



Proventeq Migration Accelerator – iManage to SharePoint

Installation Guide

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About this Guide

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

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

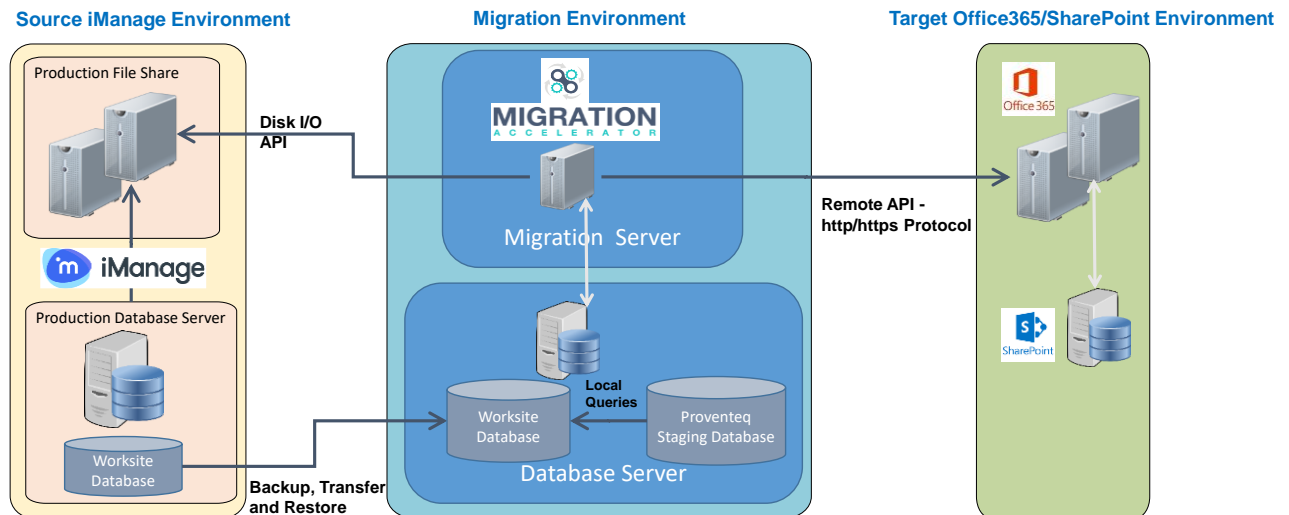
Audience

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

1. INTRODUCTION

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

1.1 Migration Accelerator Deployment Overview



The deployment diagram highlights the source environment, migration environment and target environment.

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

2. SYSTEM REQUIREMENTS

Migration Accelerator is a Windows application, which requires a migration application server (Windows server) and a staging database (SQL Server). The servers can be provisioned on-premises or in the cloud.

Proventeq is not responsible for providing the hardware, its maintenance, backups, or security management, for the hardware requirement stated in sections 2.1.1. and 2.2.1. Proventeq is also not responsible for the software licenses, subscriptions, or its support for the software requirement stated in sections 2.1.2. and 2.2.2.

It is recommended that:-

- The application server and the staging database should be provisioned in the same Class C subnet
- Where possible, the application server and the database server should be provisioned in the same Class C subnet as the source system.

2.1. Migration Accelerator Application Server

The application server is responsible for hosting the core migration engine and executing the transformation and load processes.

2.1.1. Hardware requirements

Component	Minimum Configuration	Recommended Configuration
Processor	64-bit 4 vCPU	64-bit 8 vCPU or better
Memory (RAM)	16 GB	32 GB or higher
Data Storage ¹	Solid-state disk: 500 GB free space	Solid-state disk: 1 TB free space
Network card ²	1 Gbps	1 Gbps
Azure VM Size ³	Standard_D4_v3	Standard_D8_v3

¹ - Data disk should be separate from the OS disk. Storage requirement may vary depending on total migration volume or size.

² - Minimum Network Bandwidth required is 100 Mbps.

³ - Required only while provisioning in Azure cloud. VM sizes available at <https://docs.microsoft.com/en-us/azure/virtual-machines/windows/sizes-general>

2.1.2. Software Requirement

Component	Requirement
Operating System	Windows Server 2016 Standard or later
Additional software	Microsoft Office (Outlook, Word, Excel, PowerPoint) or later (if using link resolution) SQL Server Management Studio (corresponding to installed SQL server version) Microsoft EDGE


PowerShell modules	Windows PowerShell 3.0 or higher
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Pre-requisites

The following pre-requisites needs to be installed prior to commencement of installation of Proventeq Migration Accelerator.

