



Xavor SharePoint 2010 Migrator

Premium Version – Overview



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Introduction

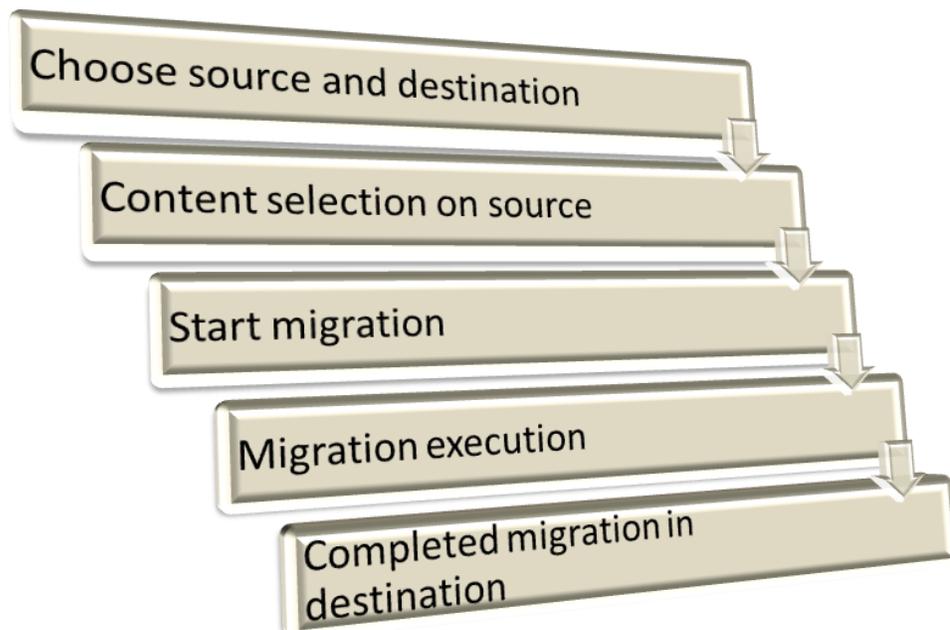
Xavor SharePoint 2010 Migration tool (XSPM) is built on-top of SharePoint Migration APIs using latest Microsoft technologies with extensible architecture to provide ease of use and definite results to satisfy migration needs. XSPM is a one stop solution to migrate unlimited data to and from following platforms:

- WSS 3.0 to WSS 3.0
- WSS 3.0 to MOSS 2007
- MOSS 2007 to MOSS 2007
- WSS 3.0 to SharePoint Foundation or SharePoint Server 2010
- MOSS 2007 to SharePoint Foundation or SharePoint Server 2010

XSPM tool is capable of restructuring or reorganizing SharePoint data or performing migration by simply drag-n-drop contents from source to destination. It even lets you schedule migration jobs and batch-up migration jobs at convenience. Besides this functionality, it even lets you to backup & restore or perform a file system based import or export operations, send site-wide notifications, manage site collections, lock sites or overview the implemented governance rules and a lot more with just a few clicks.

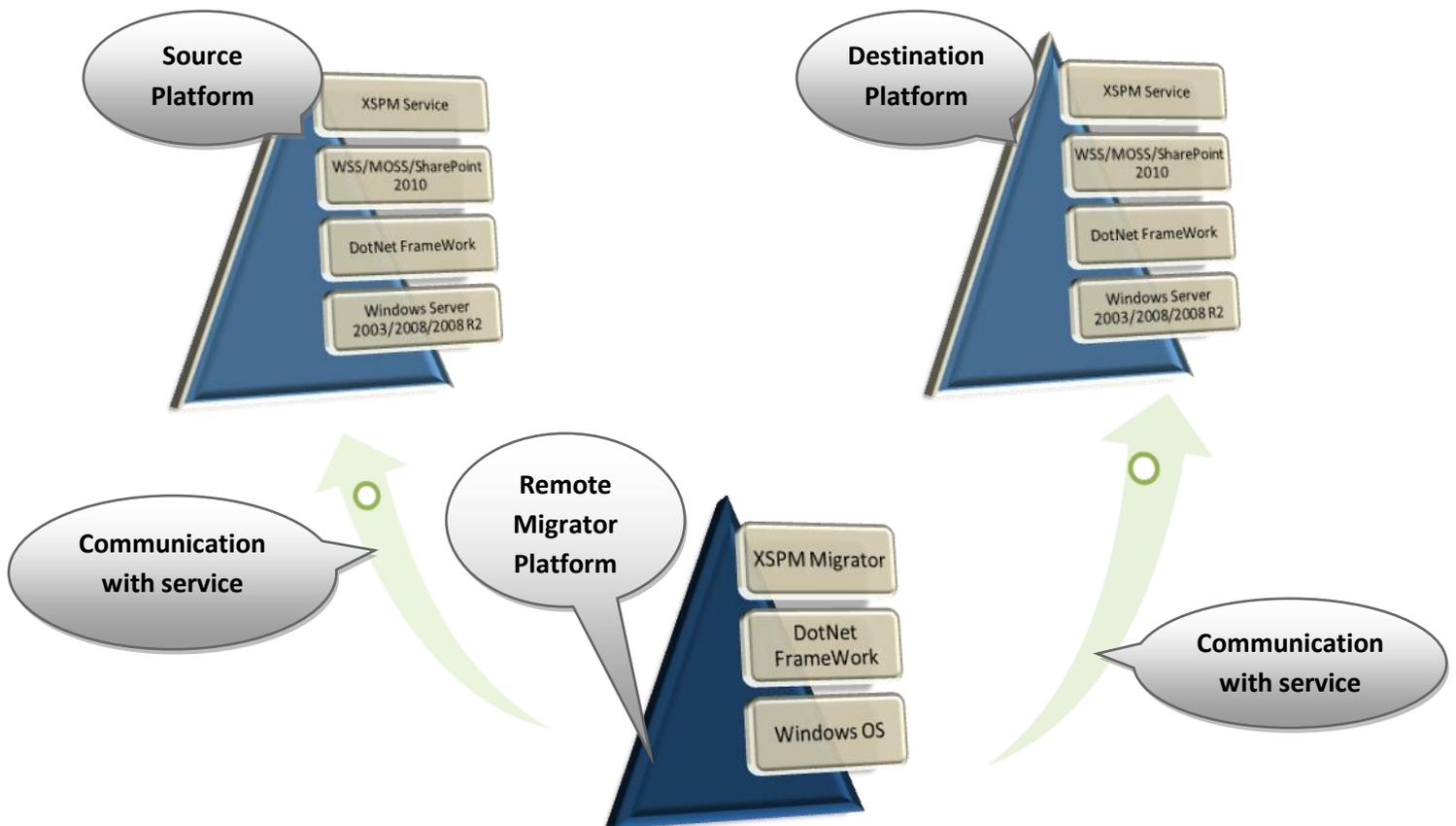
Migration Process

The following steps are involved in the migration process.



How Xavor SharePoint 2010 Migrator works

Xavor SharePoint 2010 Migrator acts as a black box to migrate all data including sites/lists/template and security to the target SharePoint environment. Refer to the figure below to see how these services interact with the client to perform migration and how the Migrator works.



NOTE:

The above diagram elaborates that XSPM client (front-end GUI) needs to be installed on any WFE in the Server farm. It is not necessary to install the XSPM client (front-end GUI) on either Source or Destination as it can work remotely but if need be then this can also be installed on these machines.

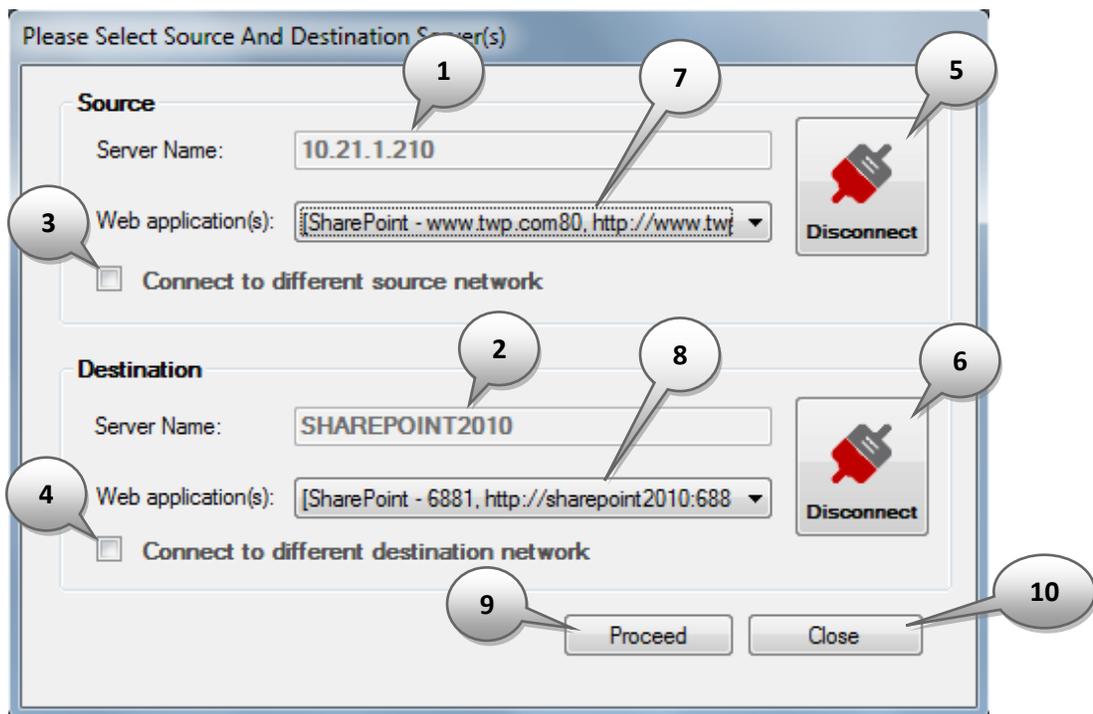
However, the XSPM extensions (back-end services) must be installed at the source and destination platforms with appropriate credentials/access rights (kindly use an account which has SharePoint Admin Rights, DB Admin Rights and Local Admin Rights, an ideal example for such account is the same account which is used for the SharePoint timer service).

1. Select the Source and Destination

When you start the application, a pop up window will open and will require the selection of web applications for establishing a connection between the servers. You must choose the Source and Destination Servers, and click “Connect” to proceed with connecting to specified servers.

