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DocAve™ 4.1 Exchange PFMigrator User Guide

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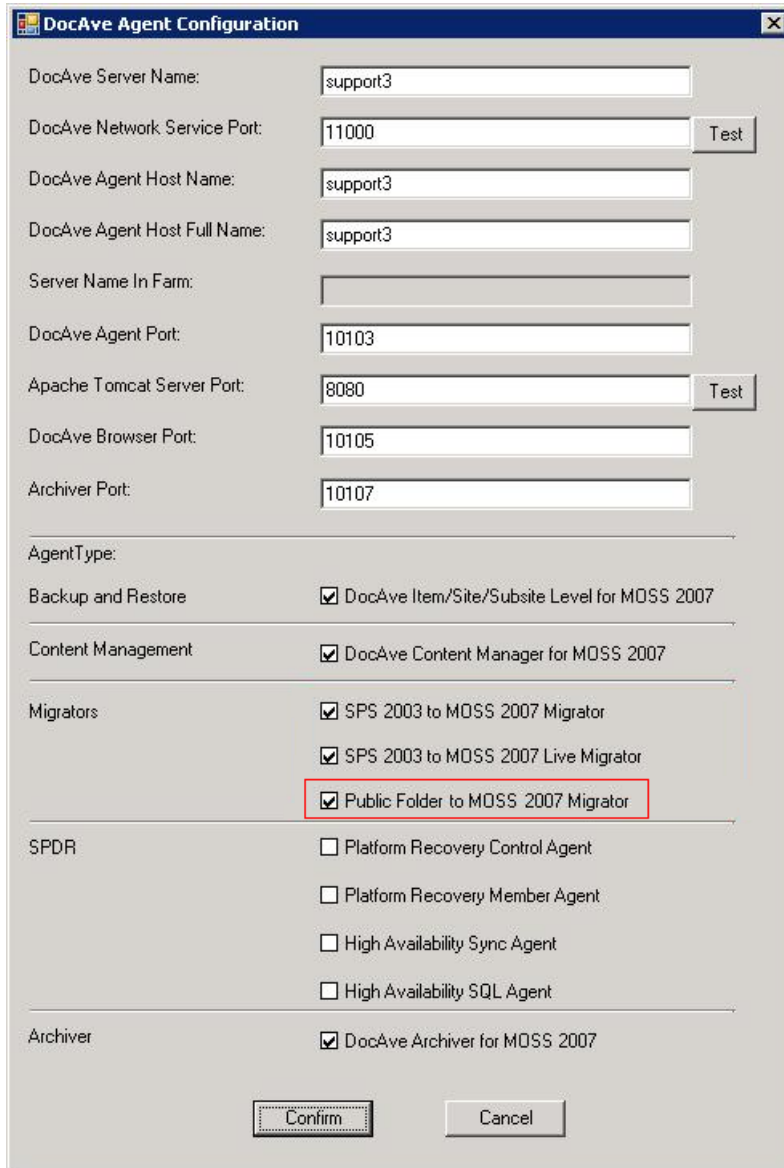
Revision History

This revision history summarizes the changes made in each published version of this document.

Document No.	Publication Date	Description of Revisions
DocAve 4.1 PFMigrator User Guide	August 28, 2007	Creation of DocAve 4.1 PFMigrator Guide.
DodAve 4.1 PFMigrator User Guide	November 1, 2007	Added section about OWA compatibility.

1 Installation

Before using the PFMigrator solution, the administrator must make sure that the Migrator is enabled. Please refer to the DocAve Installation Guide to receive an in-depth installation walk through of the DocAve Enterprise Platform. To ensure that PFMigrator is enabled on the DocAve Agent Host, please proceed as follows:



DocAve Server Name:	support3	
DocAve Network Service Port:	11000	Test
DocAve Agent Host Name:	support3	
DocAve Agent Host Full Name:	support3	
Server Name In Farm:		
DocAve Agent Port:	10103	
Apache Tomcat Server Port:	8080	Test
DocAve Browser Port:	10105	
Archiver Port:	10107	
Agent Type:		
Backup and Restore	<input checked="" type="checkbox"/> DocAve Item/Site/Subsite Level for MOSS 2007	
Content Management	<input checked="" type="checkbox"/> DocAve Content Manager for MOSS 2007	
Migrators		
	<input checked="" type="checkbox"/> SPS 2003 to MOSS 2007 Migrator	
	<input checked="" type="checkbox"/> SPS 2003 to MOSS 2007 Live Migrator	
	<input checked="" type="checkbox"/> Public Folder to MOSS 2007 Migrator	
SPDR		
	<input type="checkbox"/> Platform Recovery Control Agent	
	<input type="checkbox"/> Platform Recovery Member Agent	
	<input type="checkbox"/> High Availability Sync Agent	
	<input type="checkbox"/> High Availability SQL Agent	
Archiver	<input checked="" type="checkbox"/> DocAve Archiver for MOSS 2007	
Confirm Cancel		

1. Proceed and log onto the server that contains the DocAve Agent.
2. Then proceed to *Start*.
3. Then to *All Programs*.
4. Now search for *AvePoint DocAve 4.1*.
5. Open up the *Client Configuration Tool*.
6. From this screen make sure that the appropriate Migrator is checked. If not then check the box and click on confirm.
7. This will ensure that Migrator is enabled on that Agent. Please verify this step with all of your DocAve agents.