Component	Download link to latest version of software
.NET framework 3.5	https://www.microsoft.com/en-us/download/details.aspx?id=21
.NET framework 4.7 or later	https://www.microsoft.com/en-us/download/details.aspx?id=56116
Power BI Desktop	https://download.microsoft.com/download/8/8/0/880BCA75-79DD-466A-927D-1ABF1F5454B0/PBIDesktopSetup-2020-08_x64.exe To support advance business intelligence reporting. Choose “Advanced Download Options” for direct installer download. Select File name “PBIDesktop_x64.msi”.
SQL CLR Functions 2012	https://www.microsoft.com/en-us/download/details.aspx?id=56041 Select file name ENU\x64\SQLSysClrTypes.msi
Report Viewer 2012 Redistributable	https://www.microsoft.com/en-us/download/details.aspx?id=35747

2.1.3. Ports and Endpoint Requirement

Component	Requirement
Staging database/ Source database ports	Allow access to SQL server ports (default is TCP port 1433) from the application server. Further information at https://docs.microsoft.com/en-us/sql/sql-server/install/configure-the-windows-firewall-to-allow-sql-server-access
Endpoint for SharePoint/OneDrive migration 	Refer to https://support.proventeq.com/hc/en-us/articles/360009395437-Endpoints-requirements-for-the-Migration-Accelerator for details of all required endpoints for migration from the application server.

2.2. Staging Database

The staging database persists the migration configuration and the processing auditing information including the metadata and security information during the various stages of migration.

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

The installation program can either create a new database and configure it, or configure a pre-created database.

2.2.1. Hardware requirements


Dedicated SQL instance can be provisioned using the following hardware requirements:-

Component	Minimum Configuration	Preferred Configuration
Processor	64-bit 4 vCPU	64-bit 8 vCPU or better
Memory (RAM)	16 GB	32 GB or higher
Data Storage	Solid-state disk: 500 GB free space	Solid-state disk: 1 TB free space
Network card	1 Gbps	1 Gbps
Azure VM Size	Standard_D4_v3	Standard_D8_v3

2.2.2. Software Requirement


Component	Requirement
Operating System	Windows Server 2016 Standard or above
Database	SQL Server 2014 Standard or later
Additional software	SQL Server Management Studio (corresponding to installed SQL server version)

2.3. User Account Requirements

System Name	User Accounts Requirements
Migration Application Server	<p>Windows user account with local Administrator permissions to</p> <ul style="list-style-type: none"> Perform installation of software pre-requisites and Migration Accelerator product. Execute the migration
Migration Database Server	<p>Windows account (for integrated authentication) or SQL user account. This account will also be used by the Migration Accelerator application to access the database.</p> <p>To create a new database during installation, the user account should have 'db_creator' permissions on the database server.</p> <p>To configure an existing empty database during installation, the installer requires</p> <ul style="list-style-type: none"> The name of the database (e.g. Proventeq_Staging). The user account should have 'db_owner' or 'sysadmin' permissions on this database.
SharePoint/SharePoint Online 	<p>For SharePoint online:</p> <p>Proventeq Migration Accelerator App based authentication, where the Proventeq Migration Accelerator application ID can be used once the global administrator has granted admin consent. This Application ID uses delegated permission and hence requires a user with sufficient privileges to the target Site Collections.</p>

	<p>If content needs to be migrated to multiple site collections using a single migration task, a user account with SharePoint Administrator role assigned will be required, otherwise a user account with SharePoint Site Collection 'Administrator' permissions to load content and metadata to a SharePoint site collection.</p>
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2.3.1. Source user account requirement

System Name	User Accounts Requirements
<p>iManage Worksite</p> 	<p>A user account with '<i>db_owner</i>' permissions on iManage Worksite staging database.</p> <p>For on-premises iManage: Windows user account with Read permissions to access iManage Worksite File Share while executing migration.</p> <p>For hosted iManage: An iManage user account with privileges to retrieve files through the iManage REST API.</p>

2.4. Server Scaling

Although the migration throughput is dependent on several factors (like infrastructure, bandwidth, data, metadata etc.), the migration throughput can be increased by scaling out Migration Accelerator application servers. Contact Proventeq Sales (sales@proventeq.com) for license requirements on scaling.

