AvePoint

DocAve® 6 Exchange Public Folder Migrator

User Guide

Service Pack 11

Issued December 2018

*The Enterprise-Class **Management Platform** for **SharePoint**® Governance*

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What is New in this Release

- Exchange Public Folder Migration now supports SharePoint 2019.

About Exchange Public Folder Migrator

DocAve Exchange Public Folder Migrator efficiently migrates documents from Exchange on-premises public folder or Exchange Online public folder to Microsoft SharePoint 2010, SharePoint 2013, SharePoint 2016, SharePoint 2019, and SharePoint Online. SharePoint administrators can easily automate the process of consolidating the full spectrum of corporate-wide document sources onto SharePoint, therefore, maximizing the return on investment in existing content residing in Exchange on-premises public folder or Exchange Online public folder.

To ensure a complete and successful migration, DocAve's Pre-Migration Scanner provides a detailed analysis of the migration before it is performed. The DocAve Pre-Migration Scanner will detect and notify you of any illegal characters, user permissions, user names, user domains, and other legacy elements that must be mapped in order to migrate successfully into SharePoint.

Exchange Public Folder Migrator allows organizations to:

- **Streamline the data transfer easily** from Exchange on-premises public folder or Exchange Online public folder to SharePoint
- **Preserve and map all associated metadata and security settings** of Exchange on-premises public folder or Exchange Online public folder content during the migration
- **Plan migration jobs according to business needs** with granular or bulk content migration and customizable job scheduling

Complementary Products

Many products and product suites on the DocAve 6 platform work in conjunction with one another. The following products are recommended for use with DocAve Exchange Public Folder Migrator:

- DocAve Content Manager for SharePoint for restructuring or moving SharePoint content.
- DocAve Report Center for SharePoint to examine pain points in the SharePoint infrastructure and report on SharePoint user behavior and changes.
- DocAve Data Protection for setting backup and recovery points prior to adjusting SharePoint governance policies in this product.
- DocAve Replicator to perform live or event-driven, as well as scheduled or offline replication. Synchronization and management of all content, configurations, and securities is performed with full fidelity.

Submitting Documentation Feedback to AvePoint

AvePoint encourages customers to provide feedback regarding our product documentation. You can Submit Your Feedback on our website.

Before You Begin

Refer to the sections below for system and farm requirements that must be in place prior to installing and using DocAve Exchange Public Folder Migrator.

AvePoint's Testing Policy and Environment Support

Supported Software Environments

AvePoint is committed to testing against all major versions and service packs of SharePoint as well as the latest versions of Windows Server and SQL Server, as Microsoft announces support and compatibility.

***Note:** AvePoint does not recommend or support installing DocAve on client operating systems.

Supported Hardware

AvePoint is committed to maintaining a hardware agnostic platform to ensure that DocAve operates on common Windows file sharing and virtualization platforms. To ensure that DocAve is hardware agnostic, AvePoint tests hardware that is intended to support SharePoint and DocAve infrastructure, storage targets, and hardware-based backup and recovery solutions, as supported by AvePoint's partnerships. AvePoint directly integrates with the following platforms: any Net Share, FTP, Amazon S3, AT&T Synaptic, Box, Caringo Storage, Cleversafe, Amazon S3-Compatible Storage, DELL DX Storage, Dropbox, EMC Atmos, EMC Centera, Google Drive, HDS Hitachi Content Platform, IBM Spectrum Scale Object, IBM Storwize Family, Microsoft Azure Storage, NetApp Data ONTAP, NFS, OneDrive, Rackspace Cloud Files, and TSM.

All other hardware platforms that support UNC addressable storage devices are supported.

***Note**: AvePoint has ended the test and development for Caringo Storage and DELL DX Storage in DocAve since DocAve 6 SP7 CU1, as the providers of these two platforms have stopped the platform maintenance.

***Note:** Due to changes in the IBM Tivoli Storage Manager API, DocAve 6 Service Pack 6 and later versions require that TSM Client version 7.1.2 is installed on the Control Service and Media Service servers.

***Note:** Most of the hardware partnerships referenced in this guide are intended to make use of advanced functionality (such as snapshot mirroring, BLOB snapshots, indexing, long-term storage, WORM storage, etc.), and are not indications that any changes to the product are required for basic support. In most cases, hardware can be supported with no change to the product.

Supported Backup and Recovery

DocAve supports BLOB backup storage according to the list of hardware platforms above. BLOB snapshot function, however, is currently only supported on OEM versions and NetApp hardware.

DocAve supports SQL content and Application database backups via the SharePoint Volume Shadow Copy Service (VSS) on all Windows and SQL server platforms listed above. DocAve also supports snapshot-based SharePoint VSS on all hardware listed above where the hardware partner has certified support with Microsoft.

DocAve supports application and configuration server backups for all the supported software environments listed above. DocAve 6 SP5 or later supports VM backup via Hyper-V/VMWare for the following operating systems: Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2, and Microsoft Hyper–V Server 2012 R2.

Notable Environment Exceptions

The following are notable exceptions to the supported DocAve environments. The following represent environment level support information, not feature level support. Feature level support, specific to each feature, is described throughout this guide where applicable.

- Exchange Public Folder Migrator is partially supported for use with Exchange Public Folder 2007 32-bit and 64-bit due to a limitation with the Web Services API.
- Exchange Public Folder Migrator is partially supported for use with Microsoft Exchange Server 2013 64-bit and Exchange Server 2013 SP1 64-bit due to a limitation with the MAPI access method.
- Exchange Public Folder Migrator is partially supported for use with Microsoft Exchange Server 2016 64-bit due to a limitation with the MAPI and WebDAV access method.

Configurations

In order to use DocAve Exchange Public Folder Migrator, the DocAve 6 platform must be installed and configured properly on your farm. DocAve Exchange Public Folder Migrator will not function without DocAve 6 present on the farm. To review a list of migration source versions and systems supported by DocAve Migrator, refer to the **Appendix C: Migration Source Environment** section in the DocAve 6 Installation Guide.

Agents

DocAve Agents are responsible for running DocAve jobs and interacting with the SharePoint object model. DocAve Agents enable DocAve Manager to communicate with the respective servers, allowing for DocAve Exchange Public Folder Migrator commands to function properly.

***Note:** The use of system resources on a server increases when the installed agent is performing actions. This may affect server performance. However, if the agent installed on a server is not being used, the use of system resources is very low and, therefore, the effect on server performance is negligible.

For instructions on installing the DocAve Platform, DocAve Manager, and DocAve Agents, see the DocAve 6 Installation Guide.

Required Permissions

To install and use DocAve Exchange Public Folder Migrator properly, ensure that the Agent account has the following permissions.

Required Permissions for the Source

To install and use Exchange Public Folder Migration properly, ensure that the DocAve Agent account in the source has the Local System Permissions. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.

Required Permissions for the Exchange On-Premises User

To install and use Exchange Public Folder Migration for Exchange on-premises properly, ensure the Exchange user you used when configuring the Exchange on-premises public folder connection has the following permissions:

- Full Details
- Folder visible

Required Permissions for the Exchange Online User

To install and use Exchange Public Folder Migration for Exchange Online properly, ensure the Exchange Online user you used when configuring the Exchange Online public folder connection has the following permissions:

- Read items
- Folder visible

Required Permissions for the Destination: Migration to SharePoint On-Premises

To install and use Exchange Public Folder to SharePoint On-Premises Migration properly, ensure that the Agent account has the correct permission.

1. **Local System Permissions**: The permissions are automatically configured by DocAve during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your

organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.

2. **SharePoint Permissions**: These permissions must be manually configured prior to using Exchange Public Folder to SharePoint On-Premises Migration; they are not automatically configured.
    - User is a member of the **Farm Administrators** group
    - **Full Control** to all zones of all Web applications via User Policy for Web applications
    - Managed Metadata Service
        - Term Store Administrator
        - Managed Metadata Service Administrator with **Full Control** permission
3. **SQL Permissions**: These permissions must be manually configured prior to using Exchange Public Folder to SharePoint On-Premises Migration; they are not automatically configured.
    - Database Role of **db_owner** for all of the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, and Central Admin Database
    - Server Roles of **dbcreator** and **securityadmin** to SQL server
    - Database Role of **db_owner** for the configured Migration Database
    - Database Role of **db_owner** for the **master** system database

      ***Note**: This permission is only required when the configured Migration Database does not exist and must be created.

    ***Note**: If a Web application in the destination node is using forms based authentication and uses a database as the method of forms based authentication, refer to the Forms Based Authentication Permissions section to configure additional settings for this Web application.

Required Permissions to the Destination: Migration to SharePoint Online

To install and use Exchange Public Folder to SharePoint Online Migration properly, ensure that the following permissions are met:

Local System Permissions for DocAve Agent Account

For the registered SharePoint Online site collections/OneDrive for Business/Office 365 group team sites, the DocAve Agent account is on the DocAve Agent machine that will run the migration jobs. This machine must have network connection or have configured Agent Proxy

Settings. For more information about Agent Proxy Settings, refer to the DocAve 6 Control Panel Reference Guide.

For the registered SharePoint on-premises site collections, the DocAve Agent account is on the DocAve Agent machine that will run the migration jobs. This machine must be the Central Administration server or one of the Web front-end servers of the farm where the registered site collections reside, or the machine that can communicate with the Central Administration server or one of the Web front-end servers.

The DocAve Agent account must have proper local system permissions. These permissions are automatically configured by DocAve during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.

Required Permissions for the Account Used to Register Office 365 Objects

The required permissions for the Office 365 account that is used to register SharePoint Online site collections/OneDrive for Business/Office 365 group team sites via **Control Panel**, vary with registration methods and object types. Refer to the tables below for the details.

Method: Scan Office 365 Objects via Manual Object Registration/Dynamic Object Registration		
Object Type	**Office 365 Account Role**	**Other Permissions**
SharePoint Online Site Collection	SharePoint Administrator	Managed Metadata Service: Term Store Administrator
OneDrive for Business	Global Administrator	
Office 365 Group Team Site	SharePoint Administrator	

Method: Manually Add Office 365 Objects via Manual Object Registration > Manage Containers	
Object Type	**Permissions**
SharePoint Online Site Collection	• A member of the **Site Collection Administrator** group.
OneDrive for Business	

Office 365 Group Team Site	• Managed Metadata Service – Term Store Administrator

Required Permissions for the Account Used to Register SharePoint On-Premises Site Collections

The account that is used to register SharePoint on-premises site collections via **Control Panel** > **Manual Object Registration** > **Scan** must have the following permissions:

- **Full Control** to all zones of all Web applications via User Policy for Web Applications
- Database Role of **db_owner** for all of the database related to SharePoint, including Content Databases, SharePoint Configuration Database, and Central Admin Database.
- A member of the **Site Collection Administrator** group
- Managed Metadata Service
    - Term Store Administrator
    - Managed Metadata Service Administrator with **Full Control** permission

The account that is used to manually add a single SharePoint on-premises site collection or import site collections in batch via **Control Panel** > **Manual Object Registration** > **Manage Objects** must have the following permissions to each site collection:

- A member of the **Site Collection Administrator** group
- Managed Metadata Service
    - Term Store Administrator
    - Managed Metadata Service Administrator with **Full Control** permission

Local System Permissions

The following Local System Permissions are automatically configured during DocAve 6 installation:

- User is a member of the following local groups:
    - IIS WPG (for IIS 6.0) or IIS IUSRS (for IIS 7.0)
    - Performance Monitor Users

- DocAve Users (the group is created by DocAve automatically; it has the following permissions):
    - Full Control to the Registry of *HKEY_LOCAL_MACHINE\SOFTWARE\AvePoint\DocAve6*
    - Full Control to the Registry of *HKEY_LOCAL_MACHINE\System\CurrentControlSet\Services\EventLog*
    - Full Control to the Communication Certificate
    - Permission of **Log on as a batch job** (it can be found within **Control Panel** > **Administrative Tools** > **Local Security Policy** > **Security Settings** > **Local Policies** > **User Rights Assignment**)
    - Full Control Permission for DocAve Agent installation directory

Forms Based Authentication Permissions

If a Web application in the destination node is using forms based authentication and uses a database as the method of forms based authentication, ensure at least one of the following conditions is met:

- The Agent account has a Database Role of **db_owner** to this database.
- Specify a user in the **connectionString** node in this Web application's **web.config** profile that has the access to this database. For details, refer to the instructions below:
    i. Navigate to **Start** > **Administrative Tools** > **Server Manager** > **Roles** > **Web Server (IIS)** > **Internet Information Services (IIS) Manager**, find the Web application in the **Sites** list.
    ii. Right-click the Web application and select **Explore**.
    iii. Find the **web.config** file in the pop-up window.
    iv. Open the **web.config** file with **Notepad**.
    v. Find the **connectionString** node and specify a user that has access to the database that stores FBA security information.

Migration Speed Considerations

Speed is a very important factor when migrating content. To estimate how long your migration plans will take, in order to better inform stakeholders, the following key factors that should be taken into consideration prior to running your migration plans.

- Network bandwidth between the server that is able to connect to the Exchange Server and the SharePoint environment

- SQL I/O and memory
- Memory on Web front-end servers
- Number of CPUs on Web front-end servers
- Source environment deployment
    - Number of objects in source
        - Divide database and folder structures into small data sets before running the migration. Consider a granular migration approach.
    - Size of objects in source
        - A single 1 GB file will migrate far quicker than a million files that have a sum of 1 GB.
    - Complexity of folders and sites
        - Prioritize content to be migrated into SharePoint, and utilize tools to establish co-existence throughout the course of the migration project to slowly roll-out SharePoint to users as their content becomes available.
    - Whether DocAve has to create site collections during migration
        - Use folders to break up large document libraries or data subsets to manage library size, consider utilizing filtering to migrate a sub-set of the data at a time.
    - Whether securities are included in the plan (including mappings)
        - Permissions can be configured to be migrated in the migration plans.
    - Whether metadata is included in the plan

Health Analyzer

AvePoint recommends using Health Analyzer to check the prerequisites for properly using DocAve Exchange Public Folder Migration.