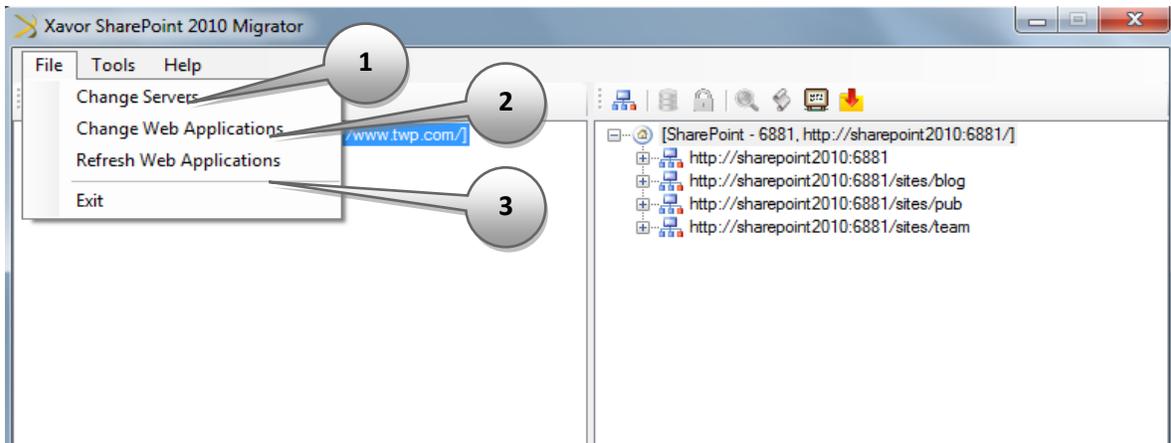
The step-by-step process is as follows:

- i. Enter the Source Server (SharePoint farm’s WFE name) – where the XSPM service is installed
- ii. Enter the Source Server (SharePoint farm’s WFE name) – where the XSPM service is installed
- iii. If you have more than one source domain networks available you can connect to a different source domain network by providing appropriate credentials
- iv. If you have more than one destination domain networks available you can connect to a different destination domain network by providing appropriate credentials
- v. Click to Connect/Disconnect Source server
- vi. Click to Connect/Disconnect Destination server
- vii. Select the Source Web Application from where the content is to be exported
- viii. Select the relevant Destination Web Application in which the content is to be imported
- ix. Once the above selections are made then click the “Proceed” button to proceed further
- x. Alternatively, click on the “Close” button to close the software without proceeding further



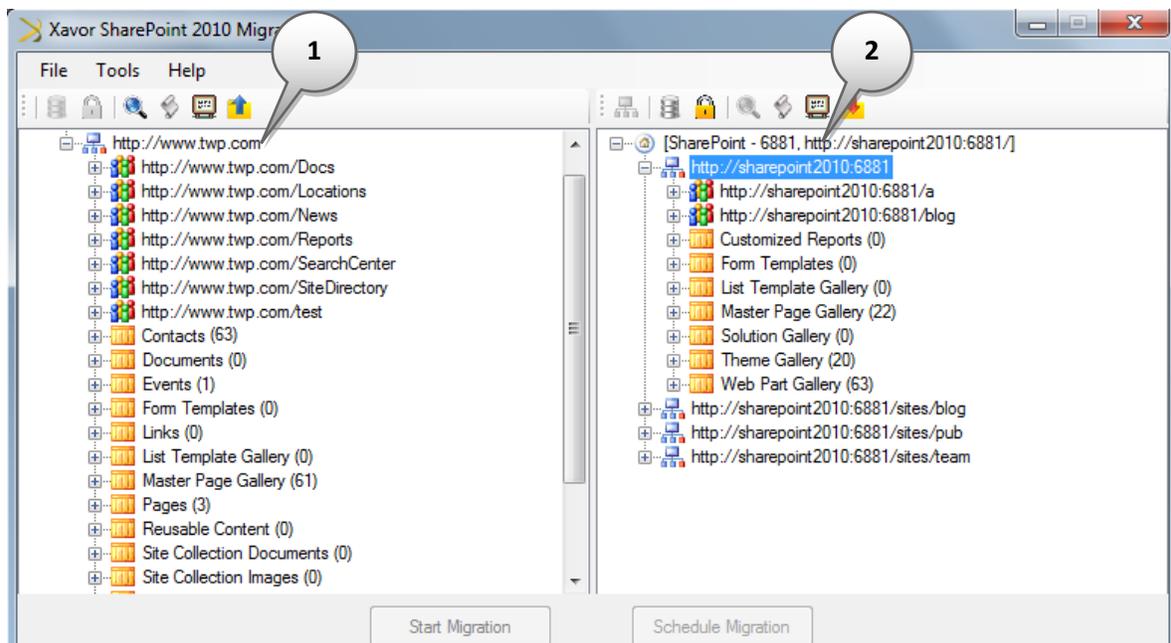
Once connected, you can also choose to change the Servers or Web Applications from the file menu.

- i. To change the selected Servers, click on “Change Servers” in file menu
- ii. To change selected Web Applications, click “Change Web Applications” in file menu
- iii. Click on “Refresh selected Web Applications” to see any items dragged to destination



2. Select the Content on Source

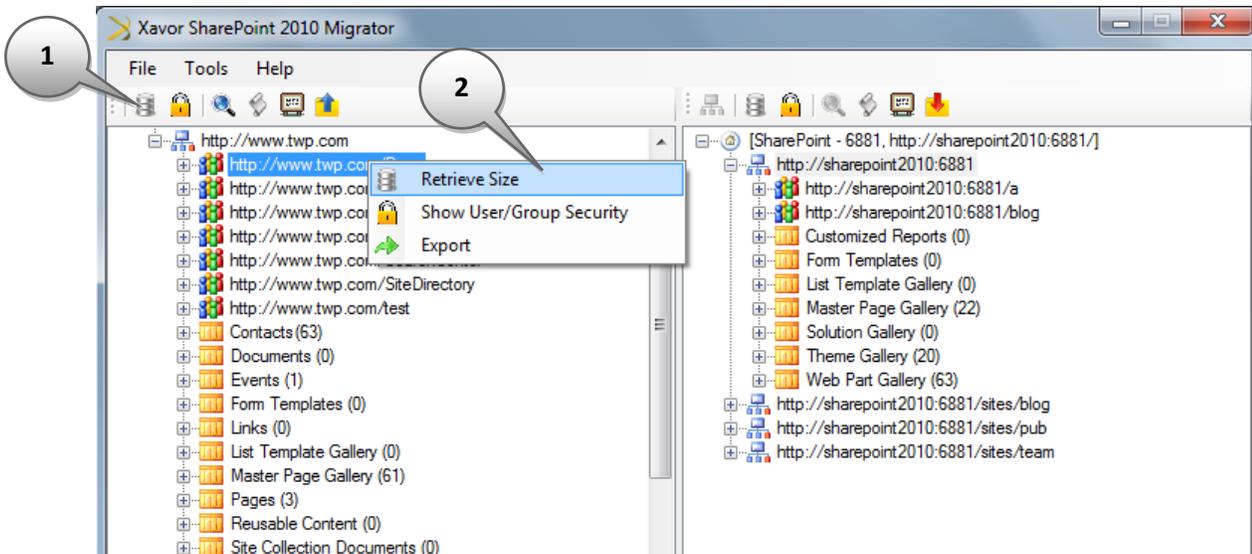
In this screen, the tool will show both the source and destination farm’s web applications hierarchy. The next step is to choose the site collection/site/web/list from source web application which is to be copied in destination web application. After selection click “Start Migration” button key to start the migration. You can also drag-n-drop site collection/site/web/list to migrate in batch mode.



Retrieve Size

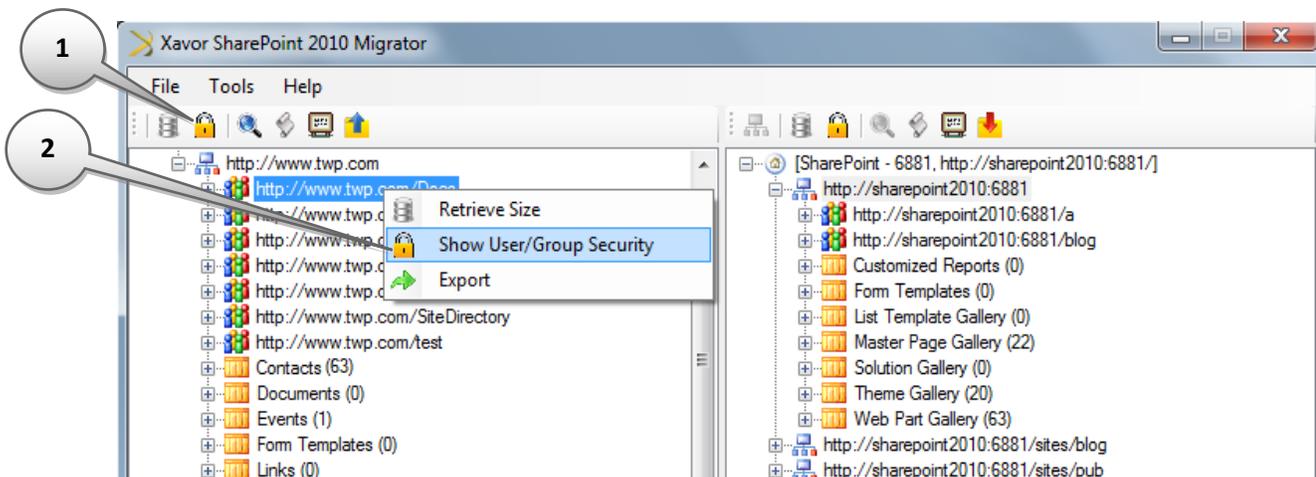
This feature calculates size of the object and of all its children. Retrieve size can be accessed by selecting item and then either clicking the disk icon or right clicking the item and then clicking “Retrieve Size”.

The processing may take some time depending on the speed of network and processing hardware and the data size or number of items within the site/web.