3. MIGRATION ACCELERATOR INSTALLATION

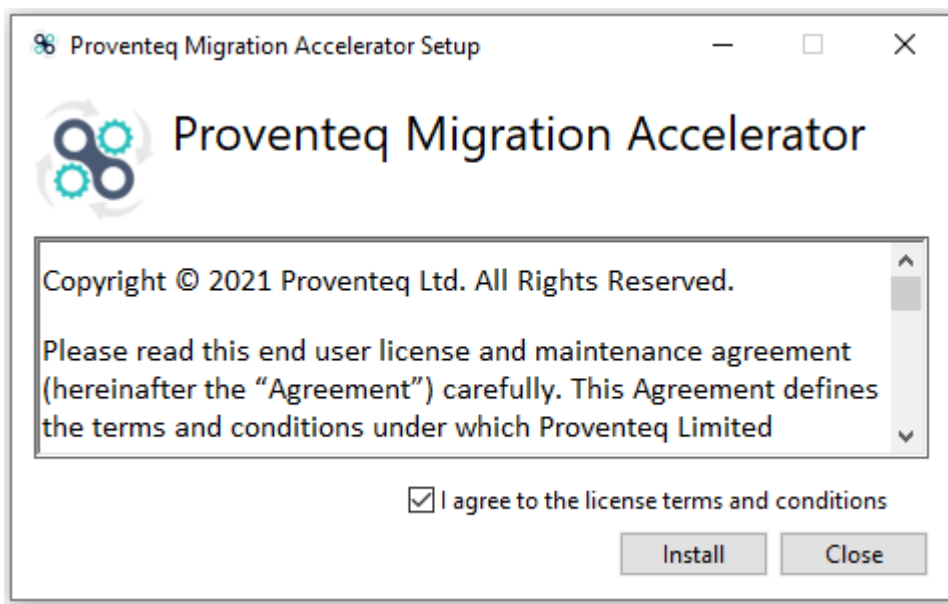
3.1. Upgrading to V7.5

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

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

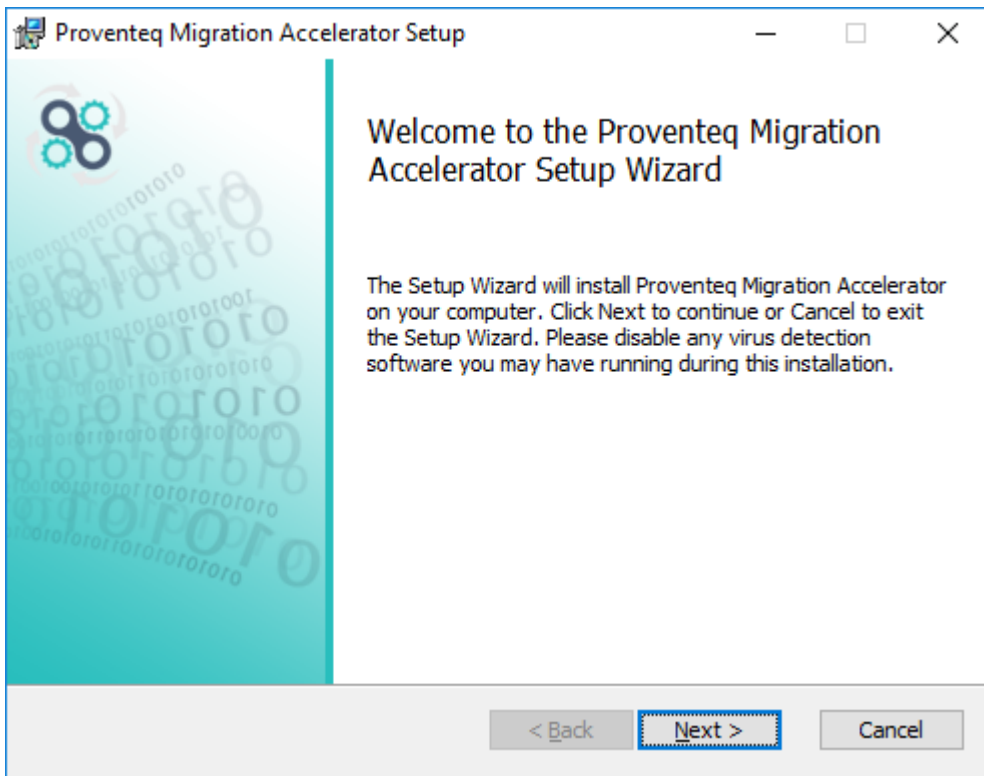
3.2. New Installation

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

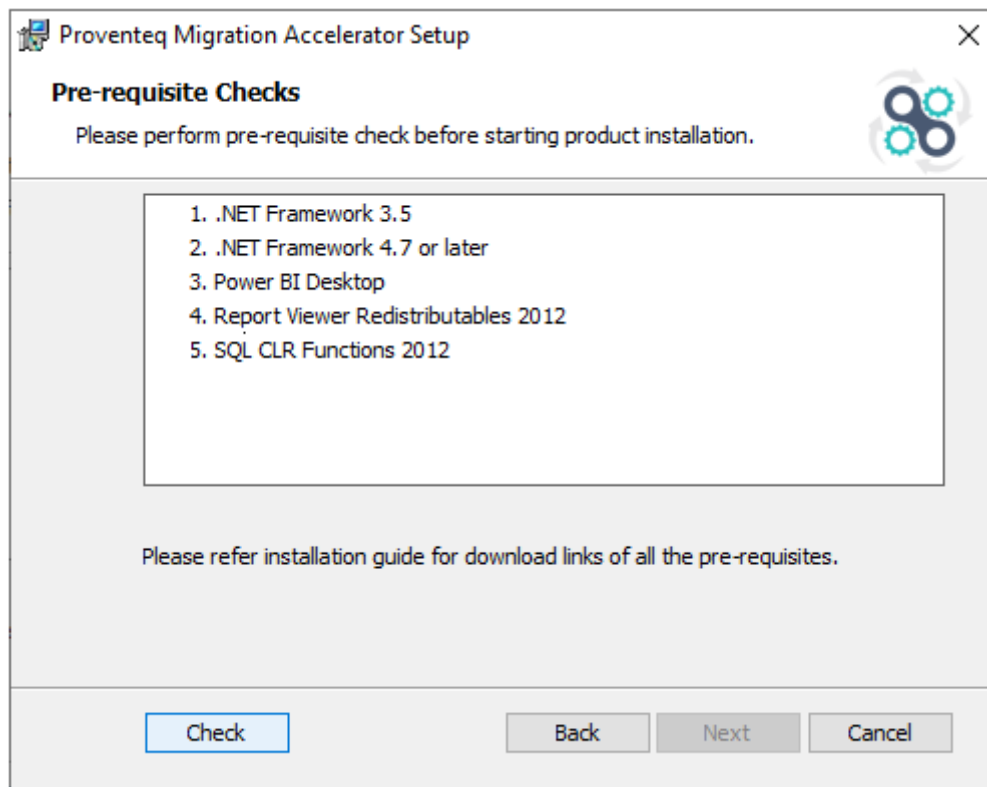


The "License Agreement" window will appear. You must select 'I agree to license terms and conditions' to continue.