Figure 1.1 – DocAve Agent Host Configuration Tool

2 Introduction

The DocAve Exchange Public Folder Migrator is embedded into the DocAve 4.1 SharePoint platform as an advanced module. It is designed to extract data from Exchange Public Folder with all of their associated information and reinsert them with metadata mapped to their SharePoint counterparts. The types of migrated data include calendars, contacts, tasks, messages, and documents.

Due to the considerable architectural differences between SharePoint 2003 and Microsoft Office SharePoint Server 2007 (MOSS 2007), two versions of PFMigrator are offered:

- PFMigrator for SP2003
- PFMigrator for MOSS 2007

2.1 Item Level Management

As with the rest of the DocAve platform of products, the PFMigrator is able to provide 4 levels of data fidelity during the migration process:

- **Item**
- **Metadata**
- **Location Structure**
- **Access Control**

The most basic form of migrated data is the item(s) themselves. They could be Contacts, Calendar Entries, Tasks, etc... The second level of information passed is the metadata associated with the items. Metadata could be the creation date, the last modified time, or the name or e-mail of the original author. It might be information that's in the header of the file or used by the application to associate with the file. The third level of migrated information is the location structure within the source application. The migrator will logically carry over the folder structure from Public Folder to SharePoint.

Lastly, user access control will be passed during the migration. Permissions will be carried over from Exchange to SharePoint if they are both connected to the same Active Directory server or the same trusted zone.

3 Exchange Public Folder Migrator

Requirements

The basic requirement for PFMigrator is remote access to the source Exchange server and local destination SharePoint server.

The general requirements for PFMigrator are:

2007:

- MOSS 2007 or WSS v3 Server (with locally installed DocAve agent)
- Outlook 2003 SP1 and above (with locally installed DocAve agent)
- Exchange 2000 or 2003 (source machine)

2003:

- SharePoint 2003 or WSS v2 (with locally installed DocAve agent)
- Outlook 2003 SP1 and above (with locally installed DocAve agent)
- Exchange 2000 or 2003 (source machine)

*(Please note that the source Exchange server and target SharePoint server on the same machine is not supported in production. This is due to Microsoft's limitation that Outlook cannot be installed on a production Exchange server)

Outlook Web Access (OWA) Compatibility

PF Migrator is programmed to pull data out of Exchange, so OWA is desired but not required. However an Exchange IIS Virtual directory would need to be set up as our tool requires a URL for reference. If OWA is not going to be used, it is possible to set up the IIS Virtual directory without exposing that information to end users.

As an added security measure, the HTTPS protocol can be utilized to IP restriction can be added so that the DocAve migration agent can solely access the Virtual directory.

Please refer to your Microsoft Exchange documentation for details.

3.1 The Two Migration Methods

The content of Exchange Public Folders can be migrated in 2 ways into SharePoint:

1. Move a folder to a SharePoint document library or list

Select a source Exchange folder and the destination SharePoint document library or list, and start the migration process. Please note that the source folder type should be compatible with the destination document library/list type. For example, a contacts folder should be migrated into a contact list. A mail folder can be migrated into either a document library or a generic list.

2. Move multiple folders to a SharePoint sub-site (web)

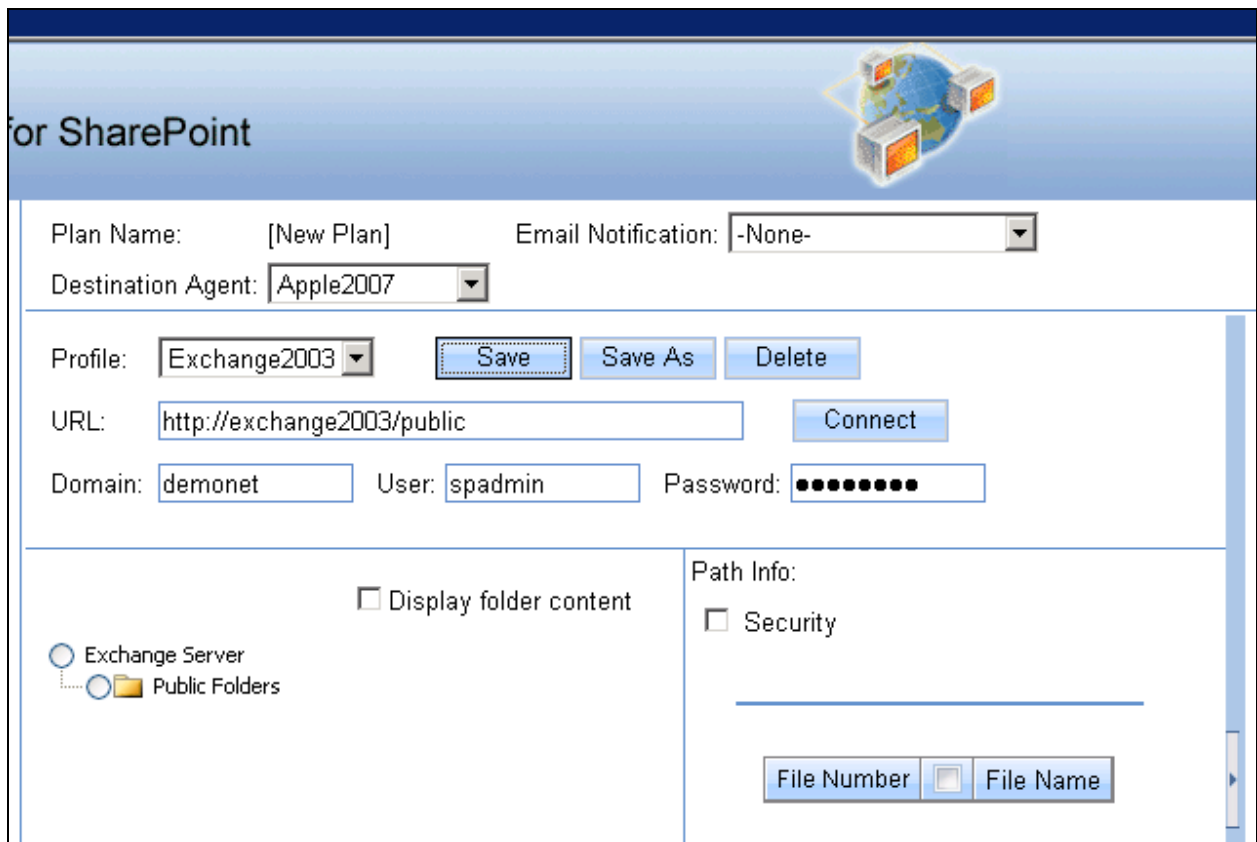
Select multiple source folders and the target sub-site and start the migration. New document library or lists will be automatically created based on source folder type if they do not already exist. If a subfolder's type is not compatible with its parent, a new document library or list with its full path as name will be created, a link item will be created in its parent document library or list to refer user to the new location.