***Note:** When configuring the Health Analyzer profile to include the rules you are about to use for scanning, select the rules for the source Agent and the destination Agent separately and include the rules in different profiles to avoid any misleading by the scan results of the rules.

***Note:** Health Analyzer is only available for the users in the DocAve **Administrators** group.

For more information about Health Analyzer, refer to DocAve 6 Installation Guide.

Getting Started

Refer to the sections below for important information on getting started with Exchange Public Folder Migration.

Launching DocAve Exchange Public Folder Migration

To launch Exchange Public Folder Migration and access its functionality, follow the instructions below:

1. Log into DocAve. If you are already in the software, click the **DocAve** tab. The **DocAve** tab displays all product suites on the left side of the window.
2. Click **Migration** to view all of the Migration modules.
3. Click **Exchange Public Folder Migration** to launch that module.

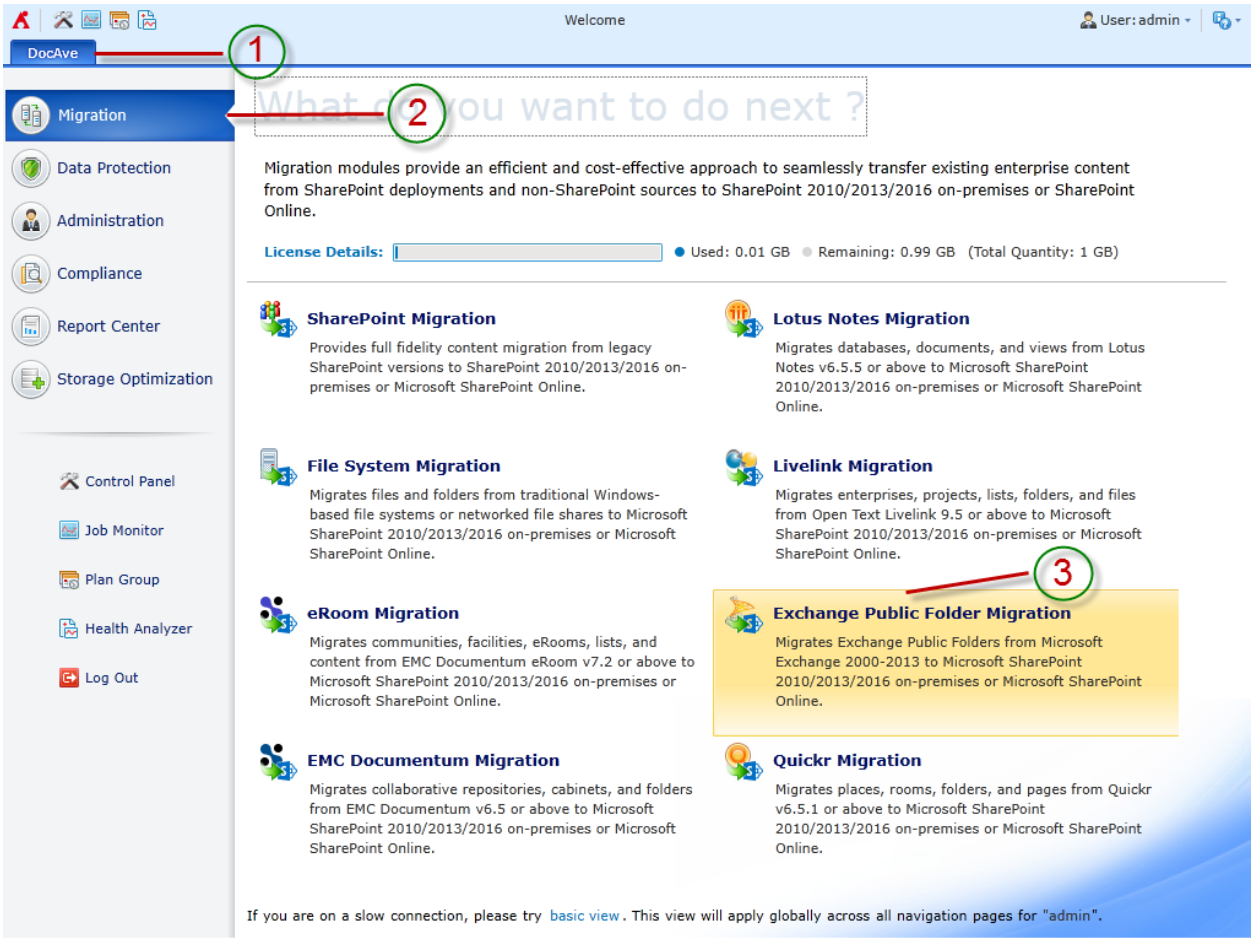


Figure 1: DocAve module launch window.

***Note:** If desired, access the **License Details** information for Migrator products from the **Migration** landing page.

Navigating DocAve

DocAve mimics the look and feel of many Windows products, making for an intuitive and familiar working environment. While there are many windows, pop-up displays, and messages within DocAve products, they share similar features and are navigated in the same ways. Below is a sample window in DocAve. It features a familiar, dynamic ribbon, and a searchable, content list view.

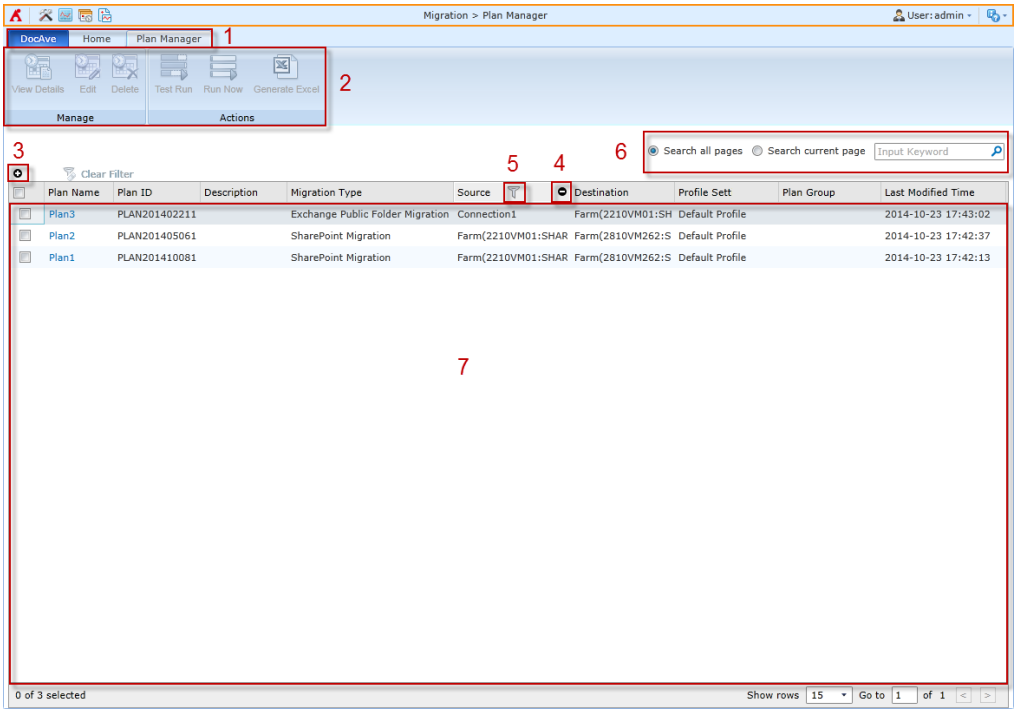


Figure 2: Navigating DocAve.

1. Ribbon Tabs— Allows users to navigate to the DocAve Welcome page and within the active module.
2. Ribbon Panes – Allows users to access the functionality of the active DocAve module.
3. Manage columns (⊕) – Allows users to manage which columns are displayed in the table. Click the manage columns (⊕) button, and then select the checkbox next to the column name in the drop-down list.
4. Hide the column (⊖) – Allows users to hide the selected column.
5. Filter the column ( ) – Allows users to filter the information in the List View. Click the filter the column ( ) button next to the column and then select the checkbox next to the column name.
6. **Search** – Allows users to search the List View pane for a keyword or phrase. You can select **Search all pages** or **Search current page** to define the search scope.

   ***Note:** The search function is not case sensitive.

7. Management Pane – Displays the actionable content of the DocAve module.

About Online Migrations

An Online Migration job migrates content, configurations, securities, and users from a source Exchange on-premises public folder or Exchange Online public folder to a destination SharePoint environment when a network connection between the source and destination is available.

While it is theoretically possible to run an Online Migration job without configuring the settings described in the sections below, it is **strongly** recommended that you configure these settings to ensure appropriate content management during migration.

Online Migration Overview

To perform Online Migration jobs, the following steps must be performed in this order. Click the link to jump to the corresponding section.

1. Pre-migration Configurations
    - Configuring Exchange Public Folder Connections
    - Configuring Migration Databases (Optional)
    - Configuring Filter Policies (Optional)
    - Configuring Mappings (Optional)
    - Configuring Dynamic Rules (Optional)
    - Retrieving User Information (for Exchange Online Public Folder Migration only)
2. Configuring an Exchange Public Folder Migration Profile
    a. Migration Options
    b. Filter Options
    c. Mapping Options
    d. Advanced Options
    e. Managing Sub-profiles
3. Performing an Exchange Public Folder Migration
    a. Selecting the Source and Destination Nodes
        - Creating Containers
    b. Select either of the following methods to perform an online migration:
        - Configuring the Run Now Interface
        - Configuring the Save As New Plan Interface

Pre-migration Configurations

Configure the following settings before performing Exchange Public Folder Migration. Click the link to jump to the corresponding section.

- Configuring Exchange Public Folder Connections
- Configuring Migration Databases (Optional)
- Configuring Filter Policies (Optional)
- Configuring Mappings (Optional)
- Configuring Dynamic Rules (Optional)
- Retrieving User Information (for Exchange Online Public Folder Migration only)

Configuring Exchange Public Folder Connections

To use Exchange Public Folder Migration, you must configure the Exchange public folder connection so that DocAve Agent is able to connect to the Exchange server. In the **Home** tab, click **Configure Connection** on the ribbon, and then the **Exchange Public Folder Connection** pop-up window appears.

Configuring an Exchange Public Folder Connection

In the **Exchange Pubic Folder Connection** pop-up window, click **Create** to create a new connection or click **Edit** to modify a selected one. Configuring the following settings on the pop-up window:

1. **Exchange Public Folder Connection Name** – Enter a name in the **Name** text box for the Exchange public folder connection. Then enter an optional description in the **Description** text box for future reference.
2. **Connection** – Enter the required information to make the specified source Agent be able to connect to the Exchange server.
    a. **Agent** – The Agents displayed are the ones whose Agent type contains **Exchange Public Folder Migration-Exchange Public Folder Agent**. From the drop-down list, select an Agent that is able to access the Exchange server from the drop-down list. For more information of Agent type configuration, refer to the DocAve 6 Control Panel Reference Guide.
    b. Select the exchange mode of the Exchange public folder you want to connect:
        - **Exchange On-Premises Public Folder**
        - **Exchange Online Public Folder**
    c. **Access method** – Select the access method according to the Exchange server.

- Select **WebDAV** if using Exchange 2000/2003/2007 server.
- Select **Web Services** if using Exchange 2007/2010/2013 server.
- Select **MAPI** if using Exchange 2000/2003/2007/2010/2013 server.

  ***Note**: AvePoint recommends using the **MAPI** access method for the connection where the source RTF (Rich Text Format) files and contact groups you want to migrate to the destination.

  ***Note**: The Microsoft Outlook 2003 Service Pack 2 (32-bit) or higher versions must be installed on the source Agent machine if you select the **MAPI** access method.

d. **Exchange URL** (for WebDAV, Web Services) – Enter the URL of the Exchange public folder that the Agent connects to. An example is shown in the **Exchange URL** text box.

e. **Outlook profile** (for MAPI only) – Enter the Outlook profile that the Agent connects to.

   ***Note**: You can find the existing profiles by navigating to **Control Panel** > **Mail (32-bit)** > **Show Profiles** on the source server. If no profile can be found, create a new one.

f. **Username** and **Password –** Provide the credentials to retrieve data from Exchange on-premises or Exchange Online.

   - If you are about to create a connection for Exchange on-premises, enter the username and the password for accessing Exchange on-premises public folder. The format of the username is shown as a watermark in the **Username** text box. It is recommended to enter the username of an administrator of the Exchange server here in order to have the required permission to load all data and perform operations on the data.
   - If you are about to create a connection for Exchange Online, enter the username and password of an account that has the **Reviewer** permission or above for accessing the Exchange Online public folder.

g. Click **Validation Test** to verify the connection and the configurations.

h. After the verification completes, click **Save** to save the settings and return to the **Exchange Pubic Folder Connection** pop-up window.

Managing Exchange Public Folder Connections

It allows you to configure multiple connections for the DocAve Agent and the Exchange server. The **Exchange Public Folder Connection** pop-up window displays any Exchange public folder connections that you have previously created.

In this interface, you can change the number of Exchange public folder connections displayed per page and the order in which they are displayed. To change the number of Exchange public folder connections displayed per page, select the desired number from the Show rows drop-down menu on the lower right-hand corner. To sort the Exchange public connections, click on a column heading such as **Name** and **Agent**.

Perform the following actions in the **Exchange Public Folder Connection** pop-up window:

- Click **Create** to create a new Exchange public folder connection. For details of creating an Exchange public folder connection, see Configuring an Exchange Public Folder Connection.
- Click **View Details** to view details about a selected Exchange public folder connection.
- Click **Edit** to edit a configured Exchange public folder connection. For details of editing an Exchange public folder connection, see Configuring an Exchange Public Folder Connection.
- Click **Delete** to delete the selected Exchange public folder connections. When the Exchange public folder connection is using by a migration plan, then this connection cannot be deleted.

