LEPIDE SOFTWARE

Configuration Guide

This document explains the steps to configure LepideMigrator for Documents.

LepideMigrator for Documents

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1. System Requirements

Before you start installing LepideMigrator for Documents, make sure that your computer meets the following requirements.

1.1 Minimum System Requirement

- Pentium 4 Class or higher Processor
- Minimum 2 GB RAM
- 1 GB free space for the installation and data migration

1.2 Required Operating Systems

One of the following Windows operating systems (32/64-bit version) is required.

- Windows XP
- Windows 7
- Windows 8
- Windows Server 2003
- Windows Server 2003 R2
- Windows Server 2008
- Windows Server 2008 R2
- Windows Server 2012
- Windows Server 2012 R2

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1.3 Supported Virtual Environment

- Hyper-V Server 2008
- Hyper-V Server 2008 R2
- Hyper-V Server 2012
- Hyper-V Server 2012 R2
- VMware ESX Server
- VMware ESXi Server
- Microsoft Virtual PC

1.4 Supported SharePoint Servers

- SharePoint Foundation 2010
- SharePoint Server 2010
- SharePoint Foundation 2013
- SharePoint Server 2013
- SharePoint Online (Office 365)

1.5 Supported Exchange Servers

- Exchange Server 2000
- Exchange Server 2003
- Exchange Server 2007
- Exchange Server 2010
- Exchange Server 2013

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- Exchange Online (Office 365)

1.6 Supported Outlook Versions

- Outlook 2003
- Outlook 2007
- Outlook 2010
- Outlook 2013

1.7 Prerequisites

- .NET Framework 4.0 or later
- Microsoft Excel 2003 or any other Spreadsheet software (required only to view report)

1.8 Prerequisites for Exchange Server

Other required prerequisites to establish the connection with different Exchange Servers are listed herein below.

Exchange Server	Supported Outlook Versions
Exchange Server 2000	▪ Outlook 2003 ▪ Outlook 2007
Exchange Server 2003	▪ Outlook 2003 ▪ Outlook 2007 ▪ Outlook 2010
Exchange Server 2007	▪ Outlook 2003 ▪ Outlook 2007

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	▪ Outlook 2010 ▪ Outlook 2013
Exchange Server 2010	▪ Outlook 2003 ▪ Outlook 2007 ▪ Outlook 2010 ▪ Outlook 2013
Exchange Server 2013	▪ Outlook 2013 ▪ Outlook 2007 Service Pack 3 with the Outlook 2007 November 2012 update (12.0.6665.5000) ▪ Outlook 2010 Service Pack 1 with the Outlook 2010 November 2012 update (14.0.6126.5000)
Office 365	▪ Outlook 2007 SP2 ▪ Outlook 2010 SP1 for 64-bit ▪ Outlook 2010 14.0.7106.5003 for 32-bit ▪ Outlook 2013 **NOTE:** Connecting to Office 365 as destination requires you to select a Global Administrator User Mailbox, which has full access to all mailboxes. You can connect to Office 365 and Archive Mailboxes through Outlook Profile only.

2. User Rights

To install and work with LepideMigrator for Documents, you need to have appropriate rights over the required file server(s), Exchange Server(s), and SharePoint Server(s).

2.1 Local System Rights

The user should have following permissions on the local computer on which the software is installed:

- Full access permission on the drive in which Operating System is installed
- Read/Write permissions in the registry

Steps to assign these permissions are listed here in below.

1. Go to Control Panel
2. Select the User Account
3. Select Change Account Type
4. Make User as **Administrator**
5. Click on **Save**

Note:

Steps mentioned above may vary depending on the Windows version installed on the System. If the User Account does not exist on the system, create a new User Account with the Administrative rights

2.2 Exchange Server Rights

(Needed only to access Live Exchange Mailboxes)

To access live Exchange Public Folders always use an Administrator account. Also, this account should have **any** of these permission levels: **Owner**, **Publishing Editor**, **Editor**, **Author**, or **Publishing Author**.

2.3 Office 365 Rights

To access multiple Office 365's mailboxes, the user should have the following rights:

- The user should be **Global Administrator**
- The user should be a delegate with **Full Access** permission over all the mailboxes, that you intend to access in Office 365

3. Adding Destination

You can add any SharePoint Server or Office 365 Server as the Destination.

3.1 Adding SharePoint Server

Follow the steps below to add a SharePoint Site. Please note that each SharePoint Site is denoted with a project name in this software.

1. Perform any of the following methods to start the process.
   i. Click "File" menu and click "Add New Site" item as shown below.

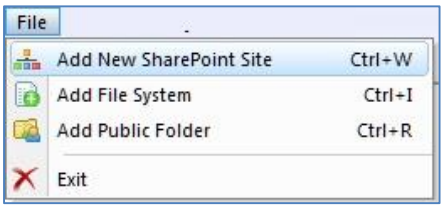
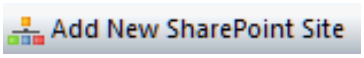


Figure 1: File Menu Command to add a site

   ii. Click  button on the toolbar.

   iii. Right click the parent "SharePoint Server" node in the "SharePoint" Section and click "Add New SharePoint Site" as shown below.

Figure 2: Right Click on SharePoint.

2. Doing any of the above steps displays the following wizard.

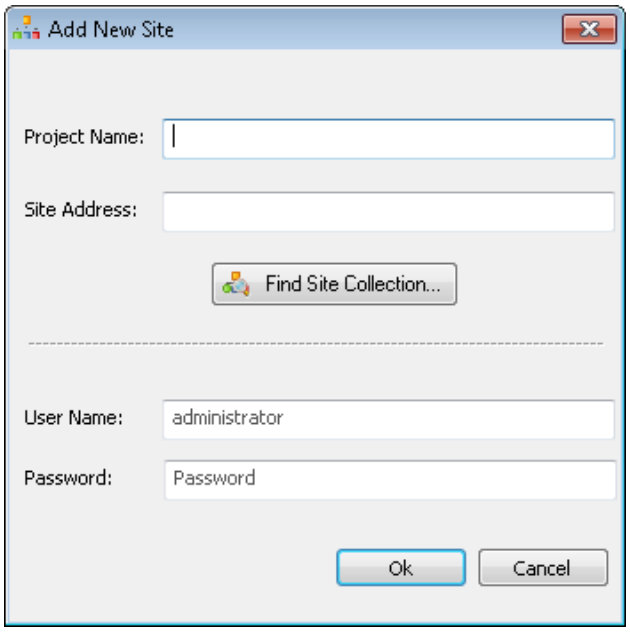


Figure 3: Wizard to add a new Site

3. If you want the software to find and enumerate the complete Site Collection, then follow the steps below.

i. Click to access the following wizard.

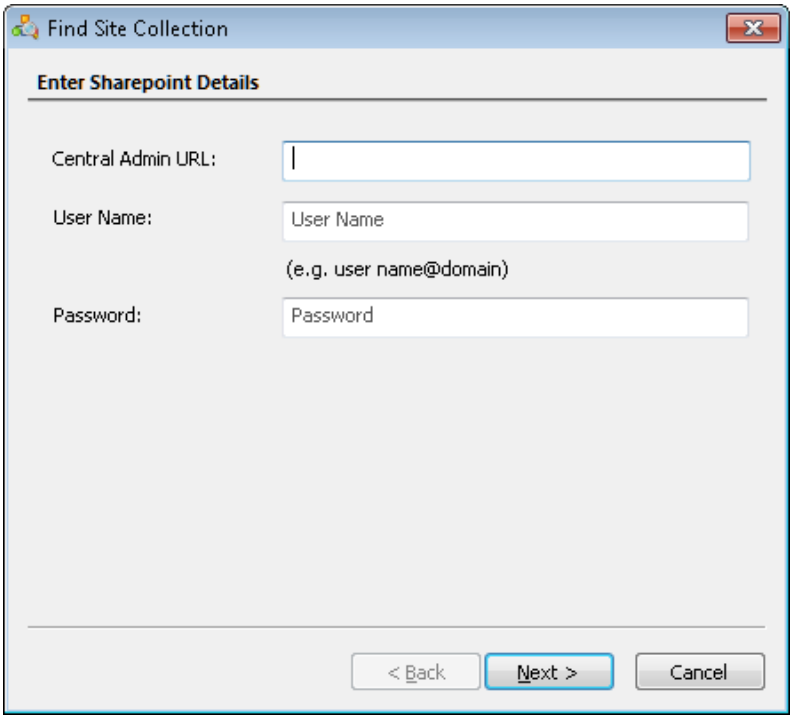


Figure 4: Wizard to find a Site Collection

ii. Enter the details like "Central Admin URL", "User Name", and "Password".

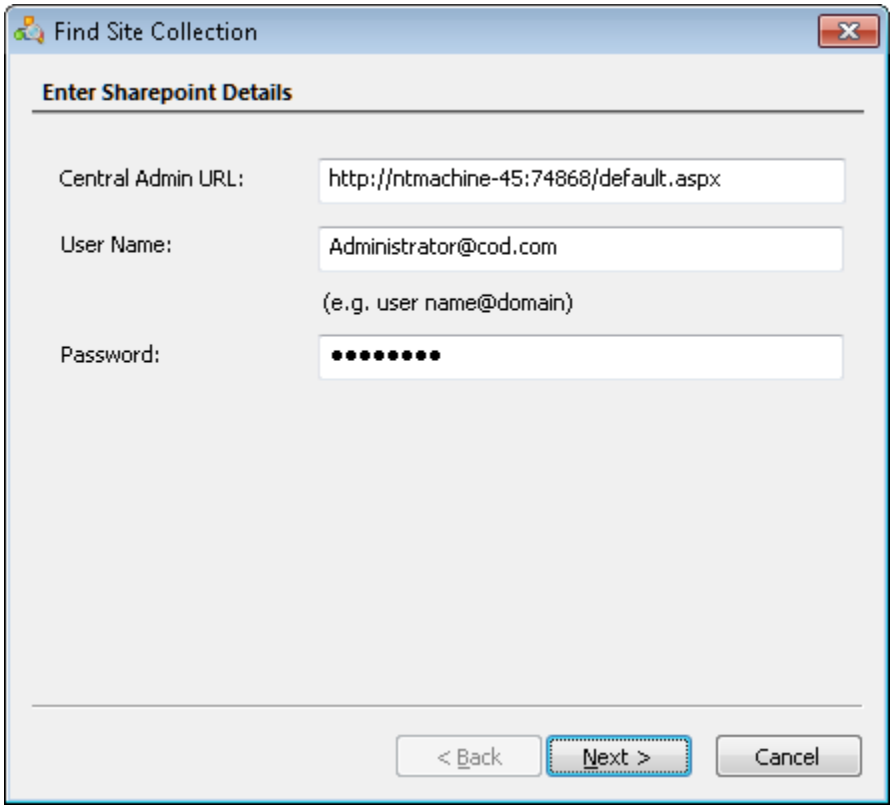
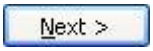


Figure 5: Inserting the details to find Site Collection

iii. Click 

. The software tries to connect to the server.

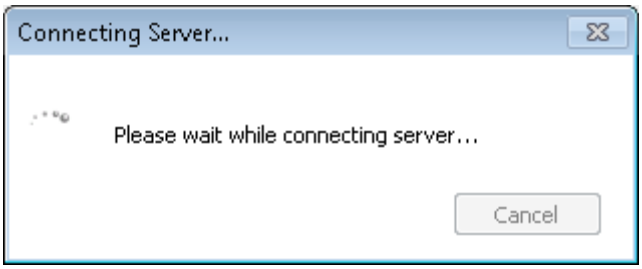


Figure 6: Attempting to connect to the server

iv. Once it is connected to SharePoint, the software displays the list of detected Web Applications.

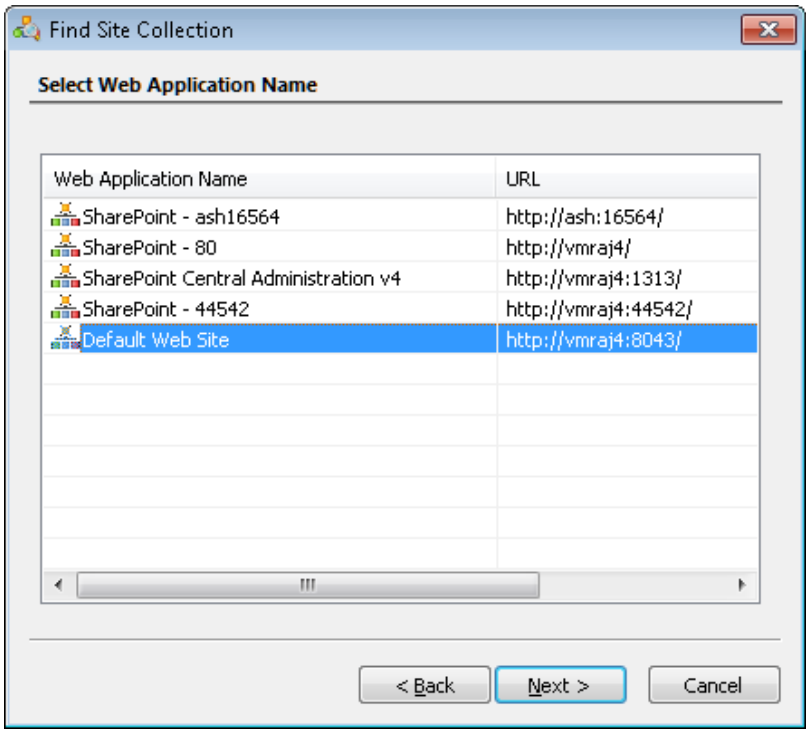


Figure 7: Displaying the detected Web Applications

v. Select a required Web Application.

vi. Click "Next" to show the list of all available sites.

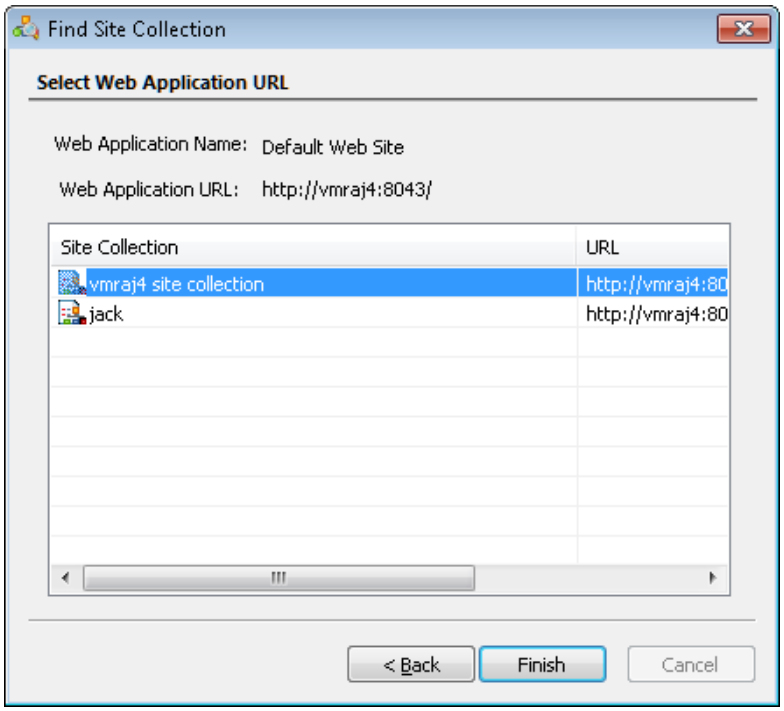


Figure 8: Displaying the list of the available sites

vii. Select a Site and click "Finish". The software takes you back to the following wizard.

viii. Here, you have to enter the Project Name.

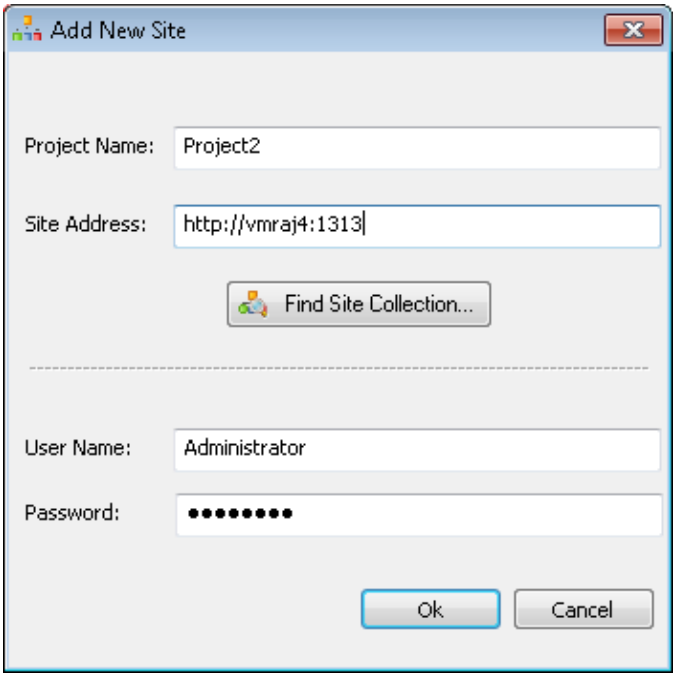


Figure 9: "Add New Site" wizard with the selected site

We are providing the inputs directly without using "Find Site Collection" method in this test case.

4. Enter the desired name of the project in the first text box titled "Project Name".
5. Provide the URL of the SharePoint Site in the next text box titled "Site Address".
6. Enter the username and password of Administrator.

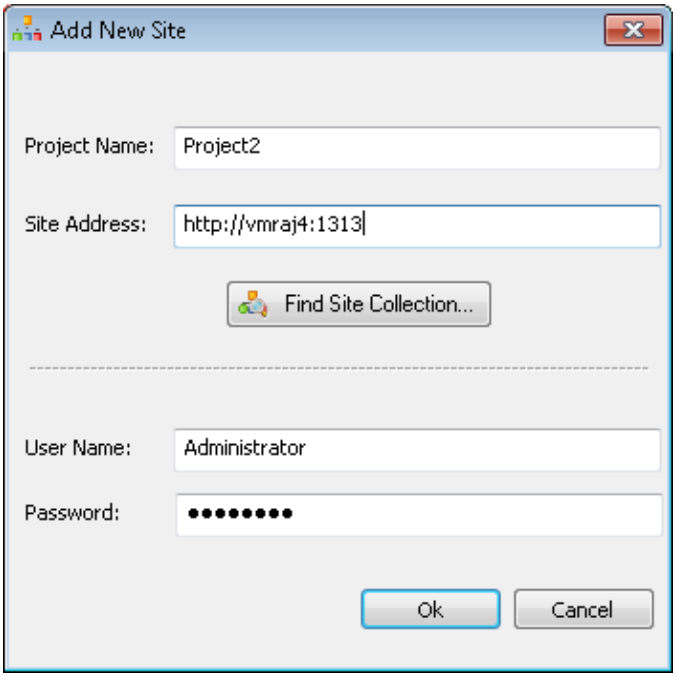


Figure 10: "Add New Site" wizard with the selected site

7. Click "OK".
8. The following message appears.

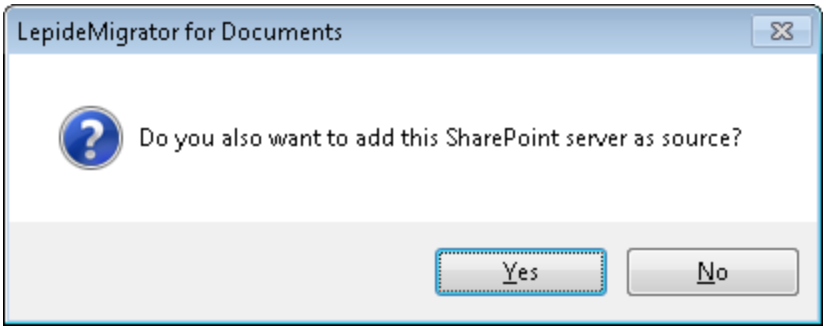


Figure 11: Message to add the SharePoint Server also as Source.

9. Click “Yes” to add this SharePoint site also as Source else click “No”.

10. Clicking any button let software add the SharePoint Site.

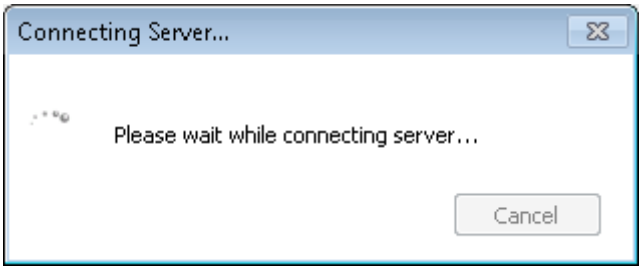


Figure 12: Attempting to connect to the server

11. The provided SharePoint Site is added and displayed with the entered Project name in the Destination Section in the Left Hand Panel. For example, project1 is the newly added node in the Destination Section as per the following image.

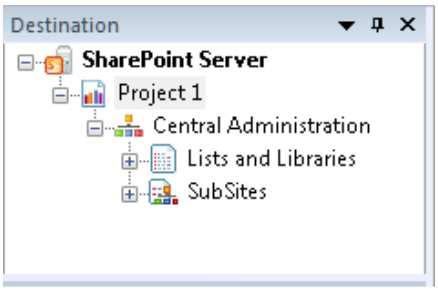


Figure 13: Newly added Project 1 site

3.2 Adding Office 365

Follow the steps below to add an Office 365 Site as a destination. Please note that each Office 365 Site is denoted with a project name in this software.

1. Perform any of the following methods to start the process.
   i. Click "File" menu and click "Add New Site" item as shown below.

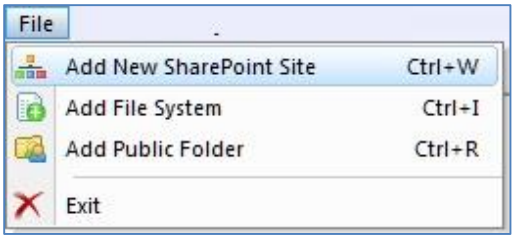
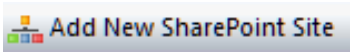


Figure 14: File Menu Command to add a site

   ii. Click  button on the toolbar.

   iii. Right click the parent "SharePoint Server" node in the "SharePoint" Section and click "Add New SharePoint Site" as shown below.

Figure 15: Right Click on SharePoint.

2. Doing any of the above steps displays the following wizard.

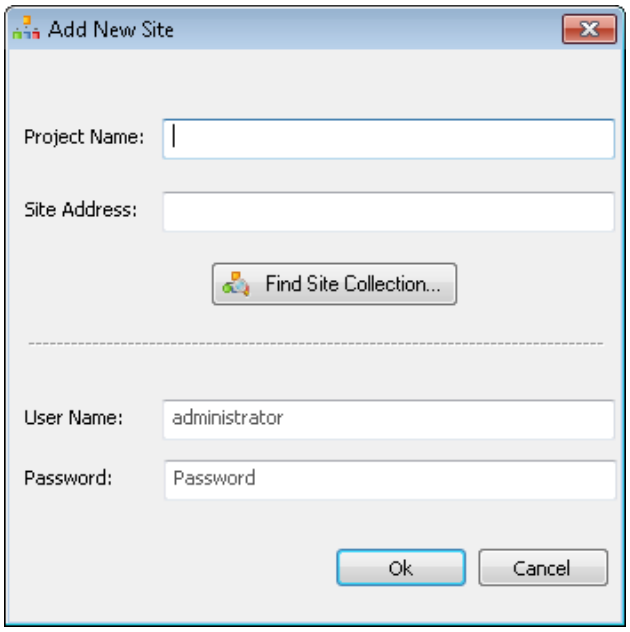


Figure 16: Wizard to add a new Site

3. If you want the software to find and enumerate the complete Site Collection, then follow the steps below.

i. Click to display the following wizard.

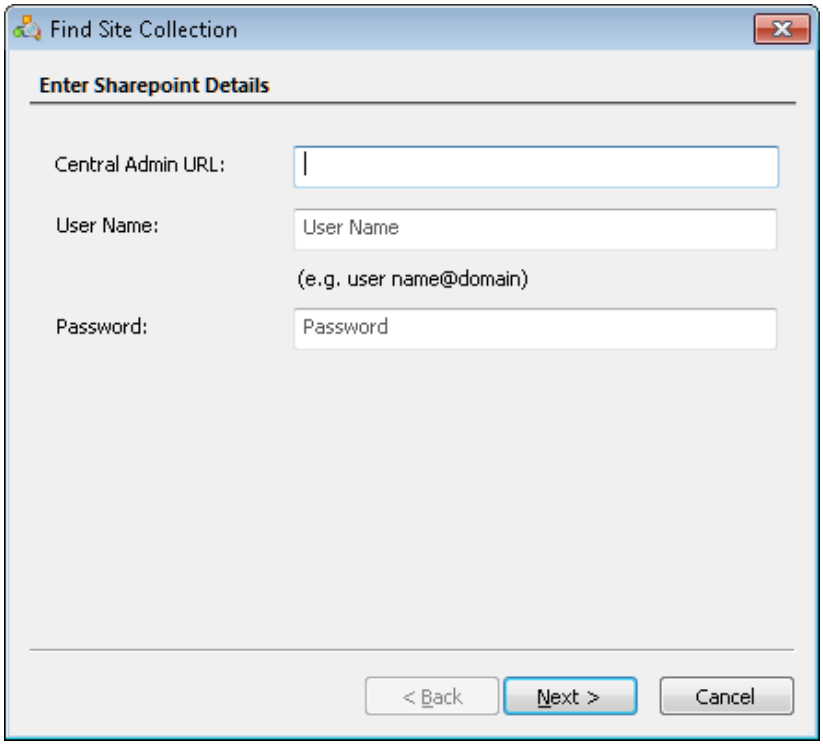


Figure 17: Wizard to find a Site Collection

ii. Enter the details like "Central Admin URL", "User Name", and "Password".

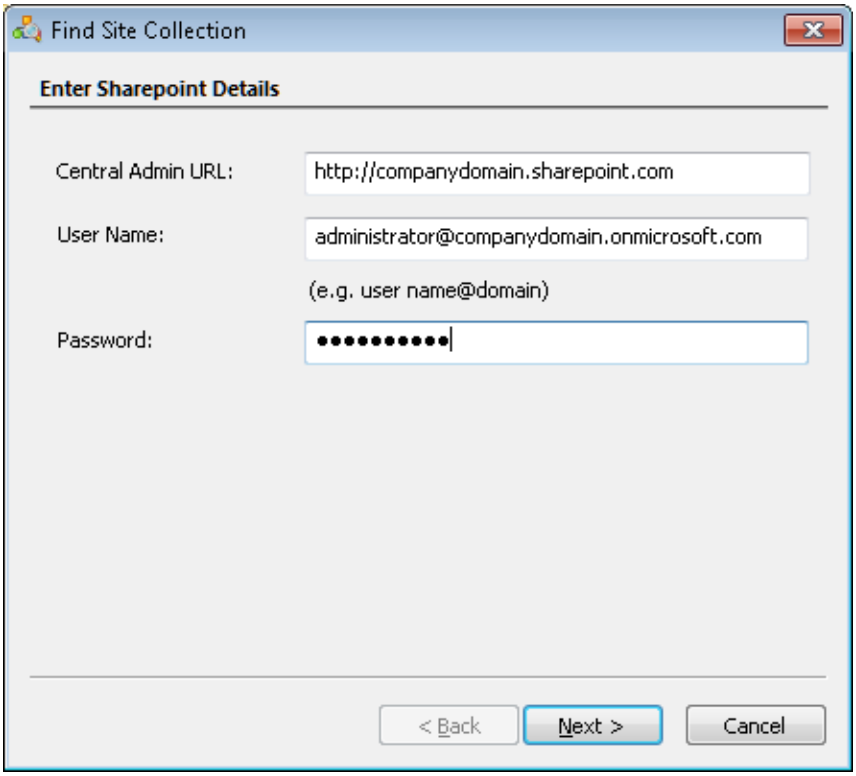
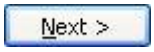


Figure 18: Inserting the details to find Site Collection

iii. Click  to proceed further. The next step displays the following screen saying to connect to the server.

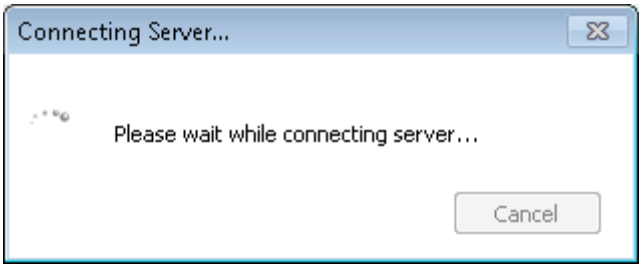


Figure 19: Attempting to connect to the server

iv. Once it connects to Office 365, the software shows the list of Web Applications.

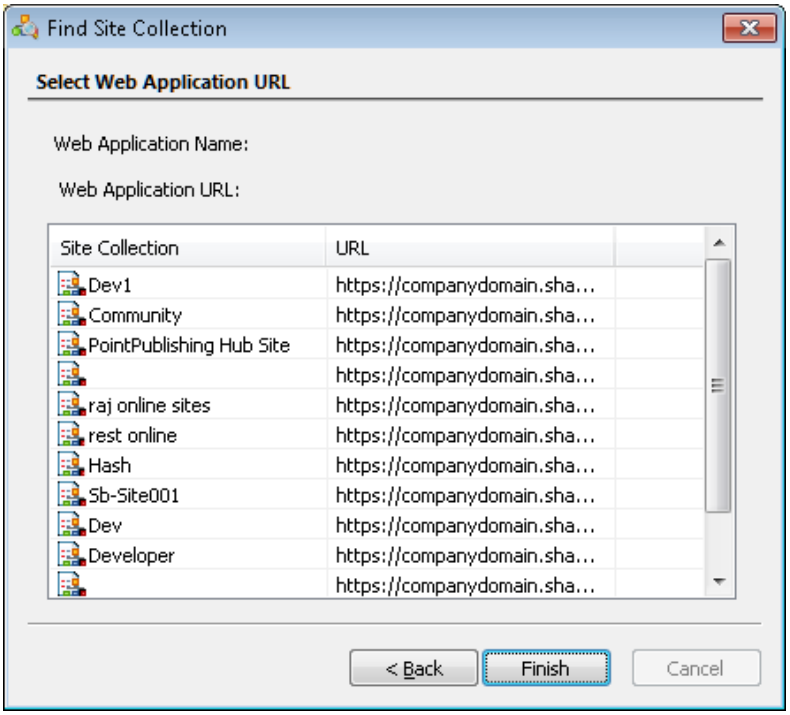


Figure 20: Displaying the detected Web Applications

v. Select a Site and click "Finish". The software shows the following step.

vi. Enter the Project Name.

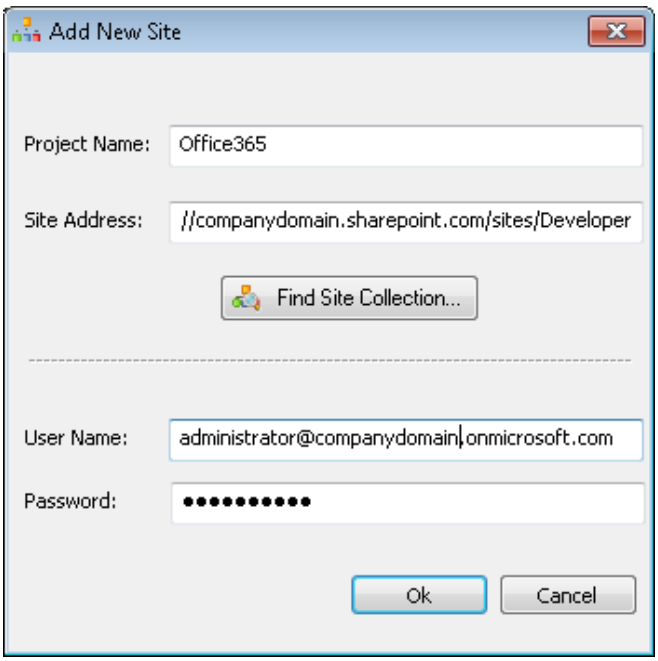


Figure 21: "Add New Site" wizard displays Office 365 site

We are providing the inputs directly without using "Find Site Collection" method in this test case.

4. Enter the desired name of the project in the first text box titled "Project Name".
5. Provide the URL of the SharePoint Site in the next text box titled "Site Address".
6. Enter the username and password of Administrator.