Source Exchange Folder	Destination SharePoint List / DocLib
Mail Folder	Document library (MSG files), Generic list (Items with attachments) and Discussion board (Keeps message threading)
Contact Folder	Contacts List
Calendar Folder	Events List
Task Folder	Tasks List
Journal Folder	Generic List
Note Folder	Generic List

Figure 3.1.1 – Compatible SharePoint List Types

3.2 Using PFMigrator

1. First, choose the Destination Agent. Next, input the Exchange connection information. You can save the connection information as a profile for future use. In our example we named our profile Exchange2003. Press the connect button to bring up the tree structure.



The screenshot shows the PFMigrator interface for configuring an Exchange connection. The interface is titled "for SharePoint" and features a globe icon with server racks. The configuration fields are as follows:

- Plan Name: [New Plan]
- Email Notification: [-None-]
- Destination Agent: [Apple2007]
- Profile: [Exchange2003] (with Save, Save As, and Delete buttons)
- URL: [http://exchange2003/public] (with Connect button)
- Domain: [demonet]
- User: [spadmin]
- Password: [masked with dots]

Below the configuration fields, there are two sections:

- Display folder content
- Path Info: Security

A tree structure is visible on the left, showing "Exchange Server" and "Public Folders". At the bottom right, there are buttons for "File Number" and "File Name".

Figure 3.2.1 – Entering in the Exchange information

2. Browse the source tree structure and select the folder(s) to migrate (a). You can also choose individual items from Public folders to migrate. If you want to migrate the permission settings for the folder, you can check the "Security" option as well (c). By default, the folder contents are not displayed for performance considerations. However, if you wish to migrate part of the folder's contents instead of the whole folder, you can check the "Display folder content" (d) and select the items under the folder.