Configuring Migration Databases

The Migration database stores detailed job information, such as the status and type of the job, the user who runs the job, the start and end time of the job, plan information, and agent information, etc. For detailed information on the Migration database schema, refer to Appendix A: Exchange Public Folder Migration Database Information.

***Note:** The version of SQL Server required to create a migration database must be SQL Server 2005 SP1 or higher.

1. On the **Home** tab, in the **Settings** group, click **Migration Database**. The **Migration Database** pop-up window appears.
2. Select a farm.
3. Click **Configure** in the **Manage** group to configure a migration database for the corresponding farm or My Registered Sites, or click the down arrow ( ) button next to the farm and select the **Configure** option from the drop-down menu. The **Migration Database > Configure** page appears.
4. Configure the following settings for the database that will store migration job data:
    a. **Configure Migration Database** – Specify a migration database. Enter a new **Database Server** and a **Database Name** in the corresponding text boxes.

b. **Authentication** – Select the authentication mode for the migration database. If you select **Windows Authentication** and you want to access the database server with a specified Windows account, select the **Specify a Windows account** checkbox. Select an existing managed account profile or create a new managed account profile by clicking **New Managed Account Profile** in the drop-down menu. If you select **SQL authentication**, the necessary information must be entered in the **Account** and **Password** text boxes. You can also validate the SQL database account by clicking **Validation Test**.

c. **Failover database server** (optional) – Specify a failover database server. In the event that the migration database collapses, the data stored in the migration database can be transferred to this standby database.

Alternatively, you can configure a migration database in the **Advanced** settings by entering a connection string instead of configuring the settings in Step 4. Click **Advanced**; the **Connection String** section appears. Select the **Edit connection string directly** checkbox to activate this feature, and then enter the connection string according to the example listed on the left pane. For more information about how to configure the connection string, refer to the **ConnectionString** property in **SQL Server Books Online** or **SQL Server Tutorials** by navigating to **Start** > **Microsoft SQL Server** (with the version you are using) > **Documentation and Tutorials**.

5. Click **Save** to finish and save the configuration, or click **Cancel** to return to the **Migration Database** page without saving any configurations.

6. Select the farm that has configured a migration database and click **View Details** in the **Manage** group to view detailed information of the migration database configured for the selected farm, or click the down arrow ( ) button next to the farm and select the **View Details** option from the drop-down menu. The **Migration Database > View Details** page appears.

   ***Note**: The **View Details** button is clickable only when the selected farm has configured a migration database.

7. Click **Configure** on the ribbon to configure the migration database for the farm.

Configuring Filter Policies

Filter Policy allows you to set up filter rules so that you can control what objects are to be migrated to the SharePoint destination, and you can target content more precisely. By setting up and saving filter policies, you can apply the same filter policies to different plans without having to recreate them each time.

Managing Filter Policies

To access the **Filter Policy** interface, click **Profile Settings** on the **Home** tab. On the **Profile Settings** page, click **Filter Policy** on the ribbon.

The **Filter Policy** interface displays all filter policies that you have created in the main display pane.

In this interface, you can change the number of filter policies displayed per page and the order in which they are displayed. To change the number of filter policies displayed per page, select the desired number from the Show rows drop-down menu on the lower right-hand corner. To sort the filter policies, click the column heading such as **Filter Policy Name** and **Description**.

Perform the following actions in the **Filter Policy** interface:

- Click **Create** on the ribbon to create a new filter policy. For details of creating a new filter policy, see Creating a Filter Policy.
- Click **View** to view details about a selected filter policy.
- Click **Edit** on the ribbon to change the configurations for the selected filter policy. For details of editing configurations for filter policies, see Creating a Filter Policy.
- Click **Delete** on the ribbon to delete the selected filter policies. A confirmation window will appear, confirming that if you want to proceed with the deletion. Click **OK** to delete the selected filter policies, or click **Cancel** to return to the **Filter Policy** interface without deleting the selected filter policies.

Creating a Filter Policy

To create a new filter policy, click **Create** on the ribbon. To modify a previously configured filter policy, select the filter policy, and then click **Edit** on the ribbon.

In the **Create Filter Policy** or **Edit Filter Policy** window, configure the following settings:

1. **Name** – Enter a name for this filter policy.
2. **Description** – Enter an optional description.
3. **Filter Rule** – Filters data that you want to migrate by setting up a set of filter criteria. Follow the steps below to set up your filter rules.
    a. Select **Folder** or **Exchange Message** as the filter level.
    b. Click **Add a Filter Level Group**.
    c. In the filter rule configuration area, configure the rule, condition, and value. For details, refer to Filter Policy Examples.
    d. Repeat the steps above to add more filter rules.
    e. If you set multiple filter rules for the same filter level, select the logic option for these rules. By default, the logic is set to **And**. You can change the logic to **Or** by selecting it from the drop-down list.
        - **And** – The data that meets all of the criteria will be filtered to be included.

- **Or** – The data that meets any one of the criteria will be filtered to be included.

f. If a filter level has multiple filter rules, you can also change the order of these rules. Select a number from the **Order** drop-down list.

4. **Basic Filter Condition** – View the logical relationship of the filter rules in this area.

   For example, if the logical relationship is ((1 And 2) Or 3), the data that meets both filter rule 1 and filter rule 2, or that meets the filter rule 3, will be included.

5. Click **Save** to save the configurations and return to the **Filter Policy** window, or click **Cancel** to return to the **Filter Policy** window without saving any changes.

Filter Policy Examples

The tables below list the examples of filter rules that are used to filter the source data to migrate.

Folder Level

Refer to the following table for the filter rules and conditions on the **Folder** filter level.

Rule	Condition	Value	Example
Name	Contains	*Marketing*	The folder whose name contains *Marketing* will be included in the filter result. For example, *Marketing Document* or *Delivered to Marketing*.
	Does Not Contain	*Marketing*	The folder whose name does not contain *Marketing* will be included in the filter result.
	Equals	*Marketing Document*	The folder whose name is *Marketing Document* will be included in the filter result.
	Does Not Equal	*Marketing Document*	The folder whose name is not *Marketing Document* will be included in the filter result.

Rule	Condition	Value	Example
	Matches Regular Expression	*Document$*	The folder whose name ends with *Document* will be included in the filter result. For example, *Marketing Document* or *Design Document*.
Type	Equals	*IPF.Note*	The folder whose type is *IPF.Note* will be included in the filter result.
	Does Not Equal	*IPF.Note*	The folder whose type is not *IPF.Note* will be included in the filter result.
Created Time	Before	*2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)*	The folder that is created before *2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)* will be included in the filter result.
	After	*2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)*	The folder that is created after *2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)* will be included in the filter result.
	Within	*5 Days*	The folder that is created in last *5 days* will be included in the filter result.
	Older Than	*5 Days*	The folder that is created *5 days* ago will be included in the filter result.
Modified Time	Before	*2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)*	The folder that is modified before *2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)* will be included in the filter result.
	After	*2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)*	The folder that is modified after *2012-10-01 12:00:00 (UTC-08:00)*

Rule	Condition	Value	Example
			Pacific Time (US & Canada) will be included in the filter result.
	Within	*5 Days*	The folder that is modified in last *5 days* will be included in the filter result.
	Older Than	*5 Days*	The folder that is modified *5 days* ago will be included in the filter result.

Exchange Message Level

Refer to the following table for the filter rules and conditions on the **Exchange Message** filter level.

Rule	Condition	Value	Example
Name	Contains	*Public*	The message whose name contains *Public* will be included in the filter result. For example, *Public Announcement* or *Release to Public*.
	Does Not Contain	*Public*	The message whose name does not contain *Public* will be included in the filter result.
	Equals	*Public*	The message whose name is *Public* will be included in the filter result.
	Does Not Equal	*Public*	The message whose name is not *Public* will be included in the filter result.

Rule	Condition	Value	Example
	Matches Regular Expression	*Schedule$*	The message whose name ends with *Schedule* will be included in the filter result. For example, *Release Schedule* or *Maintenance Schedule*.
Message Class	Contains	*IPM.Post*	The message whose message class contains *IPM.Post* will be included in the filter result.
	Does Not Contain	*IPM.Post*	The message whose message class does not contain *IPM.Post* will be included in the filter result.
	Equals	*IPM.Post*	The message whose message class is *IPM.Post* will be included in the filter result.
	Does Not Equal	*IPM.Post*	The message whose message class is not *IPM.Post* will be included in the filter result.
Created Time	Before	*2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)*	The message that is created before *2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)* will be included in the filter result.
	After	*2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)*	The message that is created after *2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)* will be included in the filter result.
	Within	*5 Days*	The message that is created in last *5 days* will be included in the filter result.

Rule	Condition	Value	Example
	Older Than	*5 Days*	The message that is created *5 days* ago will be included in the filter result.
Modified Time	Before	*2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)*	The message that is modified before *2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)* will be included in the filter result.
	After	*2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)*	The message that is modified after *2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)* will be included in the filter result.
	Within	*5 Days*	The message that is modified in last *5 days* will be included in the filter result.
	Older Than	*5 Days*	The message that is modified *5 days* ago will be included in the filter result.
Received Time	Before	*2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)*	The message that is received before *2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)* will be included in the filter result.
	After	*2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)*	The message that is received after *2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)* will be included in the filter result.
	Within	*5 Days*	The message that is received in last *5 days* will be included in the filter result.

Rule	Condition	Value	Example
	Older Than	*5 Days*	The message that is received *5 days* ago will be included in the filter result.
Start Time	Before	*2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)*	The task/activity/appointment whose start time is before *2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)* will be included in the filter result.
	After	*2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)*	The task/activity/appointment whose start time is after *2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)* will be included in the filter result.
	Within	*5 Days*	The task/activity/appointment whose start time is in last *5 days* will be included in the filter result.
	Older Than	*5 Days*	The task/activity/appointment whose start time is *5 days* ago will be included in the filter result.
Due Time	Before	*2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)*	The task/activity whose due time is before *2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)* will be included in the filter result.
	After	*2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)*	The task/activity whose due time is after *2012-10-01 12:00:00 (UTC-08:00) Pacific Time (US & Canada)* will be included in the filter result.
	Within	*5 Days*	The task/activity whose due time is in last *5 days* will be included in the filter result.

Rule	Condition	Value	Example
	Older Than	*5 Days*	The task/activity whose due time is *5 days* ago will be included in the filter result.

Configuring Mappings

Before performing an Exchange public folder migration job, you may want to define optional Domain Mapping, User Mapping, Group Mapping, and Permission Mapping settings. Refer to the following sections to decide whether to configure the mapping settings, and learn how to configure the mapping settings.

Domain Mapping

If there are users with the same name but with different domains respectively in the source and destination, you can map a source domain name to a SharePoint domain name in the destination using a domain mapping. During a migration, Migrator will change the source domain name to the specified domain name in the destination node. For example, the source user **summer\user1** can be mapped to SharePoint domain user **may\user1** using a domain mapping.

To access Domain Mapping, click **Profile Settings** on the ribbon of the **Home** tab, and then the **Profile Settings** tab appears. Click **Mappings** on the ribbon, and then select **Domain Mapping** from the drop-down menu. The **Domain Mapping** interface appears. Click **Create** on the ribbon to create a new domain mapping profile.

For specific instructions on setting up a domain mapping, refer to the DocAve 6 Control Panel Reference Guide.

User Mapping

User mapping maps an existing source node username to an existing SharePoint username in the destination. During a migration, Migrator will replace the source username with the specified username in the destination node.

To access User Mapping, click **Profile Settings** on the ribbon of the **Home** tab, and then the **Profile Settings** tab appears. Click **Mappings** on the ribbon, and then select **User Mapping** from the drop-down menu. The **User Mapping** interface appears. Click **Create** on the ribbon to create a new user mapping profile.

***Note**: In **User Mapping**, the **Add a placeholder account to keep metadata even if the user no longer exists** option is not supported for the use with Exchange on-premises Public Folder

or Exchange Online public folder to SharePoint Online Migration. This option replaces non-existent destination users with a placeholder account in the destination Active Directory.

For specific instruction on setting up a user mapping, refer to the DocAve 6 Control Panel Reference Guide.

Group Mapping

Group mapping maps an existing source group name to an existing SharePoint group name in the destination. During a migration, Migrator will replace the source group name with the specified group name in the destination node.

To access Group Mapping, click **Profile Settings** on the ribbon of **Home** tab, and then **Profile Settings** tab appears. Click **Mappings** on the ribbon, and then select **Group Mapping** from the drop-down menu. The **Group Mapping** interface appears. Click **Create** on the ribbon to create a new group mapping profile.

For specific instructions on setting up a group mapping, refer to the DocAve 6 Control Panel Reference Guide.

Permission Mapping

Permission mapping maps source Exchange permissions to SharePoint permission levels in the destination. Exchange Public Folder Migrator provides you a **Default Permission Mapping** to migrate some specific Exchange permissions to SharePoint permission levels, which is contained as the default permission mapping profile in the main display pane.

***Note:** If you have configured both the user mapping and permission mapping in the Mapping Options profile, you can merge the source user's mapping permissions in SharePoint to the permissions of the mapped destination user.

1. To access Permission Mapping, click **Profile Settings** on the ribbon of **Home** tab, and then **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **Permission Mapping** from the drop-down menu. The **Permission Mapping** interface appears.

Managing Permission Mappings

In the **Permission Mapping** interface, you will see a list of previously configured permission mappings.

In this interface, you can change the number of permission mappings displayed per page and the order in which they are displayed. To change the number of permission mappings displayed per page, select the desired number from the **Show rows** drop-down menu on the lower right-hand corner. To sort the permission mappings, click a column heading such as **Name** and **Description**.