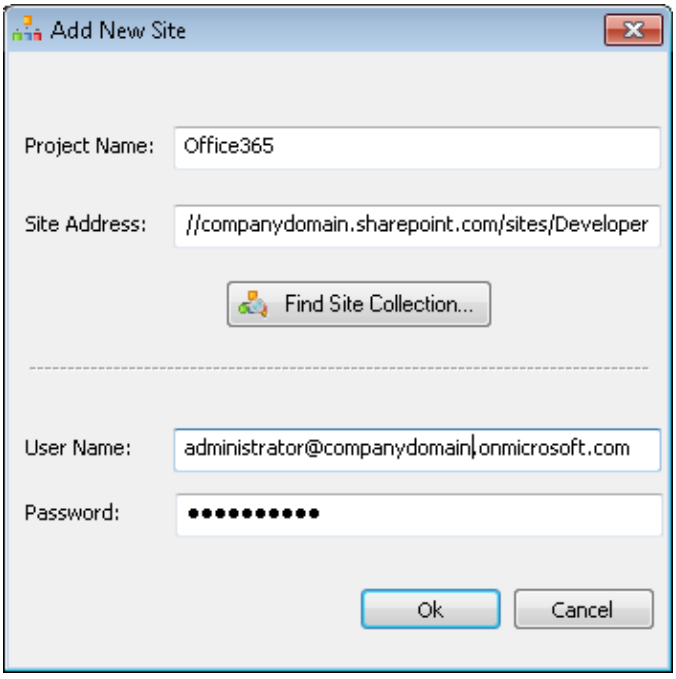


Figure 22: "Add New Site" wizard with the selected site

7. Click "OK".
8. The following message appears.

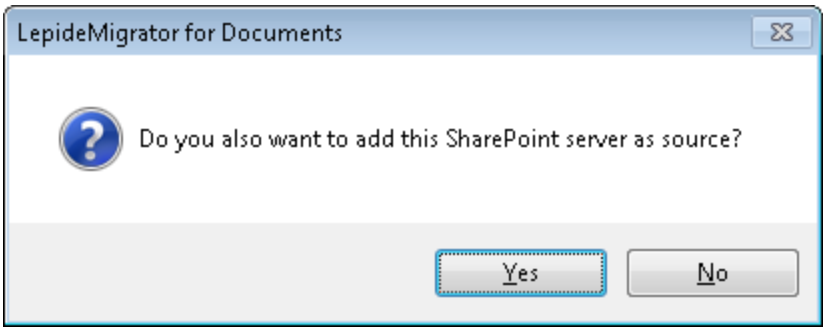


Figure 23: Message to add the SharePoint Server also as Source.

9. Click "Yes" to add same Office 365 site as Source. You can click "No" to keep this site as Destination only.
10. Clicking any button let software process the addition of Office 365 site.

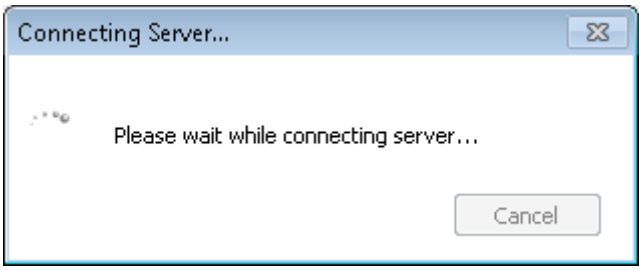


Figure 24: Attempting to connect to the server

11. The provided Office 365 Site is added and displayed with the entered Project name in the Destination Section in the Left Hand Panel. For example, Office365 is the newly added node in the Destination Section as per the following image.

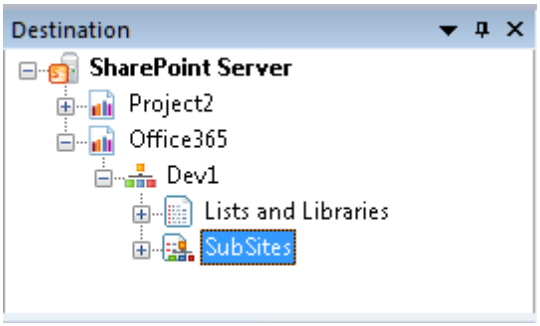


Figure 25: Newly added Office 365 site

4. Adding Source

Remote File System, Public Folders of Exchange Server, and SharePoint Site can be added as the source.

4.1 Local File System

The Local File System, where the software is installed, is added as the default file system. All its local drives and folders can be used as a source to transfer the content to the destination.

4.2 Remote File System

Follow the steps below to add a remote file system,

1. Perform any of the following methods to start the process.
    a. Click "File" menu and click "Add File System" as shown below.

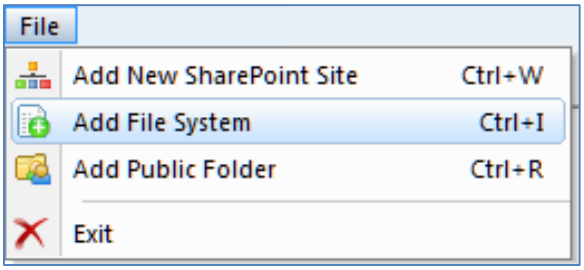


Figure 26: File Menu Command to add a file server

    b. Click "Add New Source" and select the option "File System" in its menu.

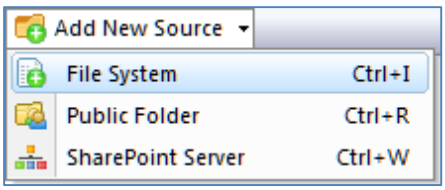


Figure 27: Menu option to add new source

c. Right click the parent "Windows File System" node in the "Source" Pane and click "Add New Drive" as shown below.

Figure 28: Right Click Context Menu for Windows File System

d. Right click the "Remote Computer" node and click "Add New Drive" as shown below.

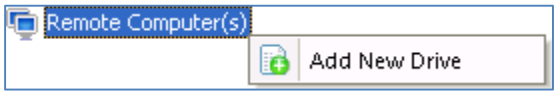


Figure 29: Right Click Context Menu for Remote Computer

2. Doing any of the above steps displays the following wizard.

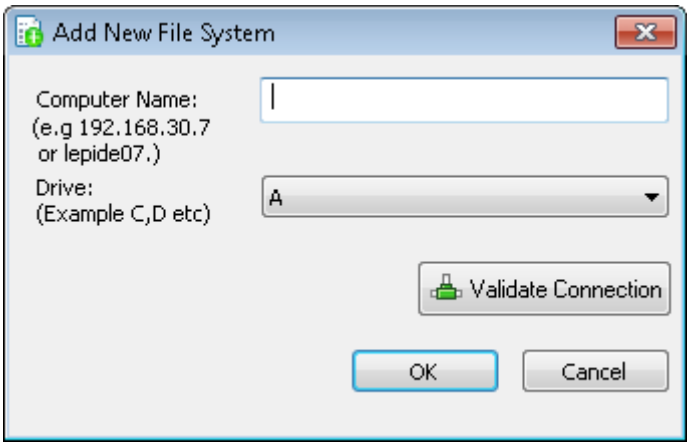


Figure 30: Wizard to add a networked computer as a File Server

3. Enter the Computer Name or IP Address in the text box titled "Computer Name"
4. Select a drive that has to be connected as a File Server for the software using the drop-down box titled "Drive".

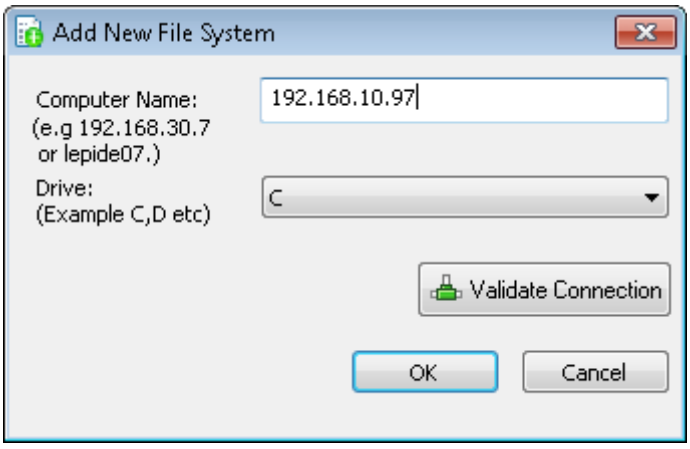


Figure 31: Enter the details to add a File System

5. **(Optional)** Follow below steps to validate the connection with the remote computer.
6. Click Validate Connection to validate the connection.
7. It displays the following dialog box.

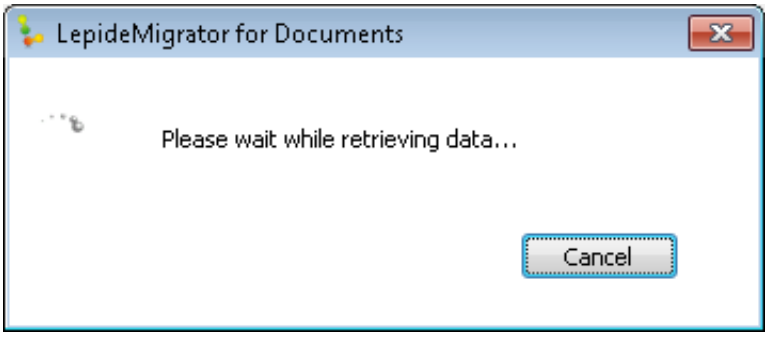


Figure 32: Retrieving Data dialog box

8. If the connection is successful, the following message box appears.

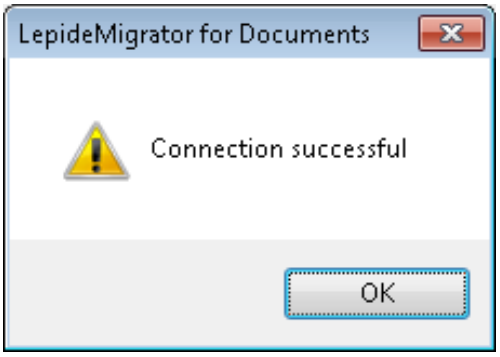


Figure 33: Connection is successful.

9. Click "OK" to process the addition of the remote file system.

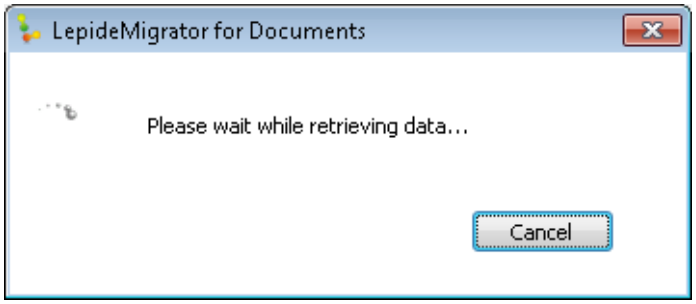


Figure 34: Retrieving Data dialog box

10. After establishing the connection, the software may ask for the login credentials to login on the remote computer. The networked storage will be added as a Remote File System to the software. It is displayed with the provided computer name under the "Remote Computer" node in the Source Section. For example, "sp13-ex10" is the newly added node in the Source section in the following image.

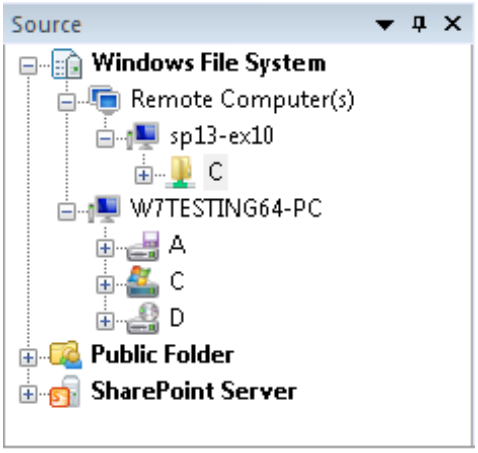


Figure 35: Newly added File Server - test-computer

4.3 Public Folders

You have to connect to an Exchange Server to add its Public Folders as the source. You can connect to an Exchange Server using the following methods.

1. Live Exchange (Direct Connection)
2. Through an Existing/New Outlook Profile
3. Manually Configure Outlook Profile

4.3.1 Connect to Live Exchange

Follow the steps below to add a Live Exchange Server.

1. Perform any of the following methods to start the process.
    a. Click "File" menu and click "Add Public Folder" as shown below.

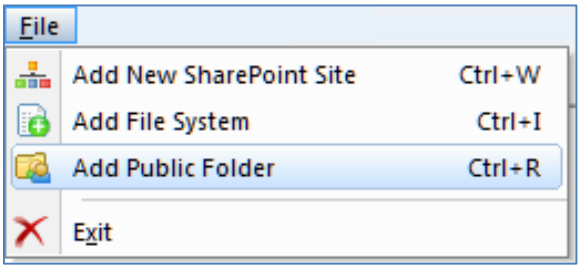


Figure 36: File Menu Command to add an Exchange Server

    b. Click "Add New Source" and select the option "Public Folder" in its menu.

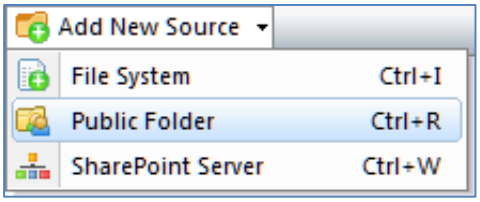


Figure 37: Menu option to add Exchange Server

    c. Right click the parent "Public Folder" node in the "Source" Pane and click "Add Public Folder" as shown below.

Figure 38: Right Click Context Menu for Public Folder Node

2. Doing any of the above steps displays the following wizard.

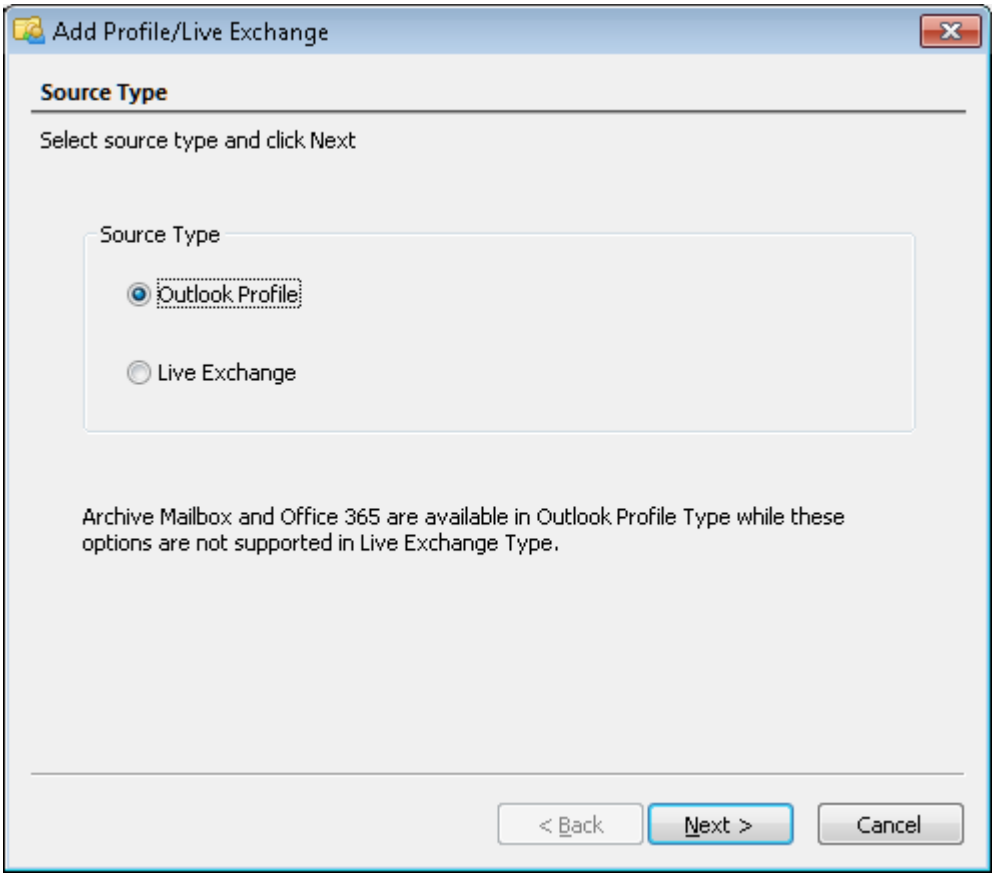


Figure 39: Wizard to add a local/networked Exchange Server

3. Select the option named "Live Exchange".

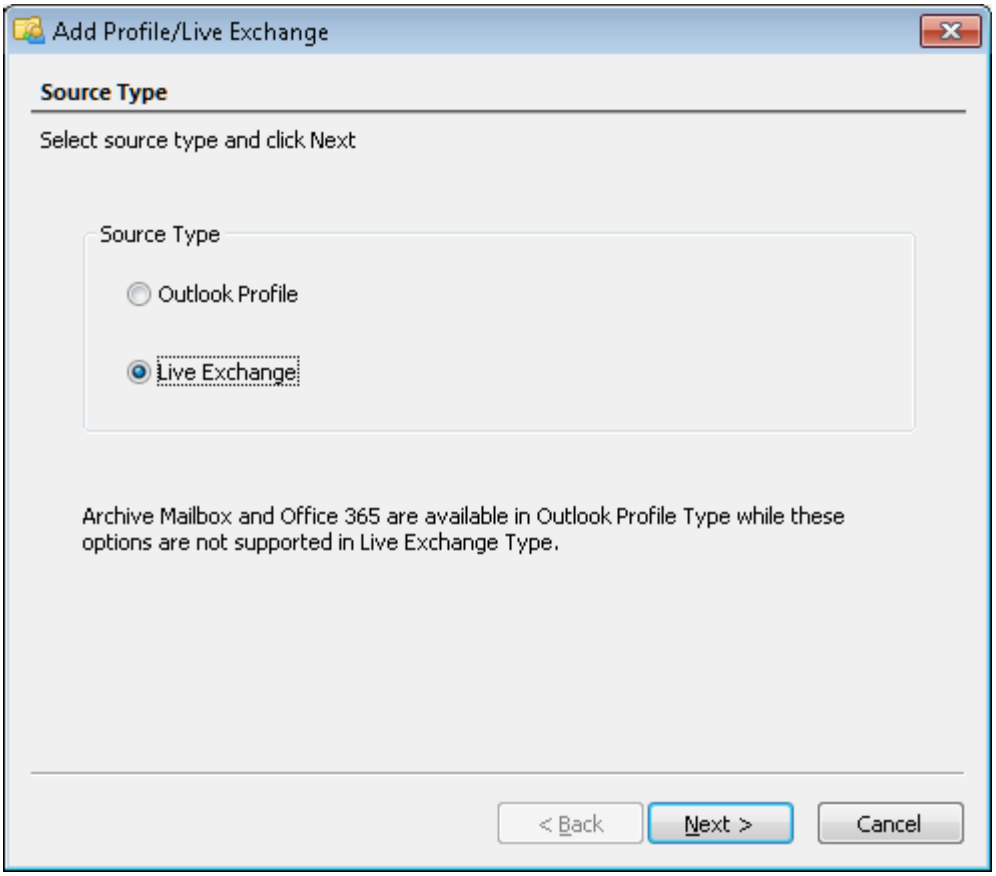


Figure 40: Selected the option to add Live Exchange

4. Click "Next".

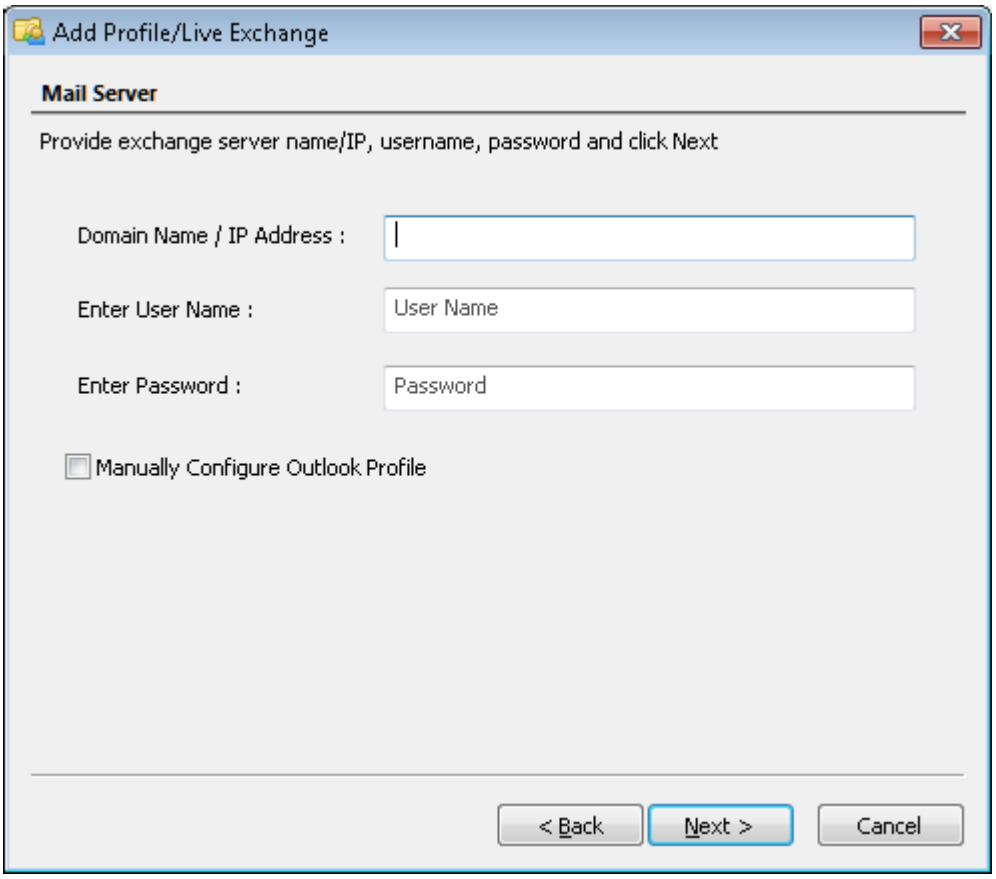


Figure 41: Add Exchange Server

You can right click on the node "Live Exchange" and select "Add Live Exchange" option to reach directly at this step.

Figure 42: Direct option to add Live Exchange

5. You have to provide the inputs like IP Address or the Domain Name of the server where Exchange Server is installed and the login credentials of an Administrator user.

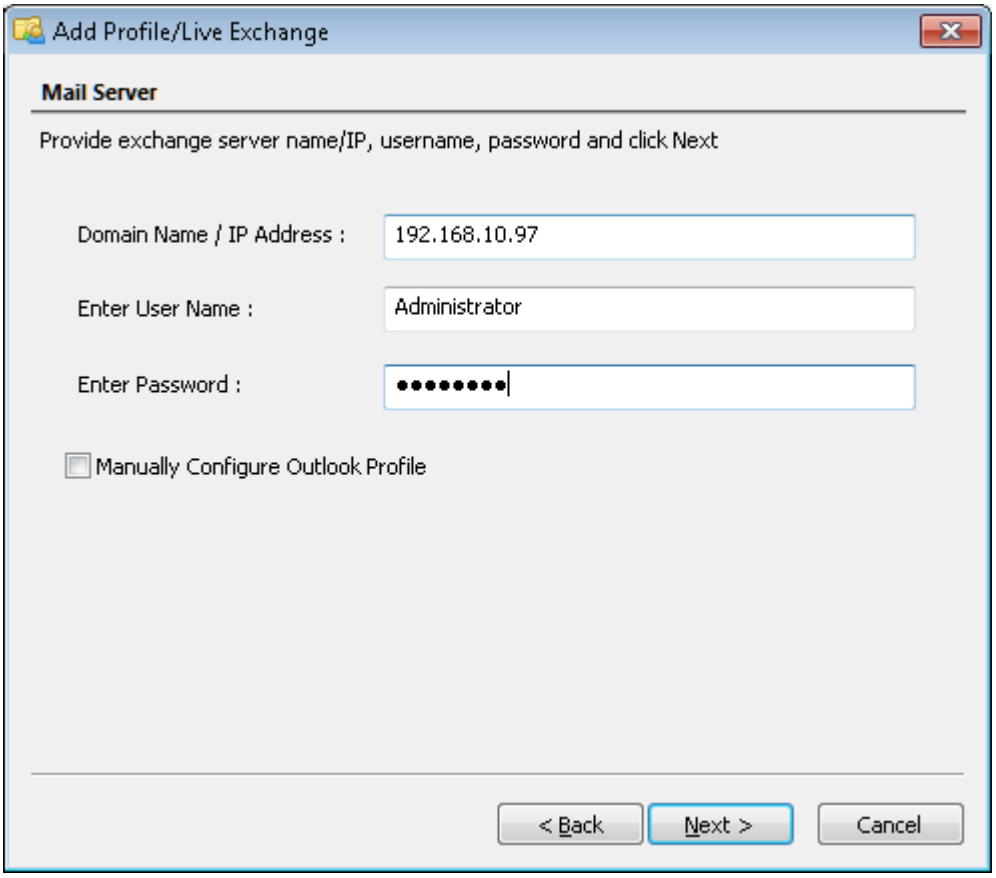


Figure 43: Sample details to add Exchange Server

6. Click "Next". You may receive the following dialog box, which tries to validate the connection.

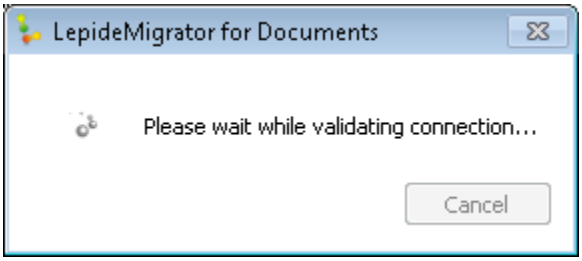


Figure 44: Dialog box to validate the connection

7. Once the connection is validated, you reach the following step.

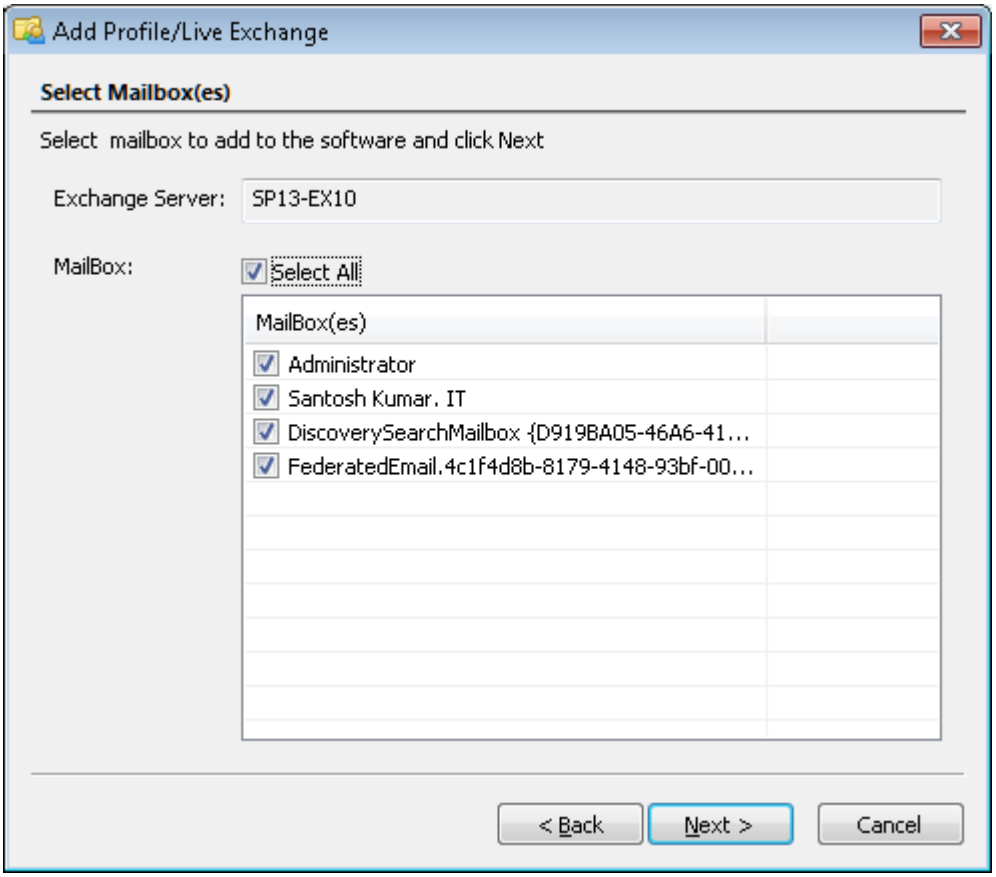


Figure 45: Select Mailboxes

8. All mailboxes are listed in this step. Select the mailboxes, with which you want to connect.

9. Click "Next", once you are done. The next step displays the summary of this connection.

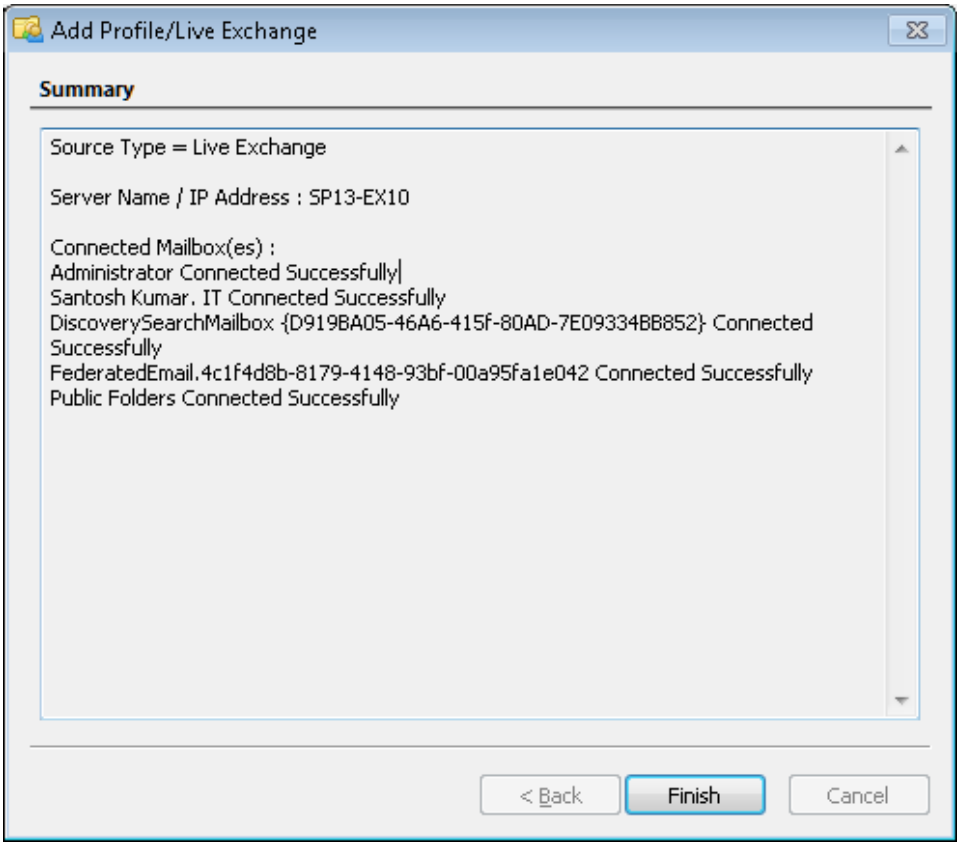


Figure 46: Summary of the connection

10. Read the summary and click "Finish" to add the Exchange Server.
11. Now, the Source pane displays the added live Exchange Server under the node "Live Exchange".

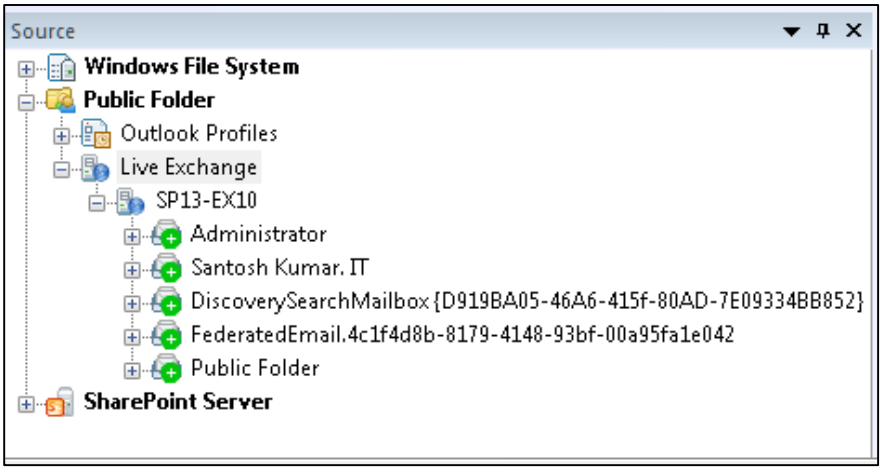


Figure 47: Added Live Exchange Server

12. The Exchange Server now lists all of its mailboxes.

4.3.2 Connect to Exchange via Existing/New Outlook Profile

You can connect to an Exchange Server directly through an existing Outlook profile on the computer where LepideMigrator for Documents is installed. You can use this method to connect to Office 365 or Archive Mailbox of any Exchange Server. You can add only one mailbox, for which the selected Outlook profile is configured. You cannot add other mailboxes in the same Exchange Server using this method.

Follow the steps below,

1. Perform any of the following methods to start the process.

   i. Click "File" menu and click "Add Public Folder" as shown below.

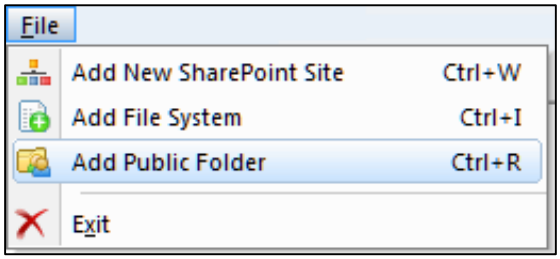


Figure 48: File Menu Command to add an Exchange Server

   ii. Click "Add New Source" and select the option "Public Folder" in its menu.