Show User/Group Security

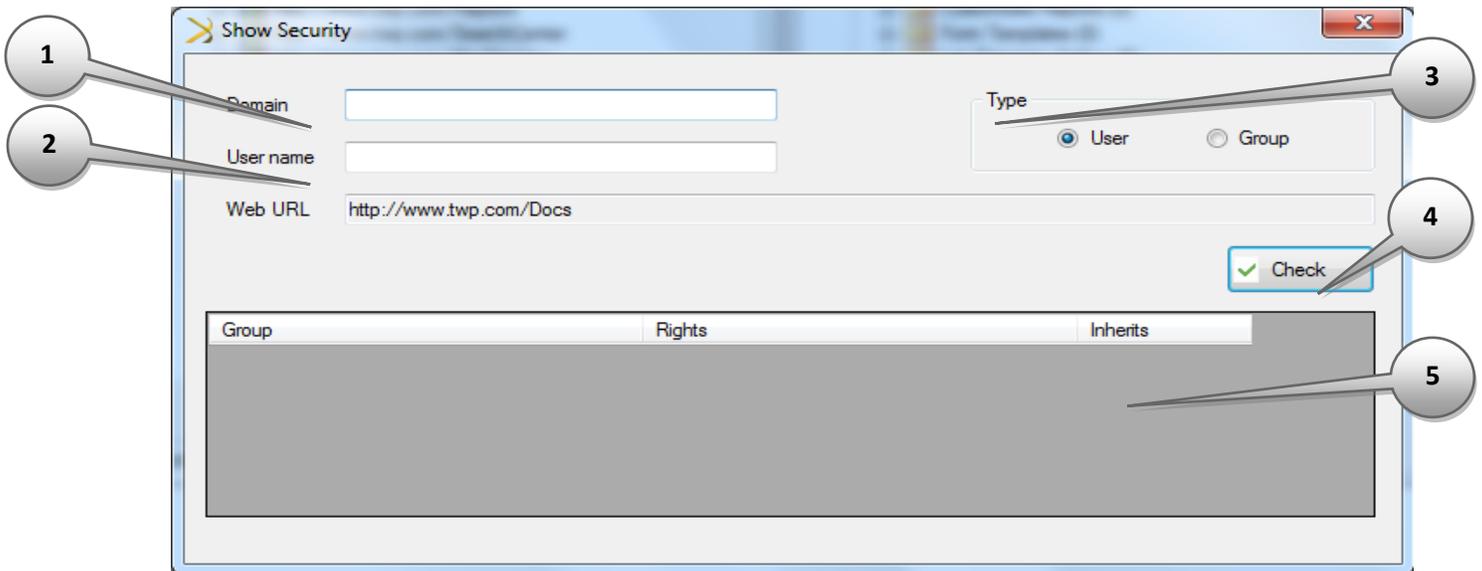
The User/Group security shows the rights of a user or group on the specified item. User/Group security can be accessed by selecting an item then either clicking lock icon or by right clicking the item and then clicking “Show User/Group Security”. The same method can also be applied at the destination server.



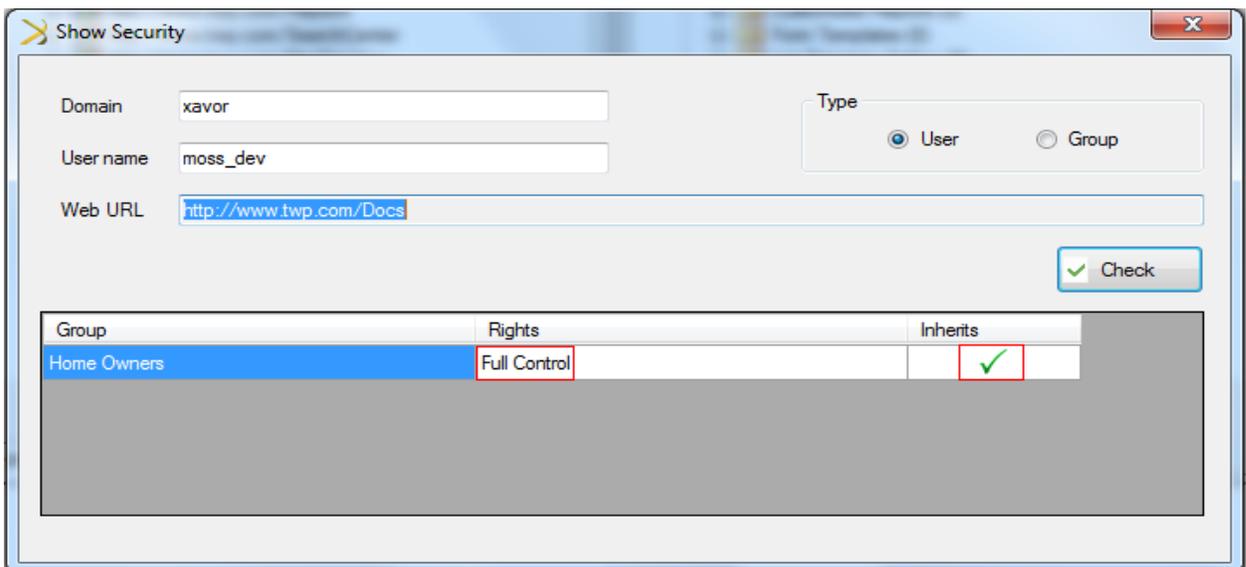
Once this option is clicked, the following pop-up window will display the following options:

- i. The domain on which the user exists
- ii. The Username you want to search
- iii. Select User or Group
- iv. Click to fetch rights
- v. Rights after fetching

After entering the above information, click “Check” button to fetch rights of selected item.

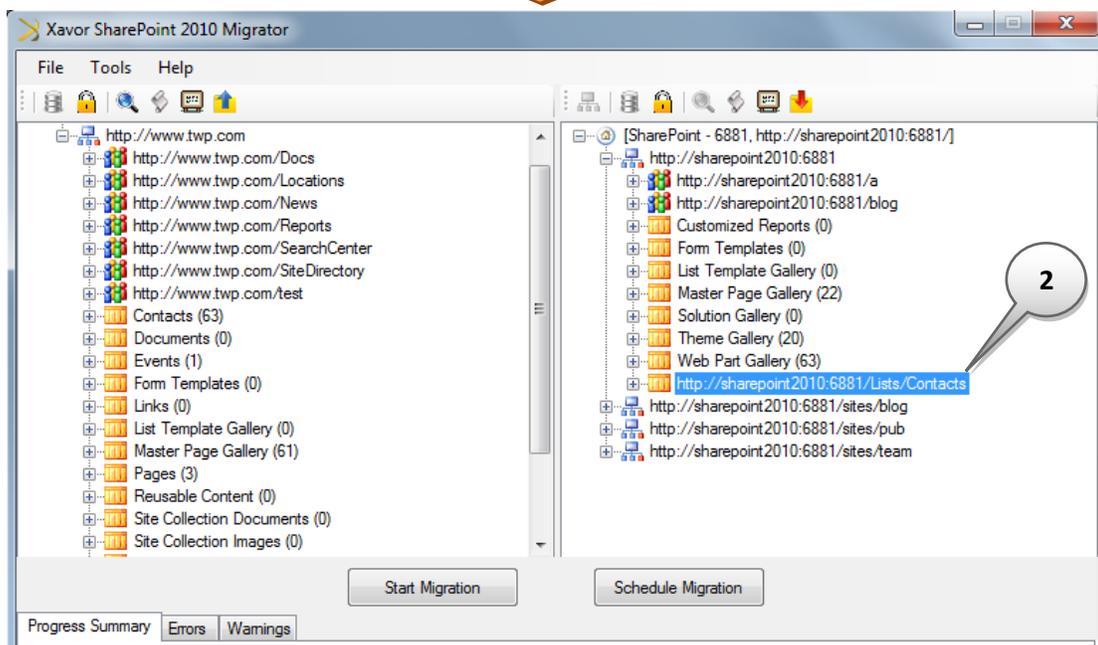
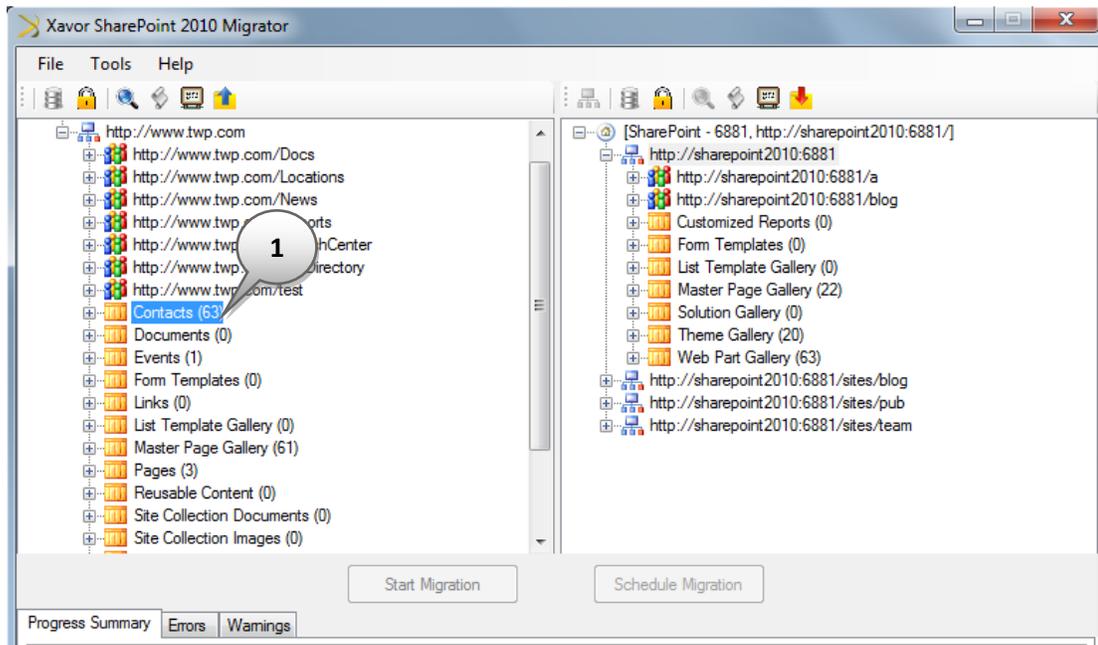


The below screen will appear showing rights fetched for the user *MOSS_DEV* on domain *XAVOR*. As you can see, the user belongs to group *Home Owners* and has *Full Control* on the selected item. The tick shows that the permissions are inherited from the parent.