Perform the following actions to a permission mapping:

- Click **Create** to create a new permission mapping. For details of creating a permission mapping, refer to Creating Permission Mappings.
- Click **View Details** to view details about a selected permission mapping. Click **View Details** on the ribbon and you will see the configured settings for the selected permission mapping. Here you can also click **Edit** on the ribbon to make changes to the permission mapping's settings. You will be brought to the **Edit Permission Mapping** page where you can change this permission mapping.
- Click **Edit** to edit a configured permission mapping. The **Default Permission Mapping** is not allowed for editing. For details of editing a permission mapping, refer to Creating Permission Mappings.
- Click **Delete** to delete the selected permission mappings. A confirmation window will appear, confirming that if you want to proceed with the deletion. Click **OK** to delete the selected permission mappings, or click **Cancel** to return to the **Permission Mapping** page without deleting the selected permission mappings. The **Default Permission Mapping** is not allowed for deleting.

Creating Permission Mappings

To create a new permission mapping, click **Create** on the ribbon. To edit a configured permission mapping, select the permission mapping and then click **Edit** on the ribbon.

In the **Permission Mapping > Create/Edit** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for the permission mapping. Then enter an optional **Description** for the permission mapping for future reference.
2. **Permission Mapping** – Set up the mapping of Exchange permissions to SharePoint permission levels. By default, each Exchange permission has set up a SharePoint permission level. You can modify it by selecting a SharePoint permission level from the **SharePoint Permission Level** drop-down list. You can also create a new SharePoint permission level by clicking **New SharePoint Permission Level** at the top of the drop-down list.
3. Click **Save** to save the configurations and return to the **Permission Mapping** interface, or click **Cancel** to return to **Permission Mapping** interface without saving any changes.

For more information of creating a new SharePoint permission level, editing an existing one, viewing details of an existing one, refer to Creating SharePoint Permission Levels.

SharePoint Permission Levels

You can manage SharePoint permission levels by creating a new level, viewing the details of a configured level, editing a configured level, or deleting configured levels.

To access **Manage SharePoint Permission Level** interface, click **Profile Settings** on the **Home** tab > **Mappings** > **Permission Mapping** > **Manage SharePoint Permission Level**. The **Manage SharePoint Permission Level** interface appears, and you will see a list of provided or configured SharePoint permission levels.

In this interface, you can change the number of SharePoint permission levels displayed per page and the order in which they are displayed. To change the number of SharePoint permission levels displayed per page, select the desired number from the Show rows drop-down menu on the lower right-hand corner. To sort the SharePoint permission levels, click on a column heading such as **Name** and **Description**.

Perform the following actions in the **Manage SharePoint Permission Level** page.

- Click **Create** on the ribbon to create a new SharePoint permission level. For detailed instructions on creating a new SharePoint permission level, see Creating SharePoint Permission Levels.
- Click **View Details** on the ribbon and you will see the configured settings for the selected SharePoint permission level. Here you can also click **Edit** on the ribbon to make changes to the SharePoint permission level's settings. You will be brought to the **Edit the SharePoint Permission Level** page where you can change its settings.
- Click **Edit** on the ribbon to change the configurations for the selected SharePoint permission level. Note that the default SharePoint permission levels provided, including Contribute, Design, Edit, Full Control, Read, View Only, PFM Delete All Items, PFM Edit All Items, PFM Create Subfolders, PFM Create Items, PFM Read Items, PFM Delete Own Items, PFM Edit Own Items, and PFM Folder Owner, are not editable. For details on editing configurations for a SharePoint permission level, see Creating SharePoint Permission Levels.
- Click **Delete** on the ribbon to delete the selected permission levels. A confirmation window will appear, confirming that if you want to proceed with the deletion. Click **OK** to delete the selected SharePoint permission levels, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without deleting the selected SharePoint permission levels. Note that the default SharePoint permission levels provided, including Contribute, Design, Edit, Full Control, Read, View Only, PFM Delete All Items, PFM Edit All Items, PFM Create Subfolders, PFM Create Items, PFM Read Items, PFM Delete Own Items, PFM Edit Own Items, and PFM Folder Owner, cannot be deleted.

Creating SharePoint Permission Levels

To create a new SharePoint permission level, click **Create** on the ribbon. To modify a customized SharePoint permission level, select the SharePoint Permission Level, and then click **Edit** on the ribbon. When creating or editing a SharePoint permission level, configure the following settings:

1. **Name and Description** – Enter a **Name** for this permission level and an optional **Description** for future reference.
2. **Permissions** – Choose which permissions to be included in this permission level. You can select permissions from **List Permissions** and **Personal Permissions** by selecting the checkbox next to the permission name. Select or deselect the **Select All** checkbox to select or clear all permissions. The permissions listed in **Site Permissions** cannot be edited, and the **View Pages** and **Open** permissions in **Site Permissions** will be selected by default when you select permissions from **List Permissions** and **Personal Permissions**.
3. Click **Save** to save the configurations, or click **Cancel** to cancel any changes.

Configuring Dynamic Rules

Dynamic rules map Exchange properties to SharePoint metadata using DLL files, which are customized in C#. In a migration profile, if dynamic rules conflict with the configured column mapping, dynamic rules take over the role of column mapping.

Managing Dynamics Rules

To use the dynamic rule feature, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears. Click **Dynamic Rule** on the ribbon.

In the **Dynamic Rule** interface, you will see a list of configured dynamic rules.

In this interface, you can change the number of dynamic rules displayed per page and the order in which they are displayed. To change the number of dynamic rules displayed per page, select the desired number from the Show rows drop-down menu on the lower right-hand corner. To sort the dynamic rules, click on a column heading such as **Name**, **Description**, **DLL File Name**, and **Last Modified Time**.

You may perform the following actions to a dynamic rule:

- Click **Create** on the ribbon to create a dynamic rule. For detailed information on creating a new dynamic rule, refer to Creating a Dynamic Rule.
- Click **View Details** on the ribbon and you will see the configured settings for the selected dynamic rule. Here you can also click **Edit** on the ribbon to make changes to the dynamic rule's settings. You will be brought to the **Edit Dynamic Rule** page where you can change this dynamic rule.
- Click **Edit** on the ribbon to change the configuration of the selected dynamic rule. For details on editing a dynamic rule, refer to Creating a Dynamic Rule.
- Click **Delete** on the ribbon to delete the selected dynamic rules. A confirmation window will appear, confirming that if you want to proceed with the deletion.

Click **OK** to delete the selected dynamic rules, or click **Cancel** to return to the **Dynamic Rule** interface without deleting the selected dynamic rules.

Creating a Dynamic Rule

To create a new dynamic rule, click **Create** on the ribbon. To edit a configured dynamic rule, select the dynamic rule and then click **Edit** on the ribbon. In the **Dynamic Rule > Create/Edit** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for the dynamic rule that you are about to create or edit. Then enter an optional **Description** for this dynamic rule for future reference.
2. **Upload a DLL File** – Upload a DLL file customized in C# from the local path. This file contains your configured mapping settings.
3. Click **Save** to save the configuration and return to the **Dynamic Rule** interface. Click **Cancel** to return to the **Dynamic Rule** interface without saving any configuration or changes.

Retrieving User Information

Due to the special structure of Exchange Online public folder user information, DocAve cannot directly retrieve the user information from Exchange Online public folder. To migrate the Exchange Online public folder users and permissions, retrieve the user information by using the DocAve Migrator Tool.

Complete the following steps to retrieve the user information:

1. Navigate to …*AvePoint**Agent**bin* on the server where the source DocAve Agent is installed.
2. Launch the **Migrator Tool**.
3. Select **Exchange Public Folder Migration**.
4. Go to the **Security Mappings** page.
5. Click the **LDAP Settings** link. The **LDAP Settings** interface appears.
6. Complete the following steps to configure the **LDAP Settings**:
    a. Select the **Source Domain Name** option of the **Type** field.
    b. Select the **Online** option from the **Exchange Version** drop-down menu.
    c. Enter the **Username** and **Password** of an account that has the **Global administrator** role in Office 365.
    d. Click **Add** to add the **LDAP Settings**.

7. Select the **LDAP Settings** of the Exchange Online public folder where the data you are about to migrate is located.
8. Click **Save Security Information** and save the **ExchangeSecurityInfo.xml** file to the directory of *...\AvePoint\DocAve6\Agent\data\Migrator\PublicFolderMigrator*.

The user information of the Exchange Online public folder is exported into the **ExchangeSecurityInfo.xml** file, and you can run the migration jobs to migrate data in the Exchange Online public folder together with the corresponding users and permissions.

For more details about DocAve Migrator Tool, refer to DocAve 6 Supplementary Tools User Guide.

Configuring an Exchange Public Folder Migration Profile

The migration profile allows you to specify and define numerous settings for the migration jobs including Migration Options, Filter Options, Mapping Options, and Advanced Options. Follow the instructions below to create a Migration Profile.

1. From the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
3. Enter a profile name in the pop-up window and click **Save**.
4. Select the **Migration Options** from the left pane. Select a configured Migration Options **Sub-profile** from the drop-down menu or enter a name and click **Create a New Profile** to create a new sub-profile. For details about this section, refer to Migration Options.
5. Select the **Filter Options** from the left pane and select a configured filter policy from the drop-down menu or click **New Filter Policy** from the drop-down menu to create a new filter policy. For details on creating a filter policy, refer to Creating a Filter Policy.
6. Select the **Mapping Options** from the left pane. Select a configured Mapping Options **Sub-profile** from the drop-down menu or enter a name and click **Create a New Profile** to create a new sub-profile. For details about this section, refer to Migration Options.
7. Select the **Advanced Options** from the left pane and configure the **Dynamic Rule**, **Character Length Settings**, and **Illegal Character Replacement Settings**. For details about this section, refer to Advanced Options.
8. Click **Save** in the **Main Profile** row to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace the existing main profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Migration Options

Configure the settings in **Migration Options** to specify how to migrate the content and the security to SharePoint. To set up Migration Options sub-profile, complete the following steps.

1. From the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. Click **Migration Options** on the left pane, and from the **Profile Settings** tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the **Migration Options** field active.
3. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
4. Enter a sub-profile name in the pop-up window and click **Save**.
5. Click the **Content** tab to configure the following optional settings.

- **Folder Migration Options** – Choose a method to migrate the source folders.
    - **Migrate root folder as list** – Select this option, and when selecting a site node as the destination, the selected source folder and the folders (the root folders of the selected source folder) under it will be migrated to respective lists. After the migration, lists with the same name as the selected source folder and the root folders will be created in the destination. Each root folder and the data in it is migrated to respective lists.

      For example, **Folder A** is the selected source folder and under **Folder A**, there are two folders, **Folder B** and **Folder C** (**Folder B** and **Folder C** are root folders of **Folder A**). When selecting **Migrate root folder as list** and selecting a site node as the destination, the migration results are as below:

        - A list named Folder A will be created and the data (except Folder B, Folder C, and the data within these two folders) which is contained in source Folder A will be migrated to the Folder A list.
        - Two lists named Folder B and Folder C are created and the data which is contained in source Folder B and Folder C will keep the data structure and will be migrated to respective lists.
    - **Use folder full path as list name** – Select this option, and when the destination node is in site level, the selected source data in folder level will be migrated to respective lists named by each folder's full path.

      For example, you have selected **Folder A** as the source content. **Folder A** is the sub folder of public folder and it contains **Folder B**. In **Folder B**, an **Item C** is included. After the migration, two lists named **Public Folders** > **Folder A** and **Public Folders** > **Folder A** > **Folder B** are created, and the Item C is included in the **Public Folders** > **Folder A** > **Folder B** list.

  If either of these two options is not selected, when selecting a site node as the destination, the selected source folder will be migrated to a newly created list named after the source folder name and keep the original data structure.

- **Folder Structure Management** – Choose whether or not to collapse folder structure of the migrated content.

  ***Note**: Only one of the **Migrate root folder as list**, **Use folder full path as list name**, and **Collapse folder structure** checkboxes can be selected in a sub-profile.

    - **Collapse folder structure** – Select the **Collapse folder structure** checkbox to collapse all levels of the folder structure of the source

content. All files and items within the source structured folders will be migrated to the same destination location.

***Note**: If you migrate more than 2000 items at one time to a destination, SharePoint performance might be affected.

- **Add a column to keep the source path or parent folder name** – Select the **Add a column to keep the source path or parent folder name** checkbox to add a column to keep the source folder structure.
  - Select the **Source Path** option to keep the source path. You can enter a column name in the text box or use the provided column name **DocAve Source Path**. The source folder path will be the column values in the destination.
  - Select the **Parent Folder** option to keep the parent folder name of the migrated content. You can enter a column name in the text box or use the provided column name **Parent Folder Name**. The parent folder name of the migrated content will be the column values in the destination.
- **Create top level folder on destination –** When selecting the list node as the destination, if using **Create top level folder on destination** to perform the migration, the migration results are:
  - A top level folder with the same name as the source folder is created in the destination list and the source content you selected is migrated to this folder.
  - Regardless of whether or not you select this option, if you select a site node as the destination, a top level folder with the same name as the source folder is created in the destination list and the source content you selected is migrated to this folder.

- **Conversation Option** – When migrating e-mails, if the destination list is a **Discussion Board** list, select whether to use the **Migrate conversation as discussion threads** option.
  - If you select this option, the e-mails whose PR_CONVERSATION_INDEX property has the same values will be migrated to a discussion having the same subject as those e-mails. The body of the e-mails, which replied the original e-mail, will be displayed as the reply items in the discussion.
  - If you do not select this option, each e-mail will be migrated to be an individual discussion using the e-mail subject as the discussion subject and using the e-mail body as the discussion body.
  - If the destination list is not a **Discussion Board** list, the **Migrate conversation as discussion threads** option will not take effect.

- **Source Content Deletion** – If you want to delete the source content that has been migrated successfully after the migration, select **Delete source content upon the job completion**. Only the data will be deleted, the folder structure will not be deleted.