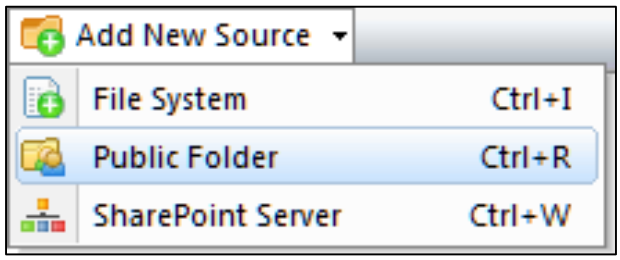


Figure 49: Menu option to add Exchange Server

iii. Right click the parent "Public Folder" node in the "Source" Pane and click "Add Public Folder" as shown below.

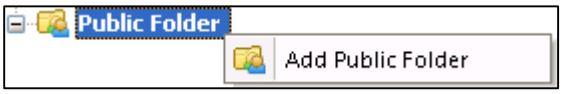


Figure 50: Right Click Context Menu for Public Folder Node

2. Doing any of the above steps displays the following wizard.

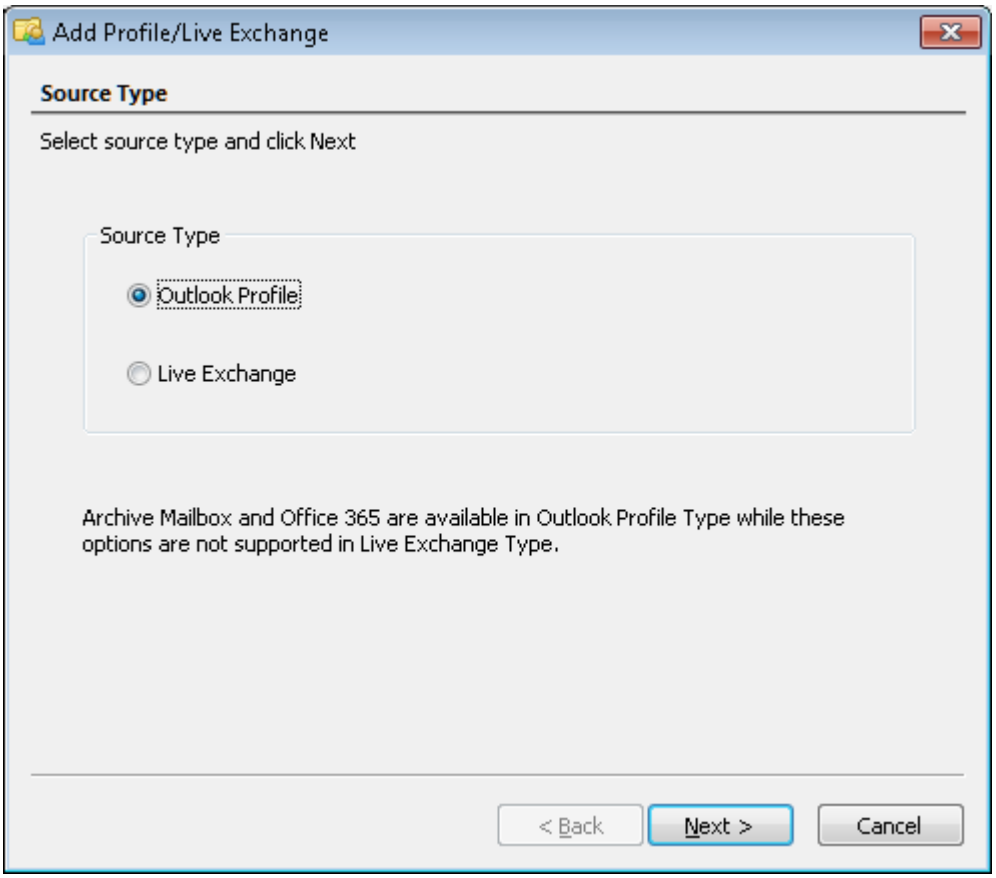


Figure 51: Wizard to add a local/networked Exchange Server

3. Select the option named "Outlook Profile".

4. Click "Next" to reach the following step.

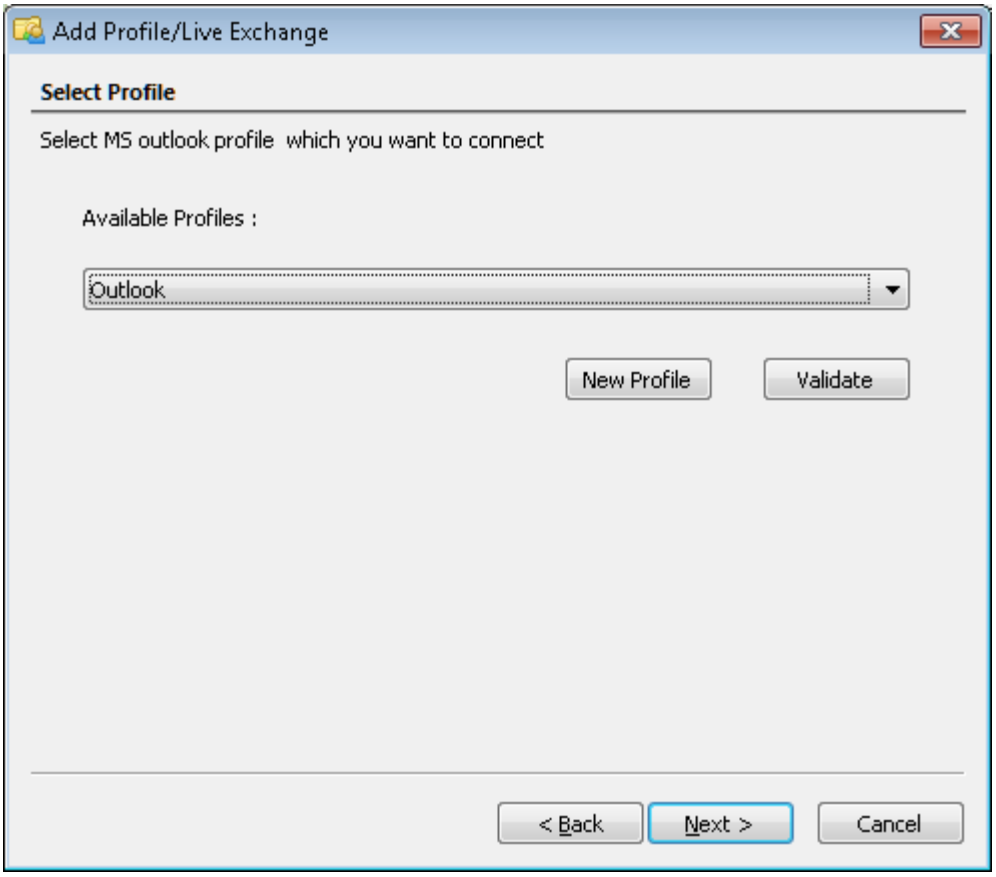


Figure 52: Select an Outlook Profile

You can right click on the node "Outlook Profiles" and select "Add Profile" option to reach directly at this step.

Figure 53: Direct option to add Exchange Server through profile

5. Select the Outlook profile from the drop-down menu.

6. You can click on "New Profile" to create a new Outlook profile right away to connect to an Exchange Mailbox. It displays the following dialog box.

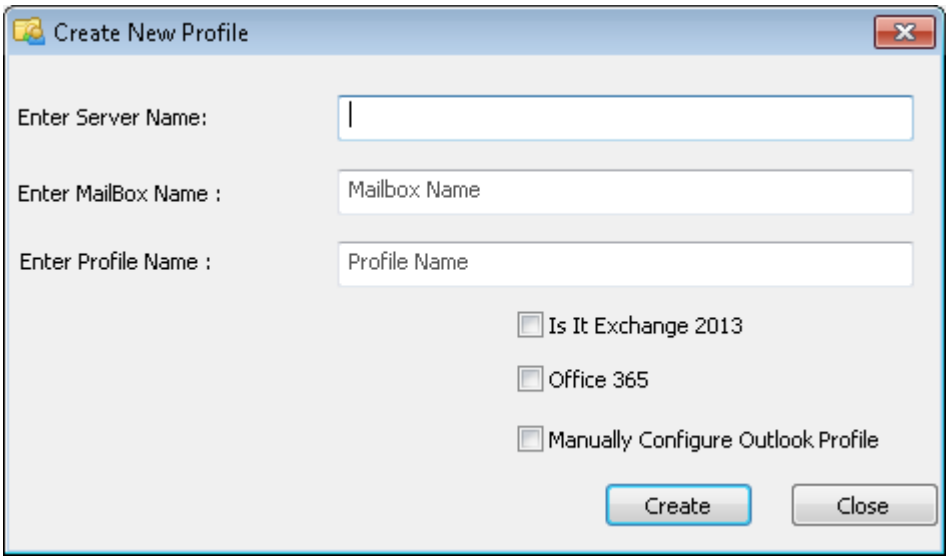


Figure 54: Create a new Outlook Profile

Follow the steps below to create a new Outlook profile,

i. You have to provide the inputs like the IP Address or domain name of the Exchange Server, mailbox name, and the desired name of the new Outlook Profile.

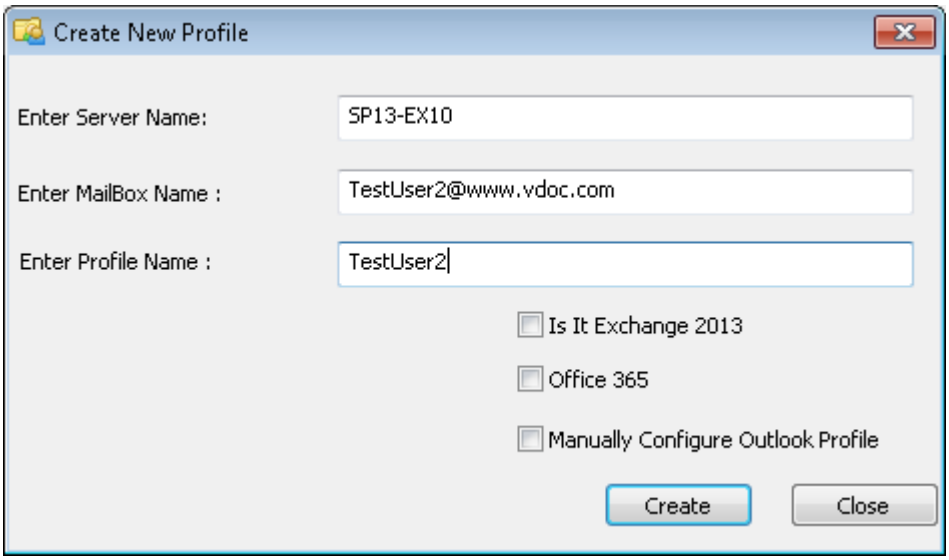


Figure 55: Sample details to create a new Outlook Profile

ii. Check the option "Is it Exchange 2013" if you are connecting to Exchange Server 2013.

iii. Check the option "Office 365" if you are connecting to Office 365.

iv. Check the option "Manually Configure Outlook Profile" if you want to configure the profile manually to connect to an Exchange Server.

v. Click "OK" to validate the connection.

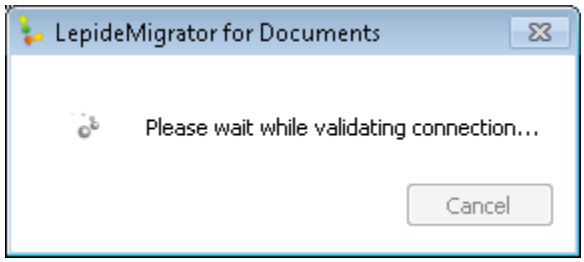


Figure 56: Dialog box to validate the connection

vi. Once the connection is validated, the profile is created. You receive the following dialog box confirming the success.

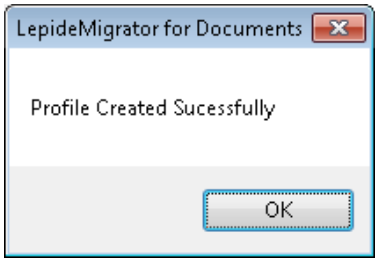


Figure 57: New profile is created.

vii. Click "OK" to go back to the main wizard.

The main wizard now displays the newly created profile.

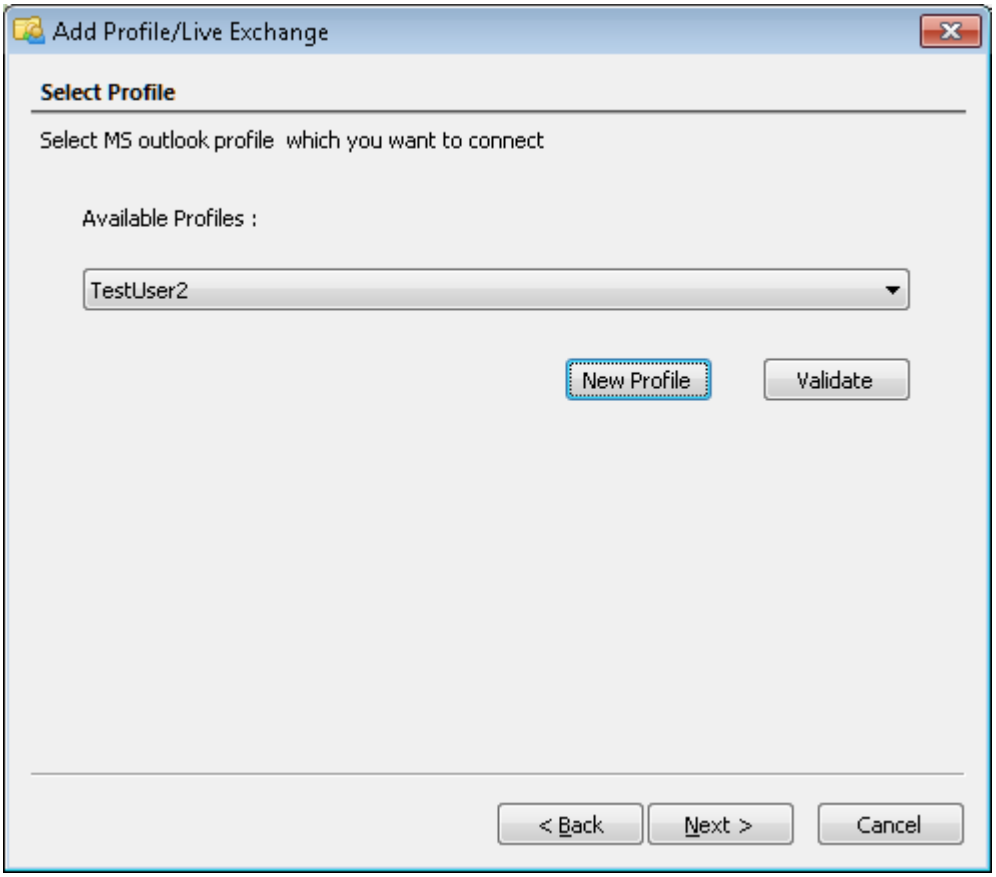


Figure 58: Select an Outlook Profile

7. Click "Validate" to validate the connection. The software tries to validate the connection to Exchange Server via selected profile.

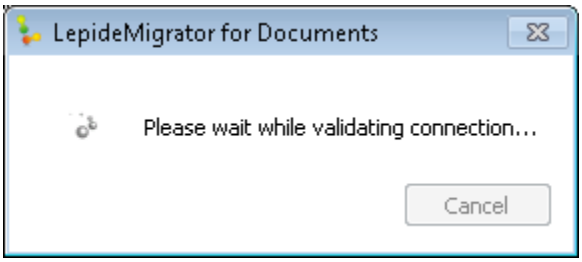


Figure 59: Dialog box to validate the connection

8. Once the connection to Exchange Server via selected profile is successful, the software displays the following message.

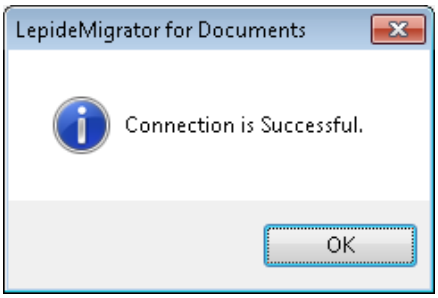


Figure 60: Connection to Exchange Server is successful.

9. Click "Next". You may receive the following dialog box, which tells you to check "Remember my password" or "Remember my credentials" option while providing the login credentials for Exchange.

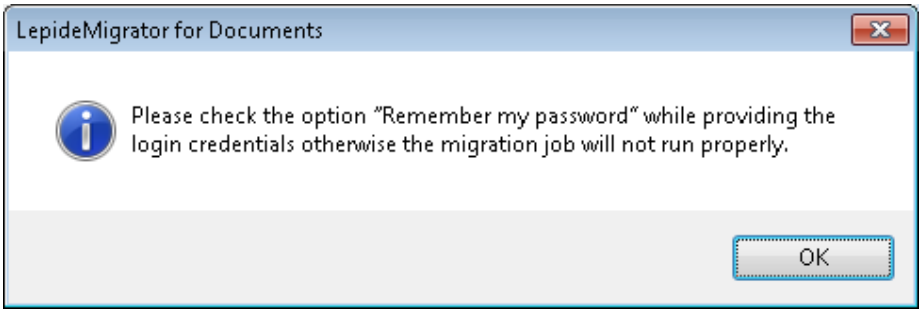


Figure 61: Message box saying to check the option "Remember Password"

Enabling "Remember my password" or "Remember my credentials" option, while providing the login credentials for adding an Exchange Server, let the software use saved credentials to run the scheduled migration jobs.

10. You may receive the following dialog box to provide the login credentials.

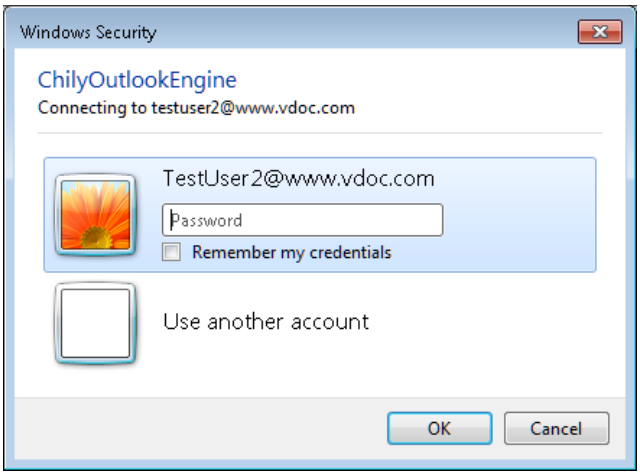


Figure 62: Asking the login credentials

11. Provide the username and password of that user, whose mailbox you are trying to connect through the existing Outlook profile.

12. As notified above, kindly check the option "Remember my password" or "Remember my credentials". It lets the software use the same login credentials to run the scheduled migration jobs.

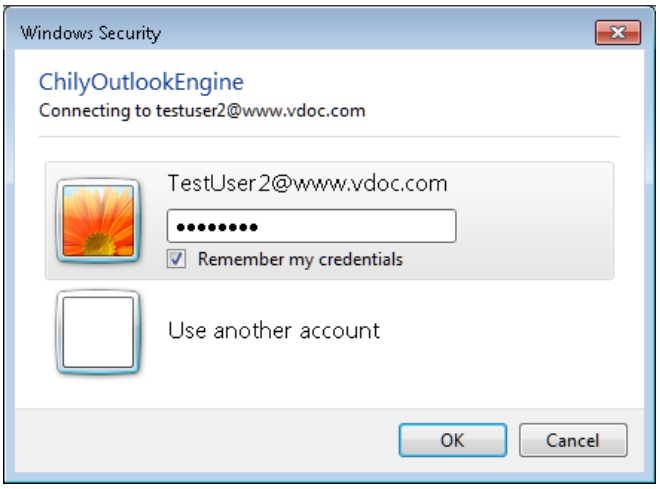


Figure 63: Sample login credentials

13. Click "OK" to let the software connect to Exchange Server.

14. Once the connection is successful, you reach the next step of the wizard. It displays the summary of this connection.

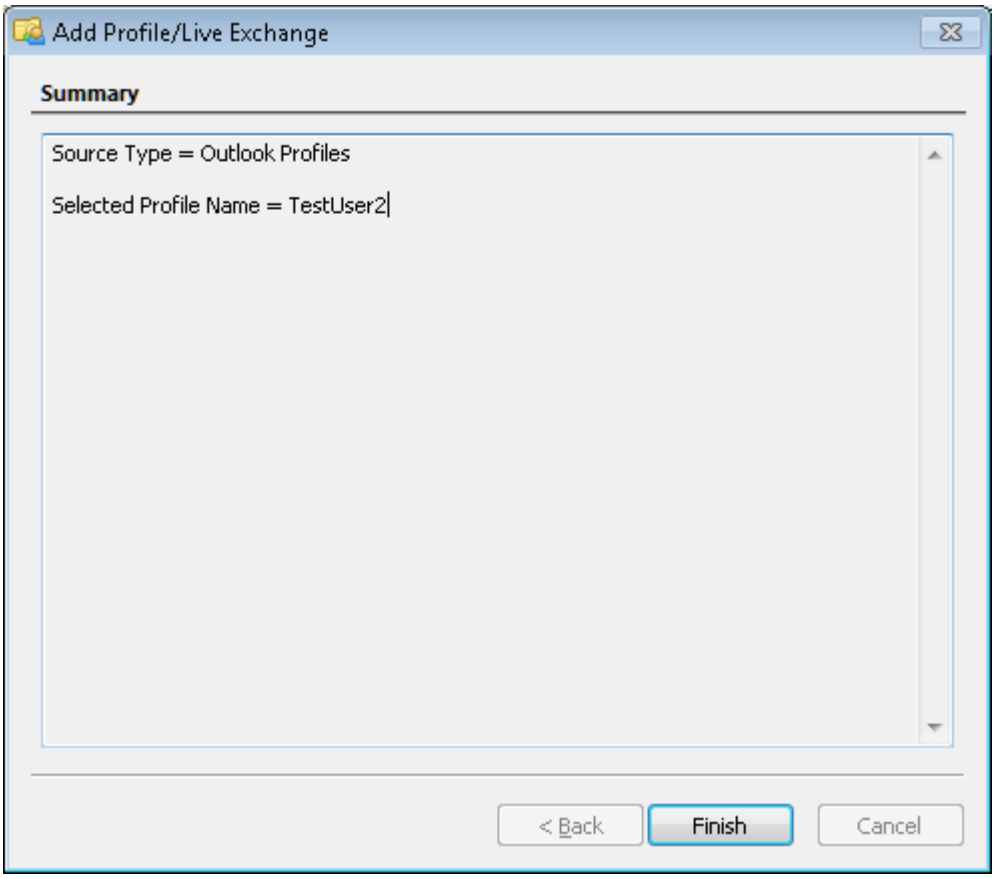


Figure 64: Summary of the connection

15. Read the summary and click "Finish" to add the Exchange Server.

16. Now, the source pane displays the added Exchange Server under the "Outlook Profiles" node.

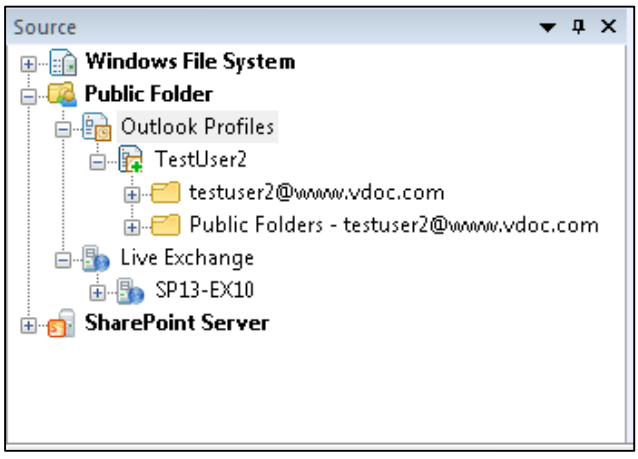


Figure 65: Added Exchange Server through Outlook Profile

4.3.3 Configure Profile manually to connect to Exchange

You can configure the Outlook profile settings manually to connect to an Exchange Server. It is recommended to use this method if you are facing any problem while connecting to an Exchange Server. Follow the steps below,

1. Perform any of the following methods to start the process.

   i. Click "File" menu and click "Add Public Folder" as shown below.

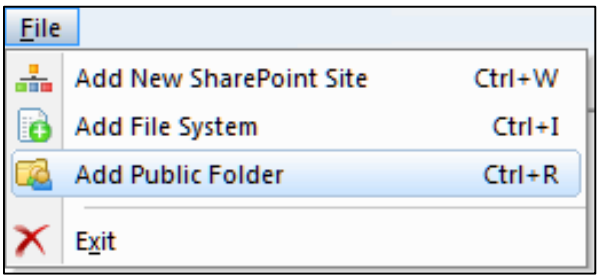


Figure 66: File Menu Command to add an Exchange Server

   ii. Click "Add New Source" and select the option "Public Folder" in its menu.

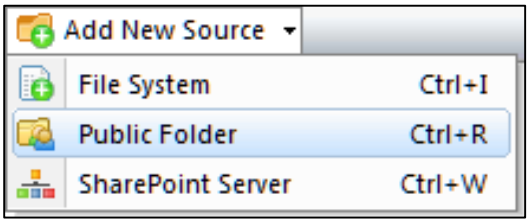


Figure 67: Menu option to add Exchange Server

   iii. Right click the parent "Public Folder" node in the "Source" Pane and click "Add Public Folder" as shown below.

Figure 68: Right Click Context Menu for Public Folder Node

2. Doing any of the above steps displays the following wizard.

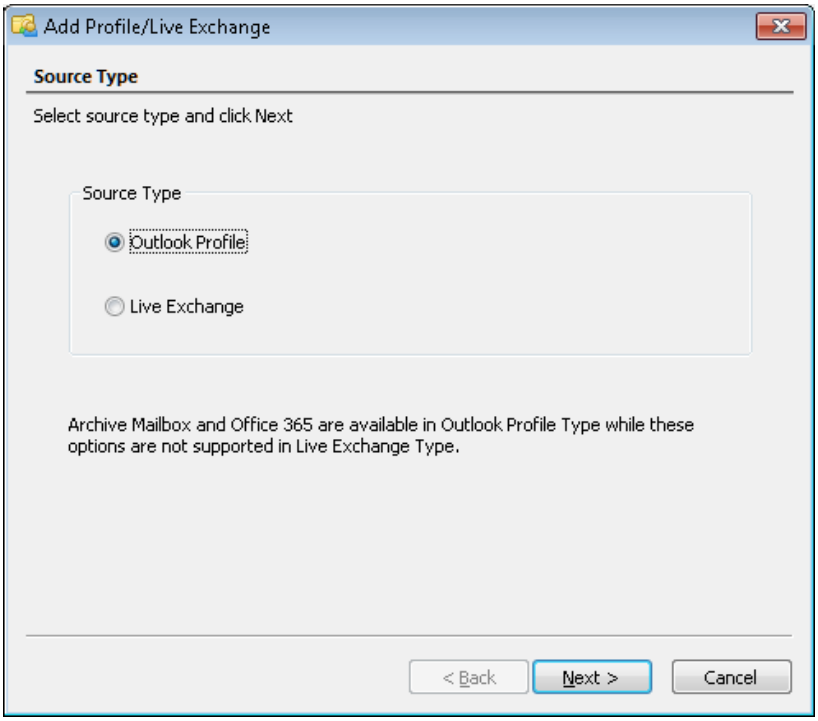


Figure 69: Wizard to add a local/networked Exchange Server

3. Select the option "Live Exchange".

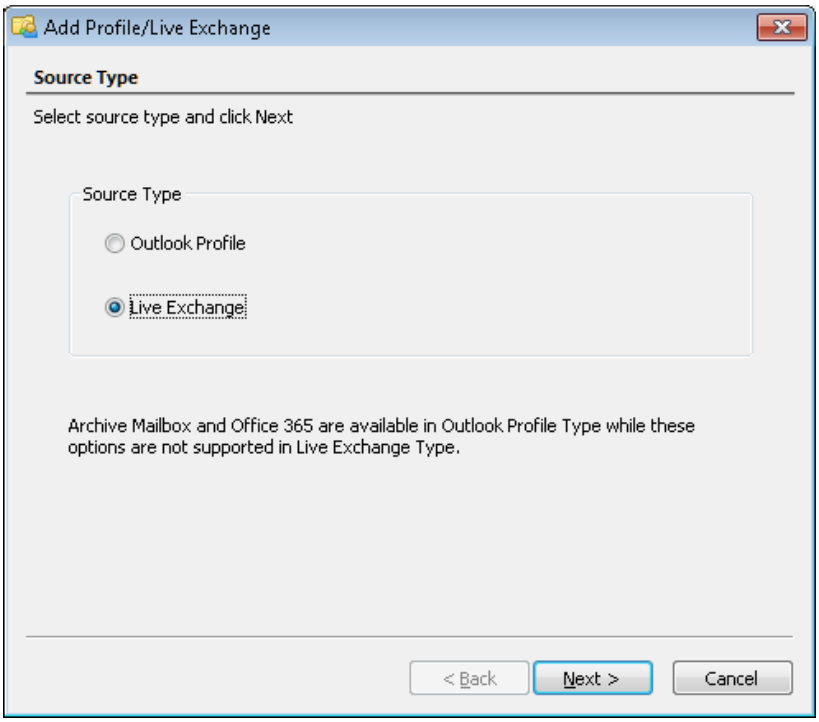


Figure 70: Selected the option to add Live Exchange

4. Click "Next".

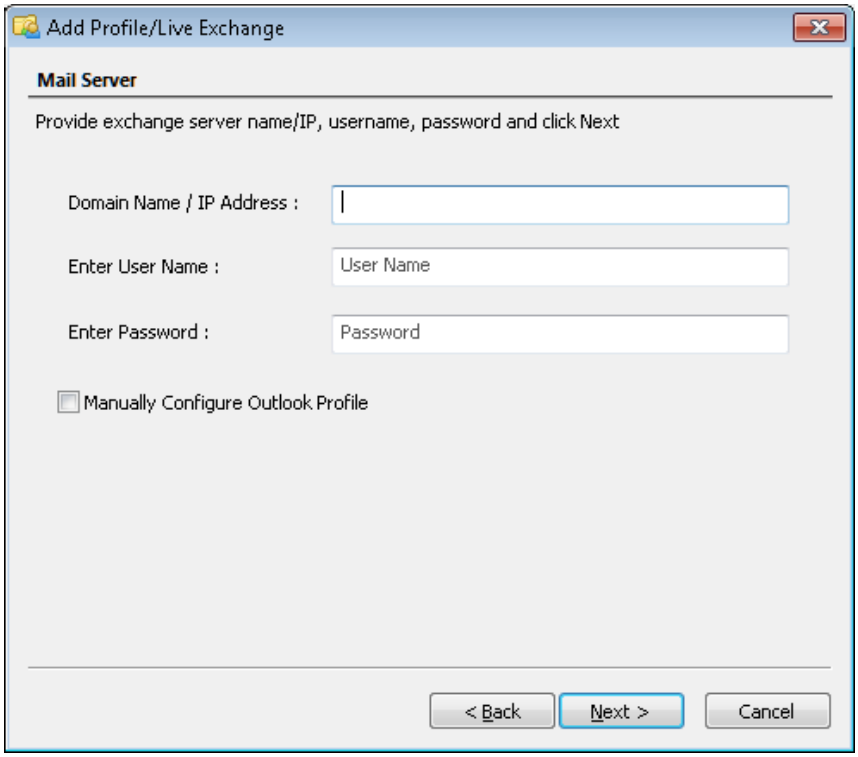


Figure 71: Add Exchange Server

You can right click on the node "Live Exchange" and select "Add Live Exchange" option to reach directly at this step.

Figure 72: Direct option to add Live Exchange

5. You have to provide the inputs like IP Address or the Domain Name of the server where Exchange Server is installed and the login credentials of an Administrator user.

6. Check the option "Manually Configure Outlook Profile", if you want to configure the profile manually to connect to an Exchange Server.