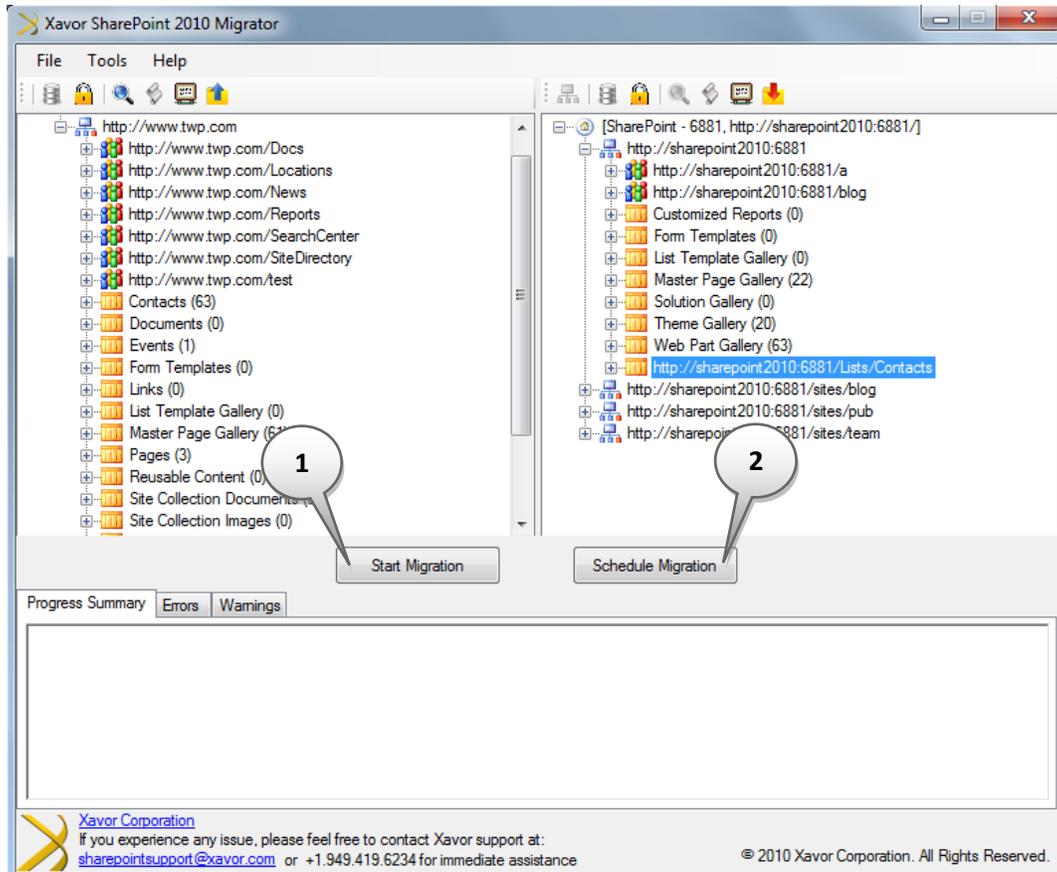
Quick overview of drag-n-drop method

- i. Selection the content/item from the Source and drag it to the destination
- ii. Drop the content that is to be copied at the destination SharePoint farm from the source web application to destination web application.



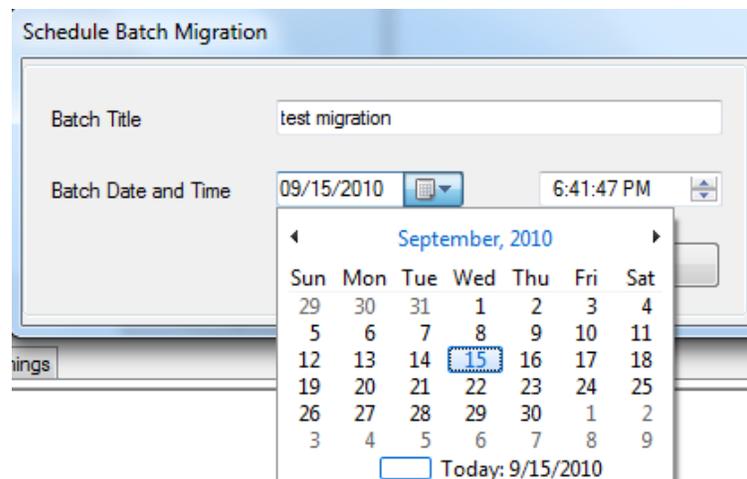
3. Start Migration

In order to start migration of the data, click the “Start Migration” button or “Schedule Migration”.



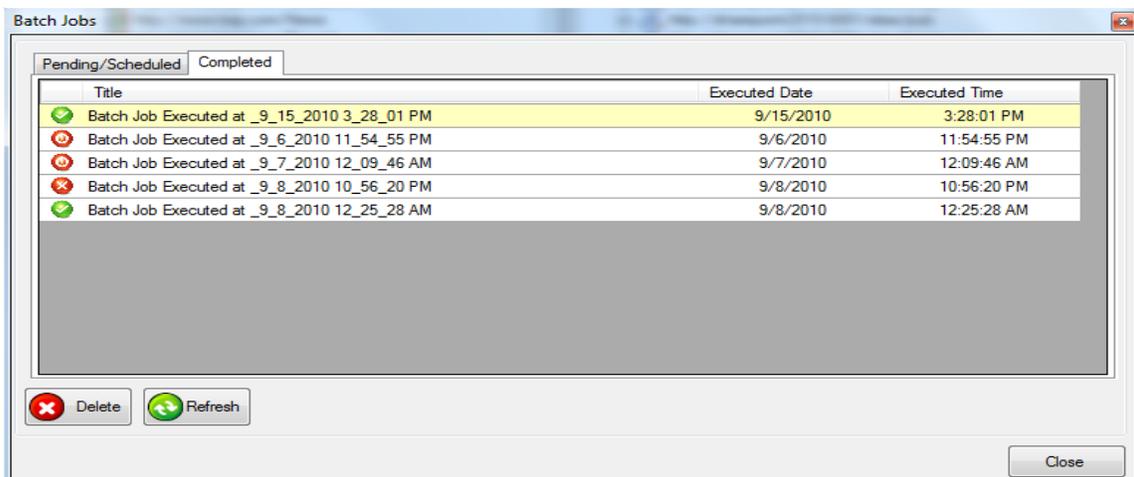
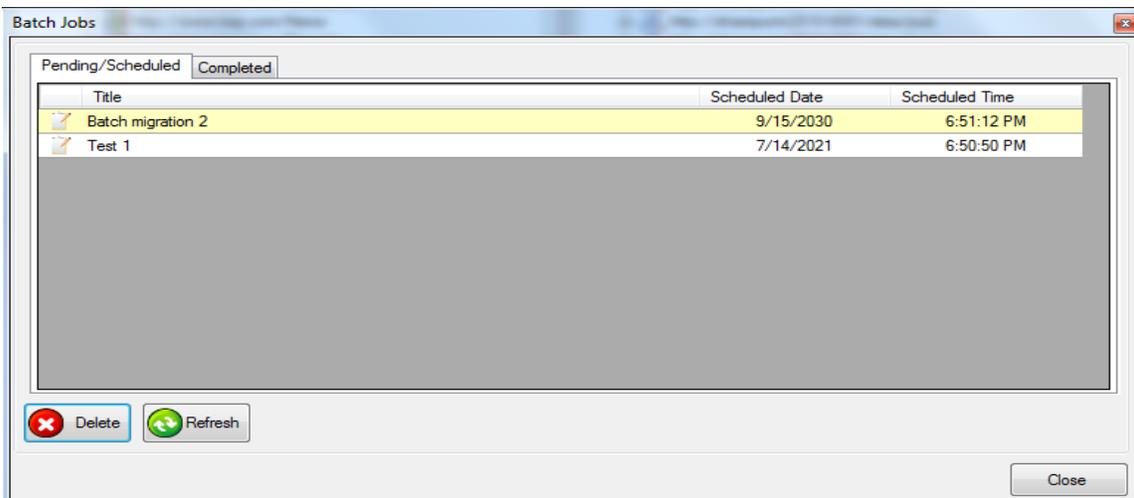
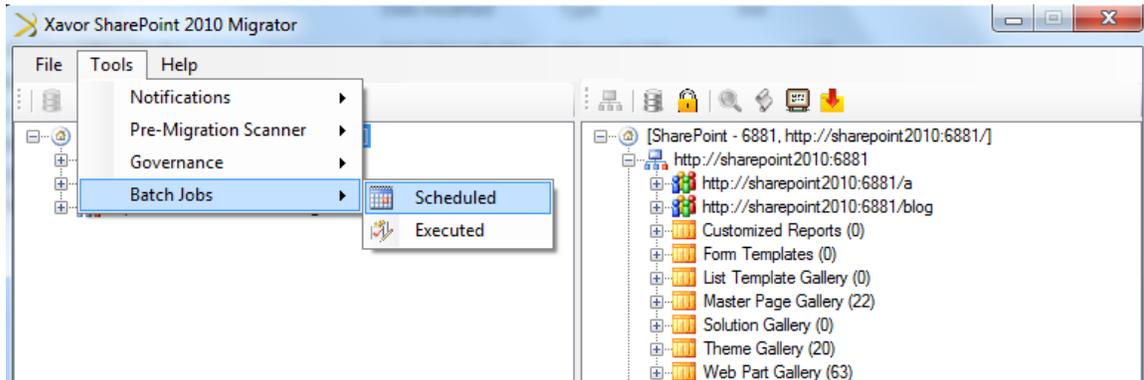
4. Schedule Migration

If you wish to Schedule Migration, then it would bring up a window as shown below.



5. Batch Migration Jobs

You can also select a Date and Time and press “OK” to schedule the Batch for migration. To view the batch tasks that are not yet performed and those that are completed; go to Tools menu, Batch Jobs and then “Scheduled” or “Executed” to see pending and completed jobs respectively.