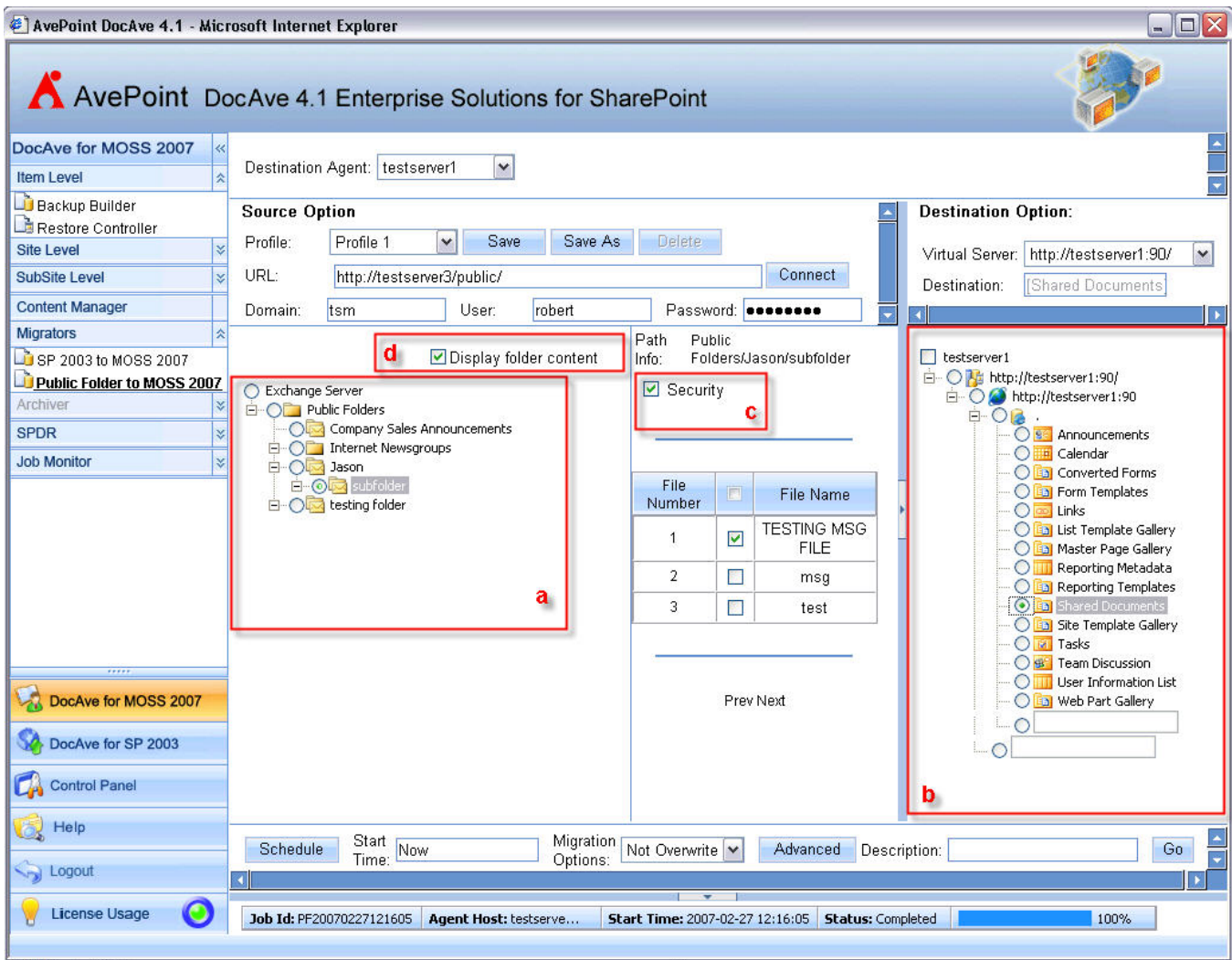


Figure 3.2.2 – Selecting Folders to Migrate

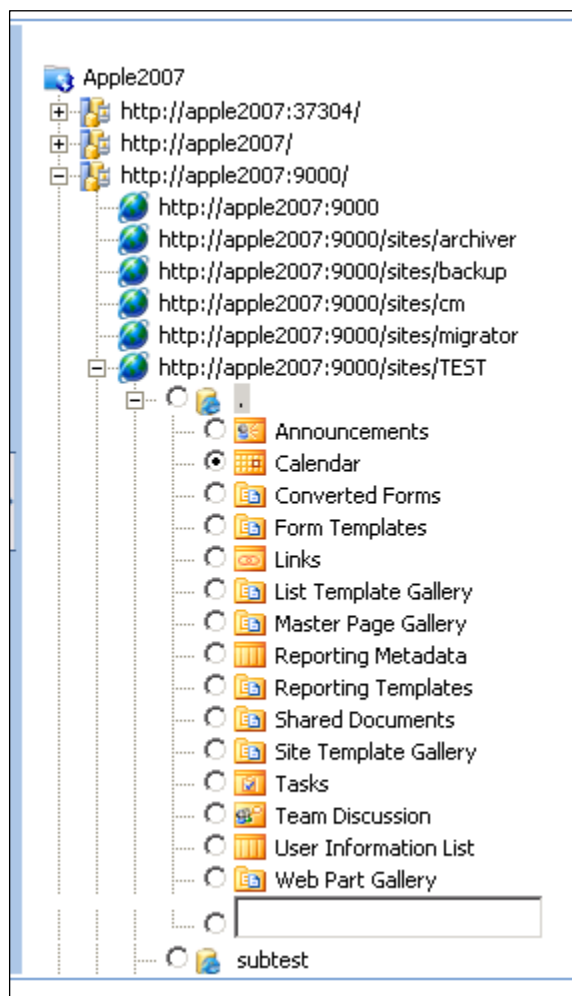


Figure 3.2.3 – Destination Folders

3. Figure 3.2.3 shows an example of the destination folders. You can choose to migrate your exchange folders anywhere on your SharePoint site. You can choose to migrate the exchange folder to an existing sub-site or create a new sub-site by selecting the blank option and entering in the name of your new sub-site.

Exchange folder structure will be maintained for mail folders if moved to a document library. If the subfolder type is different from the parent folder, a new list or document library will be created for the subfolder and a link item will be created in the parent list or document library pointing to the new list. To make it easier, it's best to organize the public folder structure to be consistent before the migration.