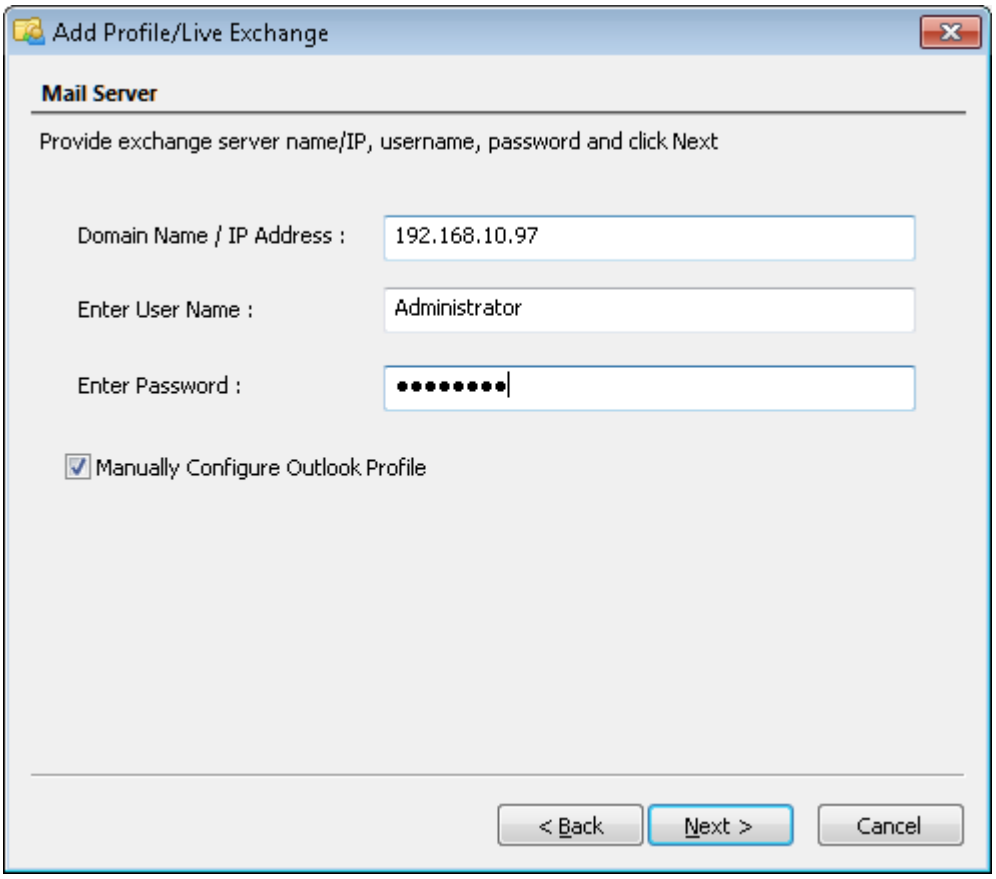


Figure 73: Sample details to add Exchange Server

While connecting to an Exchange Server using the Outlook Profile, you get an option to create a new profile with/without manual configuration. The following steps remain applicable in this case as well.

7. Click "Next". The following wizard appears onscreen.

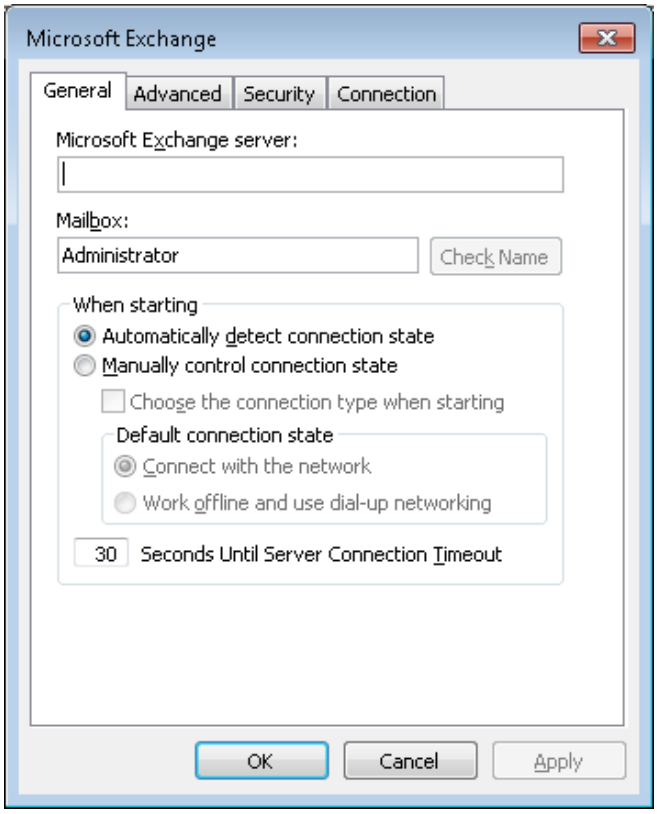


Figure 74: Wizard to configure the profile manually

8. Enter the correct name of Exchange Server and mailbox, if the entered values are wrong.

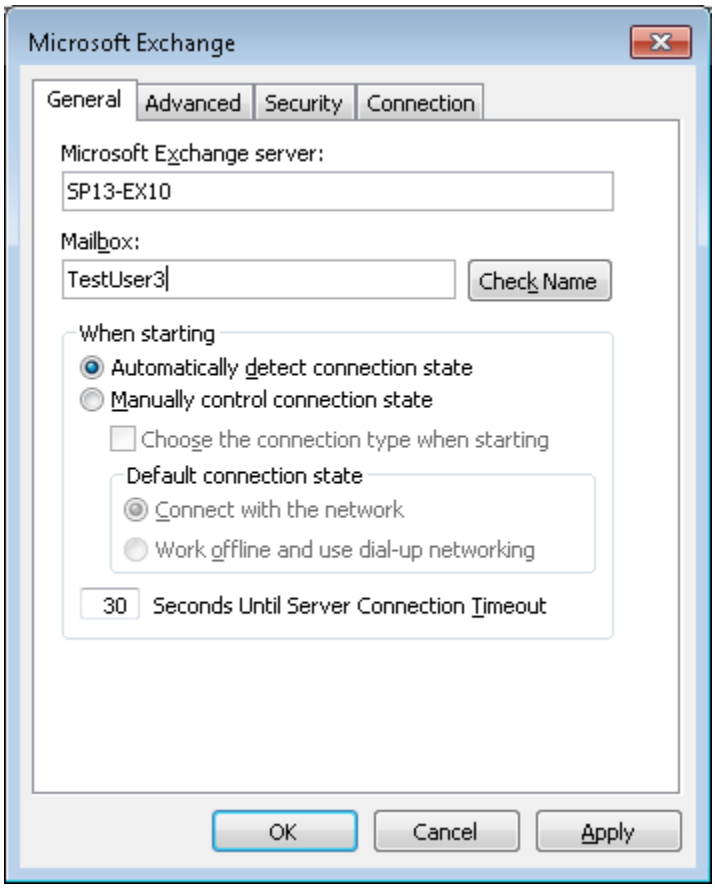


Figure 75: Sample values in Microsoft Exchange Configuration

9. Click on "Check Name" in "General" tab to identify the existence of mailbox on the Exchange Server. Doing this may display the dialog box asking for login credentials.

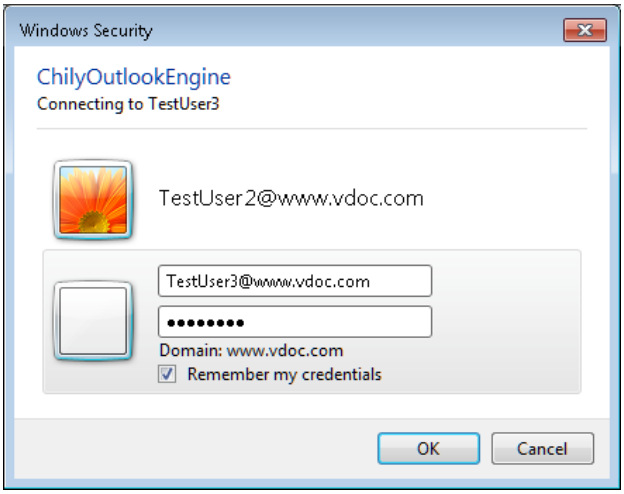


Figure 76: Dialog box asking for login credentials

10. Provide the username in the format - (Domain\Username).

11. Enter the password.

12. Click "OK" to proceed further. After verifying the mailbox existence, the software takes you back to the same wizard. Now, it shows the identified name of the Exchange Server and its mailbox.

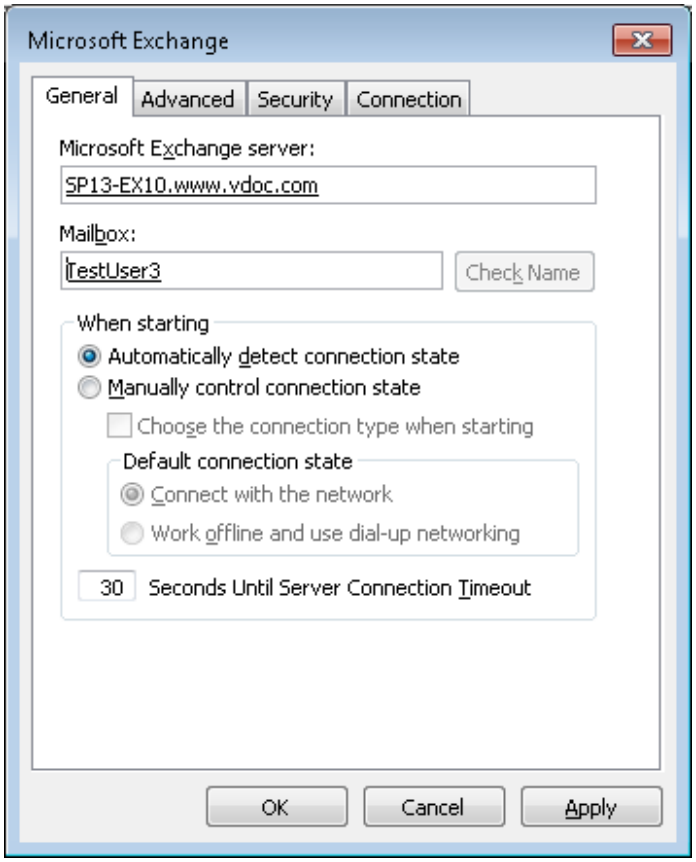


Figure 77: Displaying the name of identified Exchange Server and Mailbox

13. Switch to "Advanced" tab to configure the settings related to mailboxes.

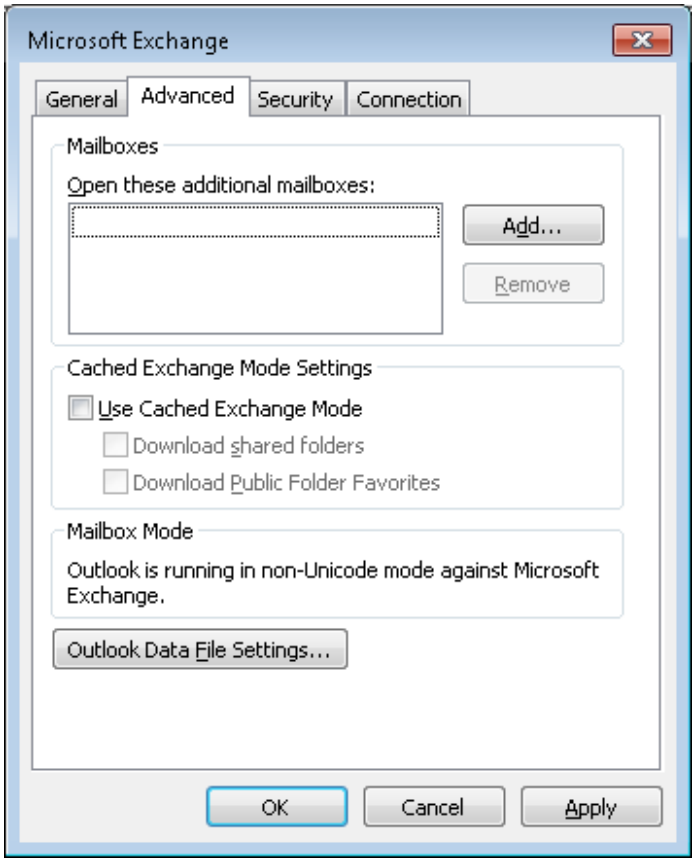


Figure 78: Advanced Tab

14. Click "Outlook Data File Settings" to modify the default location of OST file.

15. Switch to "Security" tab to view and modify the security settings.

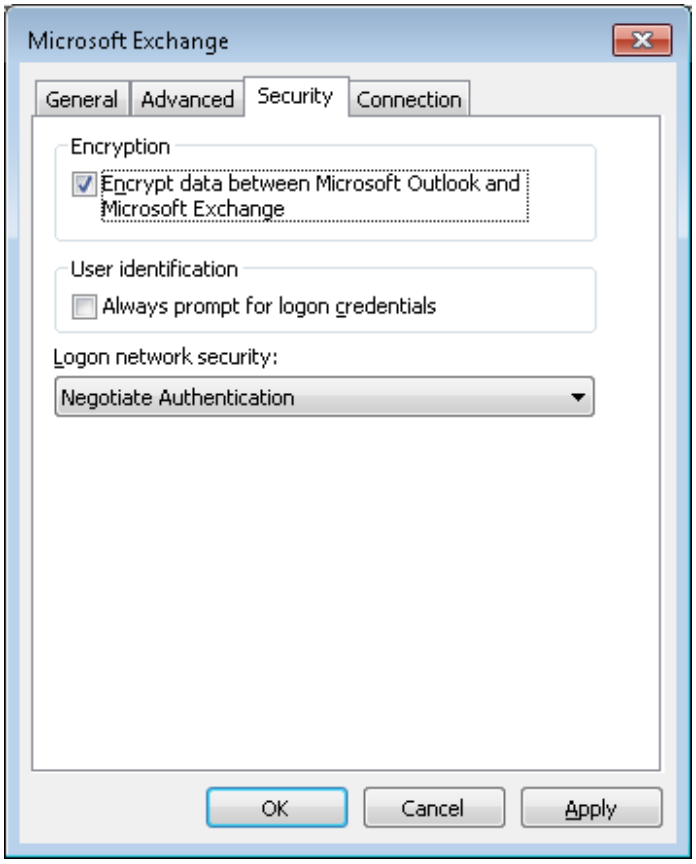


Figure 79: Security Tab

16. "Connection" tab deals with the connectivity settings.

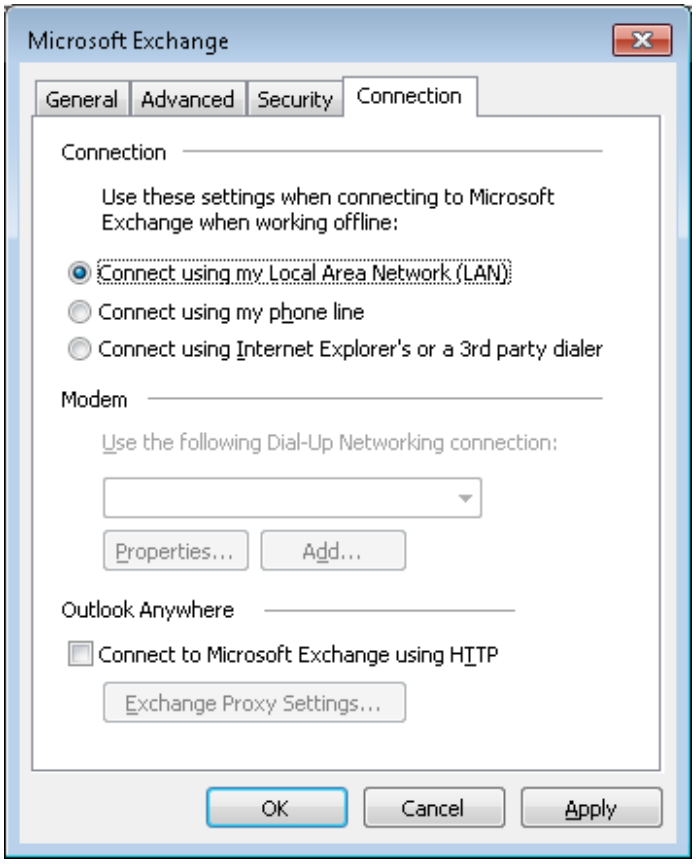


Figure 80: Connection Tab

17. Click "Exchange Proxy Settings" in this tab to access the Proxy Settings.

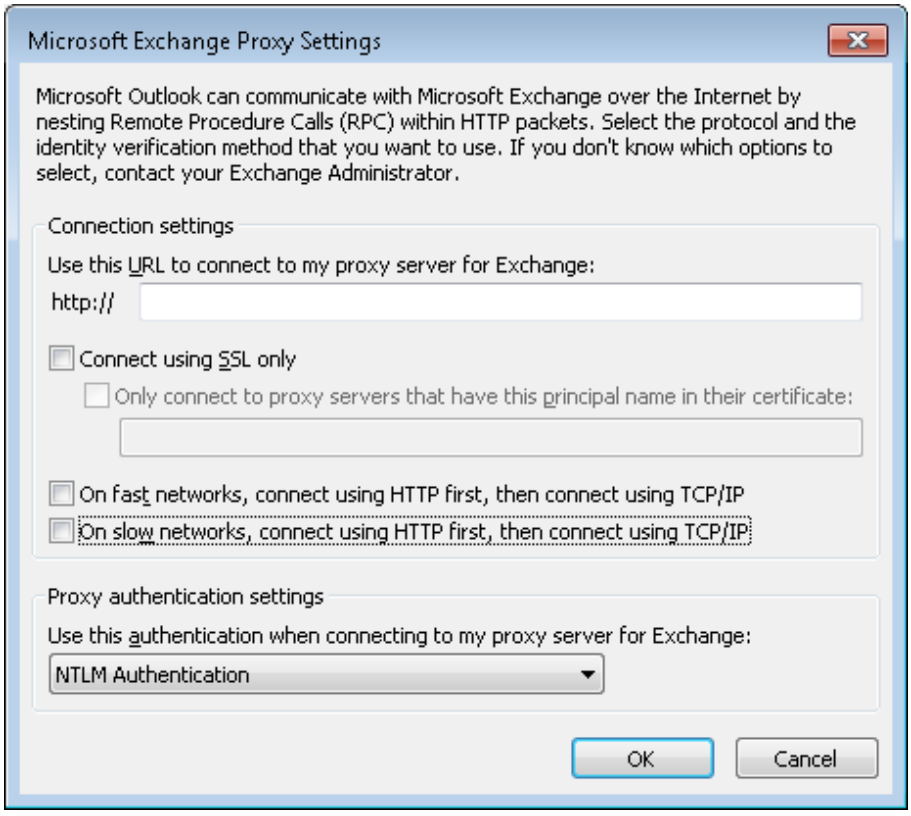


Figure 81: Proxy Settings

18. Here, you can provide an HTTP URL to allow the software connecting to Exchange Server through it. Also, you can select SSL.

19. **(Optional)** You can select the authentication level here to connect to Exchange Server.

20. Modify other proxy settings, if you want.

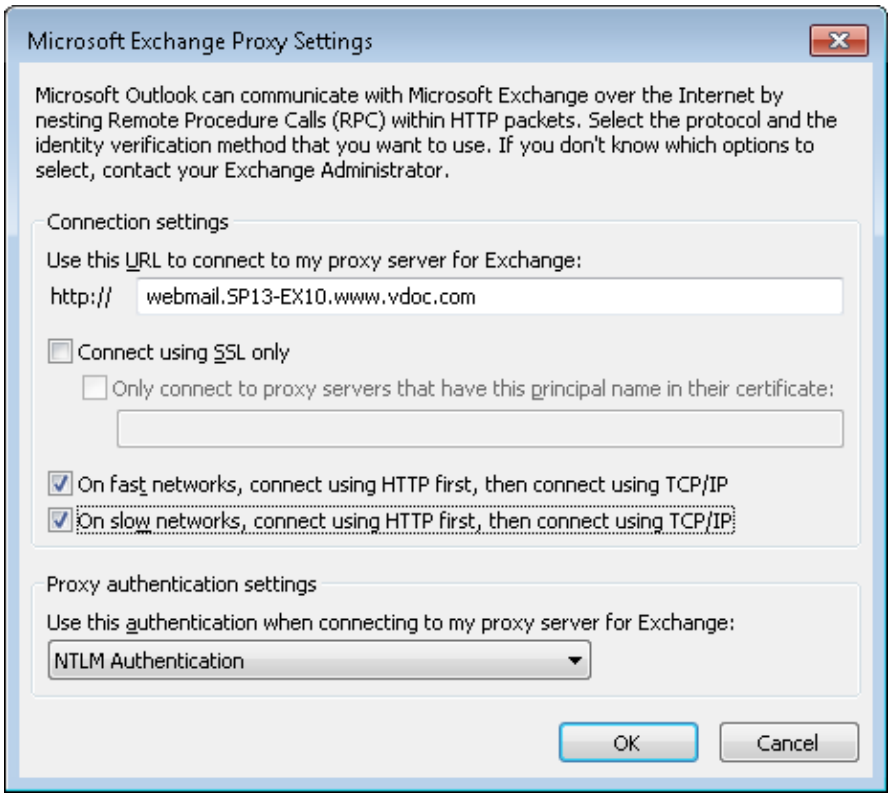


Figure 82: Filled Proxy Settings

21. Click "OK" to go back to the Exchange Configuration.

22. Click "Apply" to apply the modified settings.

23. Click "OK" to establish the connection. It displays the dialog box asking for the credentials.

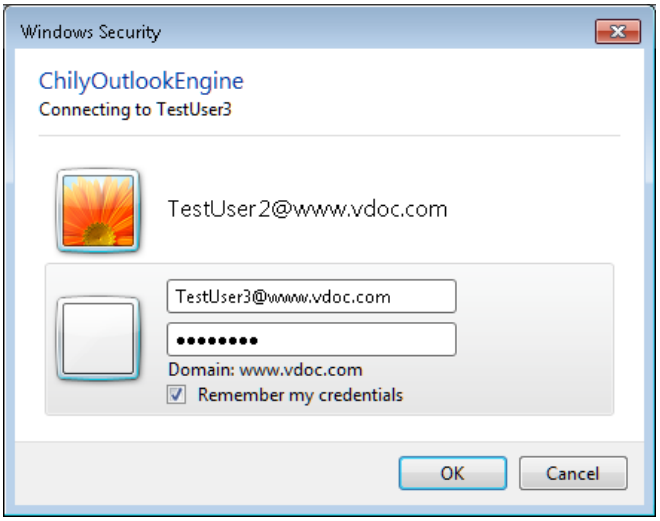


Figure 83: Dialog box asking for login credentials

24. Provide the username in the form (Domain\Username) and its password.

25. Click "OK" to proceed further.

26. You may receive the following dialog box while the software is trying to connect to Exchange Server.

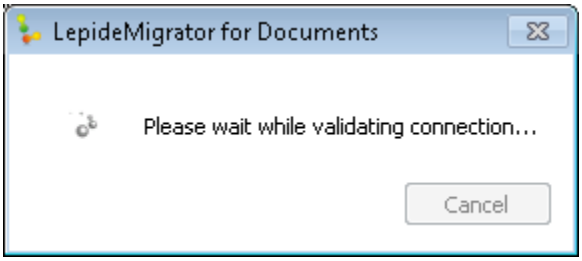


Figure 84: Validating the connection to Exchange Server

27. Once the connection is established, the software displays the enumerated list of all mailboxes available on the Exchange Server.

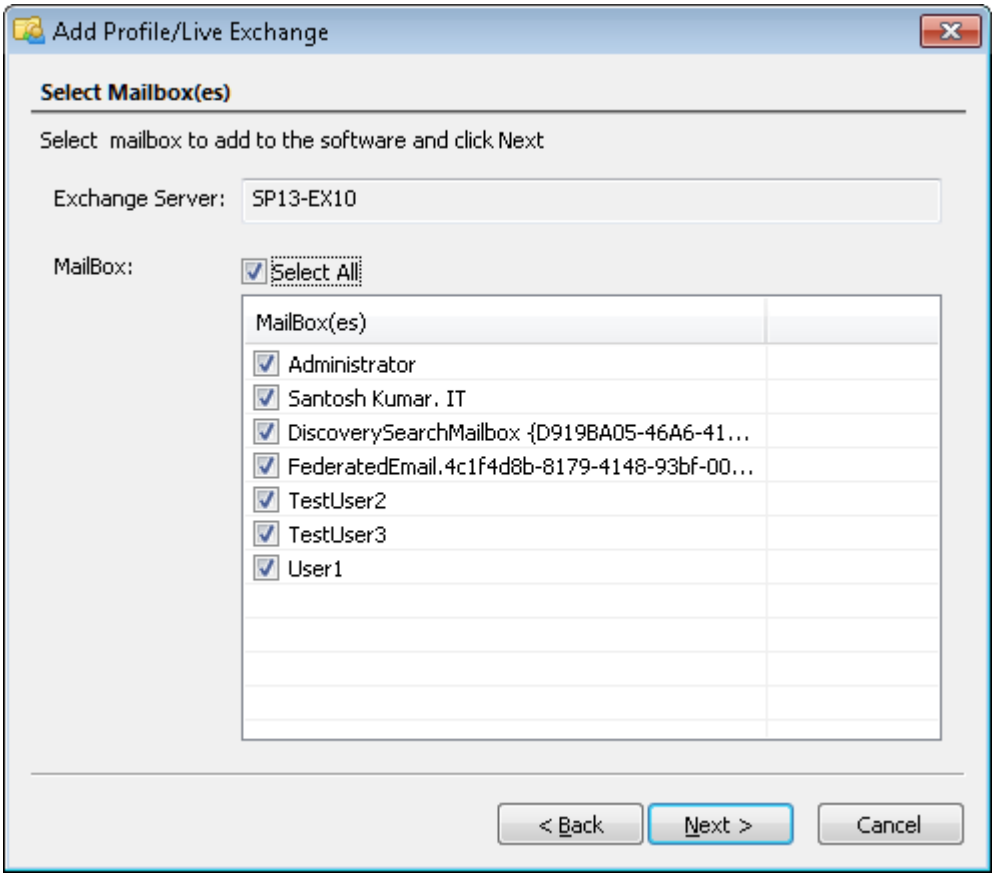


Figure 85: Select the mailboxes

28. Select the required mailboxes.

29. Click "Next" to display the last step of adding an Exchange Server.

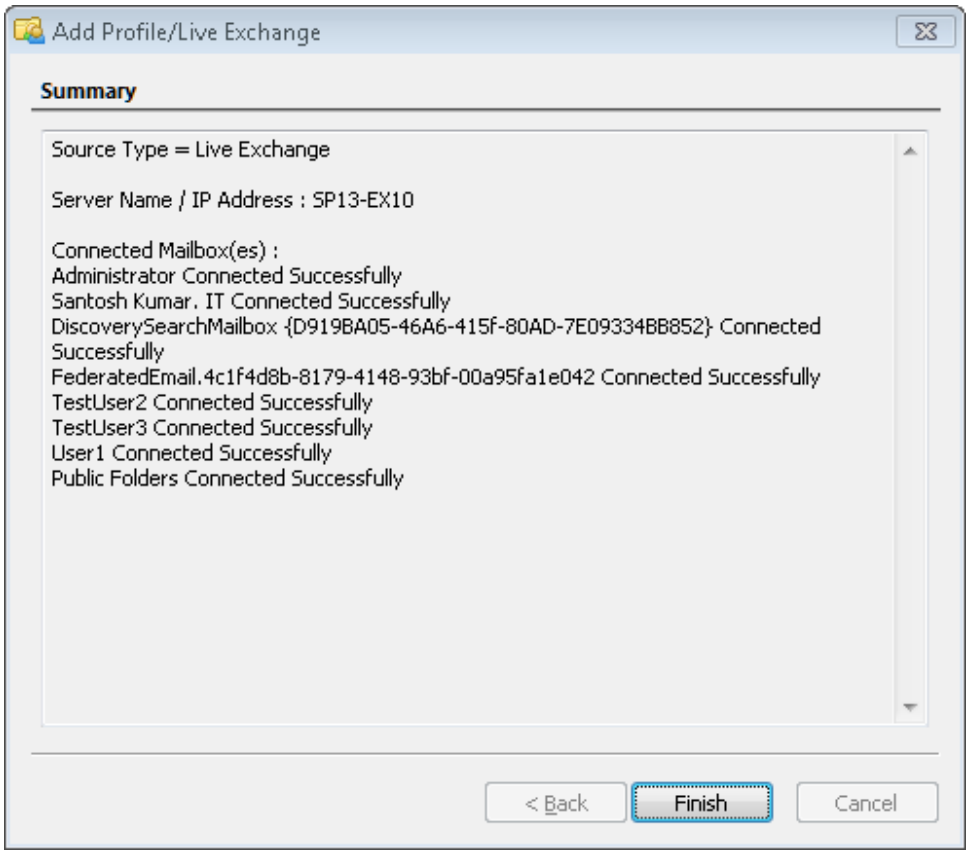


Figure 86: Summary of the connection to Exchange Server

30. Click "Finish" to complete the process.

31. The newly added Exchange Server is displayed under the "Live Exchange" node in the Source pane. If you have configured the profile manually for "Outlook Profiles" option, then newly added Exchange Server comes under the "Outlook Profiles" node.

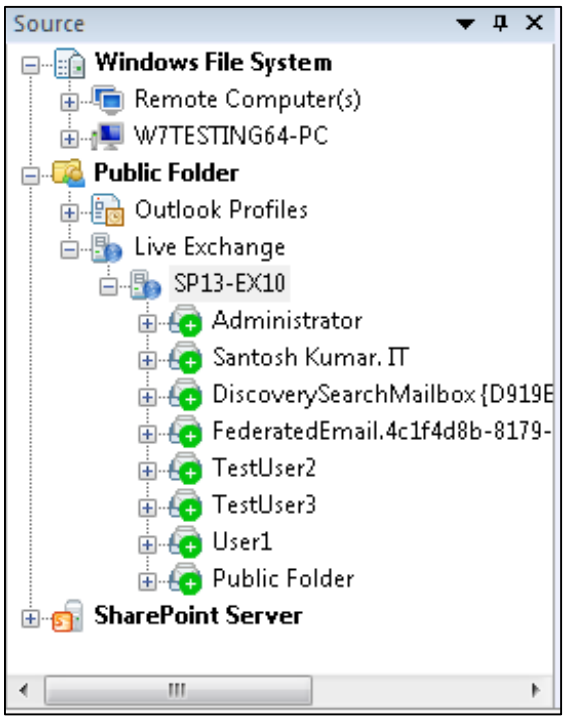


Figure 87: Added new Exchange Server

4.4 SharePoint Server as Source

Follow the steps below to add a SharePoint Site as a Source. Please note that each SharePoint Site is denoted with a project name in this software.

1. Perform any of the following methods to start the process.

   i. Click "Add New Source" on the toolbar and select "SharePoint Server."

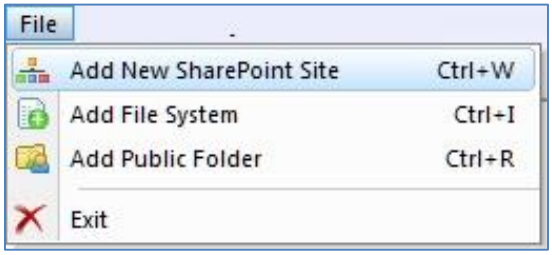


Figure 88: Option to add SharePoint as Source

   ii. Right click the parent "SharePoint Server" node in the "Source" Section and click "Add New SharePoint Site" as shown below.

Figure 89: Right Click on SharePoint Root node in Source Panel

2. Doing any of the above steps displays the following wizard.

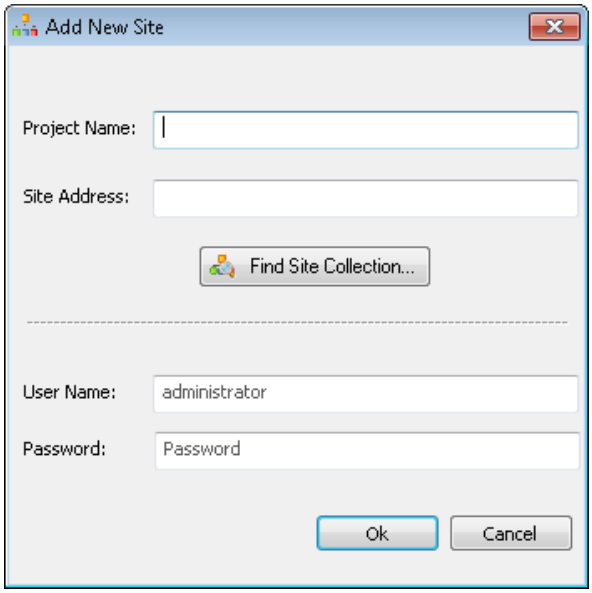


Figure 90: Wizard to add a new Site

3. If you want the software to find and enumerate the complete Site Collection, then follow the steps below.

i. Click to display the following wizard.