6. Migration Execution

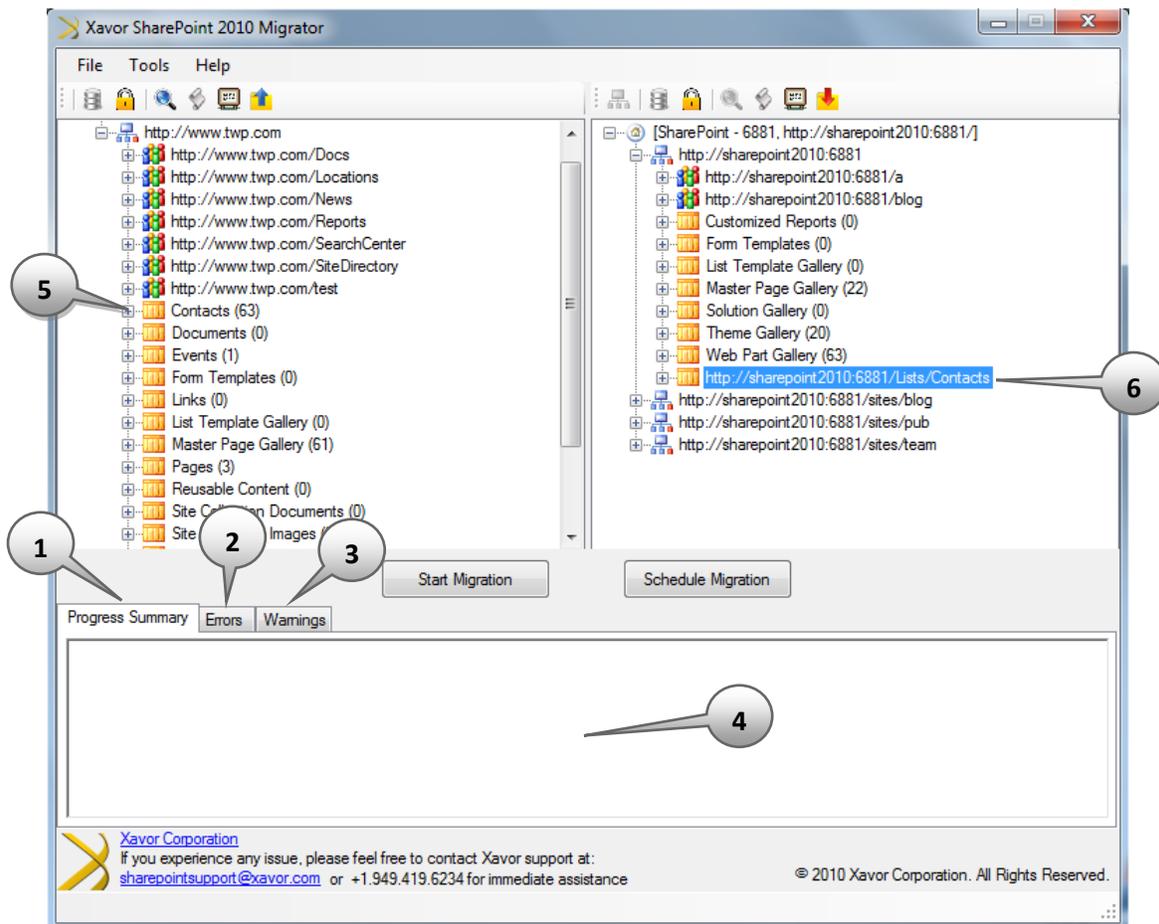
Following are the basic steps involved in the migration process.

- i. **Export data** to the source SharePoint farm.
- ii. **Copy data** from source to destination SharePoint farm
- iii. **Import data** to destination SharePoint farm

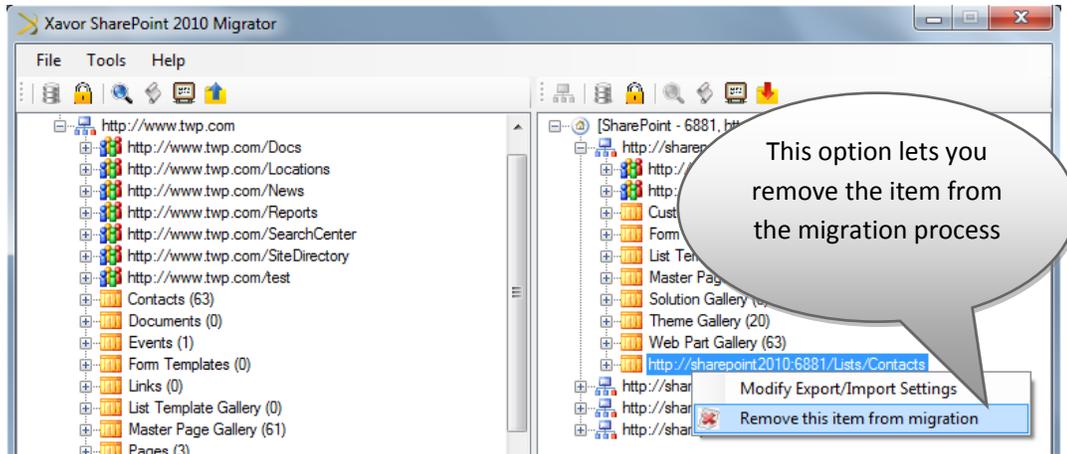
Depending on the speed of network, the processing hardware, data size and the number of items, the migration process will take its time and the data is copied to the destination SharePoint farm.

In order to explain the main screen further, kindly take a note of the following:

- i. Progress summary – Displays the progress of the whole migration process
- ii. Errors—Show possible errors in the process
- iii. Warnings— any threat or warning is displayed in this tab
- iv. Current action of migration process is displayed here
- v. Source site/list that we want to migrate
- vi. List that is placed in the destination web application

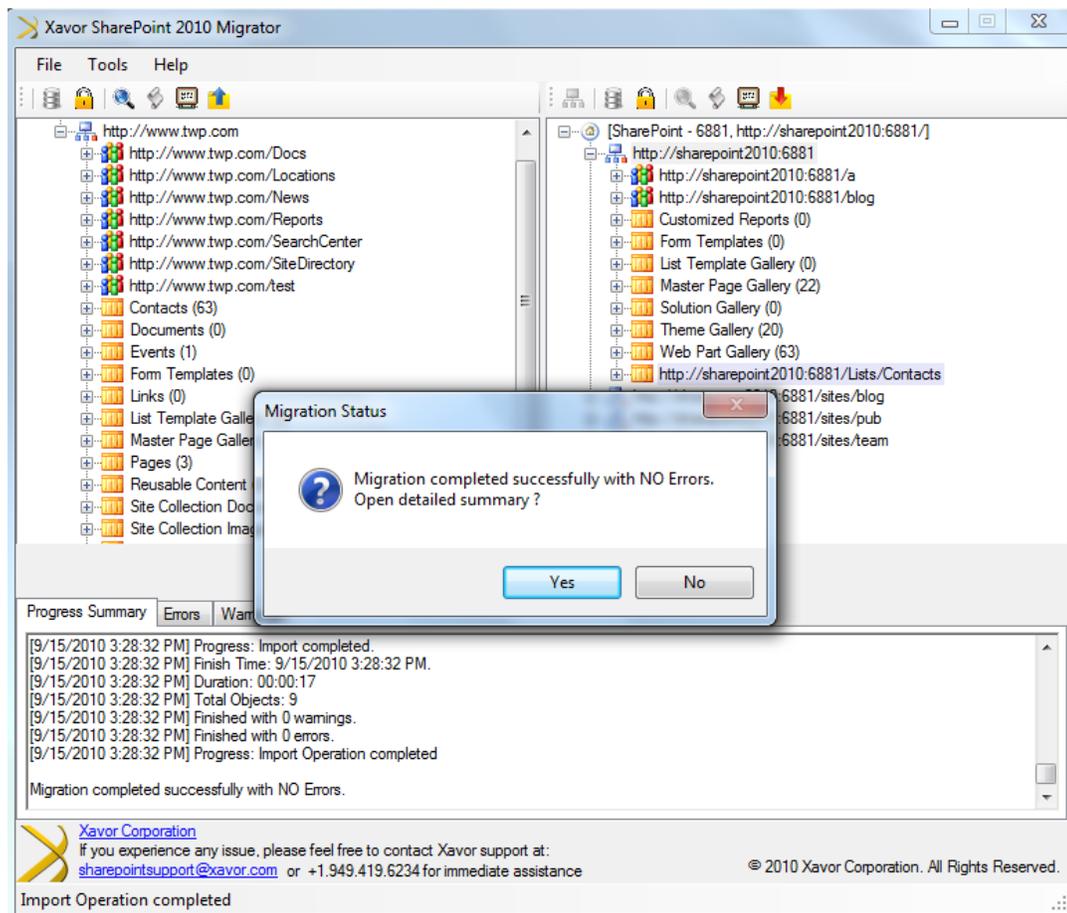


If the migration process is not initiated then you can also choose to remove the list that was placed in destination web application by right clicking on it and select “Remove this item from migration.”



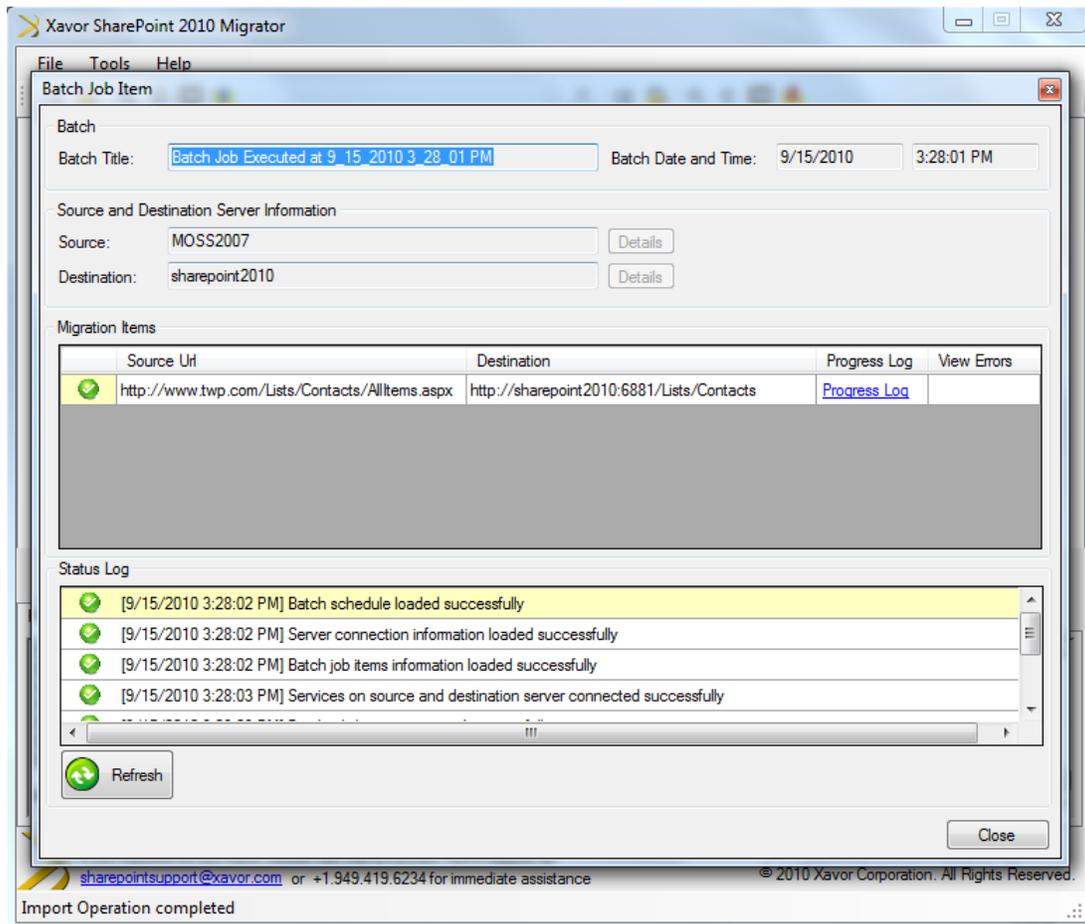
7. Completed Migration

The following screenshot shows that the migration has been completed successfully.