3.3. Welcome screen

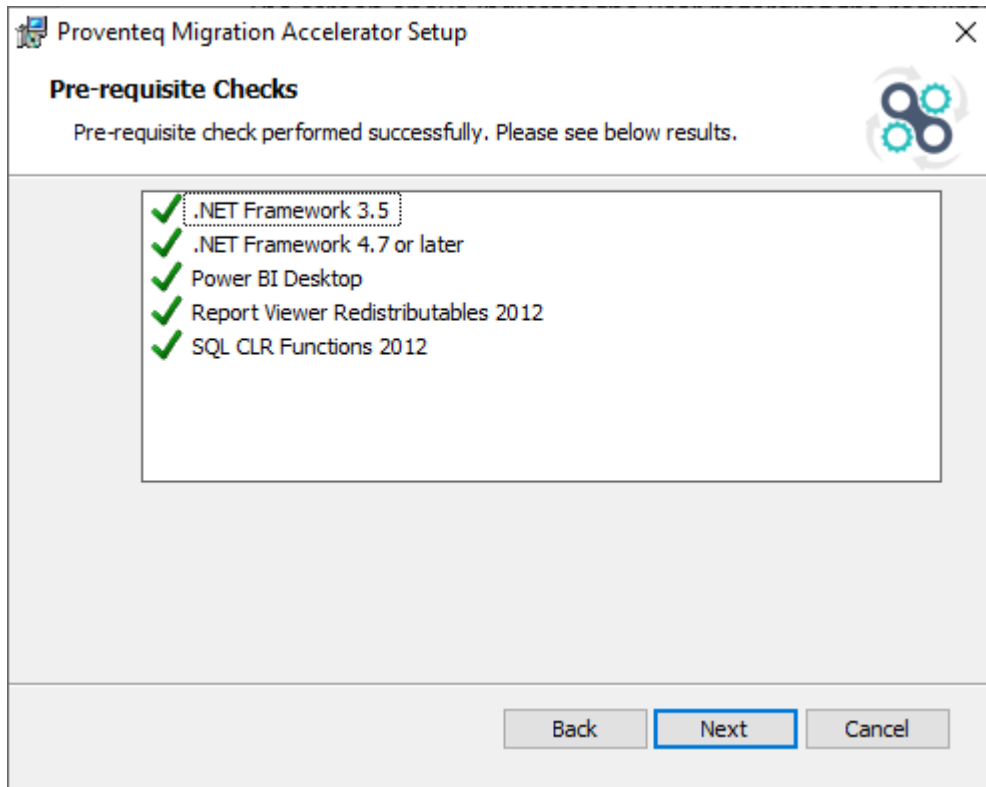


3.4. Pre-requisite Checks



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

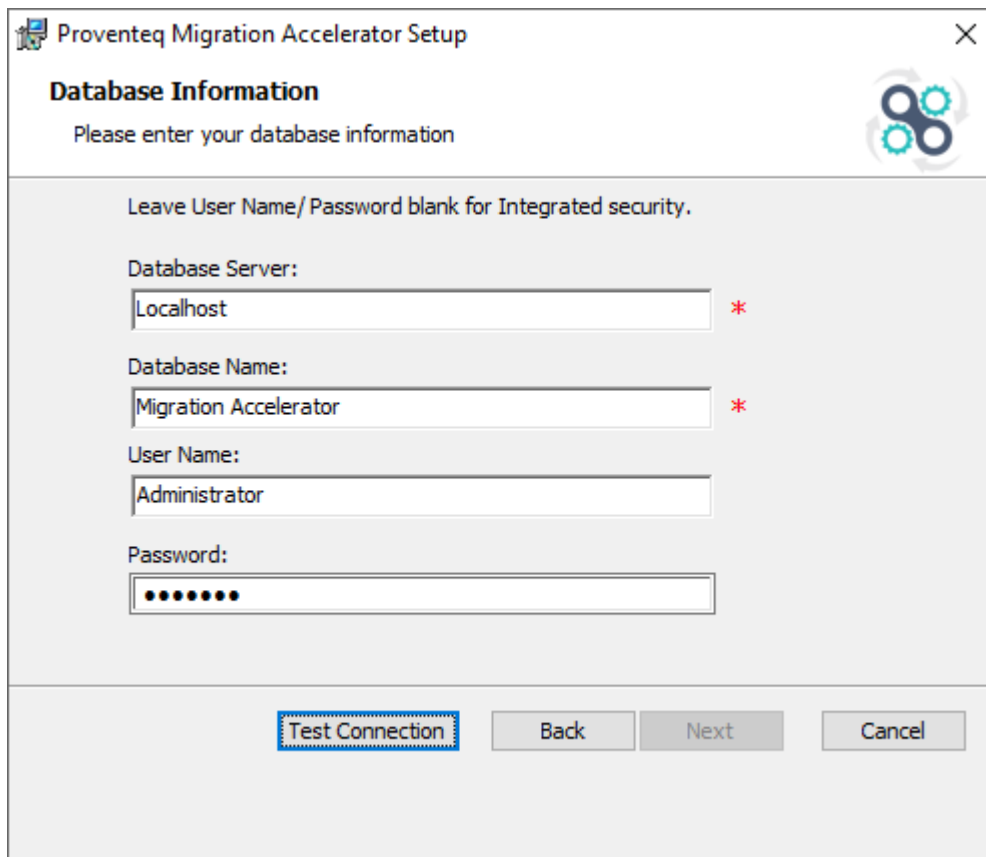
Once user clicks on Check button, the screen below will appear, which confirms that the required supportive utilities are already installed.



Click on Next button.

3.5. Database Information