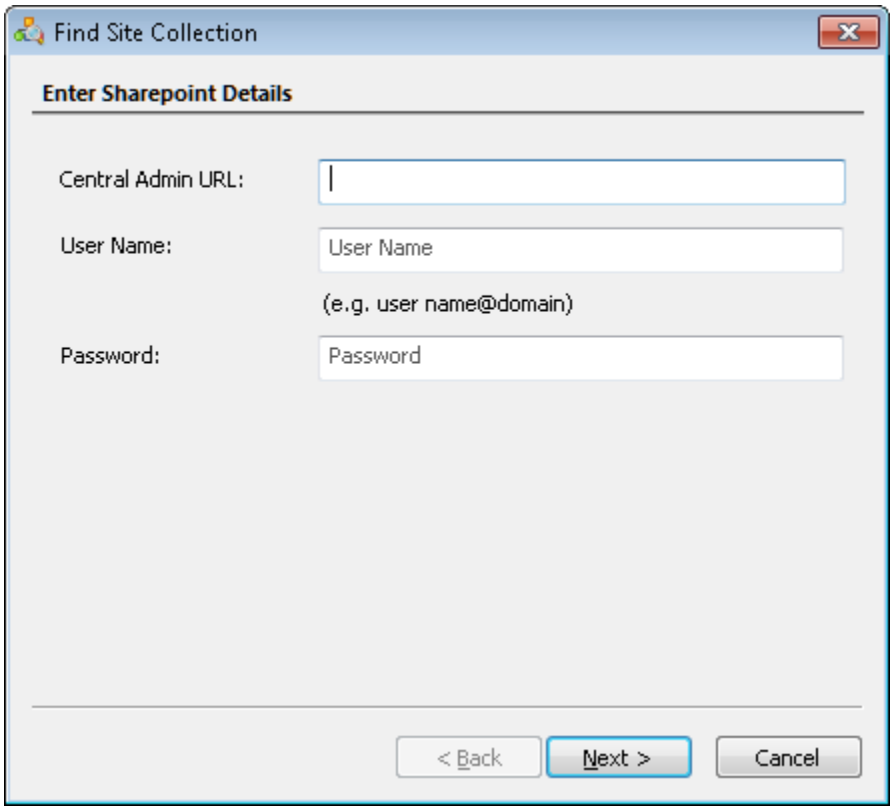


Figure 91: Wizard to find a Site Collection

ii. Enter the details like "Central Admin URL", "User Name", and "Password".

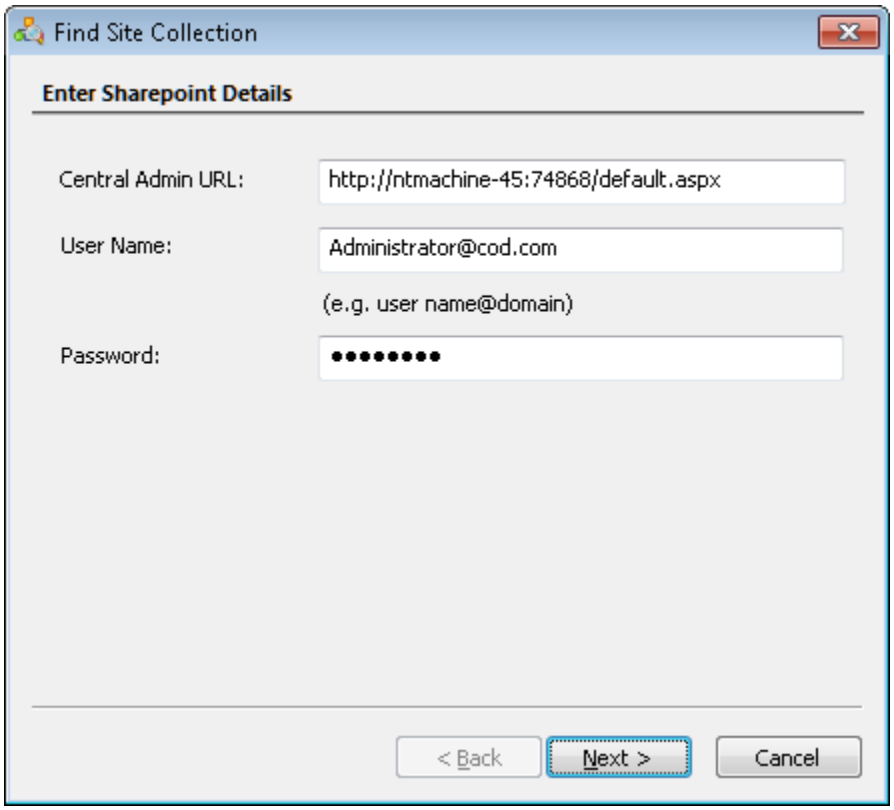
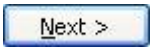


Figure 92: Inserting the details to find Site Collection

iii. Click  to proceed further. The software tries to connect to the server.

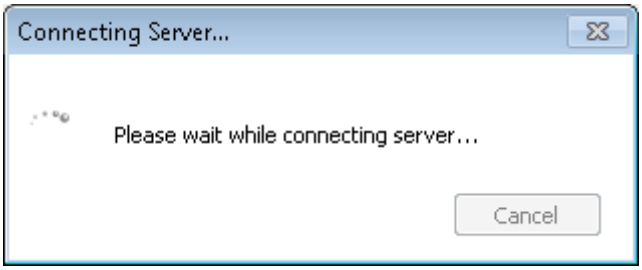


Figure 93: Attempting to connect to the server

iv. Once it connects to the SharePoint Server, the software displays the list of detected Web Applications.

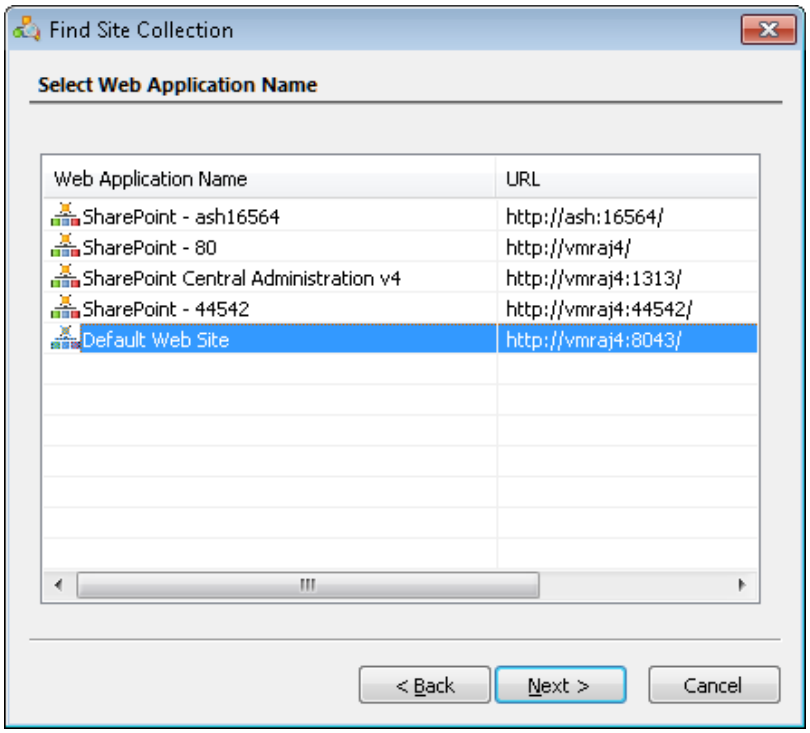


Figure 94: Displaying the detected Web Applications

v. Select a required Web Application.

vi. Click "Next". The next step displays the list of the available sites.

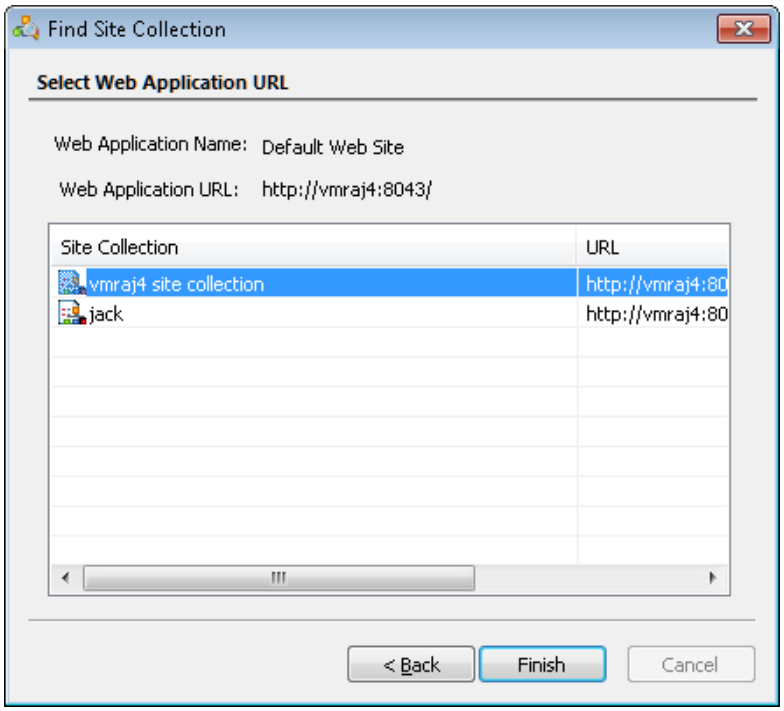


Figure 95: Displaying the list of the available sites

vii. Select a Site and click "Finish". The software displays the following wizard.

viii. Enter the Project Name.

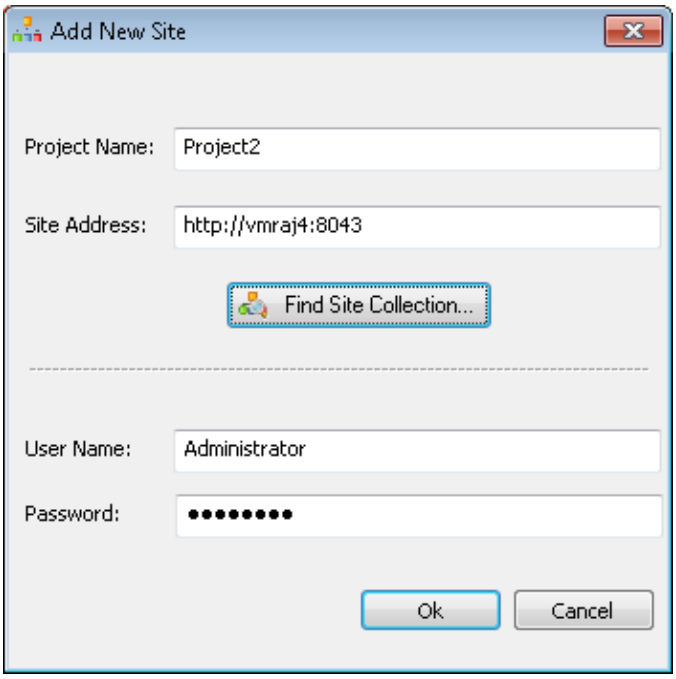


Figure 96: "Add New Site" wizard with the selected site

We are providing the inputs directly without using "Find Site Collection" method in this test case.

4. Enter the desired name of the project in the first text box titled "Project Name".
5. Provide the URL of the SharePoint Site in the next text box titled "Site Address".
6. Enter the username and password of Administrator.

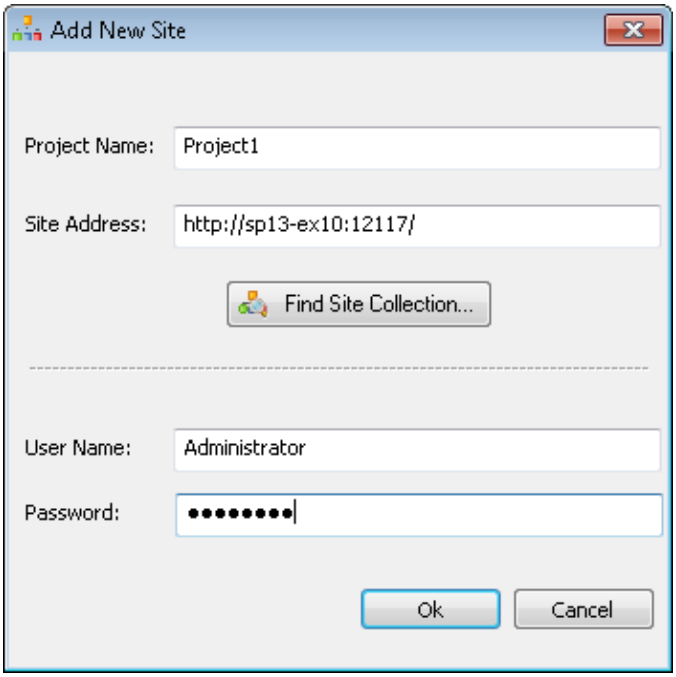


Figure 97: "Add New Site" wizard with the selected site

7. Click "OK".
8. The following message box appears that asks whether to add this SharePoint Site also as the destination or not.

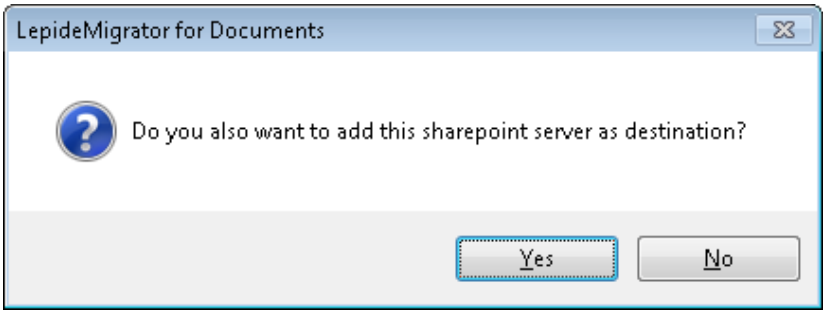


Figure 98: Message to add the SharePoint also as the destination

9. Click "Yes" to add this SharePoint Site as the destination also or click "No" to keep it as a source only.
10. Clicking any button let the software process the addition of this SharePoint Site.

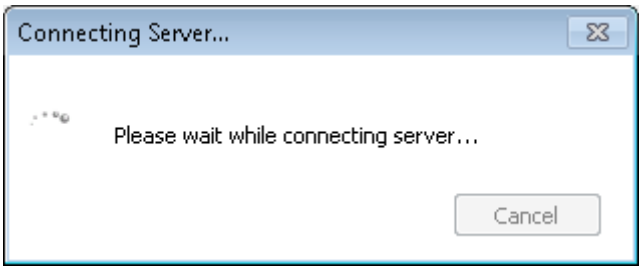


Figure 99: Attempting to connect to the server

11. The provided SharePoint Site is added and displayed with the entered Project name in the Source Panel in the Left Hand Panel. For example, project1 is the newly added node in the Source Panel as per the following image.

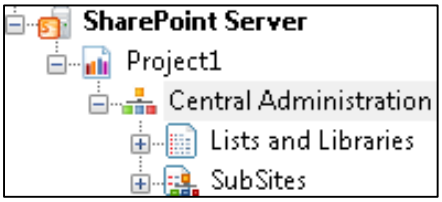


Figure 100: Newly added Project 1 site

5. Software Settings

LepideMigrator for Documents lets you apply some settings, which will be common and universal for all migration jobs from any source to destination. It includes the migration options, download options, and filters along with the options to replace invalid characters or invalid endings. Let us have a look at the steps to modify these software settings.

Click "Tools" menu and select "Settings".

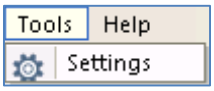


Figure 101: Settings option

It displays the following dialog box, which contains the different tabs.

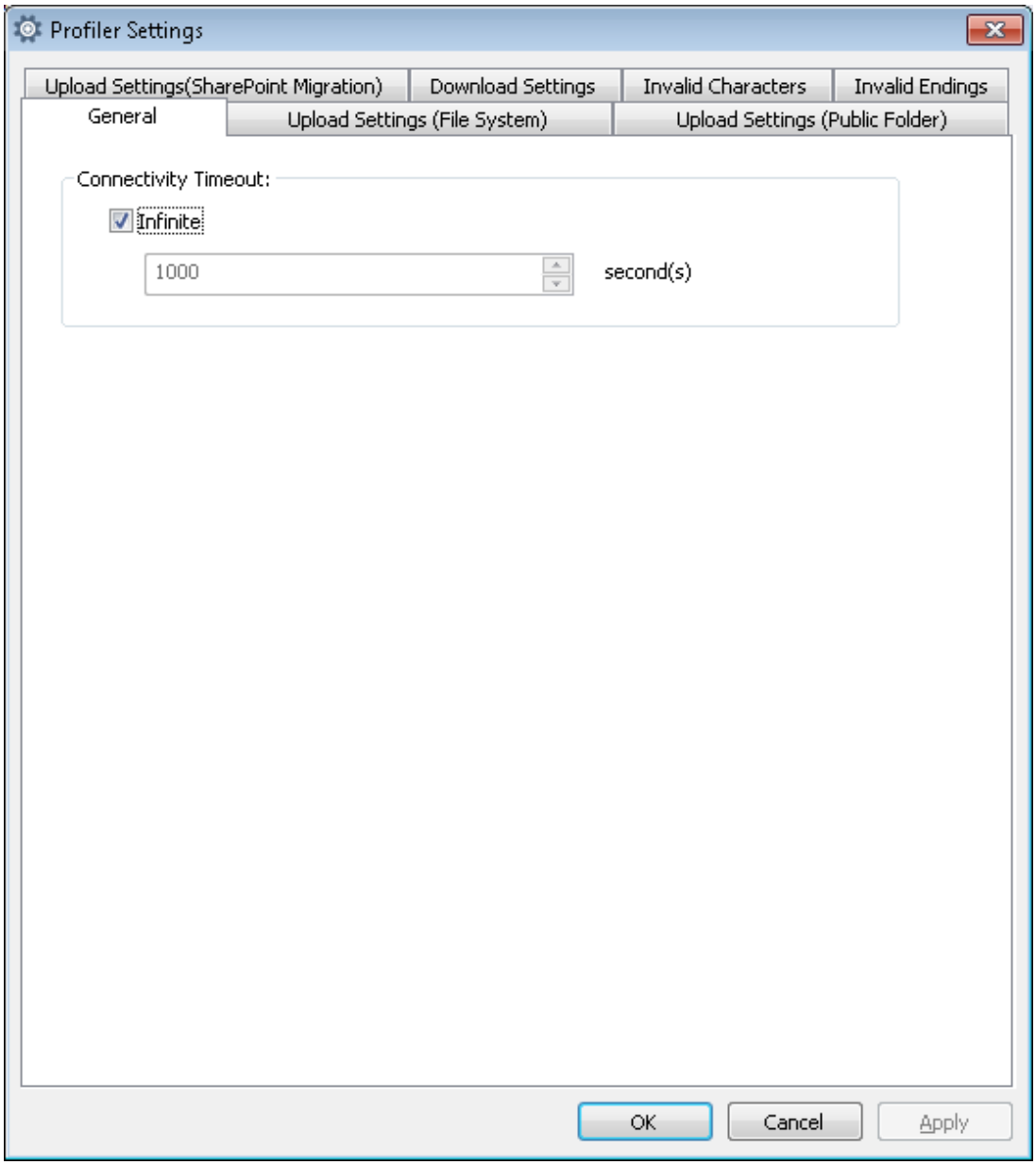


Figure 102: Software Settings

5.1 General

Connectivity Timeout: By default, the infinite timeout is set. It means that LepideMigrator for Documents wait for infinite moments until a connection has been established with the SharePoint Server. You can uncheck this option and set a custom value using the drop-down box.

5.2 Upload Settings (File System)

This tab contains the universal settings for all migrations from the File Server to the SharePoint Server. Click it to display its options.

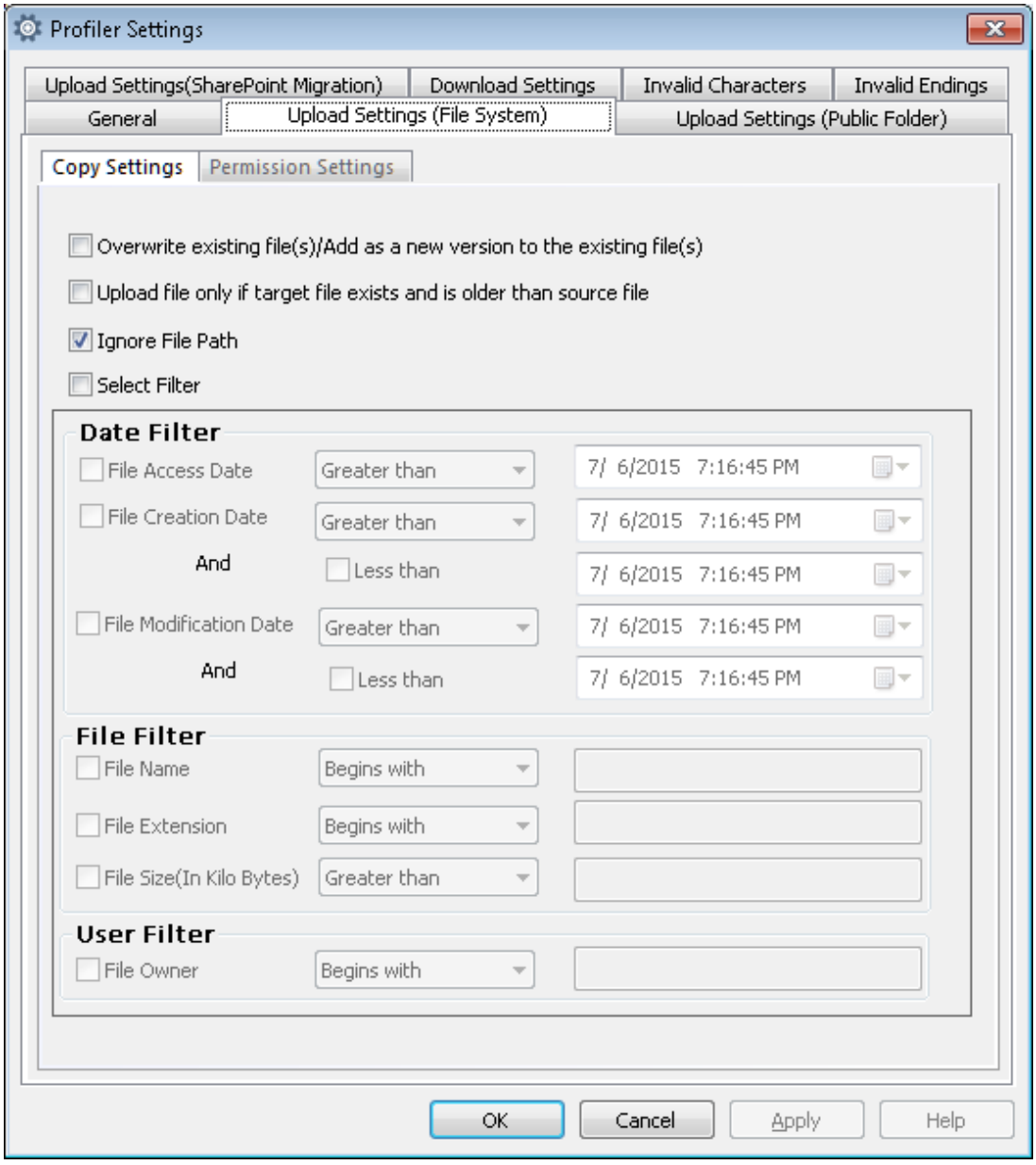


Figure 103: Upload Content Settings tab for File System

These settings are visible when you visit the step of modifying migration options in File Server to SharePoint Migration Jobs.

You can modify these settings while creating or editing a migration job. These settings are further divided into the following two tabs.

5.2.1 Copy Settings

Copy Settings are, in fact, the migration options that can be modified while performing the File System to SharePoint Migration.

As stated above, settings applied in this tab will be universally applied to all File System to SharePoint Migration Jobs. However, the user has the freedom to modify them accordingly. It contains the following options.

1. **Overwrite existing file(s):** Select this option to overwrite the existing file on the SharePoint Server. It lets the software not to ask for your confirmation once a file is already available on the destination.

2. **Add as a new version to the existing file(s):** If you are trying to upload the content that has the version option enabled, then the above "Overwrite existing file(s)" is replaced with this option.

   Select this option to add the source file as its new version. In this case, if another version of the source file exists on the target, then the item is uploaded as a different version. It means that both versions of the selected content coexists at the SharePoint Server after uploading.

3. **Upload file only if the target file exists and is older than source file:** Select this option to upload the file only if the modification date of the source file is greater than the current modification date of the target file.

4. **Ignore File Path:** Select this option if you want the software to ignore the file path and file path limitations while uploading the content.

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5. **Select filter:** Select this option to filter the File Server content that has to be migrated to the SharePoint Server. The adjacent "Filter" box will be enabled once this option is selected. The different filters and steps to apply them are listed herein below.

   a. **Date Filter:** Select any of the date filters to sort the content as per the file access, creation, or modification date. It has the following filters.

      i. **File Access Date**: It filters the files as per the provided accessed date. Enable this filter, select any of the following conditions, and select the date & time for it in the adjacent box.

         - **Greater Than:** It shows the files accessed on the date greater than the provided one.
         - **Less Than:** It shows the files accessed on the date less than the provided one.
         - **Not Equal:** It shows the files not accessed at the provided date.
         - **Equal:** It shows the files accessed at the provided date.

      ii. **File Creation Date**: It filters the files as per the provided created date. Enable this filter, select any of the following conditions, and provide a value for it.

         - **Greater Than:** It shows the files created on the date greater than the provided one. Selecting this condition also enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the files following in this date range.

         Make sure that "Less Than" date should be greater than the "Greater Than" date.

         - **Less Than:** It shows the files created on the date less than the provided date.

- **Not Equal:** It shows the files not created on the provided date.
- **Equal:** It shows the files created on the provided date.

iii. **File Modification Date**: It filters the files as per the provided modified date. Enable this filter, select any of the following conditions, and provide a value for it.

- **Greater Than:** It shows the files modified on the date greater than the provided one. Selecting this condition enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the files following in this date range.

Make sure that "Less Than" date should be greater than the "Greater Than" date.

- **Less Than:** It shows the files modified on the date less than the provided date.
- **Not Equal:** It shows the files not modified on the provided date.
- **Equal:** It shows the files modified on the provided date.

b. **File Filter:** It lets the software filter the files based on the parameters related to file such as its name, extension, and size. It contains the following filters.

i. **File Name**: It filters the content as per the provided name. You have to enable this filter first. Select any of the following conditions, and then provide a value for it. The entered value should not contain the special characters like /, \, :, *, ?, ", <, >, and |.

- **Begins With:** It shows the files, of which name starts with the provided value.
- **Includes:** It shows the files, of which name contains the entered value.

- **Not Equal:** It shows the files having the name not similar to the entered value.
- **Equal:** It shows the files having the name exactly similar to the entered value.

NOTE: Both File Name and File Extension filters has to be used collectively.

ii. **File Extension**: It filters the content as per the extension provided. Enable this filter, select any of the following conditions, and provide a value for it. The entered value should not contain the special characters like /, \, :, *, ?, ", <, >, and |.

- **Begins With:** Select it to show the files whose extension starts with the entered value.
- **Includes:** It shows the files, of which extension contains the entered value.
- **Not Equal:** Select it to show the files having extension not similar to the entered value.
- **Equal:** Select it to show the files having the extension exactly similar to the entered value.

iii. **File Size (In Kilo Bytes)**: It filters the files as per the provided file size in KB. Enable this filter, select any of the following conditions, and provide a value for it in numbers.

- **Greater Than:** It shows the files having size greater than the provided value.
- **Less Than:** It shows the files having size less than the provided value.
- **Not Equal:** It shows the files having size not equal to the provided value.
- **Equal:** It shows the files having the size equal to the provided value.

c. **User Filter:** It filters the files as per the users. It contains the following filters.

i. **File Owner**: It filters the content as per the file owners who created the files. Enable this filter, select any of the following conditions, and provide a value for it.

- **Begins With:** Select this option to show the files, whose owner's name starts with the entered value.
- **Includes:** Select it to show the files, whose owner's name contains the entered value.
- **Not Equal:** Select it to show the files having the owner's name not similar to the entered value.
- **Equal:** Select it to show the files having the owner's name exactly similar to the entered value.

Check the boxes for the desired filters and provide their values.

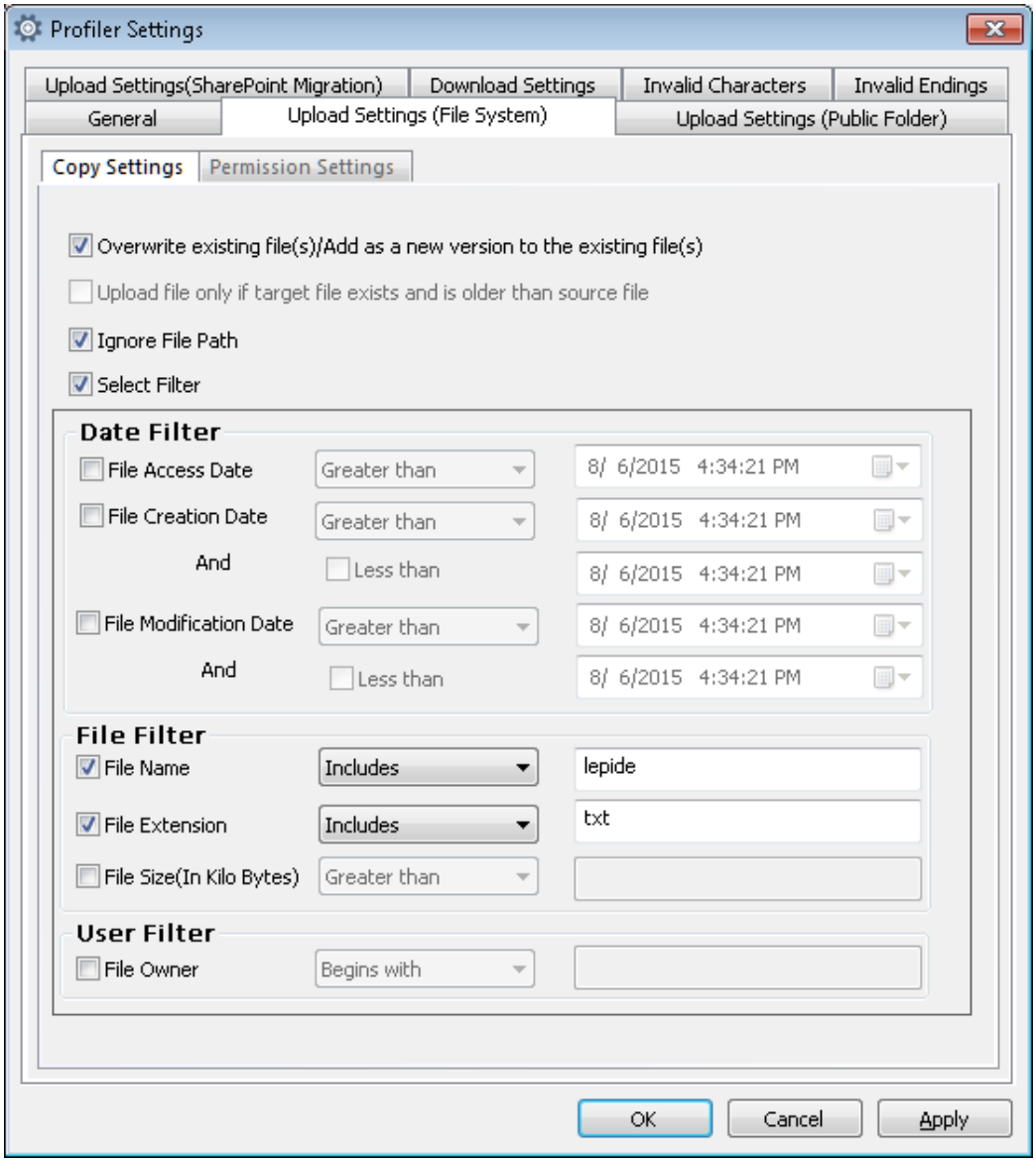

Figure 104: Dialog box shows the set of applied filters

5.2.2 Permission Settings

Permission Settings allows you applying the universal settings for migrating permissions and remapping users. Once applied, these settings will be applicable universally for all File System to SharePoint Migration.