  ***Note**: To delete the source content, make sure the user used to connect to the Exchange public folder connection has sufficient permissions.

- **Content Type Option** – When selecting **Use pre-defined SharePoint content type**, the default content type in the destination object will be used. If you do not select this option, the content type mapping configured in Mapping Options will take effect.
- **Outlook Home Page URL** – Select whether to set or remove the value of the Home Page property of the source folder.
  - When selecting **Set Outlook home page URL** to perform the migration, the destination list URL and folder URL will be set as the value of the Home Page property of the source folder. When you open the specific folder, you will be redirected to the SharePoint list URL.
  - When selecting **Remove Outlook home page URL** to perform the migration, the Home Page property of the source folder will be set blank.

    ***Note**: Make sure the user used to connect to the Exchange Public Folder connection has the **Folder owner** permission to the source folder.

- **Attachment Migration Option** – If you want to migrate source attachments as separate documents to the destination, select the **Migrate attachment as separate document** checkbox. A folder with the same name as an e-mail that has attachments will be created in the destination, and all of the e-mail's attachments will be migrated to this folder as separate documents. If multiple e-mails that have attachments are selected in the migration job, multiple folders will be created in the destination.

6. Click the **Security** tab next to the **Content** tab and configure the **Security** settings. The following settings are optional.
   - **Inherit the folder permission from its parent folder** – if you want the migrated folder to inherit from the source parent folder permission, select this checkbox.
   - **Inherit the folder permission from destination list** – If you want the migrated folder to inherit from the destination list permission, select this checkbox.
7. Click **Save** to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace the existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Filter Options

Configure the settings in **Filter Options** to specify the source content to be migrated. To configure filter options, complete the following steps.

1. From the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. Click **Filter Options** on the left pane, and select an existing filter policy from the drop-down menu. You can also click the **New Filter Policy** link to create a new filter policy. To create a new filter policy, refer to Creating a Filter Policy.

Mapping Options

Configure settings in **Mapping Options** to set the SharePoint Content Type, Property Mapping, Content Type Mapping, Folder Mapping, and Security Mapping. For different property types, WebDAV (selected by default), Web Services, MAPI, or Exchange Online, you must configure the mapping settings individually. To set up Mapping Options sub-profile, complete the following steps.

1. From the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. Click **Mapping Options** on the left pane, and from the **Profile Settings** tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the **Mapping Options** field active.
3. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
4. Enter a sub-profile name in the pop-up window and click **Save**.
5. Select an **Exchange Property Type** from the drop-down menu.
6. Configure the following settings by referring to corresponding sections: SharePoint Content Type, Property Mapping, Content Type Mapping, Folder Mapping, and Security Mapping.
7. Click **Save** to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace the existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

SharePoint Content Type

In the SharePoint Content Type settings, you can create content types based on the built-in, SharePoint content types. The content types are used to perform the content type mapping. By default, a list of new content types are pre-configured. In the list, for example, the **ExchangeDocument** content type is created based on the **Document** content type, so the **Document** content type is the parent content type of the **ExchangeDocument** content type. See the new content types and their parent types below.

Content Type Name	Base Content Type
ExchangeDocument	Document
ExchangeAnnouncement	Announcement
ExchangeMessage	Item
ExchangeContact	Contact
ExchangeEvent	Event
ExchangeTask	Task
ExchangeNote	Item
ExchangeActivity	Item
ExchangeDiscussionReply	Message

For the list, you can perform the following actions.

- Click **Add a Content Type** to add a content type. A new row appears at the bottom of the table. Enter the content type name, and then select the based SharePoint content type from the drop-down list.

  ***Note**: By default, six SharePoint columns are added to the newly created content type.

SharePoint Column Display Name	Column Type
Title	Single line of text
ExchangeID	Single line of text
Created By	Person or Group
Created	Date and Time_Date & Time
Modified By	Person or Group
Modified	Date and Time_Date & Time

- Double-click the name in the **Content Type Name** list to modify the name, and double-click the name in the Base Type Name list to select a new build-in content type.
- Click **Delete the Selected Content Type(s)** to delete a selected content type.
- Click **Edit the Selected Content Type** to edit an existing content type.

Follow the instructions below to edit a content type.

1. Select a content type and click **Edit the Selected Content Type**. The **Content Type** pop-up window appears.
2. On the pop-up window, the columns included in the selected content type and the column types are shown in the table.
3. You can add a new column and specify the column type or edit an existing one.
    - Select the **Add to Default View** checkbox to add the SharePoint column to the default view of the SharePoint content type.
    - Click **Add a Property Mapping** to add a new column and specify the column type. A new row appears at the bottom of the table. Enter the column name, and then specify the column type from the drop-down list.
    - Double-click the column name in the **SharePoint Column Display Name** list to change the column name and double-click the column type in **Column Type** list to change the column type. The built-in six columns cannot be edited. Enter the term set path and whether to allow multiple values, when selecting the **Managed Metadata** column type. The default character for separating multiple values is the semicolon (**;**)**.**

      ***Note**: For managed metadata columns, you can enter the path of the terms that have nested term structure in the **Term Set Path** text box to locate the term. The character string you enter must conform to a pre-defined format, for example **Term Group; Term Set; Term 1; Term 2**. If you deselect the **Allow multiple values** checkbox, you cannot edit the character to separate multiple values in the column. After adding a managed metadata column, click the View () button in the same row as the column to view the details of the column settings.
4. Click **OK** to save the content type settings and return to the **SharePoint Content Type** tab.

Property Mapping

Property mapping is used to set up the property mapping for an Exchange property. When configuring the content type mapping, the Exchange property's display name, which is set in the property mapping, can be selected and the values of it can be mapped to the destination column. By default, a property mapping table is pre-configured.

For the table, you can perform the following actions,

- Click **Add a Property Mapping** to add a property mapping. A new row appears at the bottom of the table. Enter the display name in the **Display Name** column and enter the property tag in the **Exchange Property Tag** column.

- Double-click the name in the **Display Name** column to set the new name, and double-click the name in the **Exchange Property Tag** column to set the property tag.
- Click **Delete the Selected Mappings** to delete a selected property mapping.

When selecting the **Web Services** or **Exchange Online** access method, you can customize the property mapping. Follow the steps below to customize the property mapping.

1. Select the **Customized Property Settings** checkbox.
2. Click **Add a Property Mapping**.
3. Enter the display name of the column in the **Display Name** list.
4. Enter the Exchange property information in the **GUID**, **ID**, **Type**, and **Property Tag** columns.
5. Repeat steps from 2 to 4 to add another customized property mapping.

Content Type Mapping

Depending on the SharePoint list template, you can set content type mapping for each message class. By default, the content mapping settings are pre-configured. In the table below, for example, the source data is using the **IPM.Post** message class and the destination SharePoint list is using the **Document Library** template, therefore, the data migrated to the destination list will use the **ExchangeDocument** content type. See the content mapping settings in the predefined table below.

Exchange Message Class	SharePoint Content Type	SharePoint List Template
IPM.Post	ExchangeDocument	Document Library
IPM.Note	ExchangeDocument	Document Library
IPM.Note	ExchangeMessage	Generic List
IPM.Note	ExchangeAnnouncement	Announcements
IPM.Post	ExchangeAnnouncement	Announcements
IPM.Document	ExchangeAnnouncement	Announcements
IPM.Post	ExchangeMessage	Generic List
IPM.Document	ExchangeDocument	Document Library

Exchange Message Class	SharePoint Content Type	SharePoint List Template
IPM.Document	ExchangeMessage	Generic List
IPM.Appointment	ExchangeEvent	Events
IPM.Contact	ExchangeContact	Contacts
IPM.Task	ExchangeTask	Tasks
IPM.Activity	ExchangeActivity	Generic List
IPM.StickyNote	ExchangeNote	Generic List
IPM.Post	ExchangeDiscussionReply	Discussion Board
IPM.Note	ExchangeDiscussionReply	Discussion Board
IPM.Document	ExchangeDiscussionReply	Discussion Board
IPN.Activity	ExchangeDocument	Document Library

For the table, you can perform the following actions,

- Click **Add a Content Type Mapping** to add a content type mapping. A new row appears at the bottom of the table. Select the message class from the drop-down list, and then specify the SharePoint content type and the SharePoint list template from the drop-down list.
- Double-click the message in the **Exchange Message Class** column to select a new message class, double-click the content type in the S**harePoint Content Type** list to select a new content type, and then double-click the list template in the **SharePoint List Template** list to select a new list template.
- Click **Delete Selected Mapping(s)** to delete a selected content type mapping.
- Click **Edit a Content Type Mapping** to edit an existing content type mapping.

Follow the instructions below to edit a content type mapping.

1. Select a content type mapping and click **Edit a Content Type Mapping**. The **Content Type Mapping Settings** pop-up window appears.
2. On the pop-up window, the column mapping from the Exchange column name (contained in the Exchange message class) to the SharePoint column display name (contained in the SharePoint content type) is shown.

3. Select the checkbox of a specific column mapping and then click **Edit the Selected Exchange Column**.
4. In the **Exchange Column Name** tab, you can select an Exchange property or define a macro.
    - **Select an Exchange property** – Select a column name from the drop-down list.
    - **Define Macro** – Specify a combination of properties. The property name and the description will be mapped to the SharePoint column.
        i. Click **Add and Define Macro**.
        ii. Select a property from the drop-down list, for example, **Cc**.
        iii. Enter the description in the **Condition** column, for example, **Jack**.
        iv. The macro result is refreshed, for example, **[Cc]Jack**.
        v. Repeat steps from i. to iii. to add other properties, for example, **[Cc]Jack[Author]Tom**.
        vi. Click **Save** to finish the settings.

        The macro will be mapped to the SharePoint column. The value of the SharePoint column will be, for example, **[Cc]Jack[Author]Tom**.
5. Click **Save** to save the Exchange column name and return to the **Content Type Mapping Settings** page. The new column mapping is refreshed according to your settings.
6. Click **Save** on the **Content Type Mapping Settings** page and return to the **Content Type Mapping** tab.

Folder Mapping

When selecting a site level as the destination, you can set the folder mapping for each type of Exchange folder. By default, a folder mapping table is pre-configured. In the table below, for example, the source folder type is **IPF** and the destination SharePoint list is using the **Document Library** template, therefore, a list using the **Document Library** template will be created to contain the source data. Double-click the list template name to change the list template.

Security Mapping

Specify the user mapping, domain mapping, group mapping, and permission mapping.

- **User Mapping** (Optional) – In the drop-down list, select a configured user mapping or click **New User Mapping** to create a user mapping. For details on creating a user mapping, refer to the DocAve 6 Control Panel Reference Guide.

  ***Note**: In a user mapping, the **Add a placeholder account to keep metadata even if the user no longer exists** option is not supported for the use with

Exchange Public Folder to SharePoint Online Migration. This option replaces non-existent destination users with a placeholder account in the destination Active Directory.

- **Group Mapping** (Optional) – In the drop-down list, select a configured group mapping or click **New Group Mappin**g to create a group mapping. For details on creating a group mapping, refer to the DocAve 6 Control Panel Reference Guide.
- **Domain Mapping** (Optional) – In the drop-down list, select a configured domain mapping or click **New Domain Mappin**g to create a domain mapping. For details on creating a domain mapping, refer to the DocAve 6 Control Panel Reference Guide.
- **Permission Mapping** (Required) – In the drop-down list, select a configured permission mapping or click **New Permission Mapping** to create a permission mapping. For details on creating a permission mapping, refer to Creating Permission Mappings. Note that if you have not configured or selected any permission mapping, the **Default Permission Mapping** will be applied during the migration.

If you select to use the mapping settings to migrate the source user and the related permissions, besides the mapping settings above, you must also configure the **PublicFolderMigrationConfiguration.xml** file. Refer to Appendix E: Advanced Settings in the Configuration File for more details.

Advanced Options

Configure the settings in **Advanced Options** to set the character length settings and the illegal character replacement settings. The configuration settings are saved to the current main profile.

Dynamic Rule

Map the source Exchange field names and values to SharePoint column names and values. Select a created dynamic rule or click **New Dynamic Rule** to create a new one.

Character Length Settings

Configure character length limitations for SharePoint URL, file name, and folder name. The maximum length of an object URL is 260 characters in SharePoint 2010, SharePoint 2013, and SharePoint 2016. The maximum length of an object URL is 400 characters in SharePoint 2019 and SharePoint Online. The maximum length of a file name or folder name is 128 characters in SharePoint 2010 and SharePoint 2013. The maximum length of a file name or folder name is 260 characters in SharePoint 2016, SharePoint 2019, and SharePoint Online.

- **Maximum Length of the folder name** – The default value is 60. For SharePoint 2010 and 2013, you can define a value from between 1 and 128. For SharePoint

2016, SharePoint 2019, and SharePoint Online, you can define a value between 1 and 260. If the folder name exceeds the maximum you set, the extra characters will be pruned from the end of the folder name. For example, a folder is named **abcdef** in the source and the value that you set here is **5**, the folder will be named **abcde** after the migration.

- **Maximum Length of the file name** – The default value is 80. For SharePoint 2010 and 2013, you can define a value between 1 and 128. For SharePoint 2016, SharePoint 2019, and SharePoint Online, you can define a value from between 1 and 260. If the total number of characters of the file name and extension name exceed the maximum you set, the extra characters will be pruned from the end of the file name. For example, a file is named **abcdef.txt** in the source and the value that you set here is **5**, the file will be named **a.txt** after the migration.
- **Maximum Length of the SharePoint URL** – The default value is 255 and you can define a value between 1 and 400. Note that only the length of a SharePoint 2019/SharePoint Online object URL can be between 261 and 400 characters. The length of the SharePoint URL is calculated from the first character of the managed path after **/**. When the folder or file's URL exceeds the maximum, the migration will produce either of the following results:
    - If the folder URL exceeds the limitation, the folder and its content will be migrated to the root folder of the destination list.
    - If the file URL exceeds the limitation, the file will be migrated to the root folder of the destination list.