Click Next to display the Database Information screen.



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

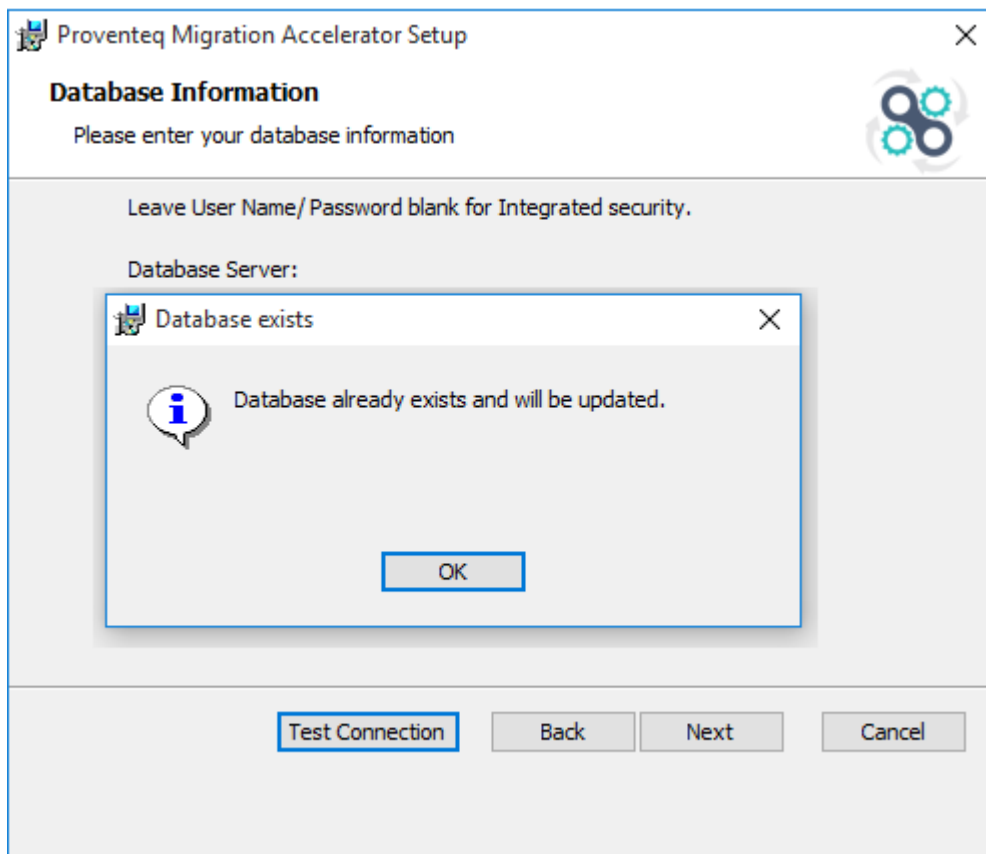
Note: In case of full release, entering previously created Database name will erase all the data from that database. Whereas in case of upgrade release, entering previously created Database name will update the existing database for any changes.