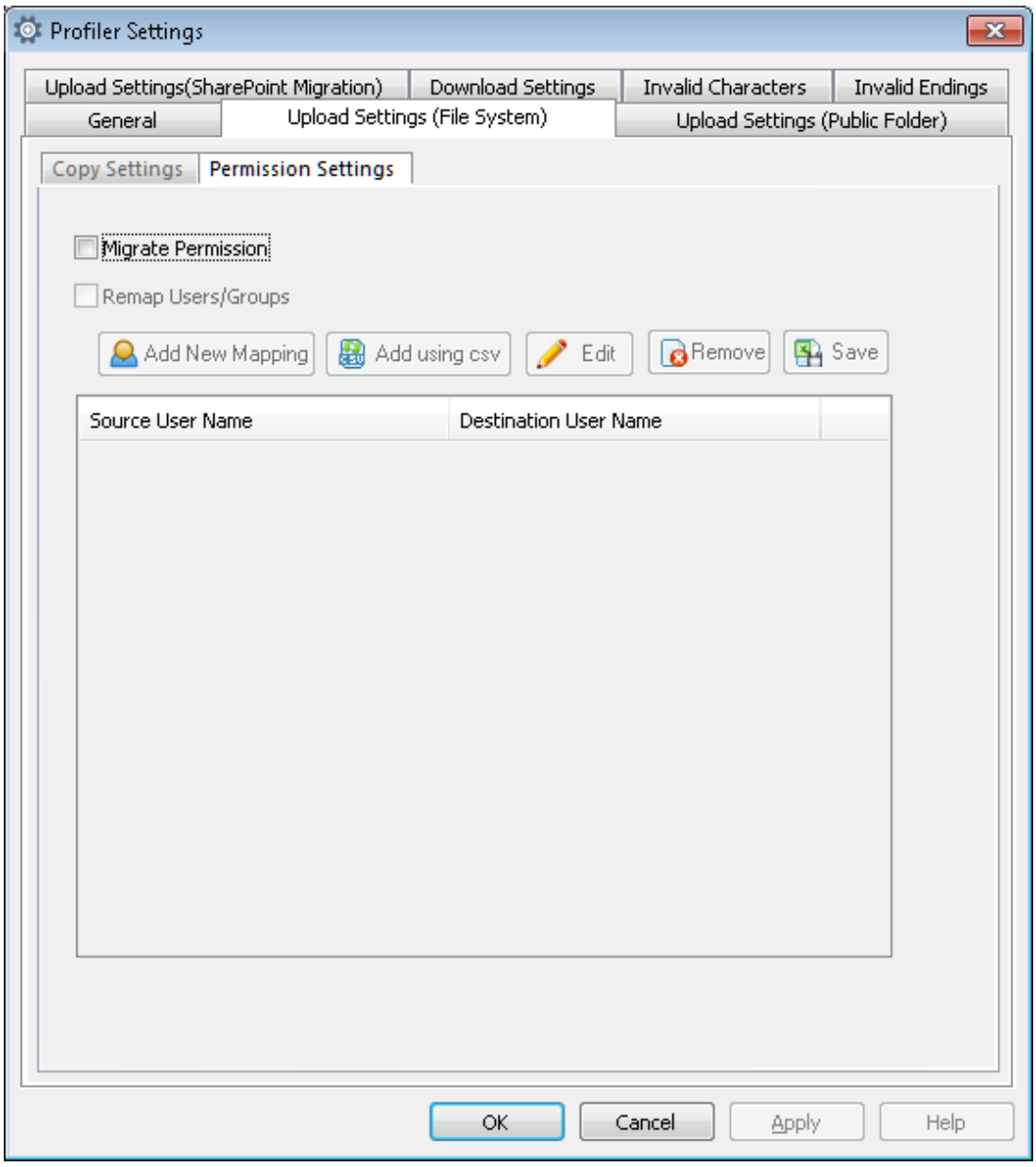

Figure 105: Permission Settings

Follow the steps below to apply the Permissions Settings.

While performing File System to SharePoint Migration, you can follow the similar steps to modify or reject these permission settings.

1. Check the box saying "Migrate Permissions" if you wish to migrate the permissions of content from File System to the SharePoint Server. Doing this enables the adjacent option to map users, i.e. "Remap Users". Enabling the "Remap Users" enables the complete section to let you map the users.

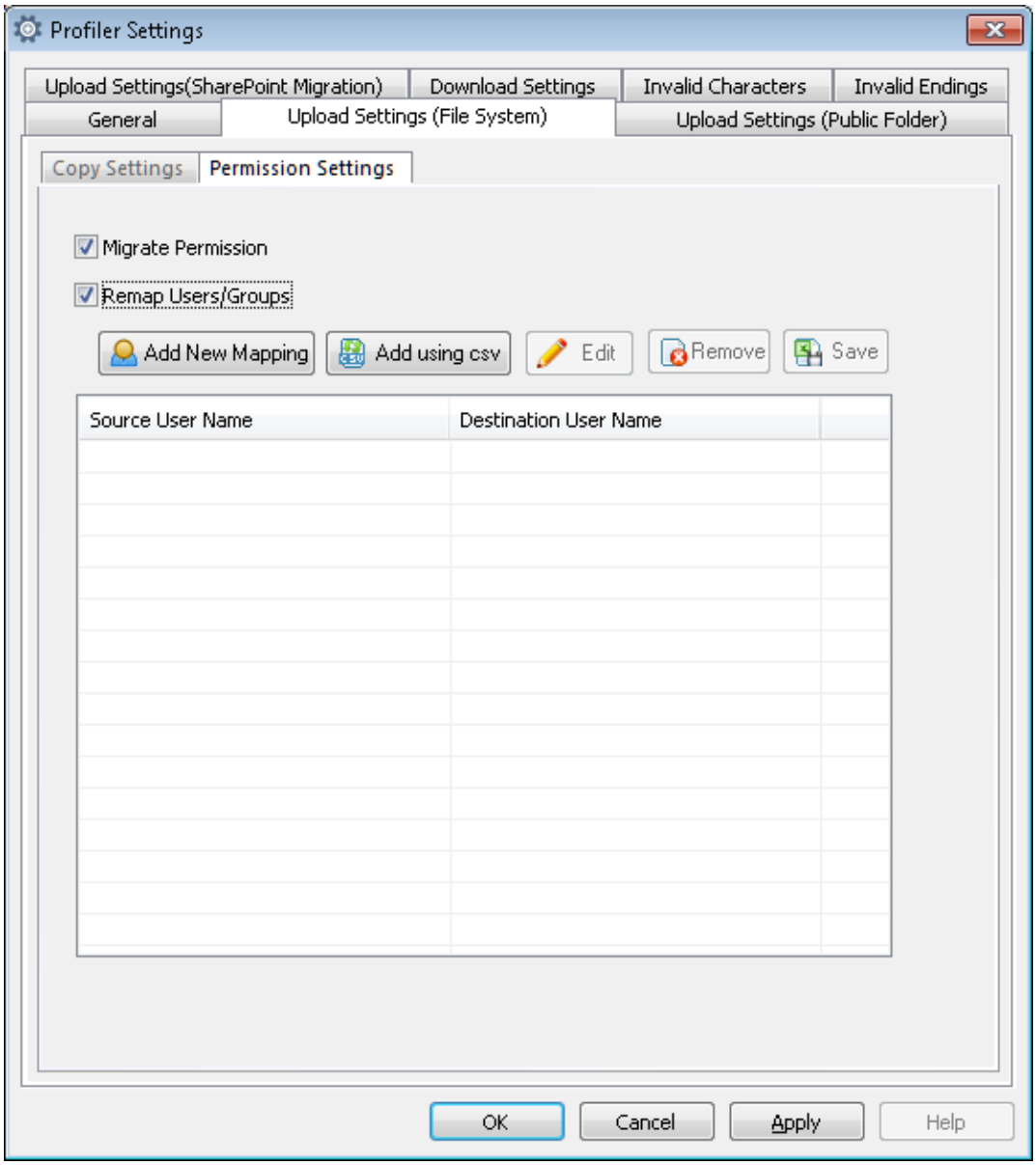

Figure 106: The section to migrate permissions and map users is enabled.

"Migrate Permissions" option will work only when the user of source content is available in the Active Directory of the destination SharePoint. In another case, you have to use the option "Remap Users" to map the users.

2. Click

to add a new user mapping.

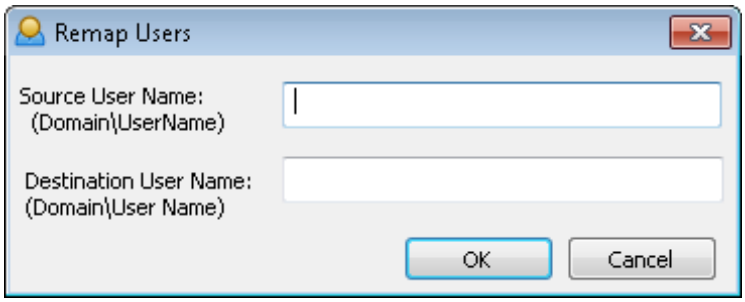

Figure 107: Dialog box to map the users

3. Add the source and target user names in their respective boxes.

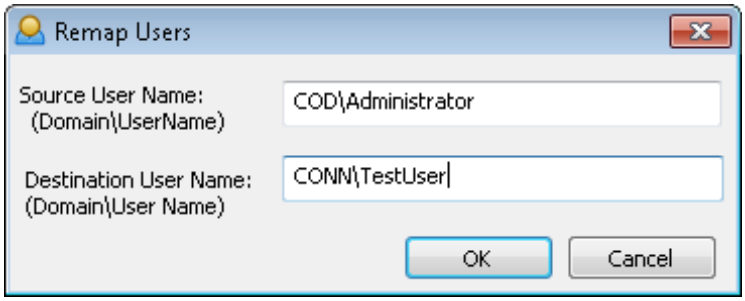

Figure 108: Dialog box to map the users

4. Click "OK" to add the mapping. It takes you back to the migration wizard, where the mapping section displays the currently added user mapping.

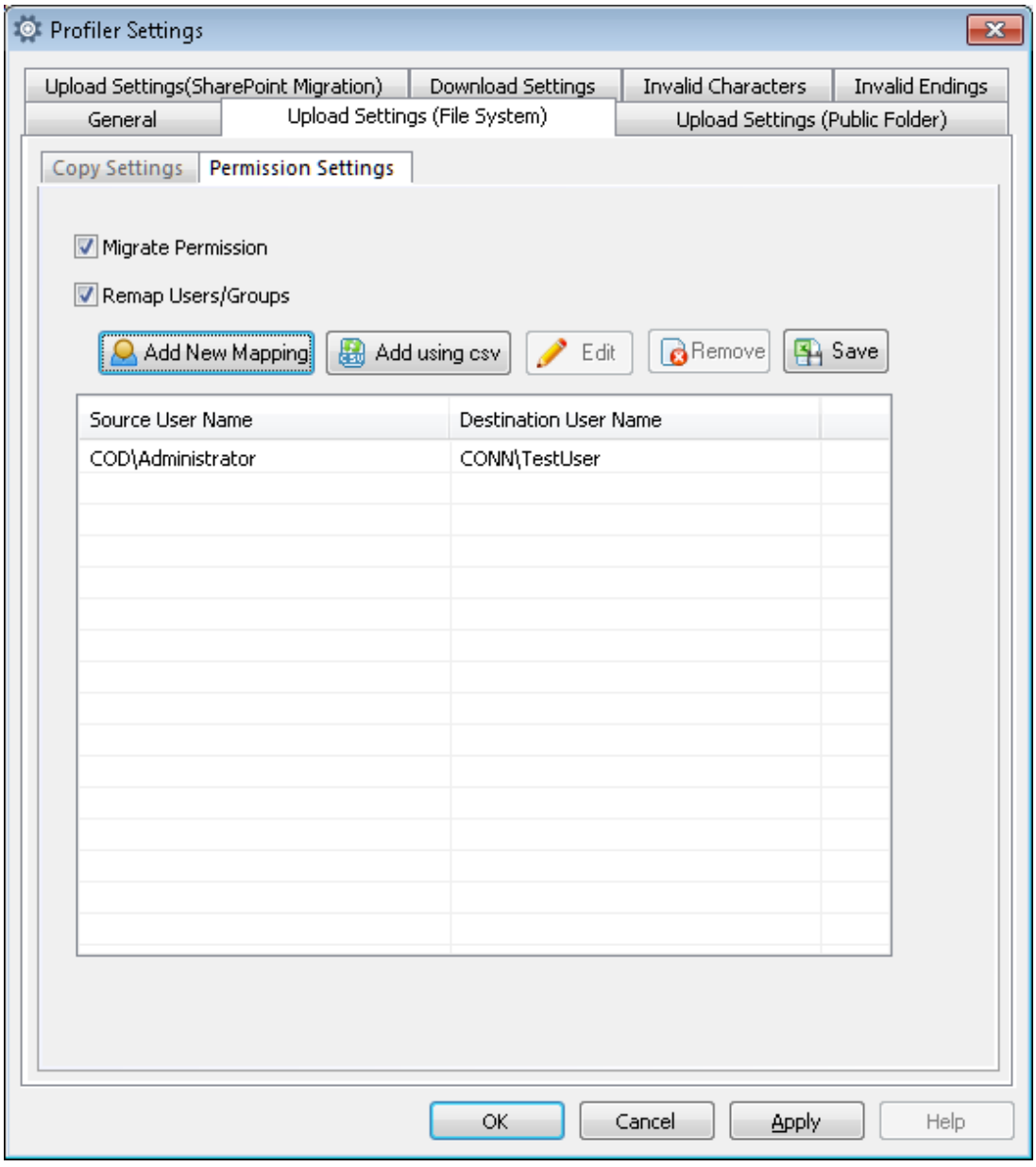

Figure 109: User Mapping

5. You can perform the following functions in this section.

- Edit...: Click it to edit the selected mapping.
- Remove: Click it to delete the selected mapping.

- Save: Click it to save the mapping list as a CSV file.
- Add Using CSV: Click it to load the mapping list from an existing CSV file.

5.3 Upload Settings (Public Folder)

This tab, in fact, contains the migration options for Public Folder to SharePoint Migration. Click it to display the following tab.

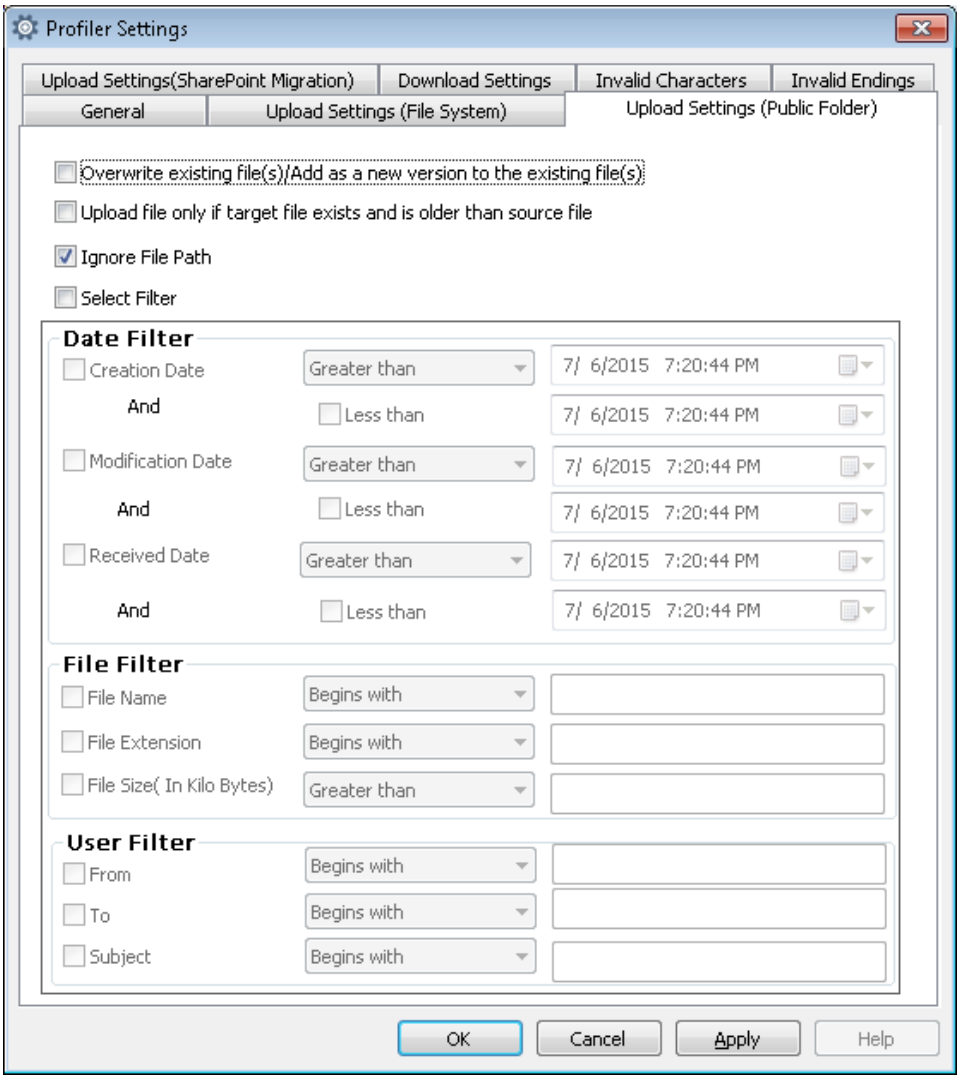

Figure 110: Settings to upload content from Public Folder to SharePoint

Once applied, these settings will be universally applicable to all Public Folder to SharePoint Migration Jobs. These settings are visible while performing the public folder migration. A user is

free to modify or reject these settings while performing any Public Folder to SharePoint Migration. It contains the following options.

1. **Overwrite existing file(s):** Select this option to overwrite the existing file on the SharePoint Server. It lets the software not to ask for your confirmation once a file is already available on the destination.
2. **Add as a new version to the existing file(s):** If you are trying to upload the content, which has the version option enabled, then the above "Overwrite existing file(s)" will be replaced with this option.

   Select this option to add the source file as its new version. In this case, if another version of the source file exists on the target, then the item will be uploaded as a different version. It means that both versions of the selected content will coexist at the SharePoint Server after uploading.

3. **Upload file only if the target file exists and is older than source file:** Select this option to upload an item only if the modification date of the source item is greater than the current modification date of the target item.

4. **Ignore File Path:** Select this option if you want the software to ignore the file path and file path limitations while uploading the content.

5. **Select filter:** Select this option to filter the File Server content that has to be migrated to the SharePoint Server. Selecting this option enables the adjacent "Filter" box. The different filters and the steps to apply them are listed herein below.

   a. **Date Filter:** Select any of the date filters to sort the content as per the access, received, or modification date. It has the following filters.

      i. **Creation Date**: It filters the files/items as per the provided created date. Enable this filter, select any of the following conditions, and provide a value for it.

         - **Greater Than:** It shows the files/items created on the date greater than the provided one. Selecting this condition also enables its accompanying

option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the files following in this date range.

Make sure that "Less Than" date should be greater than the "Greater Than" date.

- **Less Than:** It shows the files/items created on the date less than the provided date.
- **Not Equal:** It shows the files/items not created on the provided date.
- **Equal:** It shows the files/items created on the provided date.

ii. **Modification Date**: It filters the files/items as per the provided modified date. Enable this filter, select any of the following conditions, and provide a value for it.

- **Greater Than:** It shows the files/items modified on the date greater than the provided one. Selecting this condition also enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the files following in this date range.

Make sure that "Less Than" date should be greater than the "Greater Than" date.

- **Less Than:** It shows the files/items modified on the date less than the provided date.
- **Not Equal:** It shows the files/items not modified on the provided date.
- **Equal:** It shows the files/items modified on the provided date.

iii. **Received Date**: Select it to filter the mails/files as per the received date. Enable this filter, select any of the following conditions, and select the date & time for it in the adjacent box.

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- **Greater Than:** It shows the emails/files received on the date greater than the provided one.
- **Less Than:** It shows the mails/files received on the date less than the provided one.
- **Not Equal:** It shows the emails/files not received at the provided date.
- **Equal:** It shows the emails/files received at the provided date.

b. **File Filter:** It lets the software filter the files based on the parameters related to file such as its name, extension, and size.

i. **File Name**: It filters the content as per the provided name. You have to enable this filter first. Select any of the following conditions, and then provide a value for it. The entered value should not contain the special characters like /, \, :, *, ?, ", <, >, and |.

- **Begins With:** Select it to show the files whose name starts with the entered value.
- **Includes:** Select it to show the file names containing the entered value.
- **Not Equal:** Select it to show the files having the name not similar to the entered value.
- **Equal:** Select it to show the files having the name exactly similar to the entered value.

NOTE: Both File Name and File Extension filters has to be used collectively.

ii. **File Extension**: It filters the content as per the provided extension. Enable this filter, select any of the following conditions, and provide a value for it. The entered value should not contain the special characters like /, \, :, *, ?, ", <, >, and |.

- **Begins With:** Select it to show the files whose extension starts with the entered value.
- **Includes:** Select it to show the files whose extension contains the entered value.
- **Not Equal:** Select it to show the files having extension not similar to the entered value.
- **Equal:** Select it to show the files having the extension exactly similar to the entered value.

iii. **Size (In Kilo Bytes)**: It filters the files as per the provided file size in KB. Enable this filter, select any of the following conditions, and provide a value for it in numbers.

- **Greater Than:** It shows the files having size greater than the provided value.
- **Less Than:** It shows the files having size less than the provided value.
- **Not Equal:** It shows the files having the size not equal to the provided value.
- **Equal:** It shows the files having the size equal to the provided value.

c. **User Filter:** It filters the files as per the user of the files.

i. **From**: It filters the emails as per the sender who has sent the email. Enable this filter, select any of the following conditions, and provide a value for it.

- **Begins With:** Select it to show the files of which sender's name starts with the entered value.
- **Includes:** Select it to show the files of which sender's name contains the entered value.

- **Not Equal:** Select it to show the files having the sender's name not similar to the entered value.
- **Equal:** Select it to show the files having the sender's name exactly similar to the entered value.

ii. **To**: It filters the emails as per the recipient in the "To" field of the email. Enable this filter, select any of the following conditions, and provide a value for it.

- **Begins With:** Select it to show the files of which recipient's name starts with the entered value.
- **Includes:** Select it to show the files of which recipient's name contains the entered value.
- **Not Equal:** Select it to show the files having the recipient's name not similar to the entered value.
- **Equal:** Select it to show the files having the recipient's name exactly similar to the entered value.

iii. **Subject**: It filters the emails as per the subject. Enable this filter, select any of the following conditions, and provide a value for it.

- **Begins With:** Select it to show the emails of which subject starts with the entered value.
- **Includes:** Select it to show the emails of which subject contains the entered value.
- **Not Equal:** Select it to show the emails having the subject not similar to the entered value.
- **Equal:** Select it to show the emails having the subject exactly similar to the entered value.

Check the boxes for the desired filters and provide their values.

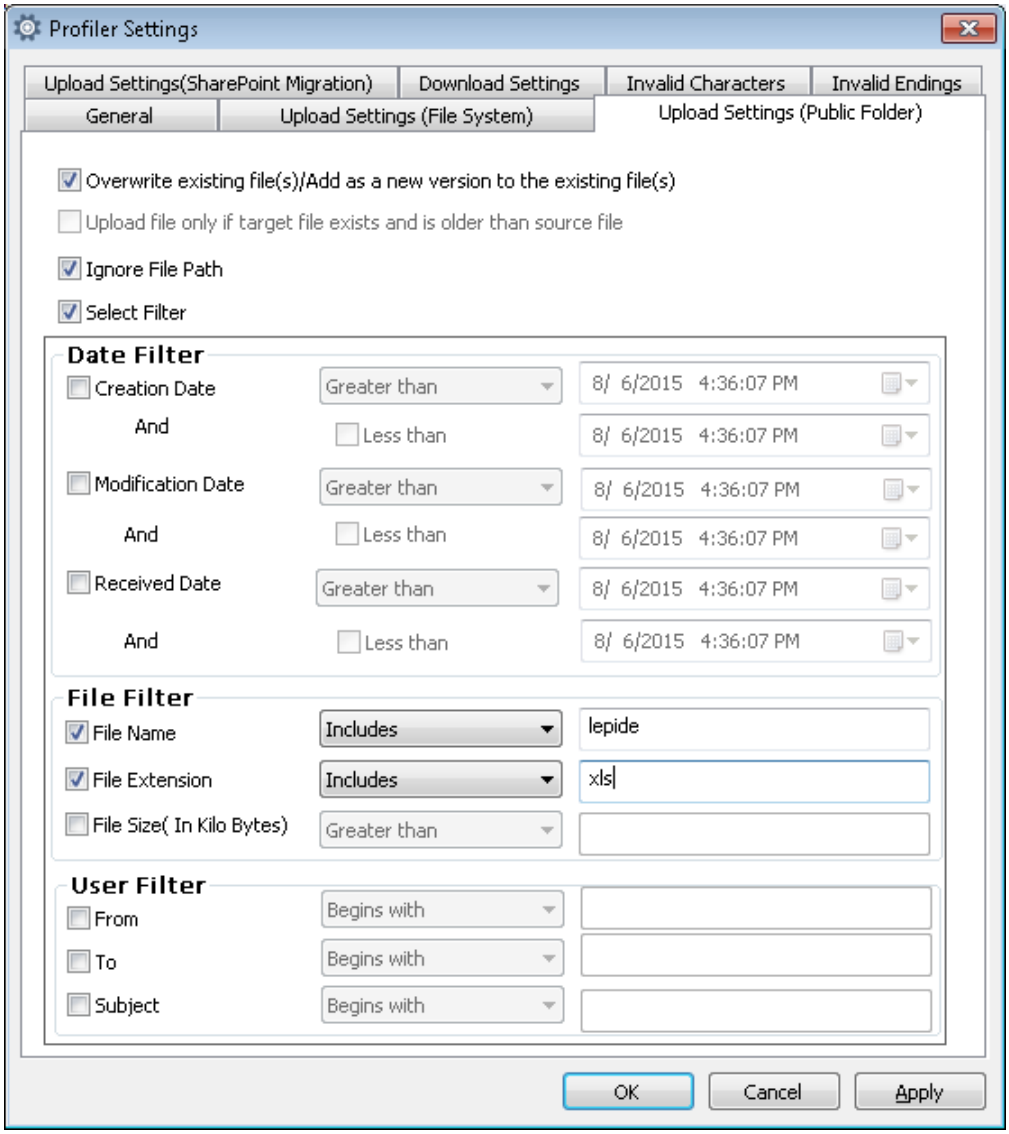

Figure 111: Dialog box shows the set of applied filters

5.4 Upload Settings (SharePoint)

This tab contains the universal settings for all migrations from the Source SharePoint Server to the Destination SharePoint Server. Click it to display its options.

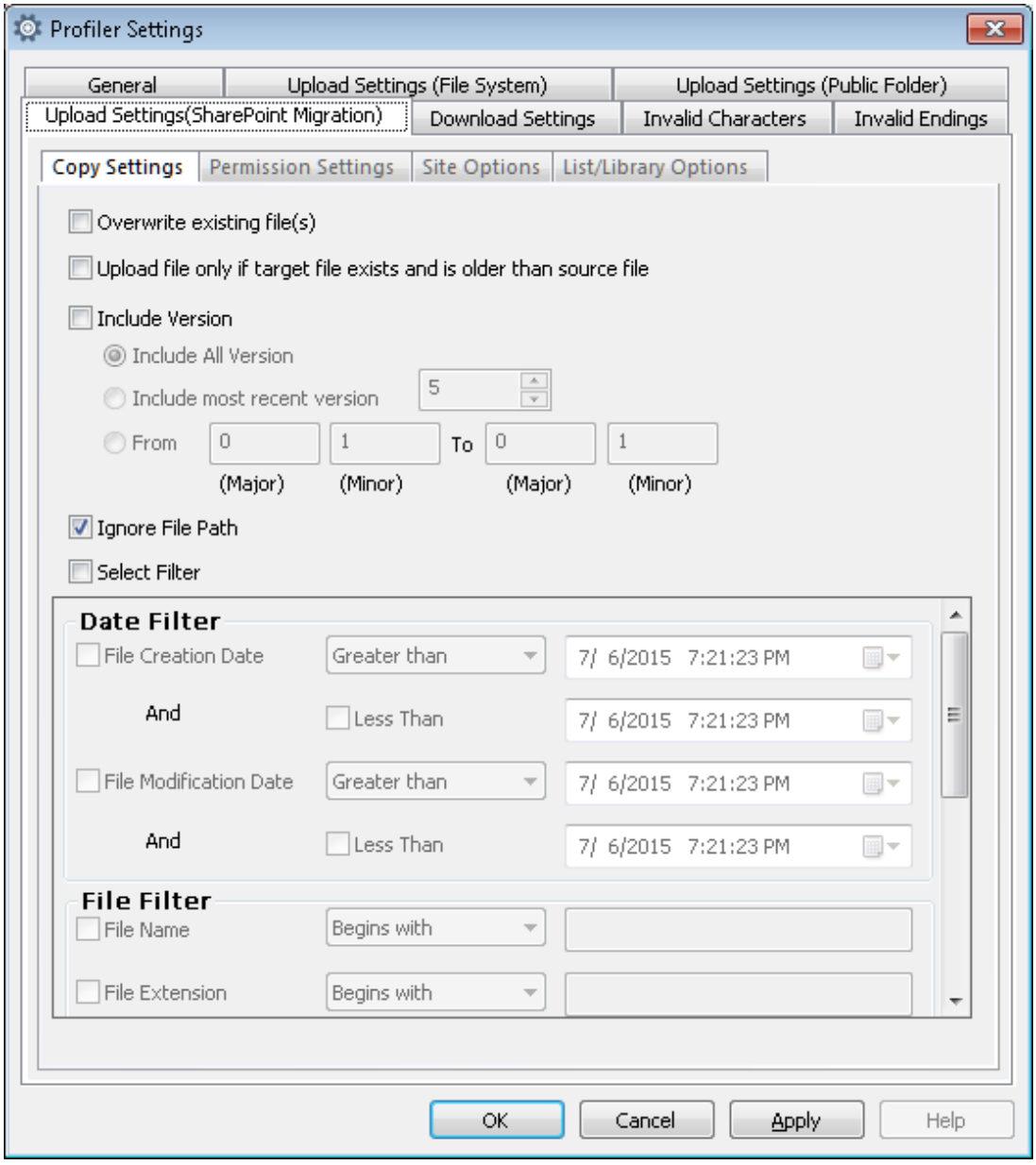

Figure 112: Upload Content Settings tab for File System

These settings are visible when you visit the step of modifying migration options in SharePoint to SharePoint Migration. You can modify these settings while creating or editing a migration job. These settings are further divided into the following four tabs.

5.2.1 Copy Settings - SharePoint

Copy Settings are, in fact, the migration options that can be modified while performing the SharePoint to SharePoint Migration.

As stated above, settings applied in this tab will be universally applicable to all SharePoint to SharePoint Migration Jobs. However, the user has the freedom to modify them accordingly. It contains the following options.

1. **Overwrite existing file(s):** Select this option to overwrite the existing file on the SharePoint Server. It lets the software not to ask for your confirmation once a file is already available on the destination.

2. **Upload file only if the target file exists and is older than source file:** Select this option to upload the file only if the modification date of the source file is greater than the current modification date of the target file.

3. **Ignore File Path:** Select this option if you want the software to ignore the file path and file path limitations while uploading the content.

4. **Include Versions:** If you wish to include the versions of the content, then check "Include Versions".

Figure 113: Include file version options

It enables the following options. You can select anyone of them.

i. **Include All Versions:** Select this option to include all versions of the files during migration.

ii. **Include most recent versions:** Select how many last versions of the content you want to migrate.

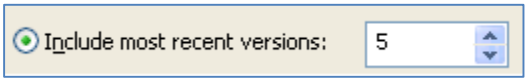

Figure 114: Include recent versions option

Enter the number of the recent version of the content, which you want to migrate.

iii. **From:** Select the range of the versions of all content that you have to download. Enabling this option enables the "To" field.

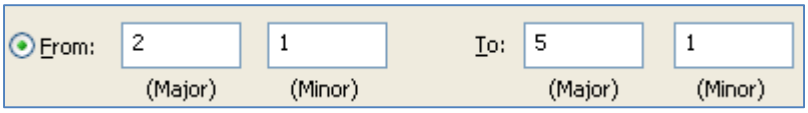

Figure 115: Include versions from and to option

Enter the "from" and "to" range of the versions of content to be migrated. Such as, entering 2.1 (2 in Major and 1 in Minor) in "From" field and 5.1 (5 in major and 1 in minor) in "To" field, will migrate all versions of a file from 2.1 to 5.1.

5. **Select filter:** Select this option to filter the File Server content that has to be migrated to the SharePoint Server. Selecting this option enables the adjacent "Filter" box. The different filters and the steps to apply them are listed herein below.

   a. **Date Filter:** Select any of the date filters to sort the content as per the file access, creation, or modification date. It has the following filters.

      i. **File Creation Date**: It filters the files as per the provided created date. Enable this filter, select any of the following conditions, and provide a value for it.

         - **Greater Than:** It shows the files created on the date greater than the provided one. Selecting this condition also enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one

previous date in the "Greater Than" field and one current date in "Less Than" field to list down the files following in this date range.

Make sure that "Less Than" date should be greater than the "Greater Than" date.

- **Less Than:** It shows the files created on the date less than the provided date.
- **Not Equal:** It shows the files not created on the provided date.
- **Equal:** It shows the files created on the provided date.

ii. **File Modification Date**: It filters the files as per the provided modified date. Enable this filter, select any of the following conditions, and provide a value for it.

- **Greater Than:** It shows the files modified on the date greater than the provided one. Selecting this condition also enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the files following in this date range.

Make sure that "Less Than" date should be greater than the "Greater Than" date.

- **Less Than:** It shows the files modified on the date less than the provided date.
- **Not Equal:** It shows the files not modified on the provided date.
- **Equal:** It shows the files modified on the provided date.

b. **File Filter:** It lets the software filter the files based on the parameters related to file such as its name, extension, and size. It contains the following filters.

i. **File Name**: It filters the content as per the provided name. You have to enable this filter first. Select any of the following conditions, and then provide a value for it.

The entered value should not contain the special characters like /, \, :, *, ?, ", <, >, and |.

- **Begins With:** Select it to show the files whose name starts with the entered value.
- **Includes:** Select it to show the file names containing the entered value.
- **Not Equal:** Select it to show the files having the name not similar to the entered value.
- **Equal:** Select it to show the files having the name exactly similar to the entered value.

NOTE: Both File Name and File Extension filters has to be used collectively.

ii. **File Extension**: It filters the content as per the provided extension. Enable this filter, select any of the following conditions, and provide a value for it. The entered value should not contain the special characters like /, \, :, *, ?, ", <, >, and |.