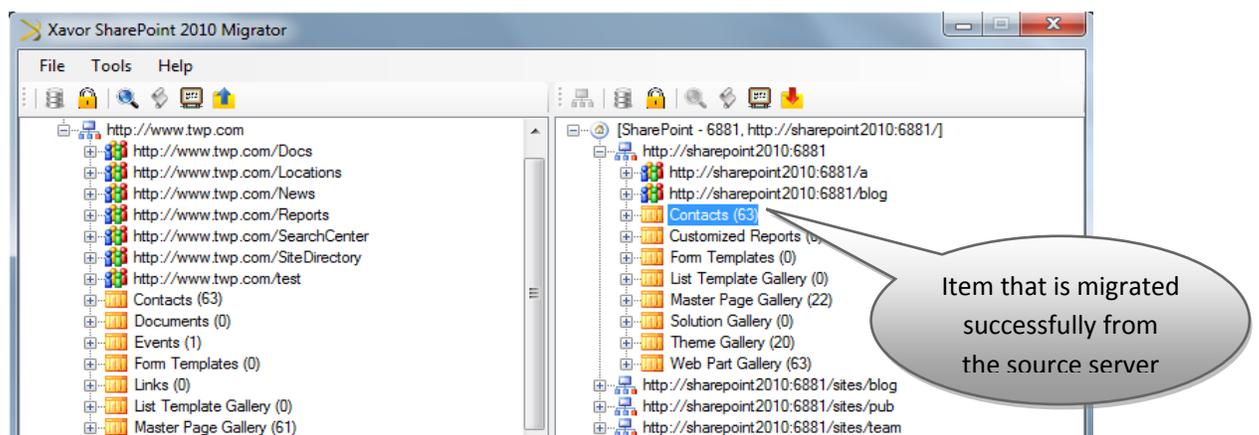


8. Post-Migration Report

The following screenshot shows the detailed post-migration report. The name of the batch and the start and end time; Source and Destination server names and Microsoft Progress Log.

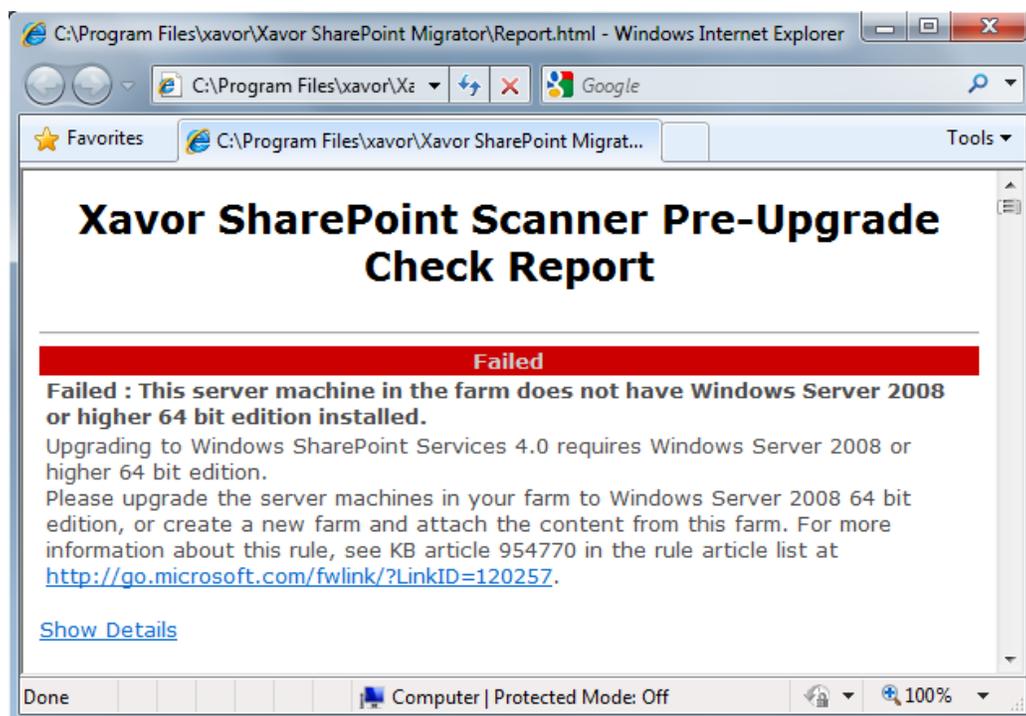
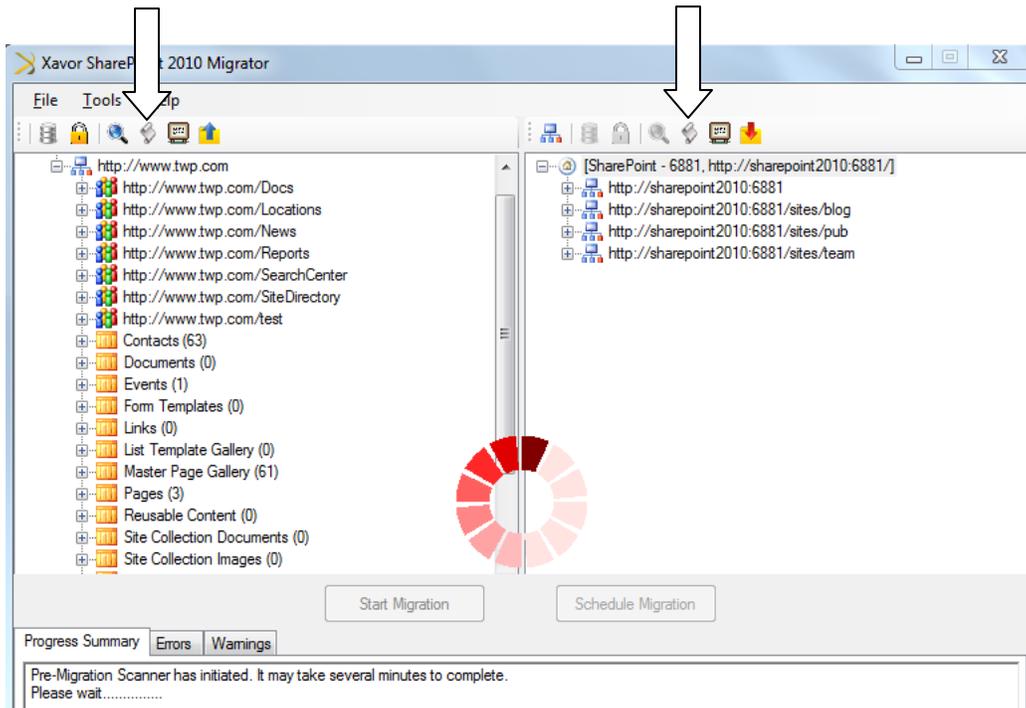


Once the migration process is complete, the migrator will show the item that was migrated in the destination server with the same number of contents.