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

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



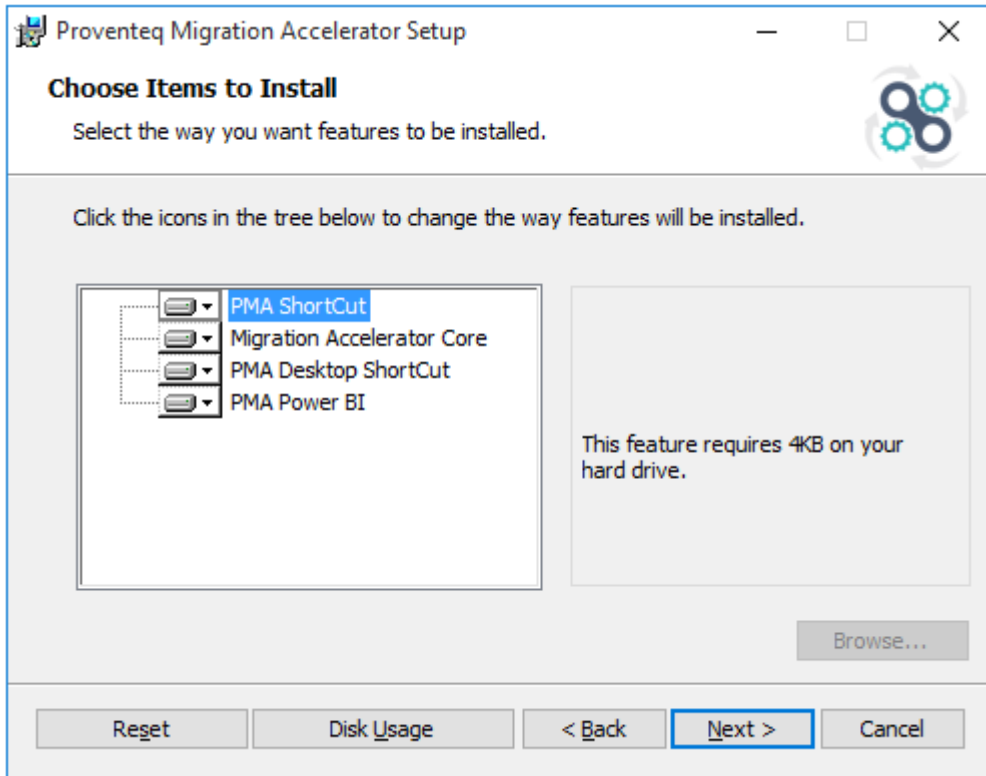
In case of upgrade release, we will provide an existing database name, which will show below Test Connection message.



Click on Next button.

3.6. Choose Items to Install

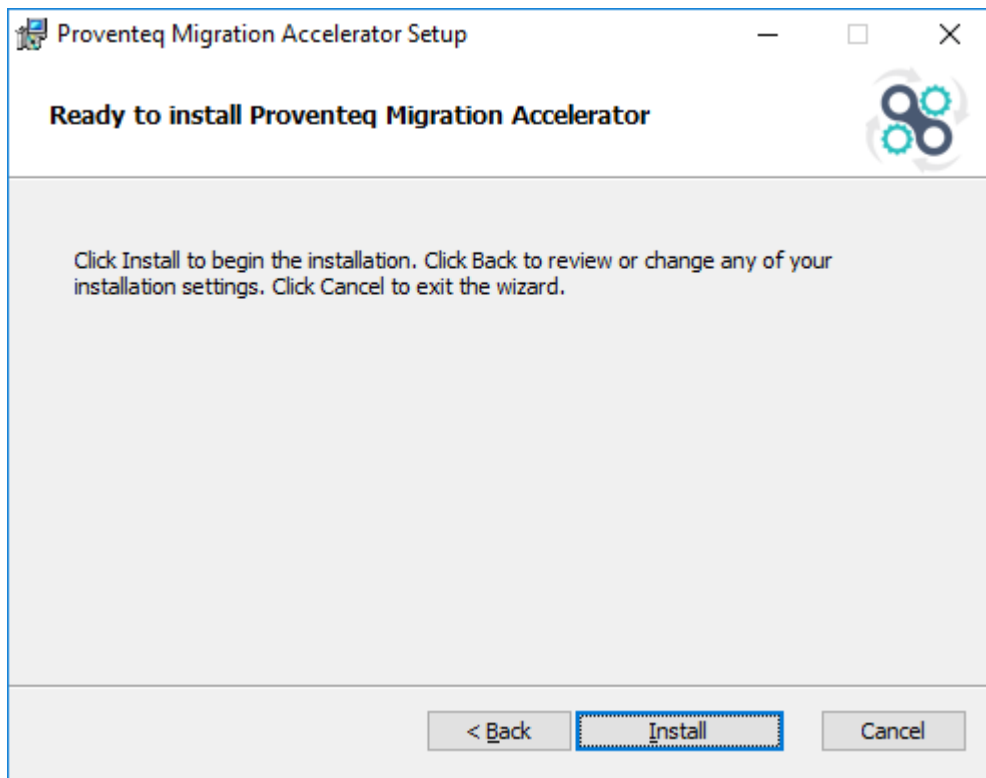
Click Next to display the Choose Items to Display screen