4. To begin the migration, click "Go" as pictured in the figure below.

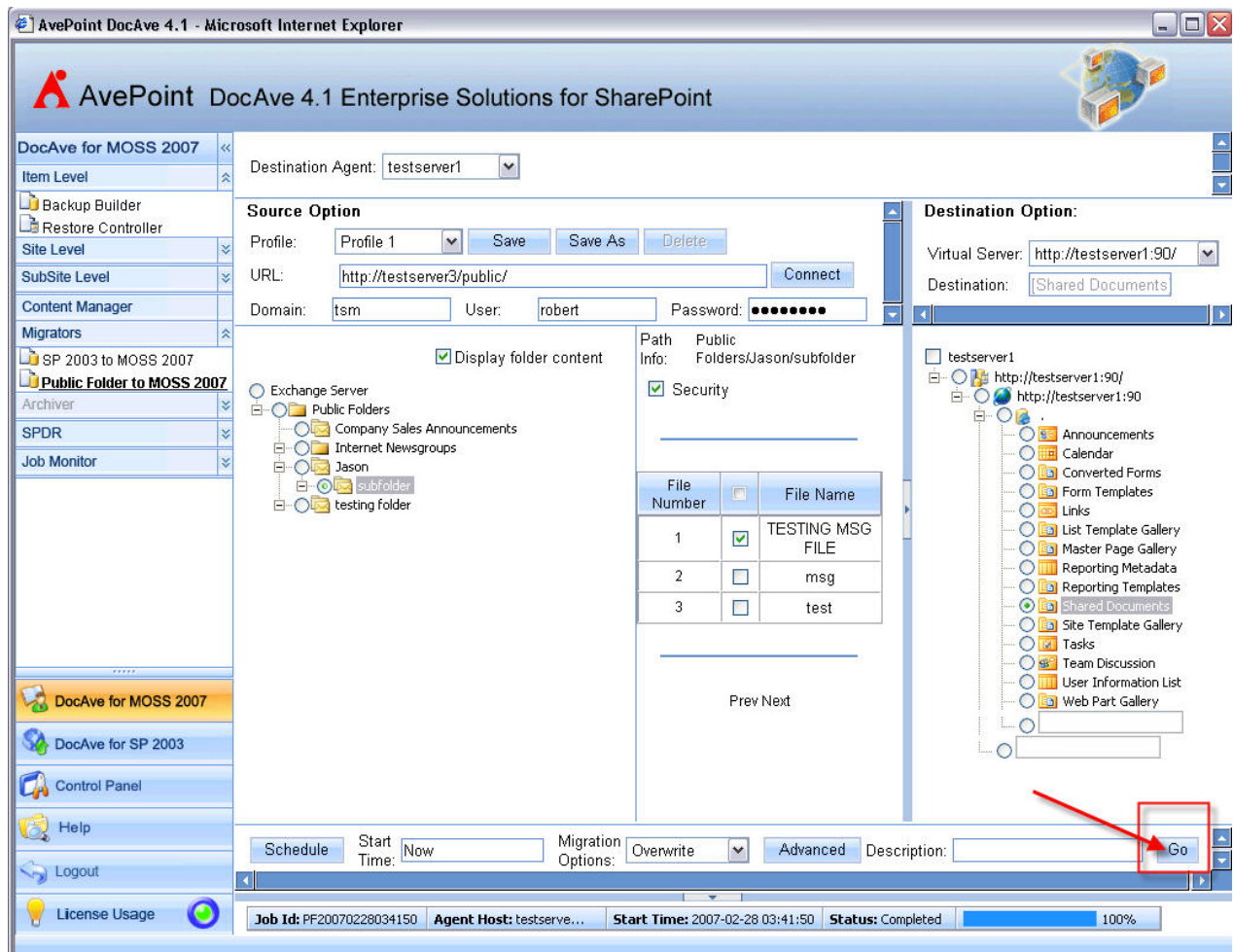


Figure 3.2.4 – Starting the Migration

5. Finally, on your SharePoint site you will see that the documents (folders) that were migrated. You can compare the source data on Outlook to the migrated data on SharePoint to verify.