- **Begins With:** Select it to show the files whose extension starts with the entered value.
- **Includes:** Select it to show the files whose extension contains the entered value.
- **Not Equal:** Select it to show the files having extension not similar to the entered value.
- **Equal:** Select it to show the files having the extension exactly similar to the entered value.

iii. **File Title**: It filters the content as per the provided title. You have to enable this filter first. Select any of the following conditions, and then provide a value for it.

The entered value should not contain the special characters like /, \, :, *, ?, ", <, >, and |.

- **Begins With:** It shows the files whose title starts with the entered value.
- **Includes:** Select it to show the file whose title contains the entered value.
- **Not Equal:** Select it to show the files having the title not similar to the entered value.
- **Equal:** Select it to show the files having the title exactly similar to the entered value.

iv. **File Content Type**: It filters the content as per the provided Content Type. Enable this filter, select any of the following conditions, and provide a value for it. The entered value should not contain the special characters like /, \, :, *, ?, ", <, >, and |.

- **Begins With:** Select it to show the files whose Content Type starts with the entered value.
- **Includes:** Select it to show the files whose Content Type contains the entered value.
- **Not Equal:** Select it to show the files having Content Type not similar to the entered value.
- **Equal:** Select it to show the files having the Content Type exactly similar to the entered value.

v. **File ID**: It filters the content as per the provided ID. Enable this filter, select any of the following conditions, and provide a value for it. The entered value should not contain the special characters like /, \, :, *, ?, ", <, >, and |.

- **Begins With:** Select it to show the files whose ID starts with the entered value.
- **Includes:** Select it to show the files whose ID contains the entered value.
- **Not Equal:** Select it to show the files having the ID not similar to the entered value.
- **Equal:** Select it to show the files having the ID exactly similar to the entered value.

vi. **File Size (In Kilo Bytes)**: It filters the files as per the provided file size in KB. Enable this filter, select any of the following conditions, and provide a value for it in numbers.

- **Greater Than:** It shows the files having size greater than the provided value.
- **Less Than:** It shows the files having size less than the provided value.
- **Not Equal:** It shows the files having the size not equal to the provided value.
- **Equal:** It shows the files having the size equal to the provided value.

c. **User Filter:** It filters the files as per the user of the files. It contains the following filters.

i. **Who Created**: It filters the content as per the file owners who created the files. Enable this filter, select any of the following conditions, and provide a value for it.

- **Begins With:** Select this option to show the files, whose owner's name starts with the entered value.

- **Includes:** Select it to show the files, whose owner's name contains the entered value.
- **Not Equal:** Select it to show the files having the owner's name not similar to the entered value.
- **Equal:** Select it to show the files having the owner's name exactly similar to the entered value.

ii. **Who Modified**: It filters the content as per the users who modified the files. Enable this filter, select any of the following conditions, and provide a value for it.

- **Begins With:** Select this option to show the files, whose modifier name starts with the entered value.
- **Includes:** Select it to show the files, whose modifier name contains the entered value.
- **Not Equal:** Select it to show the files having the modifier name not similar to the entered value.
- **Equal:** Select it to show the files having the modifier name exactly similar to the entered value.

Check the boxes for the desired filters and provide their values.

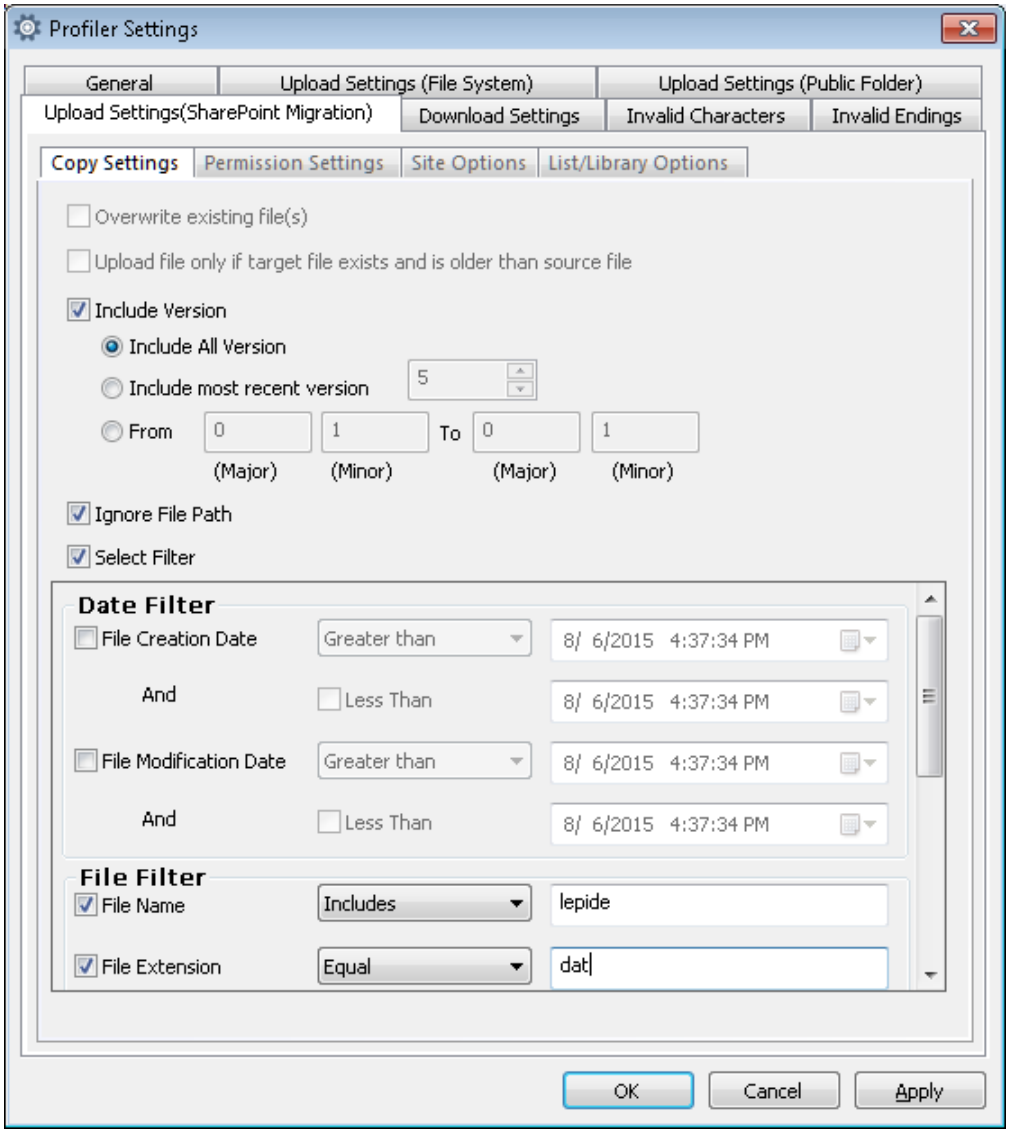

Figure 116: Dialog box shows the set of applied filters

5.2.2 Permission Settings - SharePoint

Permission Settings allow you to apply the universal settings for migrating the permissions and remapping the users. Once applied, these settings will be applicable universally for all SharePoint to SharePoint Migration Jobs.

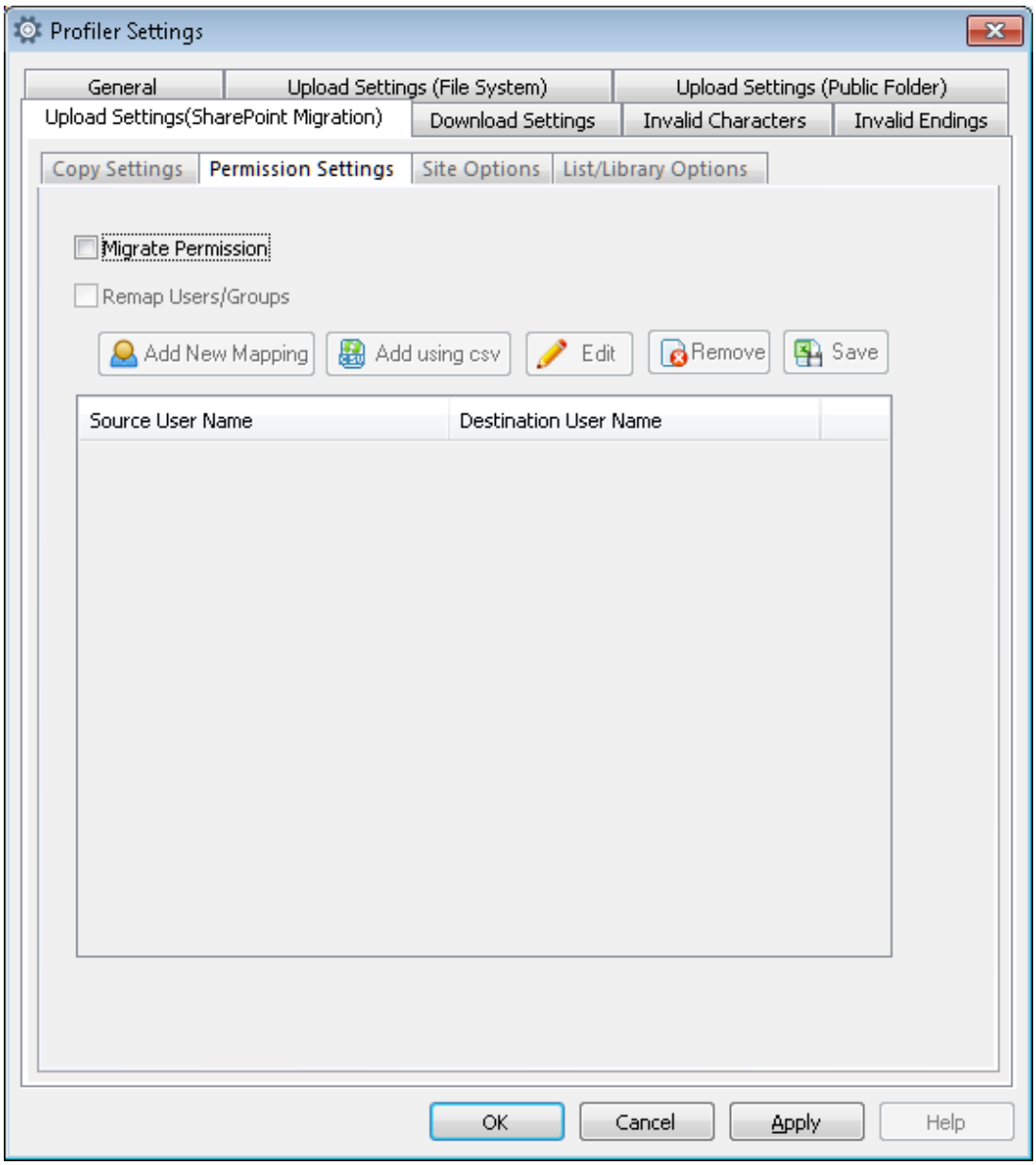

Figure 117: Permission Settings

Follow the steps below to apply the Permissions Settings. While performing SharePoint to SharePoint Migration, you can follow the similar steps to modify or reject these permission settings.

1. Check the box saying "Migrate Permissions" if you wish to migrate the permissions of content from the Source SharePoint to the Destination SharePoint. Doing this enables the adjacent option to map users, i.e. "Remap Users". Enabling the "Remap Users", in turn, enables the complete section that lets you map the users.

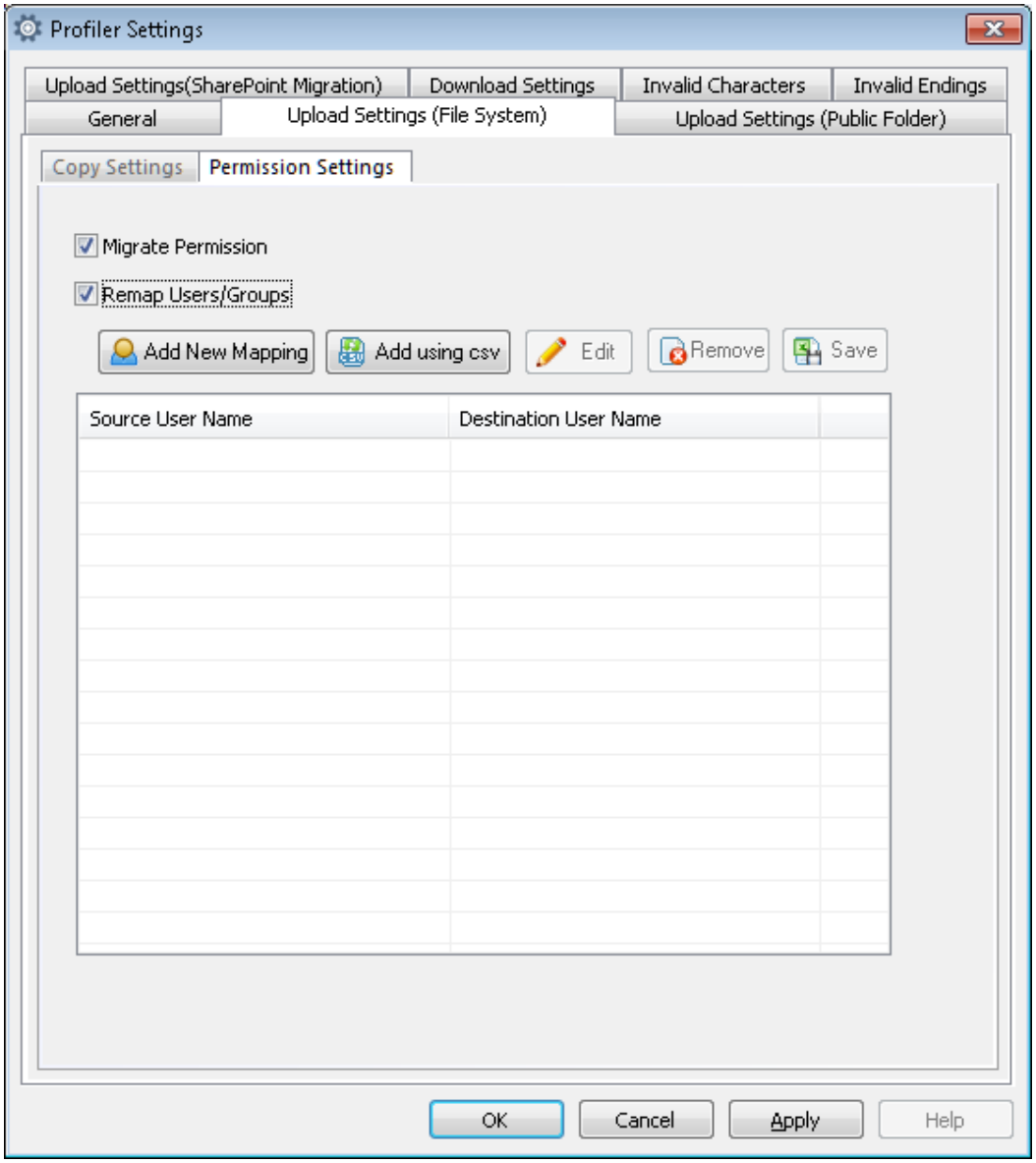

Figure 118: The section to migrate permissions and map users is enabled.

"Migrate Permissions" option works only when the user of source content is available in the Active Directory of the destination SharePoint. In another case, you have to use the option "Remap Users" to map the users.

2. Click

to add a new user mapping.

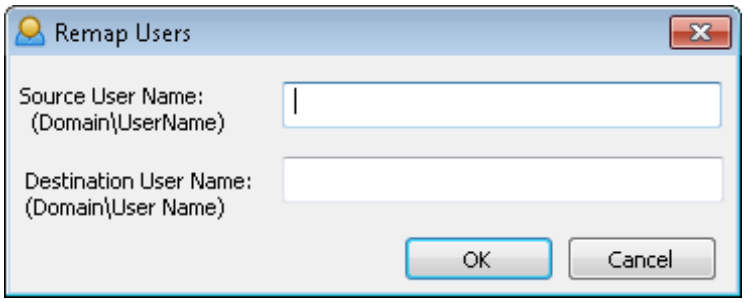

Figure 119: Dialog box to map the users

3. Add the source and target user names in their respective boxes.

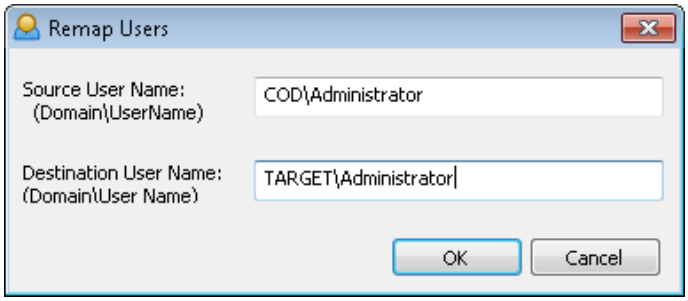

Figure 120: Dialog box to map the users

4. Click "OK" to add the mapping and bring you back to the migration wizard, where the mapping section displays the currently added user mapping.

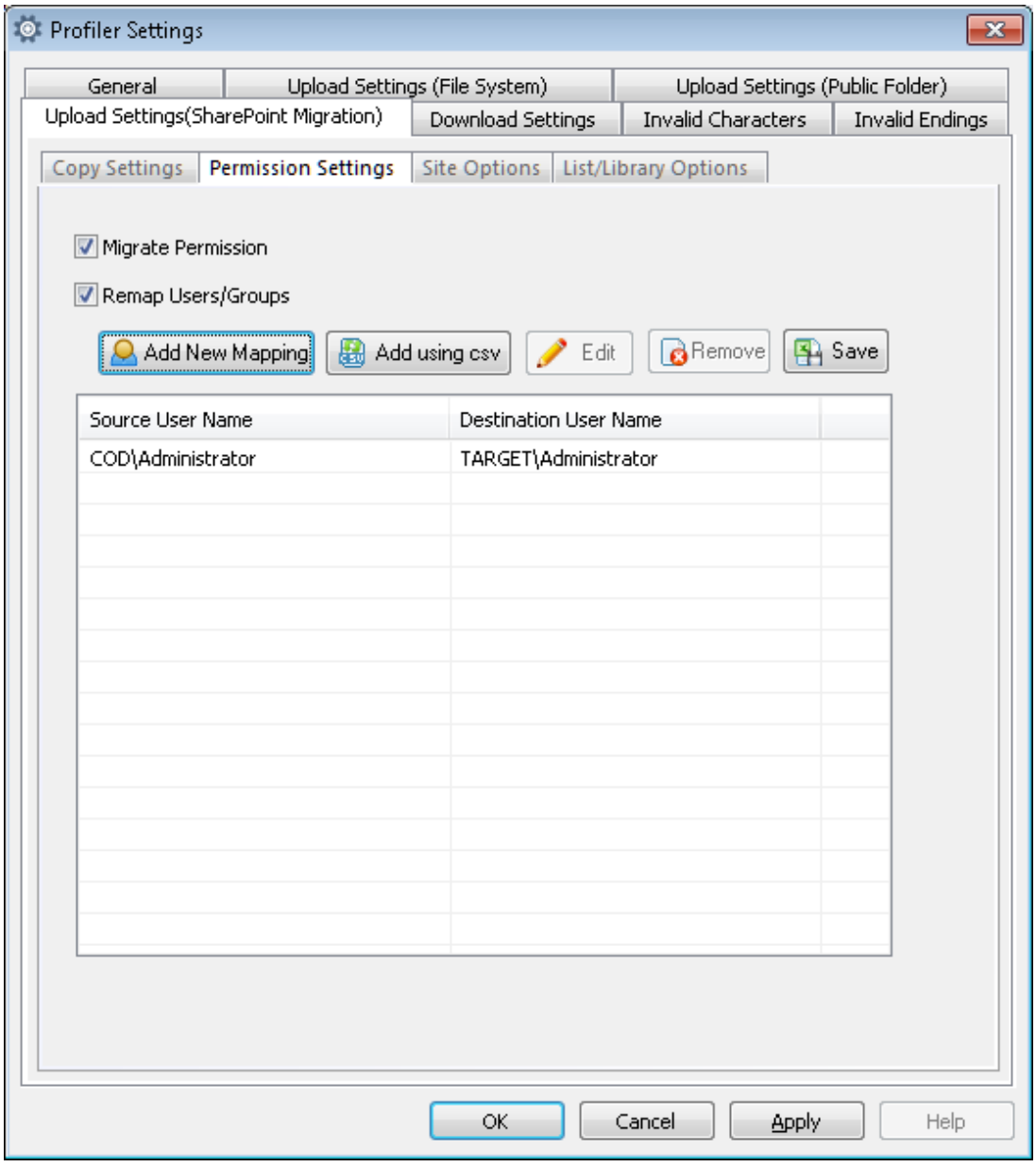

Figure 121: User Mapping

5. You can perform the following functions in this section.

- Edit...: Click it to edit the selected mapping.
- Remove: Click it to delete the selected mapping.
- Save: Click it to save the mapping list as a CSV file.

- Add Using CSV: Click it to load the mapping list from an existing CSV file.

5.2.3 Site Settings - SharePoint

"Site Options" Tab allows you applying the settings to select what all objects will be migrated while migrating any Site from a Source SharePoint to the Destination SharePoint. Once applied, these settings will be applicable universally for all SharePoint to SharePoint Migration jobs.

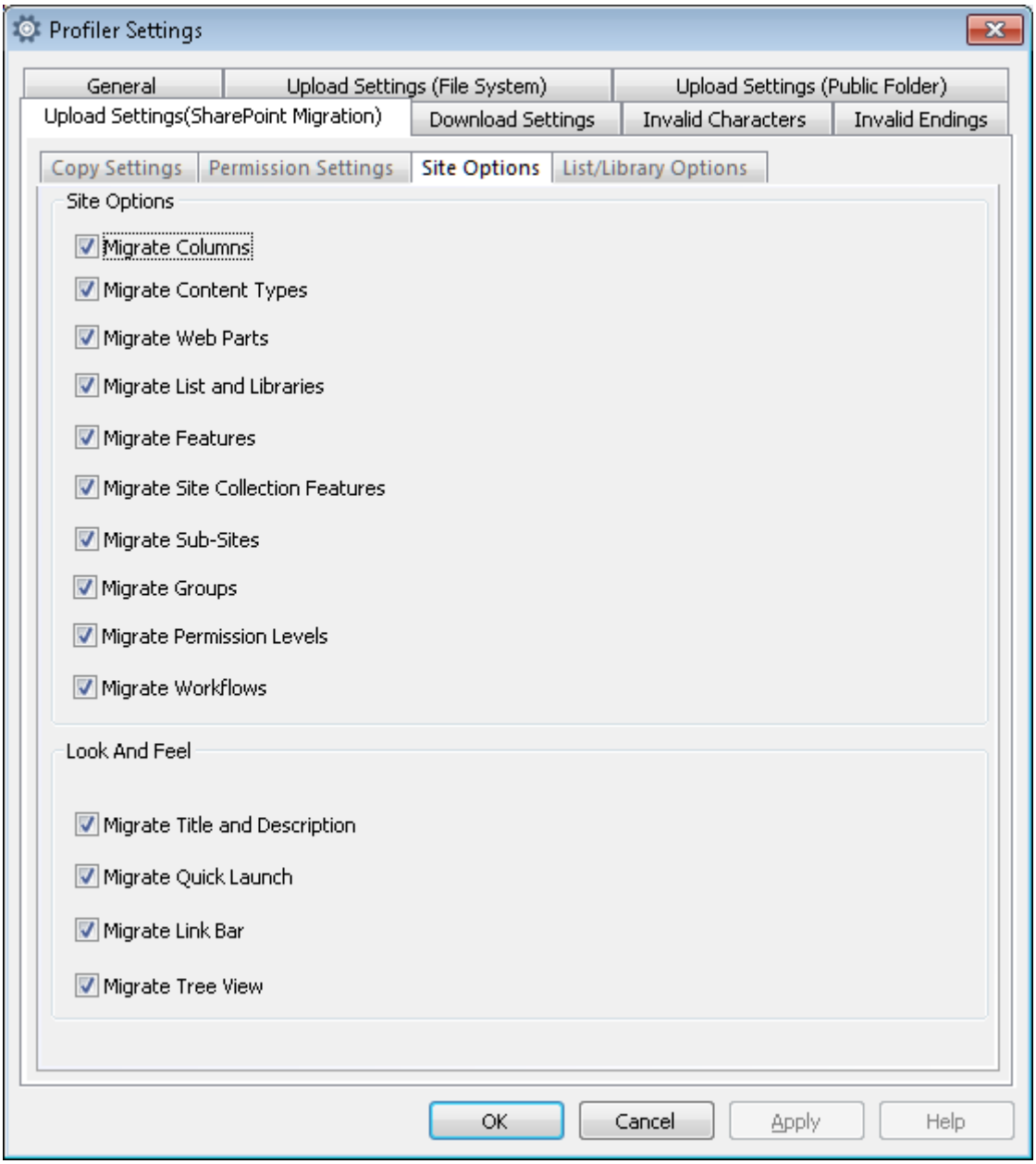

Figure 122: Site Options for SharePoint Migration

Here, you can select what objects have to be migrated or excluded during a SharePoint to SharePoint Migration. These settings are divided into following two settings. You can check the content and items to be migrated and uncheck not to be migrated.

1. **Site Options:** This section lists the objects that can be migrated during a SharePoint to SharePoint Migration.
    a. Migrate Columns
    b. Migrate Content Types
    c. Migrate Web Parts
    d. Migrate List and Libraries
    e. Migrate Features
    f. Migrate Site Collection Features
    g. Migrate Sub-Sites
    h. Migrate Groups
    i. Migrate Permission Levels
    j. Migrate Workflows
2. **Look and Feel:** This section lists the user interface elements of a SharePoint Site that will be migrated during a SharePoint to SharePoint Migration.
    a. Migrate Title and Description
    b. Migrate Quick Launch
    c. Migrate Link Bar
    d. Migrate Tree View

5.2.4 List/Library Options - SharePoint

"List/Library Options" Tab allows you applying the settings to select what all objects will be migrated while migrating any list or library from a Source SharePoint Server to the Destination SharePoint. Once applied, these settings will be applicable universally for all SharePoint to SharePoint Migration jobs.

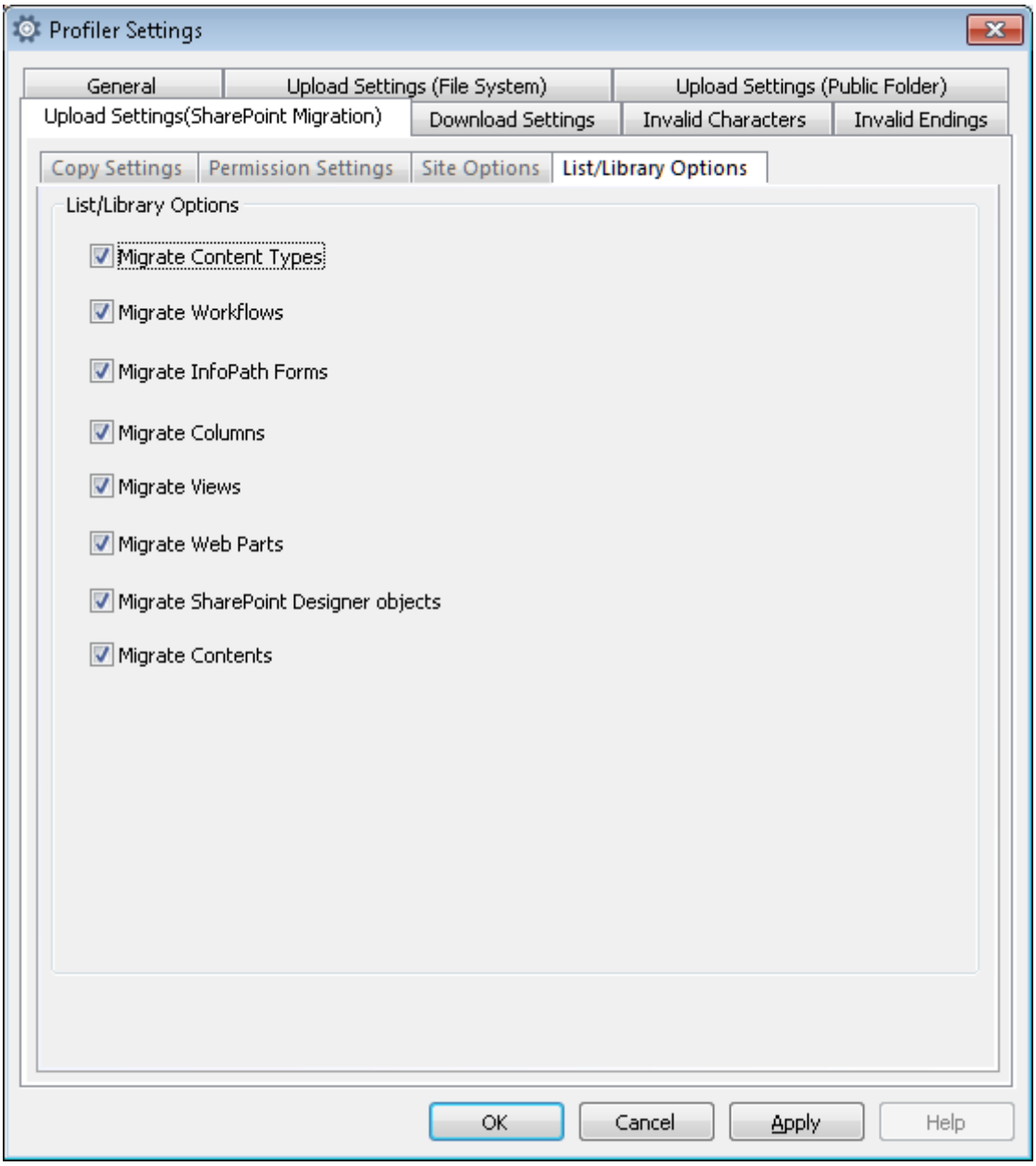

Figure 123: Universal List/Library Migration Options

5.5 Download Settings

This tab contains the universal settings for all download jobs from SharePoint to the File System. Click it to display the following tab.

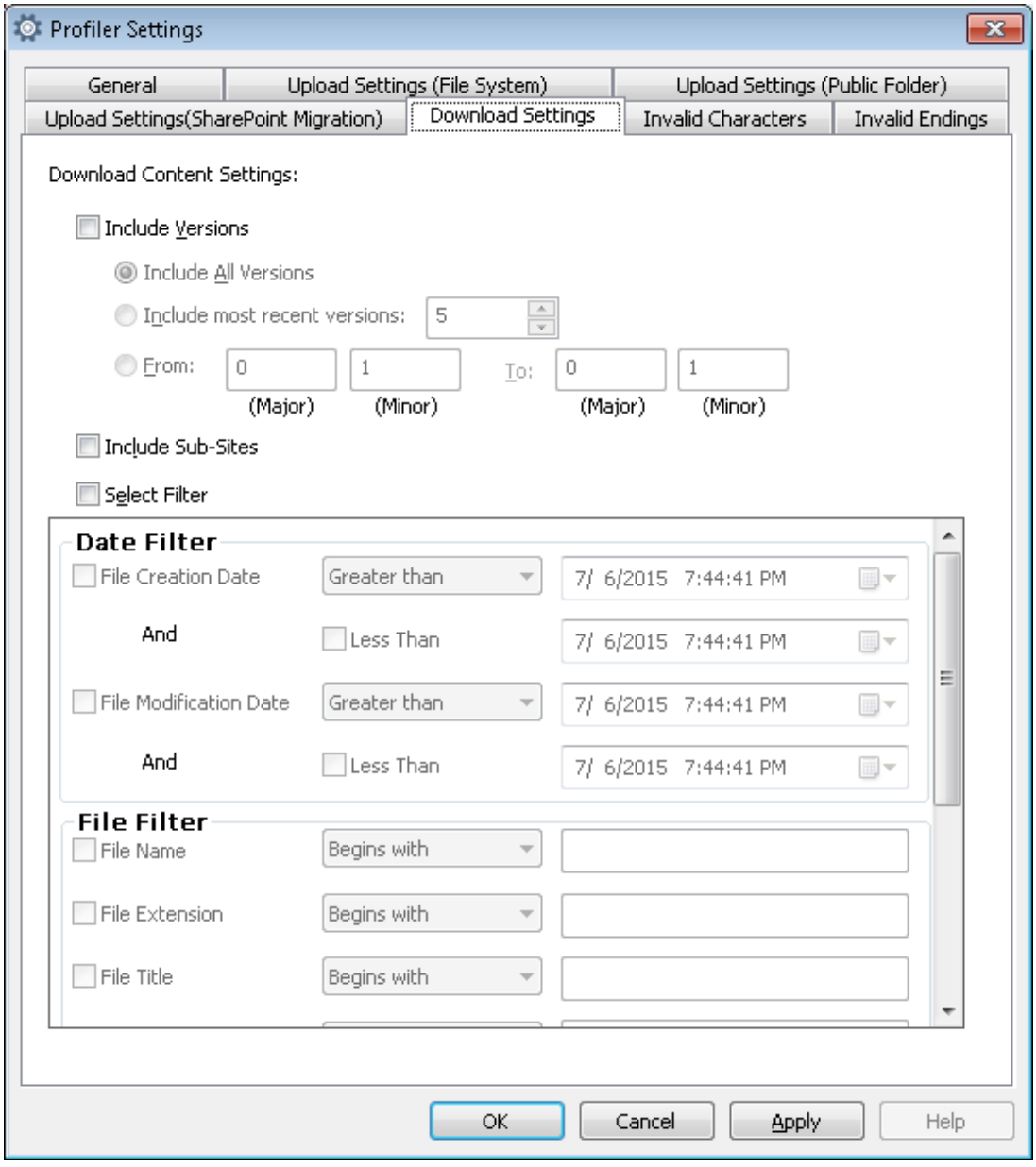

Figure 124: Download Content Settings

These settings are visible at the download wizard. You can modify these settings while downloading the content from the Destination SharePoint Server. It contains the following options.