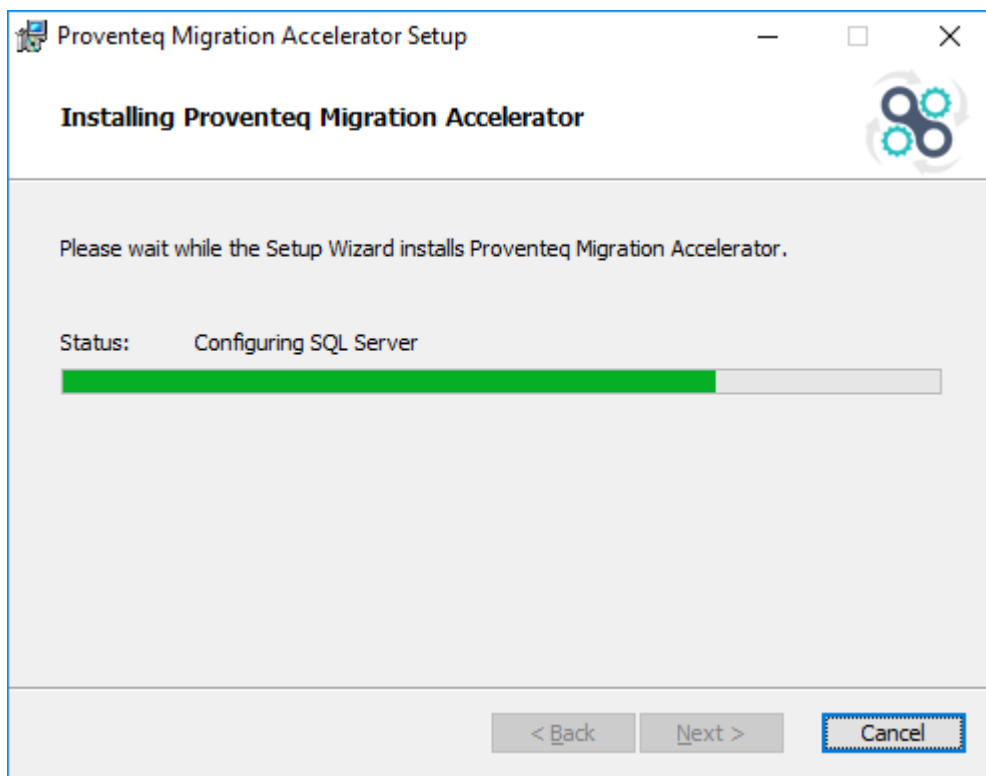
If required change location for feature(s) to install by clicking on Browse button, the default is normally fine.

3.7. Confirm and Complete Installation

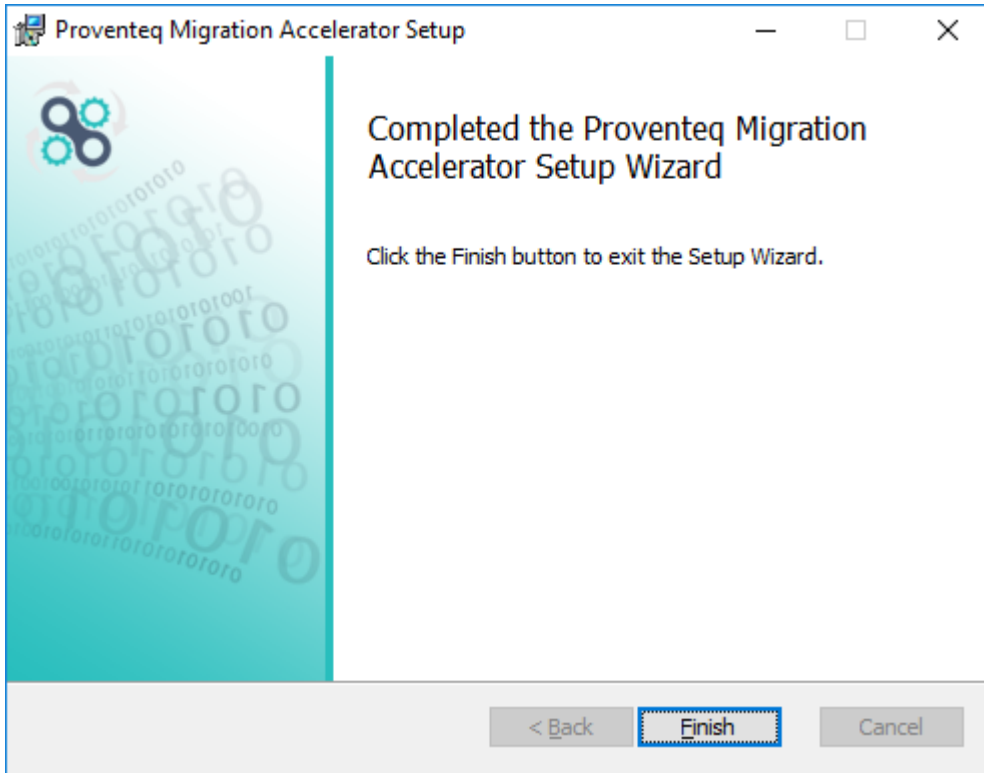
Click Next to display the Ready to install Proventeq Migration Accelerator screen