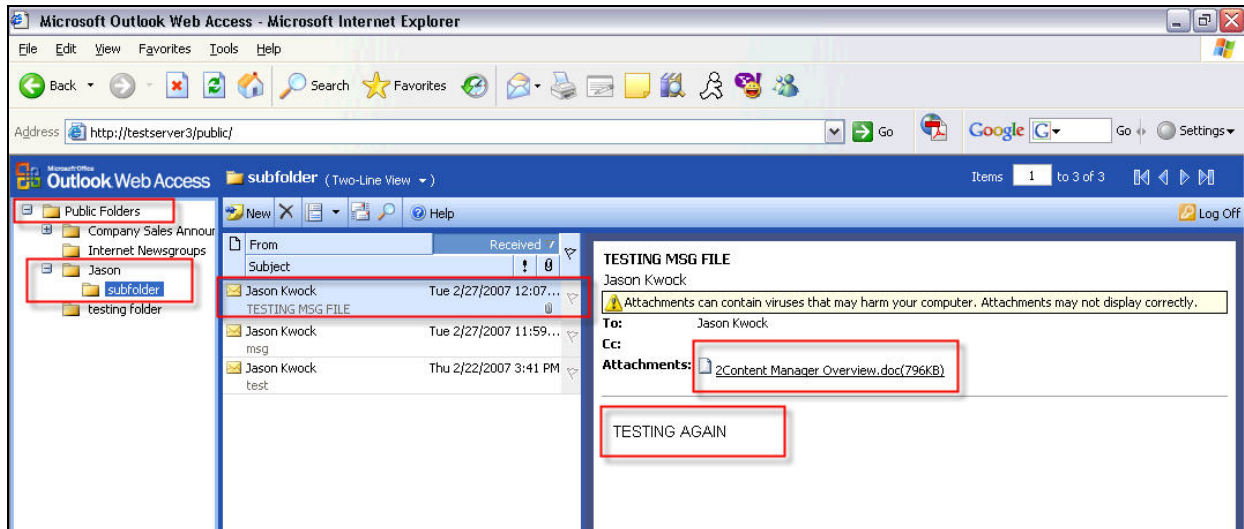


Figure 3.2.5 – Verifying Migration Success in Outlook

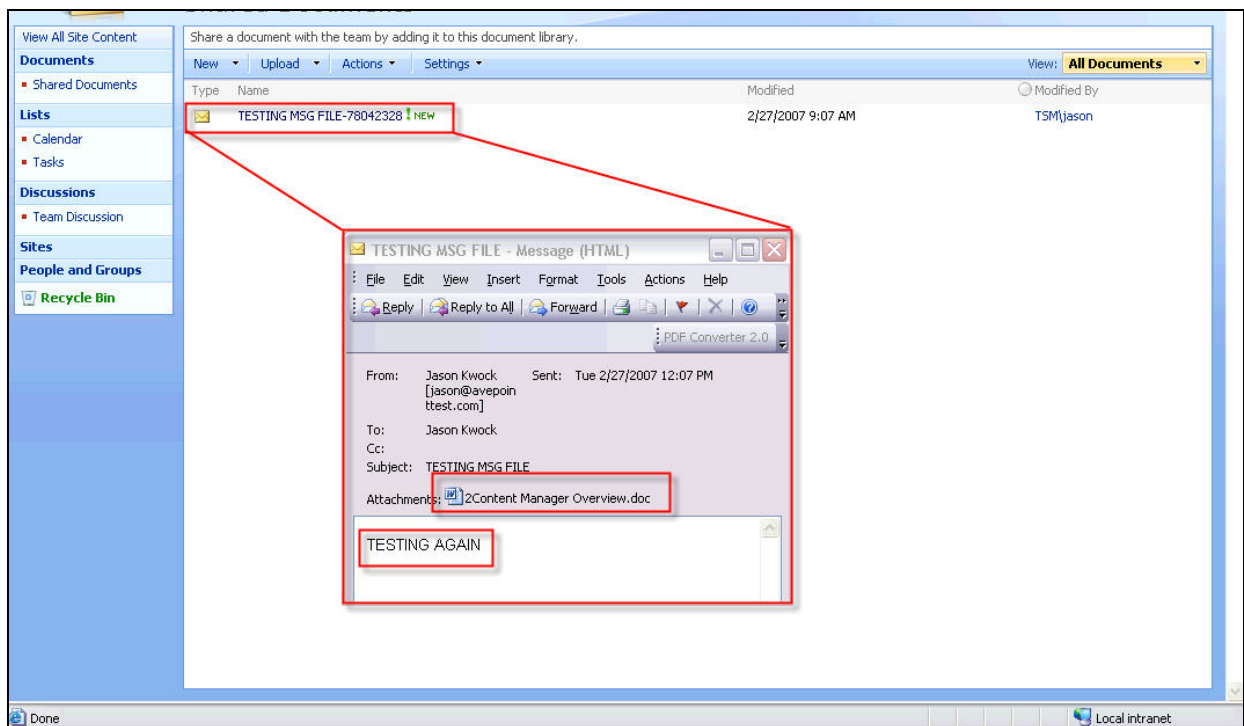


Figure 3.2.6 – Verifying Migration Success in Share Point

3.3 Other Migration Options

- Overwrite: if selected, the documents/items on the target SharePoint server will be overwritten if they are from the same Exchange source item. Otherwise, they will be skipped.
- Use Unicode MSG file: (Advanced option), if selected, the messages migrated to doclib will use Unicode MSG format. This will be useful if the environment has messages other than the default locale, but also keep in mind that only Outlook 2003 and above can read Unicode MSG format.
- Create root folder: (Advanced option), if selected, the source root folder will be created in target doclib or list.
- Enforce type compatibility check: (Advanced option, when target doclib / list is selected), when selected, all subfolders type will be checked before migration and report error if not-matching is found. Otherwise, migration will run and new doclib or list will be created for non-matching subfolders and link will be created in parent list to point to them.

