- **Log** - A logging object of type log4Net.ILog - this can be used to write messages to the application log with statement such as `$Log.DebugFormat("Doing x for item with path {0}", $MigrationItem.SI.Uri);`

## 10.2.2. XML Helper Module

The XML Helper Module can be used to extract and transform source content which is in XML format.

Sr.No.	Function API	Description	Example Usage (PowerShell)
1	GetValueByXPath( <code>byte[]</code> byteArray, <code>string</code> xpath, <code>string</code> nsName, <code>string</code> nsUri)	Loads given XML byte array and return value of given node path, namespace and uri.	<code>\$XmlHelper.</code> <code>GetValueByXPath(Xmlbytes,</code> <code>"/Persons/Person/Age", "pvq",</code> <code>"http://www.pvq.com")</code>
2	MetaDictionaryToXElement( <code>IDictionary&lt;string, string&gt;</code> metaDict)	Converts given dictionary object to XML.	<code>\$XmlHelper.</code> <code>MetaDictionaryToXElement</code> <code>(keyValuedictionary)</code>
3	XElementToMetaDictionary( <code>T&gt;</code> (XElement elemMeta)	Converts given XML to dictionary object.	<code>\$XmlHelper.</code> <code>XElementToMetaDictionary</code> <code>("&lt;?xml version="1.0"</code> <code>?&gt;&lt;node&gt;&lt;/node&gt;")</code>

## 10.2.3. HTML Helper API

The HTML Helper API can be used to extract and transform source HTML content. It can be used to:

- Retrieve specific HTML content from source HTML based on complex XPath queries. This helps in extracting only the relevant HTML from source.
- Cleanse HTML by removing unwanted nodes and/or attributes. This is particularly useful for removing embedded styles within HTML.
- Transform HTML by replacing nodes. This can be used for achieving standards compliance e.g. AA compliance.

An instance of HTML Helper module is available to metadata mappings scripts and functions as a variable name 'HtmlHelper'.

The list of methods available for HTML Helper are listed below:

Sr.No.	Function API	Description	Example Usage
1	DecodeHTML( <code>string</code> htmlContent)	Convert the string that has been HTML encoded for HTTP transmission into a decoded string.	<code>\$HtmlHelper.</code> <code>DecodeHTML("&lt;html&gt;xxx&lt;/html</code> <code>&gt;")</code>
2	LoadHtmlBytes( <code>byte[]</code> content)	Loads HTML bytes into HTMLDocument object.	<code>\$HtmlHelper.</code> <code>LoadHtmlBytes(bytes)</code>

3	LoadHtml( <b>string</b> html)	Loads HTML string into HTMLDocument object.	<code>\$HtmlHelper.LoadHtml("&lt;html&gt;xxx&lt;/html&gt;")</code>
4	LoadUrl( <b>string</b> url)	Loads HTML content from given Url into HTMLDocument object.	<code>\$HtmlHelper.LoadUrl(Url)</code>
5	GetOuterHTML( <b>string</b> nodeXPath)	Returns outer HTML string for given node path of HTMLDocument object loaded by using Load method.	<code>\$HtmlHelper.GetOuterHTML("//tr[@class = 'someClass1' or @class = 'someClass2']")</code>
6	GetValueByXPath( <b>byte[]</b> content, <b>string</b> xpath)	Returns inner HTML value from given HTML content and node path.	<code>\$HtmlHelper.GetValueByXPath(bytes, "//tr[@class = 'someClass1' or @class = 'someClass2']")</code>
7	GetInnerHtml( <b>string</b> nodeXPath)	Returns inner HTML value for given node path of HTMLDocument object loaded by using Load method.	<code>\$HtmlHelper.GetInnerHtml("//tr[@class = 'someClass1' or @class = 'someClass2']")</code>
8	GetContentBetweenComments( <b>string</b> startComment, <b>string</b> endComment)	Returns content between given start and end comment present in HTMLDocument object loaded by using Load method.	<code>\$HtmlHelper.GetContentBetweenComments("startComment", "endComment")</code>
9	RemoveNodesByXPath( <b>string</b> nodeXPath)	Removes given node present in HTMLDocument object loaded by using Load method.	<code>\$HtmlHelper.RemoveNodesByXPath("//tr[@class = 'someClass1' or @class = 'someClass2']")</code>
10	RemoveAttributesByXPath( <b>string</b> attributeName, <b>string</b> attributeXPath)	Removes given attribute present in HTMLDocument object loaded by using Load method.	<code>\$HtmlHelper.RemoveAttributesByXPath("Name", "//tr")</code>
11	ReplaceNodes( <b>string</b> nodeXPath, <b>string</b> replacementNodeName)	Replaces given node with new node name present in HTMLDocument object loaded by using Load method.	<code>\$HtmlHelper.ReplaceNodes("//tr", "//td")</code>