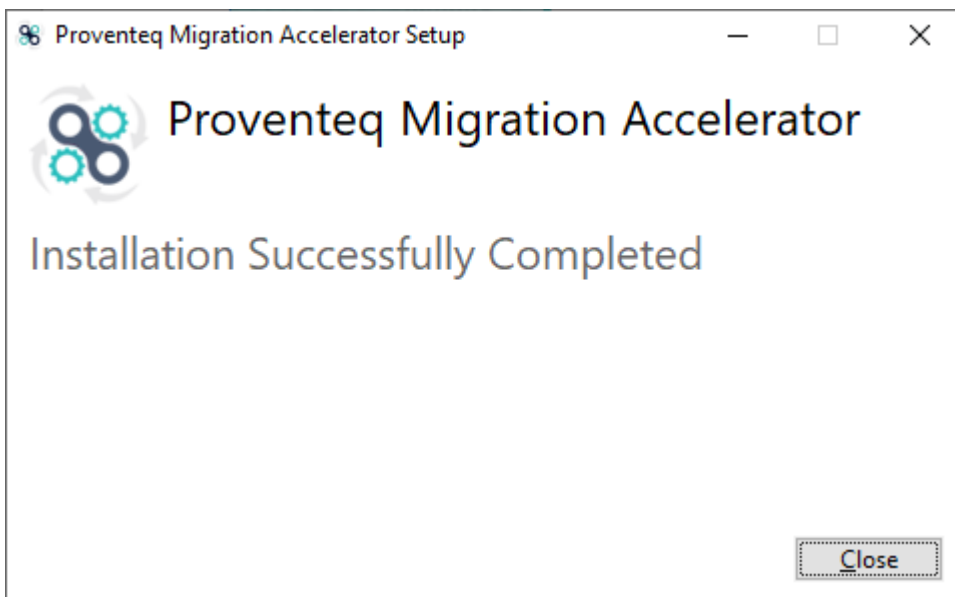
Click on Install to begin installation



On completion of Installation below setup completion screen will be displayed



Click Finish.



Click Close.

This completes the installation process.

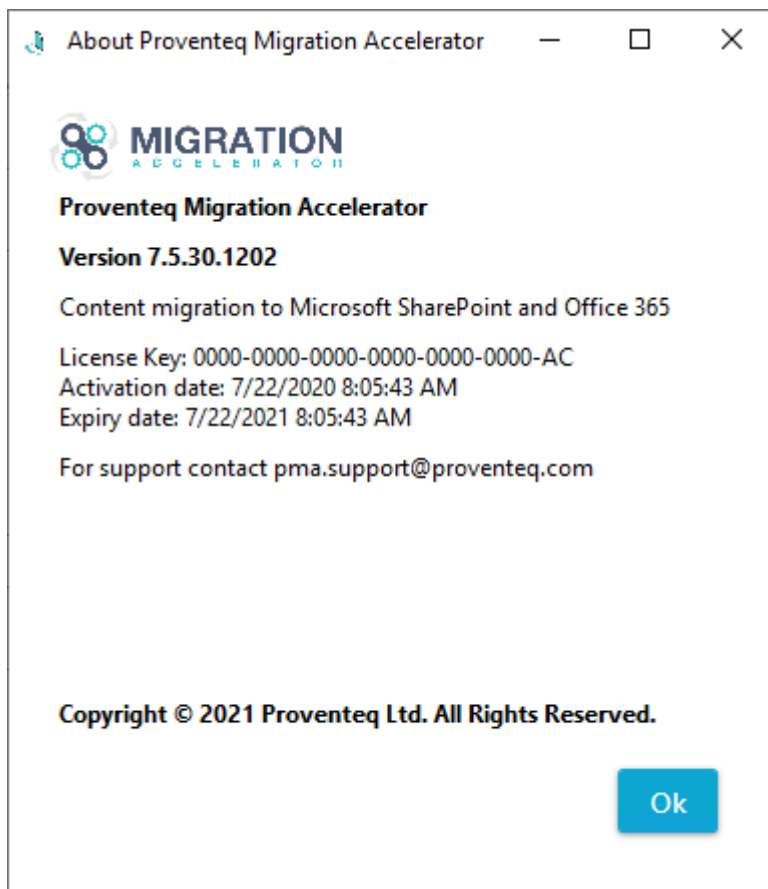
4. LAUNCH APPLICATION

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

OR

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

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



5. UNINSTALL THE SOFTWARE

5.1. Uninstall Software

This procedure removes the Proventeq Migration Accelerator.

To uninstall the Proventeq Migration Accelerator:

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

At the prompt, click OK to confirm uninstall.