9. Pre-Migration Scanning

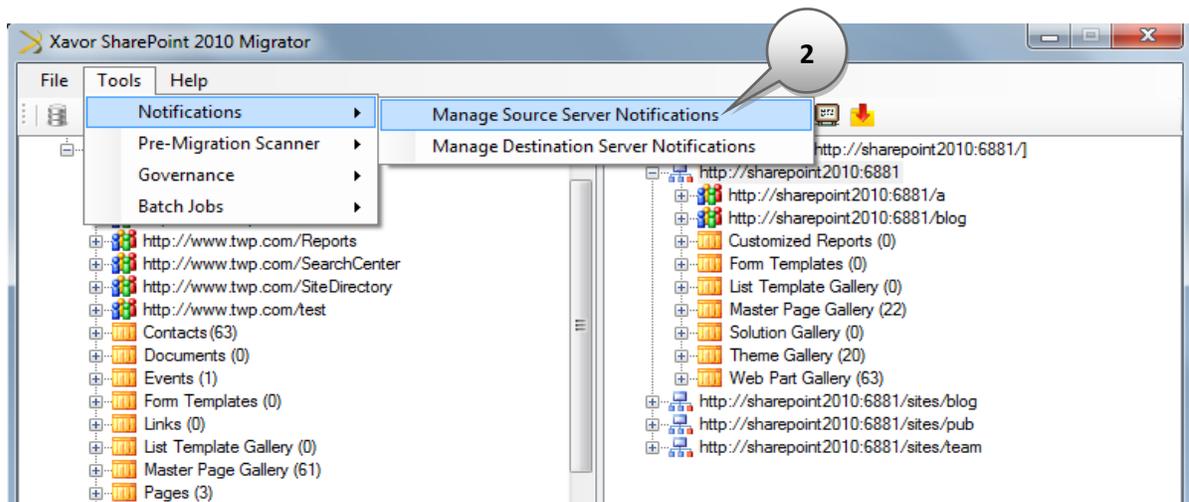
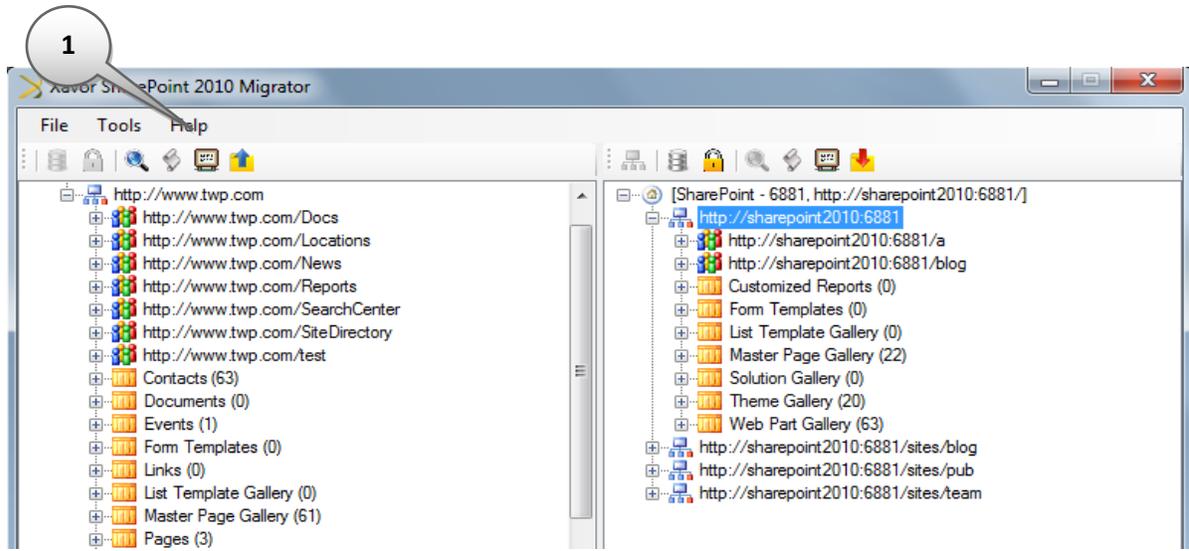
The Pre-Migration scanning feature generates a detailed report which contains valuable information which helps you understand the SharePoint environment prior to upgrading to a newer SharePoint environment. It indicates possible challenges and forms the basis of upgrade and migration strategy.



10. Manage Server Notifications

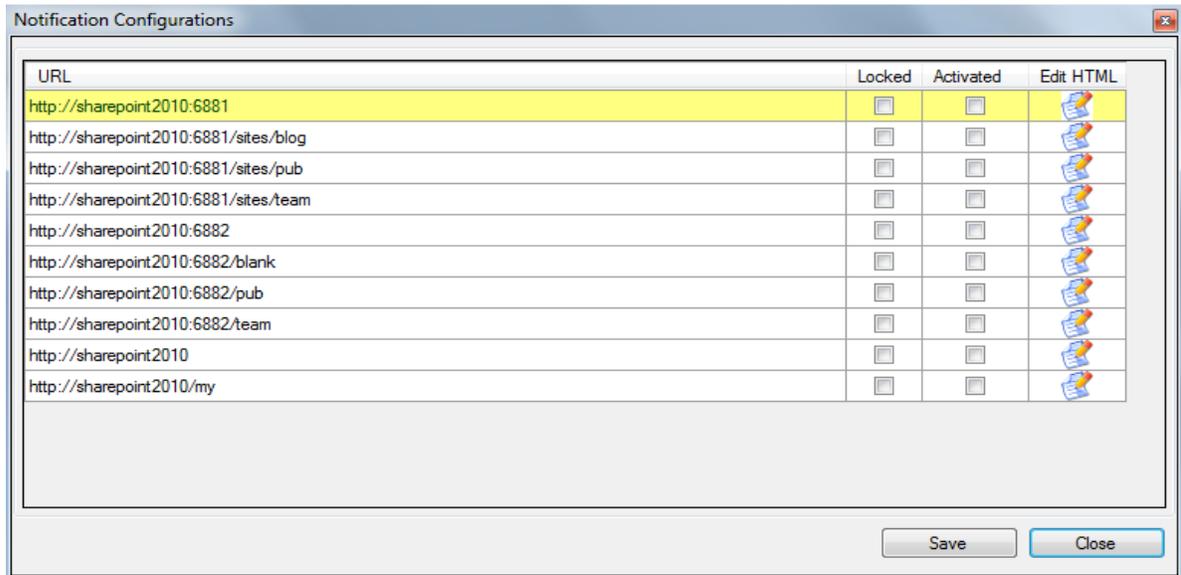
Manage Server Notification feature allows users to post notification on the Web application. It also allows the users to lock the site collection, so that changes to the site collection can be disabled. Re-enabling changes to the site collection would require unlocking through the same process.

You can click either on the Notifications icon or access this feature from the tools menu.

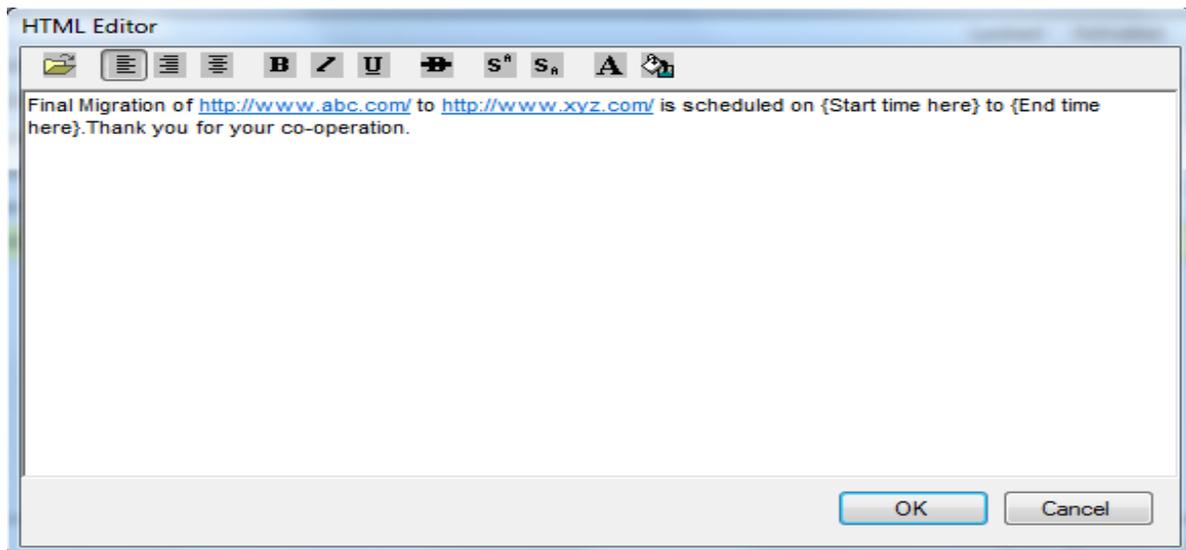


Clicking on the notifications will open a new screen displaying four columns. The first column shows the URL path of the Site Collection. Through the locking option, you can disable any updates by anyone to the respective site collection, until it is unlocked using the same feature.

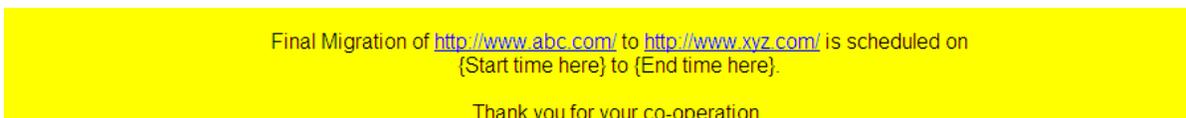
The Edit HTML column opens a rich text editor for editing notification as shown in the screen below:



The HTML editor can open HTML documents and lets you perform the basic Text Editing operations. For instance, you can align text, format it, add superscripts or subscripts, change size or color of text. The checkbox in Activated column activates the notification and the notification written in the HTML Editor is showed on respective web application as shown in following screenshot of a HTML page.

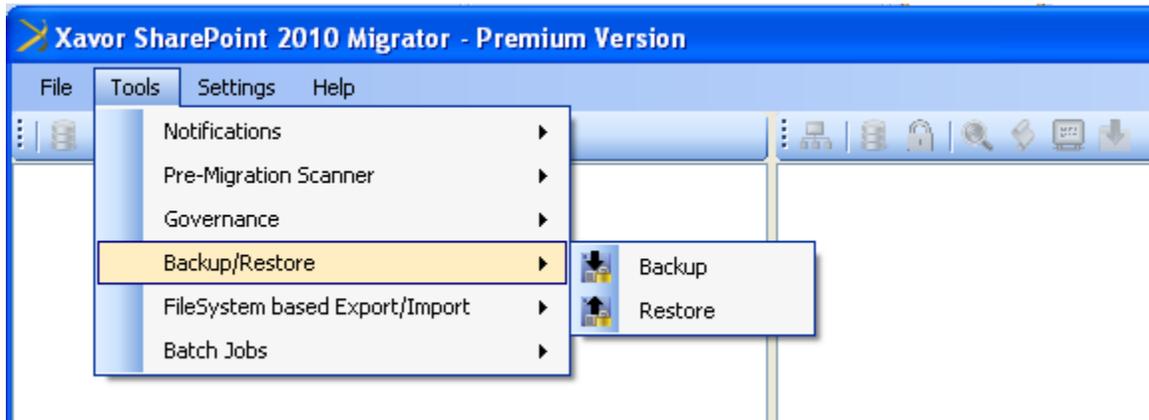


The drafted message will be displayed on specified site collections in the following manner:



11. Backup/Restore or Import/Export

Backup & Restore feature can be accessed from the “Tools” menu and then click on the “Backup” option, and when you wish to restore then click on “Restore” option from the tool menu.