Illegal Character Replacement Settings

Replaces the characters that are illegal in SharePoint with the valid characters. By default, all illegal characters are replaced with an underscore. Click **Folder Level** or **File Level** to configure the settings for folder name or file name.

- To modify an illegal character mapping, double-click the underscore in the **Replace with** column and enter a new valid character.
- To add an illegal character mapping, click **Add an Illegal Character**. Then enter the illegal character in the **Illegal characters in SharePoin**t column and the valid character in the **Replace with** column.
- To delete one or more configured illegal character mappings, select the checkboxes next to the **Illegal characters in SharePoint** column, all mappings are selected, deselect the mappings that you do not want to delete, and then click **Delete the Selected Illegal Character(s)**.

  Note the following:

- In SharePoint 2016, **~**, **&**, **{**, and **}** are not folder level illegal characters. In SharePoint 2016 too, **~**, **&**, *****, :, **{**, **}**, and **|** are not file level illegal characters. These default configured mappings can be deleted if the destination is a SharePoint 2016 node.
- In SharePoint Online, # and % are not folder and file level illegal characters any more. You can delete mappings of these characters, but note that the deletion may result in errors on migration jobs if the profile is applied to jobs whose destination is SharePoint on-premises.
- To make sure the deletion works, the **MigrationCommonConfiguration.xml** file must be configured prior to running the migration job. For detailed information, refer to Appendix E: Advanced Settings in the Configuration File.

  If the name of a migrated folder ends with one or multiple periods (.), Exchange Public Folder Migration will replace all periods (.) with underscores (_) during the migration job. If the name of a migrated file ends with one or multiple periods (.), Exchange Public Folder Migration will replace the last period (.) with an underscore (_) during the migration job.

Managing Sub-profiles

Refer the information below to manage an existing sub-profile.

Editing an Existing Sub-profile

1. Select an existing sub-profile from the **Sub-profile** drop-down list.
2. Click **Edit Sub-profile** in the **Sub-profile** group to edit the sub-profile settings.
3. Click **Save** in the **Sub-profile** group to save the sub-profile settings. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace the existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Deleting an Existing Sub-profile

1. Select an existing sub-profile from the **Sub-profile** drop-down list.
2. Click **Delete** in the **Profile/Sub-profile** group to delete the sub-profile, or directly click **Delete** next to the sub-profile name in the drop-down list. Note that the default sub-profile and the sub-profile used in the main profile cannot be deleted.

Uploading a Previously configured Sub-profile

1. In the **Profile Settings** interface, click **Migration Options** or **Mapping Options** on the left panel.

2. Click **Edit Sub-profile** to make the **Migration Options** field active.
3. Click **Upload** in the **Sub-profile** group.
4. Select a created sub-profile and click **Open** to upload it. If a sub-profile having the same name exists in DocAve, you have two options:
    - **Upload as a new profile** – Upload the sub-profile and name the uploaded sub-profile by adding a suffix, for example, **subprofile_1**.
    - **Overwrite current profile** – Replace the existing sub-profile. The **Default Mappings** and **Default Migration Options** sub-profiles cannot be overwritten.

Downloading an Existing Sub-profile

1. In the **Profile Settings** interface, click **Migration Options** or **Mapping Options** on the left panel.
2. Select an existing sub-profile and click **Edit Sub-profile** in the **Sub-profile** group.
3. Click **Download** in the **Sub-profile** group to save the sub-profile to the local disk.

Performing an Exchange Public Folder Migration

An Exchange public folder migration migrates contents, configurations, and securities from the Exchange server to the SharePoint environment.

To start an Exchange public folder migration job, click **Online Migration** on the ribbon in the **Home** tab. To perform an Exchange public folder migration job, follow the instructions below.

Selecting the Source and Destination Nodes

1. In the **Source** pane, click **Select Source**. The **Select Source** pop-up window appears.
2. On the **Select Source** pop-up window, select an Agent from the Agent drop-down list. The connections relying on this Agent will be loaded. Select a connection from the Connection drop-down list.
3. Click **OK** and return to the **Source** pane. The connection name is displayed on the **Source** pane. If you want to change the current connection, click **Change Source** to select another connection.
4. Click the connection name to load the source data and then expand the data tree to find the data to be migrated.
    a. Find the node whose data you wish to migrate. If working with a large environment, enter the name of the folder node into the **Input Keyword** text box to search for a node. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.
    b. Select the source node by selecting the corresponding checkbox. Within each folder level, there is a node named **Items** to display how many objects (including files and items) are contained in the **Items** node. You can click the **Items** node and the **Item Browser** interface appears. Select the files/items that you wish to migrate by selecting corresponding checkboxes and click **OK**.

    ***Note**: For detailed information about what kinds of lists and libraries are supported for different Exchange folders in the migration, refer to Appendix C: Supported and Unsupported Destination Levels.
5. In the **Destination** pane, click the farm name and expand the data tree to select the destination site or list.

    ***Note**: On the destination on-premises data tree, the farm, Web application, site collection, site, and list nodes all support the **Advanced Search** function to search the nodes under it that meet the specified search criteria. On the **My Registered Sites** data tree, the site and list nodes support the **Advanced Search** function.

a. The following nodes can be loaded in the destination pane: SharePoint 2010 farms, SharePoint 2013 farms, SharePoint 2016 farms, SharePoint 2019 farms, and My Registered Sites.

   To perform the migration to SharePoint Online properly, you must configure your SharePoint sites in Control Panel. For more detailed information about this configuration, refer to the DocAve 6 Control Panel Reference Guide.

   If the server you are using does not have internet access and needs to communicate to SharePoint Online site collections or sites outside of this Agent's network, configure the proxy settings for this server. For more detailed information about this configuration, refer to the **Agent Proxy Settings** section in the DocAve 6 Control Panel Reference Guide.

b. Find the node that you want to migrate the source data to. If working with a large environment, enter the keyword of the node into the **Input Keyword** text box to search for a site collection. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.

c. Select the destination node by selecting the corresponding checkbox. You can also create a new container to be the destination node without leaving the current page.

   For details on creating a container in SharePoint, refer to Creating Containers.

For each source folder node, if you select the site node in the destination, the newly created list or library will use the template that you configured in the Folder Mapping; if you select the list or library node in the destination, only the list or library using the particular template is supported. For more information of the supported template, refer to Appendix C: Supported and Unsupported Destination Levels.

***Note**: The libraries created or used by DocAve Connector or the libraries that applied DocAve Storage Manager rules cannot be selected as the destination node for the Exchange Public Folder Migration.

6. When finished configuring the job, select one of the following options:

   - Click **Run Now** to perform a migration job immediately. For more information on the **Run Now** interface, refer to Configuring the Run Now Interface.
   - Click **Save As New Plan** to configure more specific settings and then save them as an Exchange public folder migration plan, which then can be used to perform an Exchange public folder migration job. For more information on the **Save As New Plan** interface, refer to Configuring the Save As New Plan Interface.

Creating Containers

Prior to migration, containers can be created in the destination to store the migrated content. The destination container in Exchange Public Folder Migration can be a site, list, or library. DocAve allows you to create containers in SharePoint without leaving the DocAve interface, providing you the ability to perform migration tasks without using SharePoint to create all of the necessary containers in the destination.

To create a container, in the **Destination** pane, enter the name of a new container in the available field, and then click **Create Container**. The **Create Container** interface will pop up. Depending on the container type you are creating, configure the settings for each type of container as such:

Creating a Site

Configure these settings in the **Create Container** page:

- **Title and Description** – Enter the **Title** of the new site and a **Description** for future references.
- **Template Selection** – Select a language from the **Select a language** drop-down list. Then select a site template for this new site. Click on a tab to access the templates listed in that category.
- **Permissions** – Select **Use unique permissions** to allow a unique set of users to access this new site. Select **Use same permissions as parent site** to allow the same users who can access the parent site to access this new site.
- **Navigation** – Select the **Yes** option if you want a link to this site to appear in the Quick Launch and top link bar of the parent site.
- **Navigation Inheritance** – Select **Yes** to use the top link bar from the parent site.

Click **OK** to create the new site, or click **Cancel** to close the **Create Container** interface.

Creating a List/Library

Configure these settings in the **Create Container** page:

- **Object Type** – Choose whether you wish to create a **List** or **Library** by selecting the corresponding option.
- **Category** – Select the category for the new list or library.
- **Navigation** – Select **Yes** if you want to display the library/list on the Quick Launch.
- **Document Template** (for Library only) – For a new library, select a document template from the drop-down list to determine the default for all new files created in this document library.

- **Document Version History** (for Document Library only) – Select **Yes** to create a version each time you edit a file in this library.

Click **OK** to create the new list or library, or click **Cancel** to close the **Create Container** interface.

Configuring the Run Now Interface

In the **Run Now** interface, configure the settings below:

1. **Conflict Resolution –** Conflicts occur when the Exchange on-premises public folder or Exchange Online public folder object name/Exchange ID in the source node is the same name as an existing object in the destination node.
    - **Container level conflict resolution** – Set the conflict resolution on list and folder level. There are two resolutions:
        - **Skip** ignores the source container that has the same name as the destination one. For the content in the source container, if you do not select the **Check lower objects for conflicts** checkbox, the content will be also ignored. If you select the **Check lower objects for conflict** checkbox, continue to configure Content level conflict resolution.
        - **Merge** combines the configuration of the source and destination container. For the content in the source container, continue to configure Content level conflict resolution.
    - **Content level conflict resolution** – Set the conflict resolution of the item/document level. There are two resolutions.
        - **Skip** ignores the source item and/or document that has the same Exchange ID as the destination item or document.
        - **Overwrite** copies the source item and/or document to the destination by overwriting the destination item/document with same Exchange ID.

    For more information of Conflict Resolution, refer to Appendix F: Conflict Resolution.
2. **Profile Selection** – Specify the main profile configured in Profile Settings.
3. **Destination Agent Group** – Select a destination Agent group to execute the migration job.
4. **Migration Database –** Choose whether or not to use the specified migration database to store the job data. If you have not set up a migration database, you can click the **Migration Database** link to create a new one. If you have set up one, check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, you can click **Details** to view the information of all agents and the connected status. To use the migration database to store the job data, select **Use specified Migration Database to store the job data**.

5. **Notification** – Select the e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.
6. **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the Exchange public folder migration job status. If only the content metadata or security fails to migrate and you select **Ignore metadata/security exceptions** option, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.
7. Click **OK** to run the job immediately or click **Cancel** to return to the **Home** page of Online Migration.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings to build a migration plan:

1. **Plan Name** – Enter the plan name and the optional description.
2. **Profile Selection** – Select a previously created main profile from the drop-down menu.
3. **Destination Agent Group** – Select a destination Agent group to execute the migration job.
4. **Schedule Selection** – Specify the schedule to start the migration job.
    - **No schedule** – Select this option to run the plan manually.
    - **Configure the schedule myself** – Select this option and the **Schedule Settings** section appears under Schedule Selection. Click **Add Schedule** and the **Add Schedule** interface pops up. For more information on the **Add Schedule** interface, refer to Configuring Schedule Settings in the Add Schedule Interface.
5. **Notification** – Select a previously configured notification profile from the drop-down list, or click **New Notification Profile** in the drop-down list to create a new one. For details on creating a notification profile, refer to the DocAve 6 Control Panel Reference Guide.
6. **Associated Plan Group** – Select an associated plan group or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.
7. **Migration Database** – Specify migration database to store detailed job information in SQL Server for each farm. If you have not set up a migration database, you can click the **Migration Database** link to create a new one. If you have set up one, check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, you can click **Details** to view the information of all agents and the connected status. To use the migration database to store the job data, select **Use**

specified Migration Database to store the job data. For the detailed information about the migration database, refer to Configuring Migration Databases.

8. When you are finished configuring the plan, select one of the following options:
    - Click the triangle next to **Save**, and then select **Save** to save the plan you have configured. The **Plan Manager** interface appears. For more information, refer to Managing Plans.
    - Click the triangle next to **Save**, and then select **Save and Run Now** to save the plan you have configured. The **Run Now** interface appears. For detailed information on the options in the **Run Now** interface, refer to the Configuring the Run Now Interface.

Configuring Schedule Settings in the Add Schedule Interface

To configure the schedule settings, complete the following settings:

1. **Options** – Select a type of migration for the customized schedule. Choose **Full migration** to migrate all contents from the source node to the destination node. Choose **Incremental migration** to migrate the source node content that has been modified (**Add** and **Modify**) since the last migration job and the content that failed to be migrated in the last migration job.

    ***Note**: If you select the **Incremental migration** option, the **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job** option in the **Conflict Resolution** section will be enabled.

2. **Conflict Resolution –** If the Exchange on-premises public folder or Exchange Online public folder object name/ID in the source node is the same as an existing object in the destination node, it is considered a conflict.
    - **Container level conflict resolution** – Set the conflict resolution on list and folder levels. There are two resolutions:
        - **Skip** ignores the source container that has the same name as a container in the destination. If you select the **Check lower objects for conflicts** checkbox, continue to configure Content level conflict resolution.
        - **Merge** combines the configuration of the source and destination container. For the content in the source container, continue to configure Content level conflict resolution.
    - **Content level conflict resolution** – Set the conflict resolution of the item/document level. There are two resolutions.
        - **Skip** ignores the source item/document that has the same Exchange ID as the destination item/document.

- **Overwrite** copies the source item/document to the destination by overwriting the destination item/document with same Exchange ID.

  For more information of Conflict Resolution, refer Appendix F: Conflict Resolution.

3. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minutes**, **Hours**, **Days**, **Weeks** or **Months** from the drop-down list.