1. **Include Versions:** If you want to include the versions of the content, then check "Include Versions".

Figure 125: Include file version options

It enables the following options. You can select anyone of them.

i. **Include All Versions:** Select this option to include all versions of the files.

ii. **Include most recent versions:** Select how many last versions of the content you want to download.

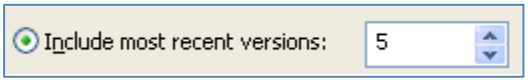

Figure 126: Include recent versions option

Enter the number of the recent version of the content, which you want to download.

iii. **From:** Select the range of the versions of all content that you have to download. "To" field is also enabled when you enable this option.

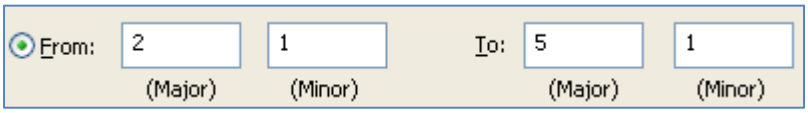

Figure 127: Include versions from and to option

Enter the "from" and "to" range of the versions of content, which you want to download. Such as, entering 2.1 (2 in Major and 1 in Minor) in "From" field and 5.1 (5 in major and 1 in minor) in "To" field will download all versions of a file from 2.1 to 5.1.

2. **Include Sub-Sites:** This option is available only when you are trying to download the complete SharePoint Site or Sub-Site containing a subsite. Check this option only when you want to download the content of the subsites as well.
3. **Set Filter:** Use this option to apply the filters on the data being downloaded. Check the box saying "Set Filter" if you want to apply the filter on the content to be downloaded. Selecting this option enables the filter section.

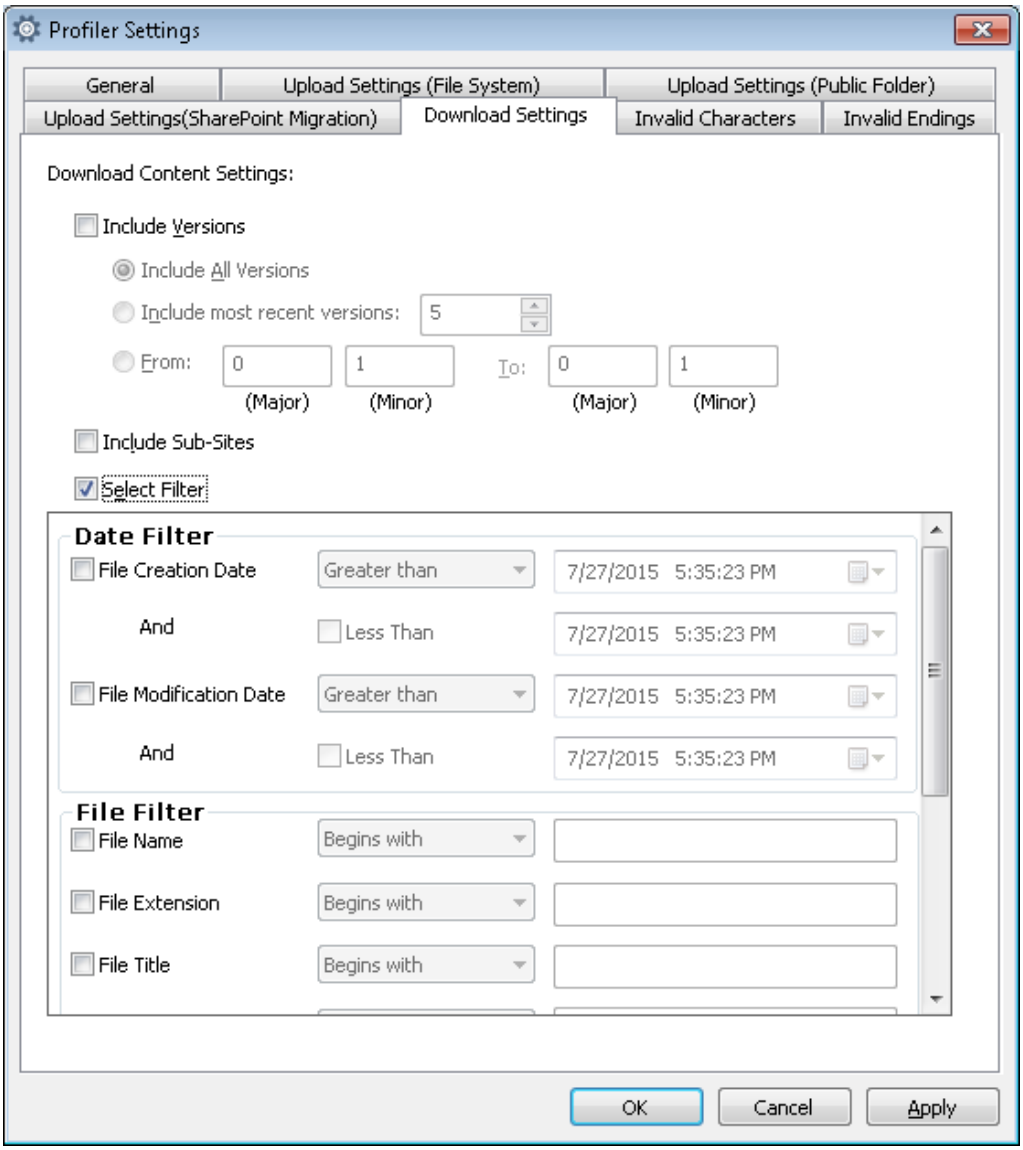

Figure 128: Filters to filter the SharePoint Content while downloading

Here, you can select the following filters.

a. **Date Filter:** A date filter allows you sorting the content as per the provided creation and/or modification date. This category contains the following filters.

i. **File Creation Date**: It filters the items as per the provided created date. Enable this filter, select any of the following conditions, and provide a value for it.

- **Greater Than:** It shows the items created on the date greater than the provided one. Selecting this condition also enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the items following in this date range.

Make sure that "Less Than" date should be greater than the "Greater Than" date.

- **Less Than:** It shows the items created on the date less than the provided date.
- **Not Equal:** It shows the items not created at the provided date.
- **Equal:** It shows the items created at the provided date.

ii. **File Modification Date**: It filters the content as per the provided modified date. Enable this filter, select any of the following conditions, and provide a value for it.

- **Greater Than:** It shows the items modified on the date greater than the provided one. Selecting this condition also enables its accompanying option "Less Than" that helps you to bracket the filtering criteria. You can enter one previous date in the "Greater Than" field and one current date in "Less Than" field to list down the items following in this date range.

Make sure that "Less Than" date should be greater than the "Greater Than" date.

- **Less Than:** It shows the items modified on the date less than the provided date.

- **Not Equal:** It shows the items not modified on the provided date.
- **Equal:** It shows the items modified on the provided date.

b. **File Filter:** These filters allow you filtering the files based on the attributes such as file name, extension, ID, etc. It contains the following filters.

i. **File Name**: It filters the content as per the provided name. You have to enable this filter, select any of the following conditions, and then provide a value for it.

- **Begins With:** Select it to show the items of which name starts with the entered value.
- **Includes:** Select it to show the items of which name contains the entered value.
- **Not Equal:** Select it to show the items having the name not similar to the entered value.
- **Equal:** Select it to show the items having the name exactly similar to the entered value.

NOTE: Both File Name and File Extension filters has to be used collectively.

ii. **File Extension**: It filters the content as per the provided extension. Enable this filter, select any of the following conditions, and provide a value for it.

- **Begins With:** Select it to show the files whose extension starts with the entered value.
- **Includes:** Select it to show the files whose extension contains the entered value.
- **Not Equal:** Select it to show the files having the extension not similar to the entered value.
- **Equal:** Select it to show the files having the extension exactly similar to the entered value.

iii. **File Title**: It filters the content as per the provided title. Enable this filter, select any of the following conditions, and provide a value for it.

- **Begins With:** Select it to show the items whose title start with the entered value.
- **Includes:** Select it to show the items whose title contain the entered value.
- **Not Equal:** Select it to show the items having the title not similar to the entered value.
- **Equal:** Select it to show the items having the title exactly similar to the entered value.

iv. **File Content Type**: It filters the content as per the provided content type. Enable this filter, select any of the following conditions, and provide a value for it.

- **Begins With:** Select it to show the items whose type start with the entered value.
- **Includes:** Select it to show the items whose type contain the entered value.
- **Not Equal:** Select it to show the items having the type not similar to the entered value.
- **Equal:** Select it to show the items having the type exactly similar to the entered value.

v. **File ID**: It filters the content as per the provided ID Number. Enable this filter, select any of the following conditions, and provide value in numbers for it.

- **Begins With:** Select it to show the files whose ID starts with the entered value.
- **Includes:** Select it to show the files whose ID contain the entered value.
- **Not Equal:** Select it to show the files having the ID not equal to the entered value.
- **Equal:** Select it to show the files having the ID equal to the entered value.

vi. **File Size (In Kilo Bytes)**: It filters the content as per the provided file size in KB. Enable this filter, select any of the following conditions, and provide a value for it.

- **Greater Than:** It shows the items having the size greater than the provided value.
- **Less Than:** It shows the items having size less than the provided value.
- **Not Equal:** It shows the items having the size not equal to the provided value.
- **Equal:** It shows the items having the size equal to the provided value.

c. **User Filter:** Such filters let you filter the content as per the user attributes of the content. This category contains the following filters.

i. **Who Created**: It filters the content as per the user who has created it. Enable this filter, select any of the following conditions, and provide a value for it.

- **Begins With:** Select it to show the items of which creator's name starts with the entered value.
- **Includes:** Select it to show the items of which creator's name contains the entered value.
- **Not Equal:** Select it to show the items having the creator's name not similar to the entered value.
- **Equal:** Select it to show the items having the creator's name exactly similar to the entered value.

ii. **Who Modified**: It filters the content as per the user who has modified it recently. Enable this filter, select any of the following conditions, and provide a value for it.

- **Begins With:** Select it to show the items of which modifier's name start with the entered value.

- **Includes:** Select it to show the items of which modifier's name contains the entered value.
- **Not Equal:** Select it to show the items having the modifier's name not similar to the entered value.
- **Equal:** Select it to show the items having the modifier's name exactly similar to the entered value.

5.6 Invalid Characters

This tab contains the settings related to the invalid characters, which may be available in the names of content that has to be migrated to the SharePoint. It lists the invalid characters and their suggested replacements.

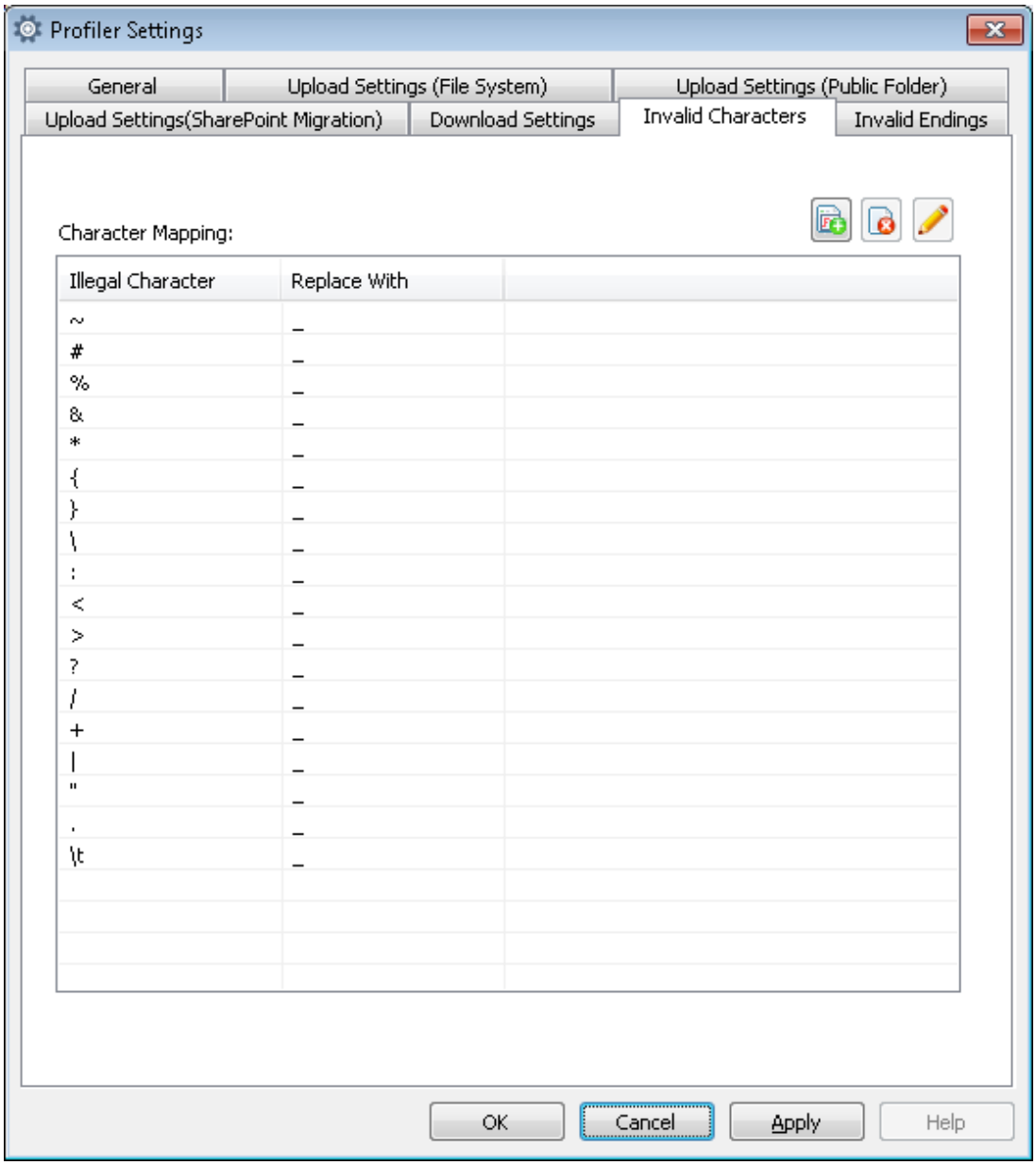

Figure 129: Invalid Character Tab

The software already has some predefined entries. It allows you performing the following operations here: -

- : Click this icon to add a new invalid character and its replacement using the following dialog box.

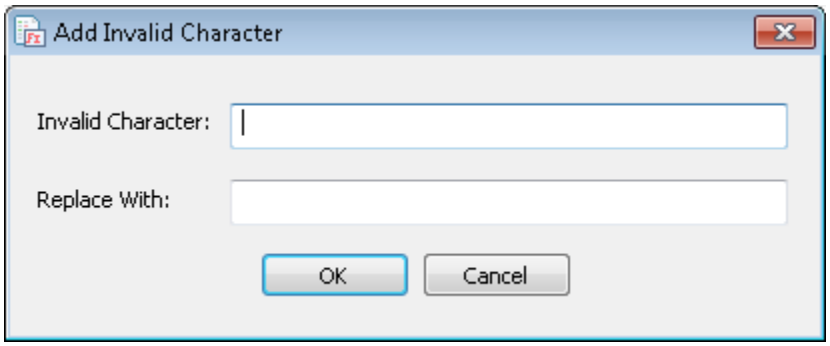

Figure 130: Add Invalid Character and its replacement

Enter the invalid character in the first text box and then add its replacement.

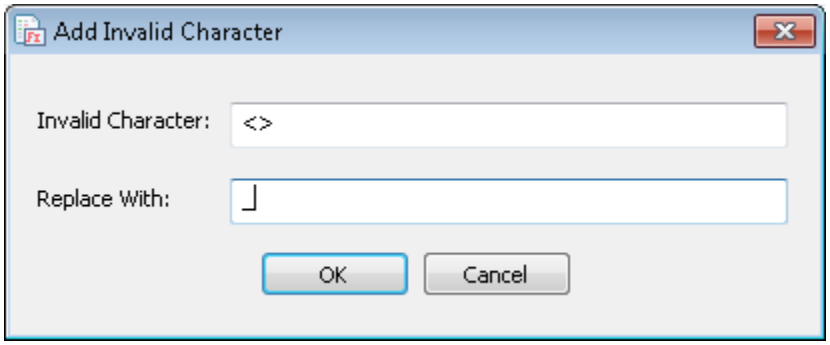

Figure 131: Adding a replacement to an invalid character

Click "OK" to add the new invalid character. It takes you back to the same tab, where the newly added character is visible in the last row.

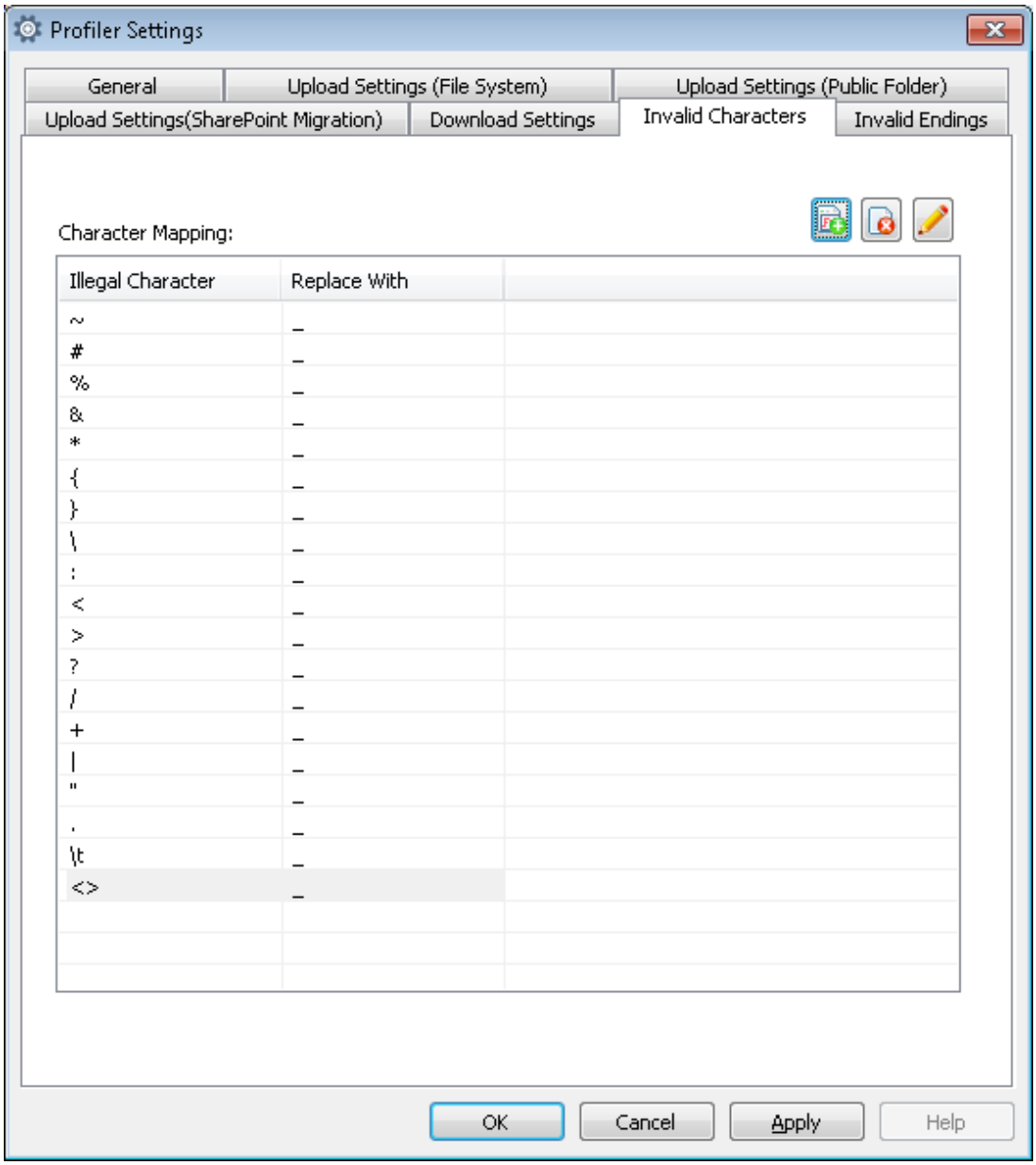

Figure 132: Showing the added invalid character and its replacement

- : Click this icon to remove the user-defined invalid character. Please note that you cannot remove the predefined invalid characters.

- : Click this icon to edit the selected invalid character using the following dialog box.

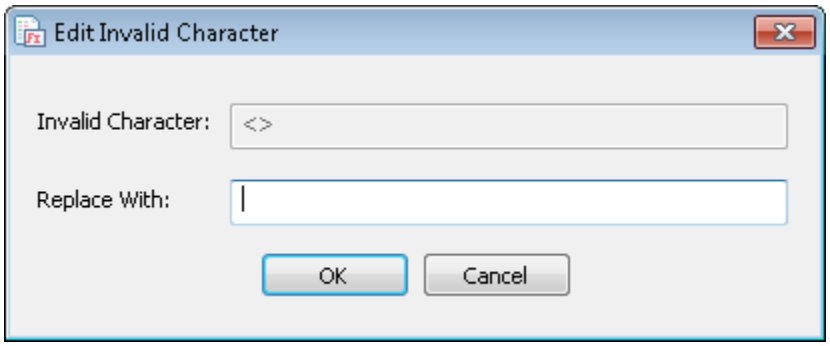

Figure 133: Editing an invalid character

You just have to provide a new value for this invalid character, which will replace it. Click "OK" to save the changes.

5.7 Invalid Ending

This tab contains the settings related to the invalid endings, with which the name of the content items ends. It specifies the invalid endings and their suggested replacements.

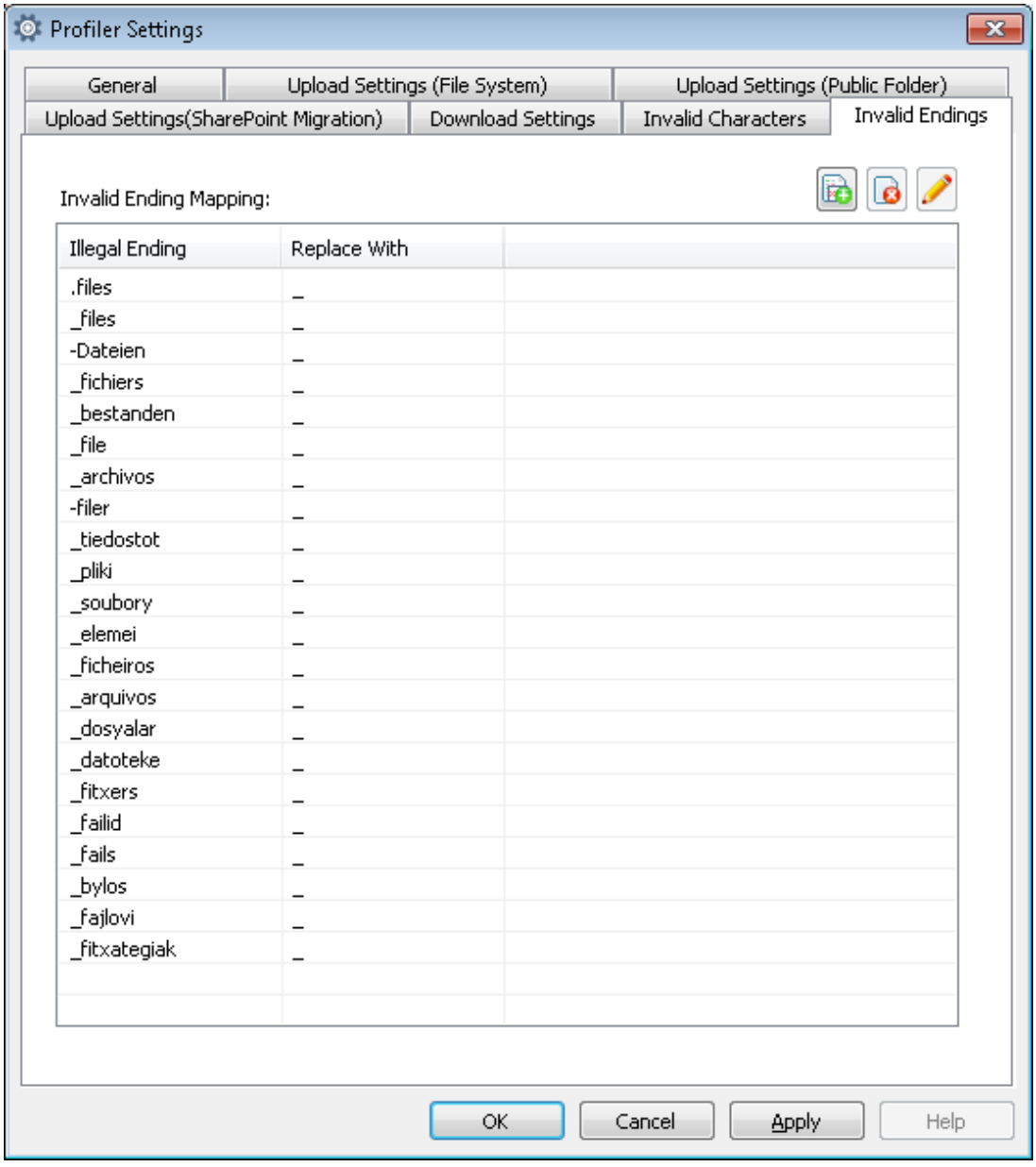

Figure 134: Invalid Ending Tab

The invalid endings setting work only for the folders, but do not work for the files. The software already has a set of some predefined entries. It allows you performing the following operations here: -

- : Click this icon to add a new invalid ending and its replacement using the following dialog box.

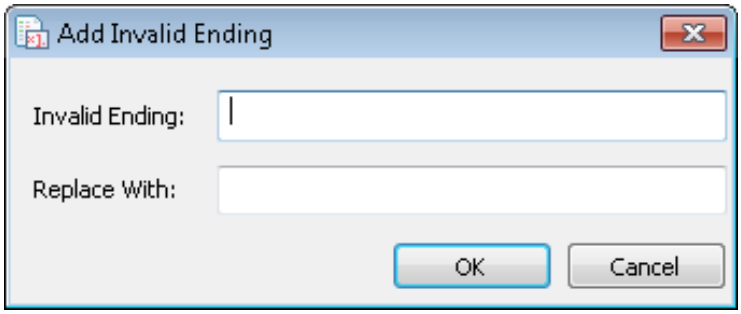

Figure 135: Add invalid ending and its replacement

Enter the invalid ending in the first text box and then add its replacement.

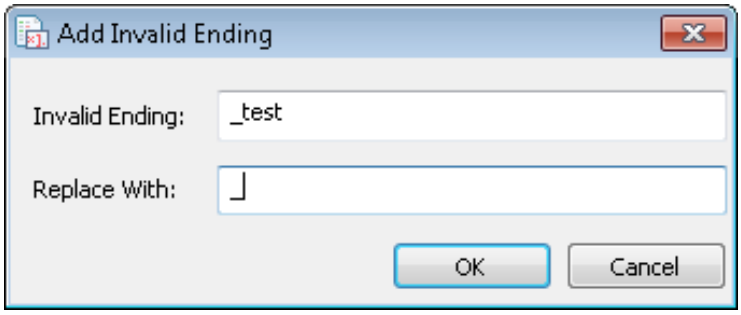

Figure 136: Adding a replacement to an invalid ending

Click "OK" to add the new invalid ending. It takes you back to the same tab, where the newly added ending is visible in the last row.

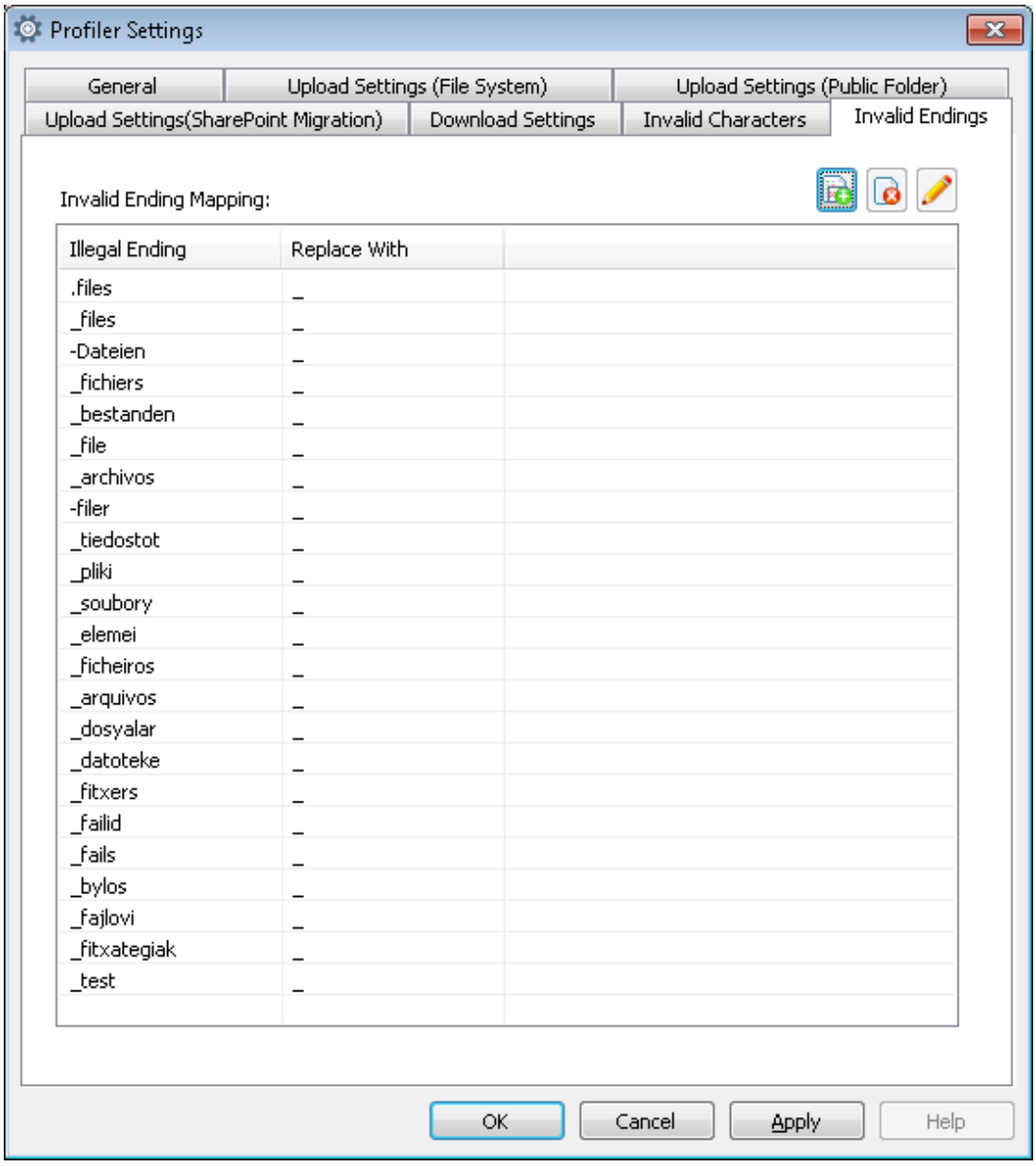

Figure 137: Showing the added invalid ending and its replacement

- : Click this icon to remove the user-defined invalid endings. Please note that you cannot remove the predefined invalid endings.

- : Click this icon to edit the selected invalid ending using the following dialog box.

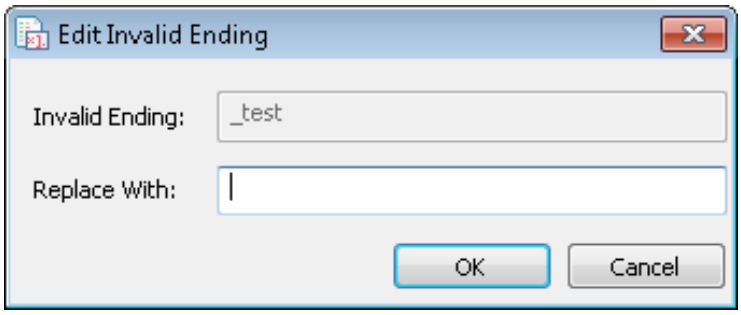

Figure 138: Editing an invalid ending

You just have to provide a new value for this invalid ending, which will replace it. Click "OK" to save the changes.

6. Conclusion

After following the steps mentioned above, you can start performing the migration. To know the detailed steps of migration, please check the software help manual that comes preinstalled with the software.

To read more about the software visit: http://www.lepide.com/lepidemigratordocuments/

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For support or any other queries, drop a mail at

For General Queries: contact@lepide.com

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