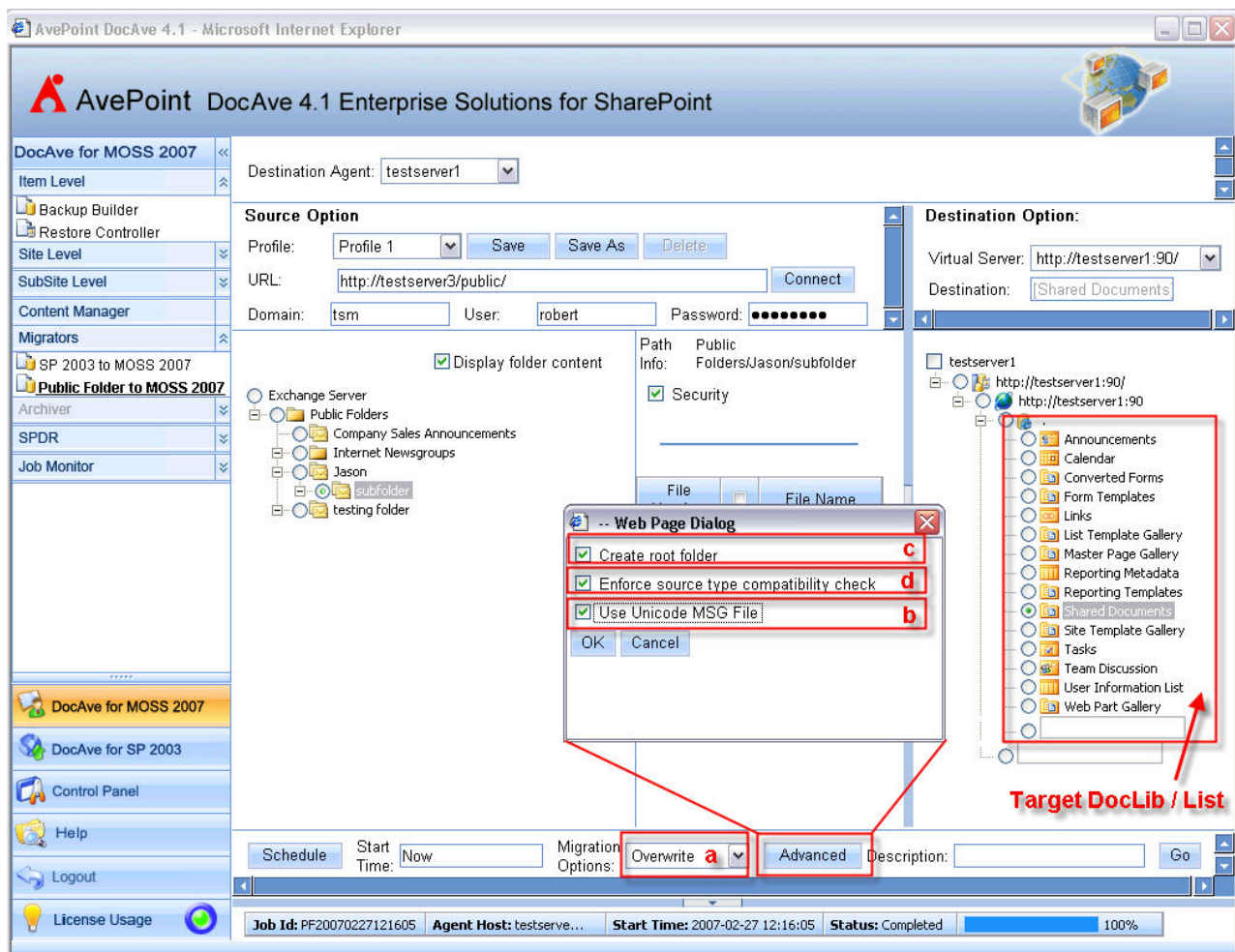


Figure 3.2.7 – Advanced Migration Options 1

- e. Treat level 1 folders as root: (Advanced option, when target sub-site is selected), when selected, level 1 folders will be treated as root folders so that new doclib or list will be created to migrate them. This is useful when moving one folder tree to a sub-site, like the “Branch” folder shown in the example.
- f. Use full path as name: (Advanced option, when target sub-site is selected), when selected, the target doclib / list name will use the full path of the source folder instead of its name, for example, “Branch>Public Contacts” will be used instead of “Public Contacts”. This will be helpful to show the original location of the folders. If the number of source folders are not large, this will solve the subfolder type compatibility issue mentioned above. Also, this option is mutually exclusive to the “create root folder” option.