   - **Range of Recurrence** – Specify when to start and end the running recurring schedule.

     - **Start time** – Set up the time to start the plan and the Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.

     - **Schedule ending** – Designate when to stop the scheduled job.

       - **No end date** – Select this option to repeat running the plan until being stopped manually.

       - **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.

       - **End by** – Set up the time to end the recurrence of plans.

4. **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the Exchange public folder migration job status. If only the metadata/securities of the content failed to be migrated, and you select **Ignore metadata/security exceptions** option, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

5. Click **OK** on the ribbon to save the schedule setting configurations. Click **Cancel** on the ribbon to return to the **Plan setting** interface without saving any changes. Repeat the configurations above to create more schedules. Click **Calendar View** to preview the configured schedule in a calendar. You can delete a configured schedule by clicking the delete () button next to the schedule.

Managing Plans

After launching the migration module, click **Plan Manager** next to the **Home** tab. In the **Plan Manager** interface, any plans that you have previously created are displayed in the main display pane.

In this interface, you can change the number of plans displayed per page. To change the number of plans displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the plans, click the column heading such as **Plan Name**, and **Plan ID**.

Perform the following actions in the **Plan Manager** interface:

- Select a plan and click **View Details**. The source node and the destination node are displayed on the data tree. You can also click **Settings** on the ribbon to view the migration settings of this plan. When you want to change the nodes you selected or want to modify the migration settings, click **Edit** on the ribbon.
- Select a plan and click **Edit** on the ribbon to change the configurations for the selected plan. You can change the nodes you selected and modify the migration settings. Besides, you can click **Profile Settings** or **Create Container** to performing the corresponding actions.
- Select the plans that you want to delete and click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected plans, or click **Cancel** to return to the **Plan Manager** interface without deleting the selected plans.
- Click **Test Run** to perform a test run job that simulates the real migration job. By viewing the job report of the test run, you can find whether the source contents can be migrated to the destination successfully, and then adjust the plans or optimize the settings.

  *__Note__: Test Run results may differ from the results of an actual migration. Investigate Test Runs that display **Finished with Exceptions** results by reviewing the log file. If no obvious content, metadata, or permission errors are found, it is likely that the actual migration will complete successfully.

- Click **Run Now** to perform the migration job.

You can also add plans to plan groups. Plan Group collects plans to groups according to your setup. The plans will run simultaneously or in sequence. For more information, refer to the Plan Group section in the DocAve 6 Control Panel Reference Guide.

When adding a migration plan to a plan group, the migration jobs of the modified plan will be run according to the following schedules:

- If the **Disable the schedule for each plan and run plans according to the plan group's schedule** checkbox is selected in the plan group, the plan's schedule will be disabled. The migration jobs of the plan will be run according to the plan group's schedule. If no schedule is configured for the plan group, the migration jobs of the plan will not be run until the plan (or plan group) is run automatically.
- If the **Disable the schedule for each plan and run plans according to the plan group's schedule** checkbox is not selected in the plan group, one of the following situations could occur:
    - If both the plan and the plan group have a schedule configured, the migration jobs of the plan will be run according to both the schedules. For more information, refer to Common Schedule Logic.
    - If only one schedule is configured (for the plan or plan group), the migration jobs will be run according to the configured schedule.
    - If no schedule is configured for the plan or the plan group, the migration jobs of the plan will not run until the plan (or plan group) automatically runs.

When adding a migration plan to multiple plan groups, the migration jobs of this plan will be run according to the following schedules:

- If the **Disable the schedule for each plan and run plans according to the plan group's schedule** checkbox is selected (in one or all of the plan groups), the plan's schedule will be disabled. The migration jobs of the plan will be run according to the plan groups' schedules. Refer to the common logic for details.
- If the **Disable the schedule for each plan and run plans according to the plan group's schedule** checkbox is not selected in all of the plan groups, the migration jobs of the plan will be run according to all of the configured schedules of the plans and plan groups. Refer to the common logic for details.

Common Schedule Logic

When more than one schedule is available, the common logic is:

- If the schedules are on the same time, only one migration job will be run.
- If the schedules are on different times, the migration jobs will be run according to each schedule.
- If the migration job of the plan is running, any scheduled jobs that should start after the current running job will be skipped until the current job finishes.

Exchange Public Folder Migrator Tool

The Exchange public folder migration tool is provided in the …*AvePoint**Agent**bin*. This tool is used to scan source public folder contents selected for migration and generate a scan report that records the contents in the selected nodes. The contents that match the configured rules will be marked with a comment for your reference. Additionally, you can configure domain mapping, group mapping, and user mapping, used during Exchange public folder migration. Refer to the DocAve 6 Supplementary Tools User Guide for instructions on using the tool.

Appendix A: Exchange Public Folder Migration Database Information

Refer to the following tables to view the detailed job information stored in the migration database. In Job Detail, you can view the job details of each migrated source object, the source/destination object ID, the URL of the source/destination object, the size of the source object, the owner of the source/destination object, the migration start time, the end time, and so on. In Job Notification, you can view the status of the migration job and view the comment related to the migration job. In Job Statistic, you can view the statistical information of the migration job, such as, the job ID, the plan ID, the source/destination start time, the source/destination end time, the source/destination Agent name, the number of migrated/failed/skipped items/folders/lists, and so on.

Job Detail

View the job details information in the table below.

Column Name	Description	Value
JobId	It is the ID of the job.	The prefix of the job ID facilitates the distinction of different migrations. The job ID for Exchange public folder migration is PF. For example, **PF20130815184723743272**.
SequenceId	It is the sequence ID of each migrated source object.	The value represents the sequence of each migrated source object. For example, **1**, it indicates that this source object is the first migrated object.
SourceObjectId	It is the ID of the source object.	The value is the ID of the source object.
SourceObjectParentID		The value is the ID of the parent of the source object.
TargetObjectId	It is the ID of the target object.	The value is the GUID of each target object level from site

Column Name	Description	Value
		collection level to item level. For example, **df3f11c6-c499-4597-b4fc-d482a2fc9f56** is the GUID of the target folder.
TargetObjectParentID		The value is blank.
SourceFullUrl	It is the full URL of the source object.	The value is the full URL of the source object. Use the value to find the source object.
TargetFullURL	It is the full URL of the target object.	The value is the full URL of the target object. Use the full URL to find the target object. If the source object is not migrated to the target, the column value is blank.
SourceObjectTitle	It is the title of the source object.	The value is the title of the source object.
TargetObjectTitle	It is the title of the target object.	The value is the title of the target object.
SourceObjectType	It is the type of the source object.	The value represents the type of the source object, which is different according to the source you selected. • 106– Folder • 108 – Item • 109 – Attachment • 110 – Contact Group • 1001 – Group • 1002 – User
TargetObjectType	It is the type of the target object.	The value represents the type of the target object.

Column Name	Description	Value
		• 10002 – Site Collection • 10003 – Site • 10004 – Library • 10005 – List
SourceObjectSizeBytes	It is the size of the source object. The unit is byte.	The value is the real size of the source object.
TargetObjectSizeBytes	It is the size of the target object. The unit is byte.	The value is the size of the target object.
SourceObjectOwner	It is the owner of the source object.	The value represents the user who creates the source object.
TargetObjectOwner	It is the owner of the target object.	The value represents the user who creates the target object.
SourceObjectVersion	It is the version of the source object.	The column value is blank.
TargetObjectVersion	It is the version of the target object.	The column value is blank.
Operation	It is the operation performed for each source object during migration.	The value represents the operation performed when migrating the source object to the target. • 0 – None • 1 – Skipped • 2 – New Created • 3 – Overwritten • 4 – Appended • 5 – Filtered • 6 – Collapsed • 7 – Merge

Column Name	Description	Value
Status	It is the migration status of the source object.	The value represents the status of the job. • 0 – Starting • 1 – Successful • 2 – Backup Failed • 3 – Restore Failed • 4 – Filtered Out • 5 – Skipped • 6 – Exceptional
StartTime	It is the time when the backup starts.	The value represents the time when the backup starts.
EndTime	It is the time when the restore completes.	The value represents the time when the restore completes.
FilteredOutPolicy	It is the status of using filter policy.	The value represents the status of using filter policy. • 0 – Not Used • 1 – Used
TruncatedPolicy	It is the truncated policy that is applied to the source object.	The value represents the truncated policy that is applied to the source object. • None – No truncated policy. • Truncated – The object name is truncated. • Renamed – The object name is renamed. • MoveUp – The object is moved up to the higher level.

Column Name	Description	Value
TruncatedOrRenamedAs	It is the new name of the object in the target.	The value is the new name of the object in the target after truncating or renaming.
CustomMetadata	It is the status of using custom metadata.	The value represents the status of using custom metadata. • 0 – Not Used • 1 – Used The default value is false.
MetadataMapping	It is the statues of using C-Based Object Oriented Language (C# Language) Mapping.	The value represents the status of using C-Based Object Oriented Language (C# Language) Mapping. • 0 – Not Used • 1 – Used
Message	It displays the migration message of the source object.	The value is the migration message of the source object.

Job Notification

View the job notifications information in the table below.

Column Name	Description	Value
SequenceId	It is the ID of the sequence for each job.	The value represents the sequence of each job. For example, **1**, it indicates that this job is the first migration job.
JobId	It is the ID of the job.	The prefix of the job ID facilitates the distinction of different migrations. The job ID for Exchange Public Folder

Column Name	Description	Value
		Migration is PF. For example, **PF20120702184324729287**.
Status	It is the status of the job.	The value represents the status of the job. • 0 – In Progress • 2 – Finished • 3 – Failed • 4 – Stopped • 7 – Finished With Exception • 8 – Paused
Message	It displays the job comment.	The value displayed is the same as the comment in Statistics of Job Details.

Job Statistic

View the job statistics information in the table below.

Column Name	Description	Value
JobId	It is the ID of the job.	The prefix of the job ID facilitates the distinction of different migrations. The job ID for Exchange Public Folder Migration is PF. For example, **PF20120702184324729287**.
PlanId	It is the ID of the plan.	The value is the plan ID, for example, **PLAN20120702184321934938**.
PlanName	It is the name of the plan.	The value is the plan name. If you run a job without saving it

Column Name	Description	Value
		as a plan, the value is Instance Plan.
PlanGroupId	It is the ID of the plan group.	The value is the ID of the plan group that you set for the plan.
PlanGroupName	It is the name of the plan group.	The value is the name of the plan group that you set for the plan.
SourceAgentType	It is the source Agent type.	The value represents the source Agent type. 3 indicates the source Agent type is Exchange Public Folder.
TargetAgentType	It is the target Agent type.	The value represents the target Agent type. • 5 – SharePoint 2010 • 6 – SharePoint 2013 • 11 – SharePoint Online • 12 – SharePoint 2016 • 13 – SharePoint 2019
SourceAgentName	It is the source Agent name.	The value is the source Agent name.
TargetAgentName	It is the target Agent name.	The value is the target Agent name.
Status	It is the status of the job.	The value represents the status of the job. • 0 – In Progress • 2 – Finished • 3 – Failed • 4 – Stopped

Column Name	Description	Value
		• 7 – Finished With Exception • 8 – Paused
Run Type	It is the type of the job.	The value represents the type of the job. • 0 – Run • 1 – Test Run • 0 – Rerun
SourceStartTime	It is the time when the backup starts.	The value represents the time when the backup starts.
SourceFinishTime	It is the time when the backup completes.	The value represents the time when the backup completes.
TargetStartTime	It is the time when the restore starts.	The value represents the time when the restore starts.
TargetFinishTime	It is the time when the restore completes.	The value represents the time when the restore completes.
Description	It is the description of the job.	The value is the description of the job.
UserName	It is the DocAve user who runs the job.	The value is the username who runs the job.
JobOption	It is the option of the job.	The value is 0.
JobType	It is the type of the job.	The value represents the type of the migration job. • 0 – Full Migration • 1 – Incremental Migration
ContainerConflictResolution	It is the container conflict resolution.	The value represents the resolution of container conflict. • 0 – Skip

Column Name	Description	Value
		• 5 – Merge
ContentConflictResoltuion	It is the content conflict resolution.	The value represents the resolution of content conflict. • 0 – Skip • 3 – Overwrite
MigratedBytes	It is the size of the migrated data. The unit is byte.	
FailedBytes	It is the size of the data that are failed to be migrated. The unit is byte.	
SkipedBytes	It is the size of the skipped data. The unit is byte.	
FilteredBytes	It is the size of the data that is filtered out. The unit is byte.	
MigratedSiteCollectionCount	It is the number of migrated site collections.	N/A
MigratedSiteCount	It is the number of the migrated sites.	N/A
MigratedListCount	It is the number of the migrated lists.	N/A
MigratedFolderCount	It is the number of migrated folders.	
MigratedItemCount	It is the number of migrated items.	

Column Name	Description	Value
FailedSiteCollectionCount	It is the number of site collections that are failed to be migrated.	N/A
FailedSiteCount	It is the number of the sites that are failed to be migrated.	N/A
FailedListCount	It is the number of the lists that are failed to be migrated.	N/A
FailedFolderCount	It is the number of the folders that are failed to be migrated.	
FailedItemCount	It is the number of the items that are failed to be migrated.	
SkippedSiteCollectionCount	It is the number of the skipped site collections.	N/A
SkippedSiteCount	It is the number of the skipped sites.	N/A
SkippedListCount	It is the number of the skipped lists.	N/A
SkippedFolderCount	It is the number of the skipped folders.	
SkippedItemCount	It is the number of the skipped items.	
FilteredOutSiteCollectionCount	It is the number of site collections that are filtered out.	N/A

Column Name	Description	Value
FilteredOutSiteCount	It is the number of sites that are filtered out.	N/A
FilteredOutListCount	It is the number of lists that are filtered out.	N/A
FilteredOutFolderCount	It is the number of folders that are filtered out.	
FilteredOutItemCount	It is the number of items that are filtered out.	

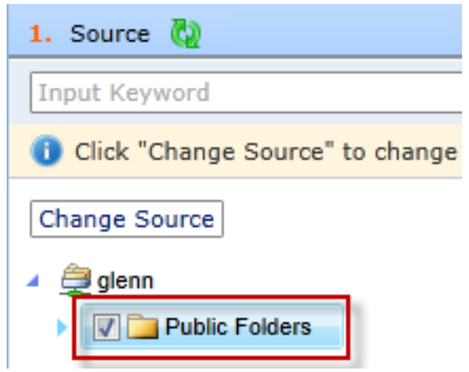
Object Type

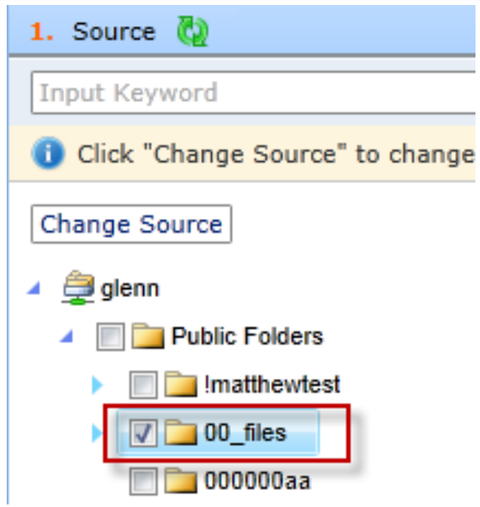
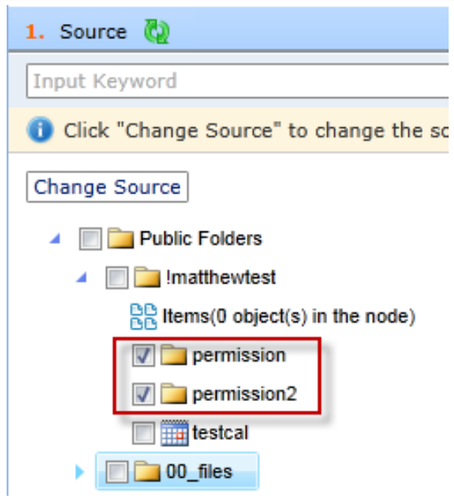
View the information of the object type of Exchange Public Folder in the table below.

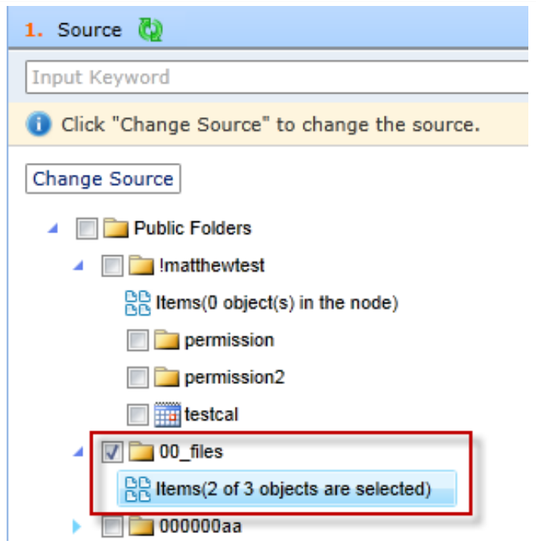
Object Type	Value
Folder	106
Item	108
Attachment	109

Appendix B: Exchange Public Folder Migration Customization Table

The following table shows what kinds of source node are supported to be migrated to the corresponding destination nodes. √ means the migration is **Supported** at this level and a blank area means the migration is **Not Supported** at this level.

What to migrate \ Destination level	Site	List/Library	What to select in the source
Public Folders	√	√	

What to migrate \ Destination level	Site	List/Library	What to select in the source
Folder	√	√	
Subfolder	√	√	

What to migrate \ Destination level	Site	List/Library	What to select in the source
Item	√	√	

Appendix C: Supported and Unsupported Destination Levels

DocAve Exchange Public Folder Migration does not support the destination levels that are not listed in the table below.

Destination Level		What to migrate						
		Mail and post	Calendar	Contact	InfoPath	Journal	Task	Note
Site		Supported	Supported	Supported	Supported	Supported	Supported	Supported
List	Discussion Board	Supported	Unsupported	Unsupported	Supported	Unsupported	Unsupported	Unsupported
	Generic List	Supported	Unsupported	Unsupported	Supported	Supported	Unsupported	Supported
	Announcements	Supported	Unsupported	Unsupported	Supported	Unsupported	Unsupported	Unsupported
	Calendar	Unsupported	Supported	Unsupported	Unsupported	Unsupported	Unsupported	Unsupported
	Contact	Unsupported	Unsupported	Supported	Unsupported	Unsupported	Unsupported	Unsupported
	Task	Unsupported	Unsupported	Unsupported	Unsupported	Unsupported	Supported	Unsupported
Library	Document Library	Supported	Unsupported	Unsupported	Supported	Supported	Unsupported	Unsupported

Appendix D: Supported and Unsupported Access Method for Rich Text Field Data

Refer to the following tables to view the detailed supported and unsupported access method for Rich Text Field (RTF) data.

RTF Data Type	WebDAV	Web Services	MAPI	Comment
Mail and post (Rich Text format)	Unsupported	Supported	Supported	
Calendar	Unsupported	Partially Supported	Supported	If you use the **Web Services** access method to connect the source Calendar items and configure the configuration file to migrate the source Calendar items to be attachments to the destination, the migrated attachments are empty.
Contact	Unsupported	Unsupported	Supported	
Journal	Unsupported	Unsupported	Supported	
Task	Unsupported	Unsupported	Supported	
Note	Unsupported	Unsupported	Supported	

Appendix E: Advanced Settings in the Configuration File

By using the **PublicFolderMigrationConfiguration.xml** file, you can configure the following settings:

- The maximum number of items that is to be requested from the source each time.
- For the source mail items, specify the file type after migration.
- Specify the sequence of migrating the source items.
- Specify whether to check the user's logon name when migrating the source user.
- Specify whether to migrate the source hidden items to the destination.
- Specify whether to migrate the source RTF (Rich Text Format) files to be destination list items or keep the original file format.
- Specify whether to generate the performance log.

To configure the **PublicFolderMigrationConfiguration.xml** file, complete the following steps:

1. Go to the machine where the source DocAve Agent (using for the Exchange public folder connection) is installed.
2. Open the … *\AvePoint\DocAve6\Agent\data\Migrator\PublicFolderMigrator* directory and find the **PublicFolderMigrationConfiguration.xml** file.
3. Open the .xml file and configure the following settings:
   - **<PagingSize value="500"/>** – When performing the migration job, this node is used to specify the maximum number of items that is to be requested from the source each time. Modify the value of the **value** attribute according to the migration performance. If the migration job is hung due to the number you set is too large, try to configure the maximum number. The default value is 500.
   - **<ConvertToMsg value="true"/>** – This node is used to specify the file type after migration for the source mail items. Modify the value of the **value** attribute according to your requirements. **true** represents to migrate the source mail item to be .msg file, and **false** represents to migrate the source mail item to be .eml file.

     ***Note**: AvePoint recommends keeping the **true** value for this node to migrate the source mail item as a .msg file.

     ***Note**: This node only work for the Exchange Public Folder Migration jobs when Microsoft Outlook 2003 Service Pack 2 (32-bit), or above, is installed on the source Agent.

- **<ReverseItemsByTime value="false"/>** – This node is used to specify the sequence of migrating the source items. Modify the value of the **value** attribute according to your requirements. **true** represents to migrate the source items according to the source sequence, and **false** represents to migrate the source items according to the reverse source sequence.
- **<CheckUserName value="false" adAddress=" " exchangeVersion=" " />** – When restoring the source user, this node is used to specify whether to check the logon name of the user in the source domain. Modify the value of the **value** attribute according to your requirements.

  *__Note__: This feature is not available for the migration jobs whose source is the Exchange Online public folder.

  - **true** represents to check the logon name of the user. If you select **true**, you must specify the IP address where the source Activity Directory is and the Exchange Server version.
    - There are two options to specify the IP address.
      a. Enter the IP address as the value of the **adAddress** attribute.
      b. Go to the machine with the DocAve Agent (that one you configured in Exchange Public Folder connection) installed. Use Notepad to open the **hosts** file located in the *C:\Windows\System32\drivers\etc* directory. In this file, map the IP address to the name of the host where the source Activity Directory is.
    - For the Exchange Server version, enter the number of major version. For example, enter **2007** for the Exchange Server 2007 Service Pack 3.
  - **false** represents to not check the logon name of the user. The **adAddress** attribute is invalid also.
- **<BackupHiddenItem value="true"/>** – This node allows you to choose whether to migrate the source hidden items to the destination. Modify the value of the **value** attribute according to your requirements.
  - **true** represents that the source hidden items will be migrated to the destination.
  - **false** represents that the source hidden items will not be migrated to the destination.
- **<MigrateLastModificationTimeAsCurrent value="false"/>** – This node allows you to choose whether to keep the last modified time for the migrated content.

    - **true – true** means that the last modified time of the migrated content will be the time when the content was migrated to the destination.
    - **false – false** means that the last modified time of the source content will be kept in the destination after the migration.
- **<ManagedMetadataConfig createTerm="true"/>** – This node allows you to choose whether to create the source terms that do not exist in the destination.
    - **true – true** means that the source terms that do not exist in the destination will be created.
    - **false – false** means that the source terms that do not exist in the destination will not be created.
- **<UseMultiThread value="false"/>** – This node allows you to choose whether to use multiple threads to run migration jobs.

  ***Note**: This feature only works for the migration job whose configured destination is a SharePoint Online node.

    - **true –** Set the **true** value for this node to use multiple threads to run a migration job simultaneously.
    - **false –** Set the **false** value for this node to use one thread to run a migration job. The default value is **false**.
- **<MultiThreadCount value="5"/>** – This node allows you to specify the number of threads to be used to run a migration job simultaneously. The default value is **5**.

  ***Note**: The value configured for this node only works when the value of the node above is **true**.

- **<RestoreRtfItemAsAttachment value="false"/>** – When migrating the source RTF (Rich Text Format) files to the destination lists, you can choose the migration type using this node. Modify the value of the **value** attribute according to your requirements.
    - **true** represents that the source RTF files will keep the original format during the migration and be migrated to the attachments of the destination list items.
    - **false** represents that the source RTF files will be migrated to the destination list items. The source RTF files' properties will be migrated to the destination items' properties.
- **<PerformanceLogDisable value="false"/>** –This node allows you to choose whether to collect the performance log, which records the performance about migrated items when performing an Exchange public folder migration job.

Enable/Disable this feature according to the AvePoint representative's suggestion. Set the value of the **value** attribute as explained below:

- **true – true** means that the performance log will not be collected when performing an Exchange public folder migration job.
- **false – false** means that the performance log will be collected when performing an Exchange public folder migration job. By default, the value of the **value** attribute is set to **false**.

  You can go to the DocAve Agent installation path *…\AvePoint\DocAve6\Agent\jobs* to find the Exchange public folder migration job folder, for example, **PF20121227162813538557_Backup**. The performance log, for example, **EPFBackupWorkerPerformanceLog_PF20121227162813538557.xml**, is generated in this job folder.

- **UserAgentTag** – Occasionally, data may fail to be migrated to SharePoint Online due to Exception 429 (too many requests). The root cause of Exception 429 is that there are too many concurrent jobs or requests to access SharePoint Online, which causes an overuse of resources. SharePoint Online has a built-in throttling feature that limits the number of concurrent jobs (by script or code) to prevent this issue. This node is used to avoid getting throttled in SharePoint Online. You can leave the value as empty. Exchange Public Folder Migration will automatically add a user agent string when sending requests to SharePoint Online. If you want to use custom user agent string, add the user agent string as the value of this node. Make sure the custom user agent string follows the format described here.

4. Save the modifications and close the .xml file.

By configuring the **MigrationCommonConfiguration.xml** file, you can choose whether or not to use the illegal character replacement settings configured in the profile.

1. Go to the machine where the source DocAve Agent (using for the Exchange public folder connection) is installed.
2. Open the … *\AvePoint\DocAve6\Agent\data\Migrator\MigrationCommonMigrator* directory and find the **MigrationCommonConfiguration.xml** file.
3. Open the .xml file and find the **<IsEnableIllegalCharReplacement Flag=" "/>** node.
4. Configure the value of the **Flag** parameter.
   - **true – true** means the default configured mappings of illegal characters will be used even when they have been deleted from the profile used in the migration job. The default value is **true**.
   - **false – false** means the configured mappings of illegal characters in the profile will be used in the migration job.

5. Save the modifications and close the .xml file.

***Note**: The modifications made to this file take effect on jobs of all Migration modules except SharePoint Migration.

Appendix F: Conflict Resolution

In this appendix, each resolution is described in detail. View the tables below for your reference.

Container Level Conflict Resolution

Resolution	Object	Conflict	No Conflict
Skip	Configuration	Ignore the conflicting configuration and do nothing on the destination.	A new SharePoint object will be created.
	Security	Ignore the conflicting security and do nothing on the destination.	A new SharePoint object will be created.
Merge	Configuration	Merge the settings in the destination node with settings from the source node.	A new SharePoint object will be created.
	Security	Permissions – Source permissions that do not already exist in the destination node will be added to the destination node. Permission Levels – the permission levels that do not already exist in the destination node will be added to the destination node. The permission levels that already exist in the destination node will not be replaced.	A new SharePoint object will be created.

Content Level Conflict Resolution

Resolution	Object	Conflict	No Conflict
Overwrite	Content	Delete the conflicting content on destination first and overwrite it with the source content.	A new SharePoint object will be created.
Skip	Content	Ignore the conflicting content and do nothing on destination.	A new SharePoint object will be created.

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