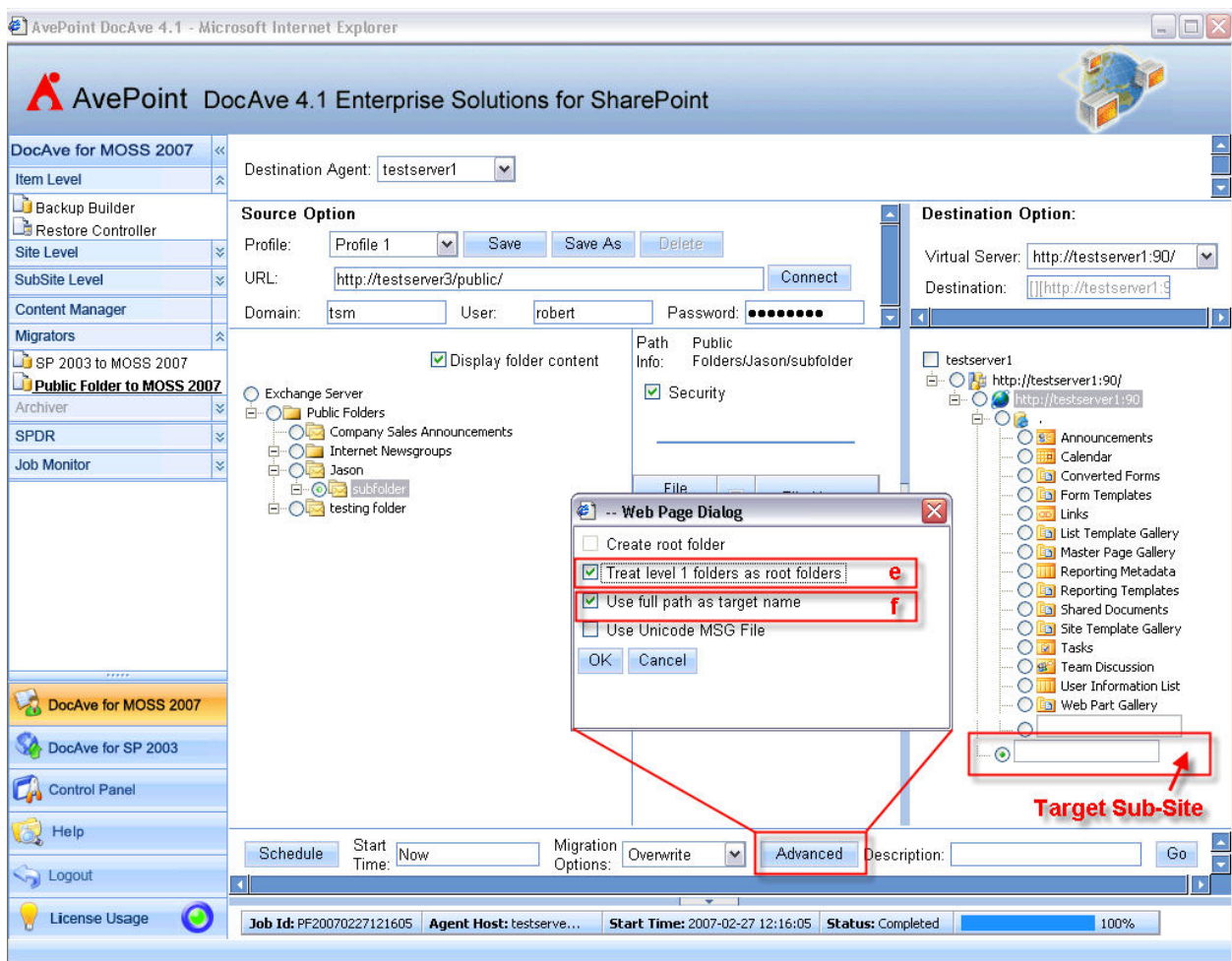
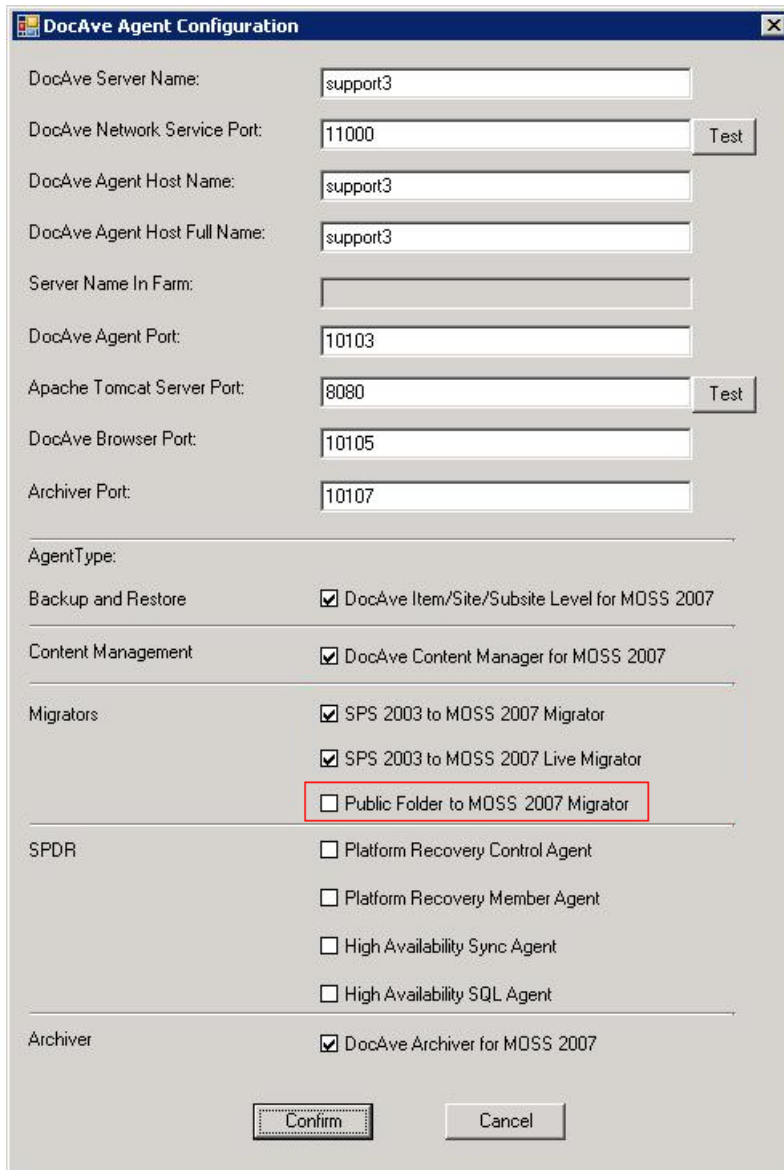


Figure 3.2.8 – Advanced Migration Options 2

4 Disabling Migrator

To disable Migrator the end user must proceed to disable it from the Agent configuration.



DocAve Agent Configuration

DocAve Server Name: support3

DocAve Network Service Port: 11000 Test

DocAve Agent Host Name: support3

DocAve Agent Host Full Name: support3

Server Name In Farm:

DocAve Agent Port: 10103

Apache Tomcat Server Port: 8080 Test

DocAve Browser Port: 10105

Archiver Port: 10107

Agent Type:

Backup and Restore DocAve Item/Site/Subsite Level for MOSS 2007

Content Management DocAve Content Manager for MOSS 2007

Migrators SPS 2003 to MOSS 2007 Migrator
 SPS 2003 to MOSS 2007 Live Migrator
 Public Folder to MOSS 2007 Migrator

SPDR Platform Recovery Control Agent
 Platform Recovery Member Agent
 High Availability Sync Agent
 High Availability SQL Agent

Archiver DocAve Archiver for MOSS 2007

Confirm Cancel

1. Proceed and log onto the server where the DocAve Agent is installed.
2. Then proceed to *Start*.
3. Then *All Programs*.
4. Now search for AvePoint *DocAve 4.1*.
5. Open up the *Client Configuration Tool*.
6. From this screen locate Migrator and uncheck the corresponding boxes.
7. This will disable Migrator.

Figure 4.1 – Disabling Migrator