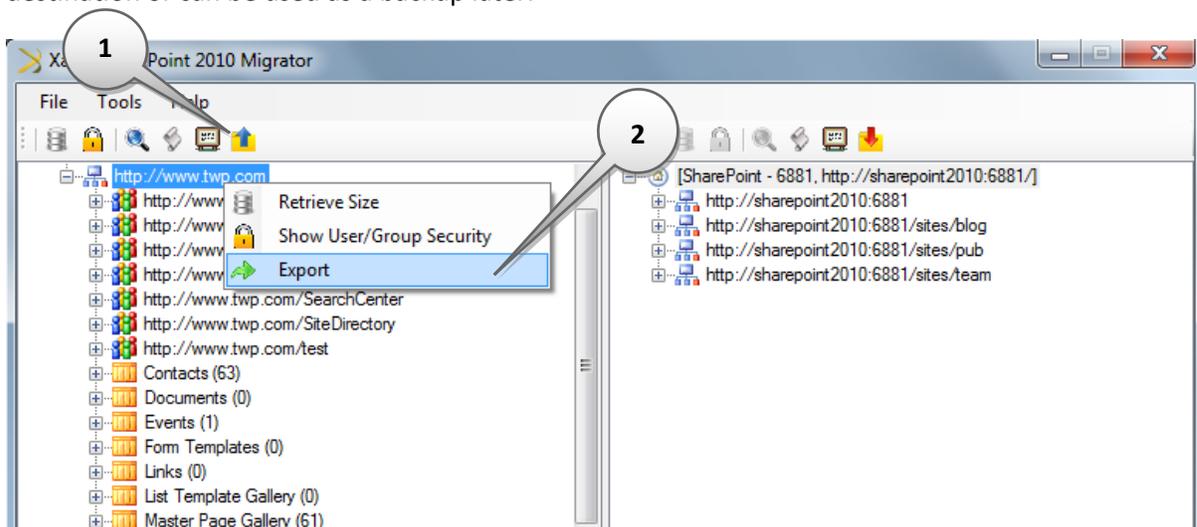


The Backup & Restore features works similarly to the Import/Export features. The selected content is exported on file system based format to the specified folder which can be referred as checkpoint.

Export Feature

The Source Export feature allows the user to export the SharePoint content to disk. When clicked, it opens the folder selection dialog. The user selects the folder and the folder becomes the default folder for exporting items.

When the user right clicks on the item and clicks *Export*, a new folder with a unique name is created and the item is exported to the folder. The export content can be physically transferred to the destination or can be used as a backup later.



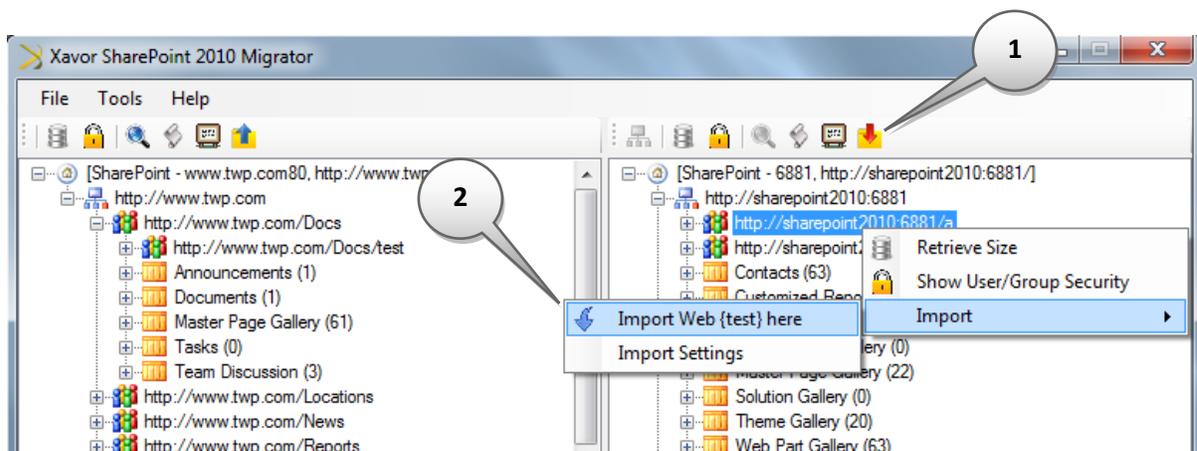
Import Feature

For importing the data, click on “Set Import Folder “icon and a folder selection dialogue will appears. Once the folder containing valid Exported SharePoint content is selected (the content that had been exported earlier using the Source Export feature), you will see additional right click context menu item “Import” for import under appropriate parent only.

You can import items based on the following hierarchy:

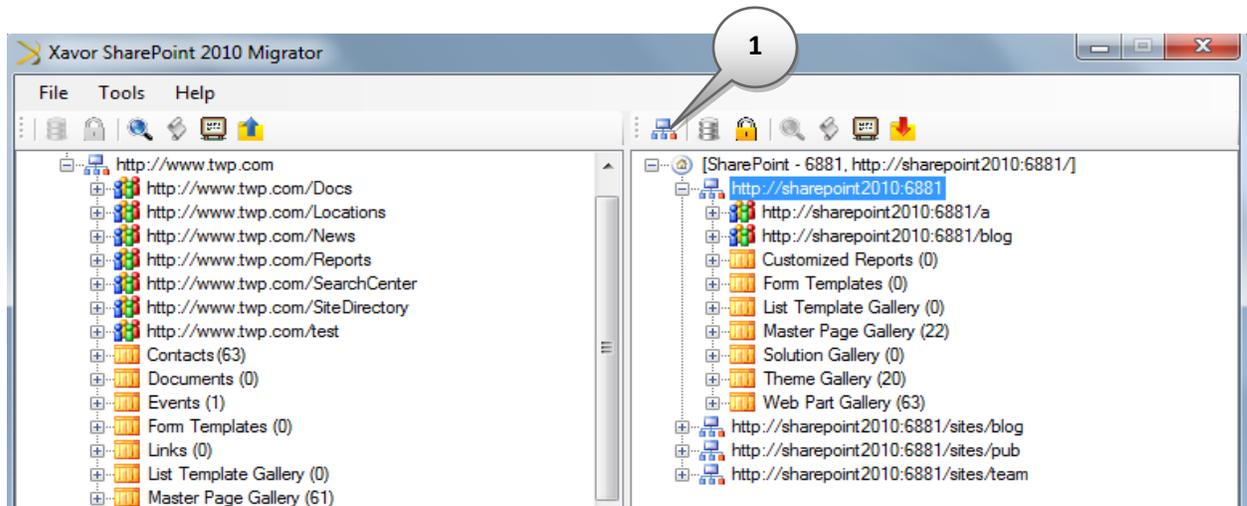
Selected SharePoint Content	Appropriate Parent
Site Collection	Site Collection Web
Web	Site Collection Web
List	Site Collection Web
Item	List

This feature can also be used to restore the backup of SharePoint content. When you right click on the item and then click “Import”, the item is imported from the folder into the Web Application.



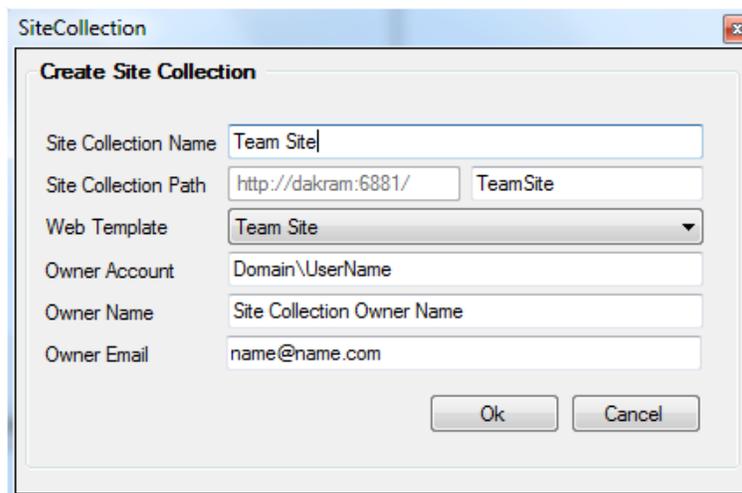
12. Managing Site Collections

New Site Collections can be easily created by clicking on “Create” Site Collection icon. This option is only available at the destination server if the Web Application is selected.



Upon clicking the icon, the following window will appear.

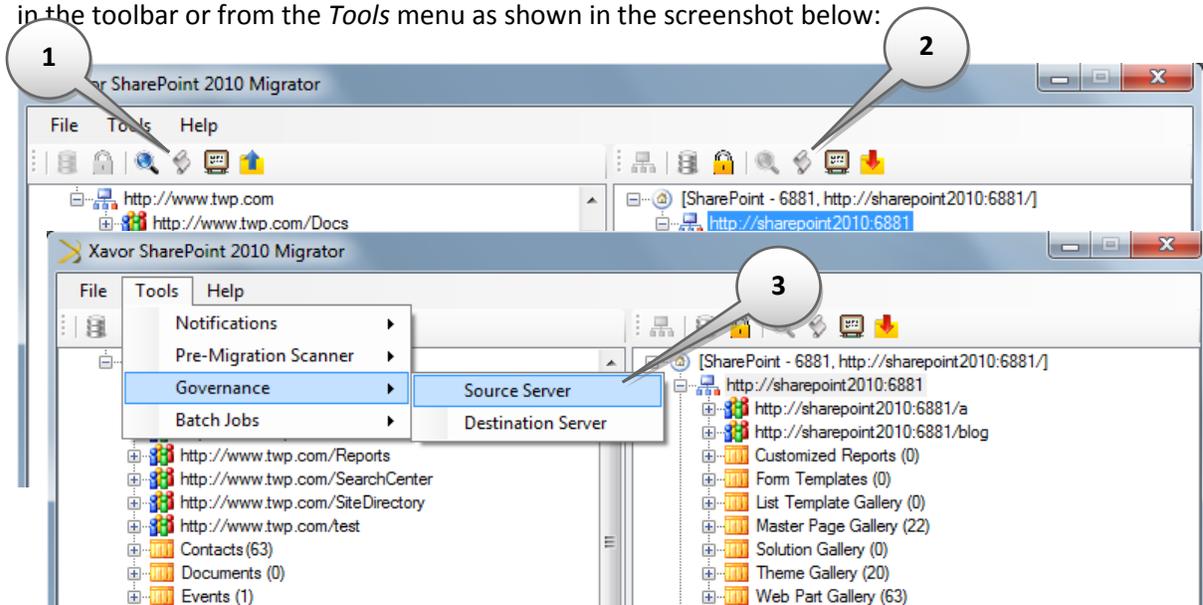
Kindly provide the name of site collection and select the type of site collection from Web template e.g. a team site. Also, provide your account information, name and email address for creating a site collection. After entering the information required, Press “OK” to proceed further.



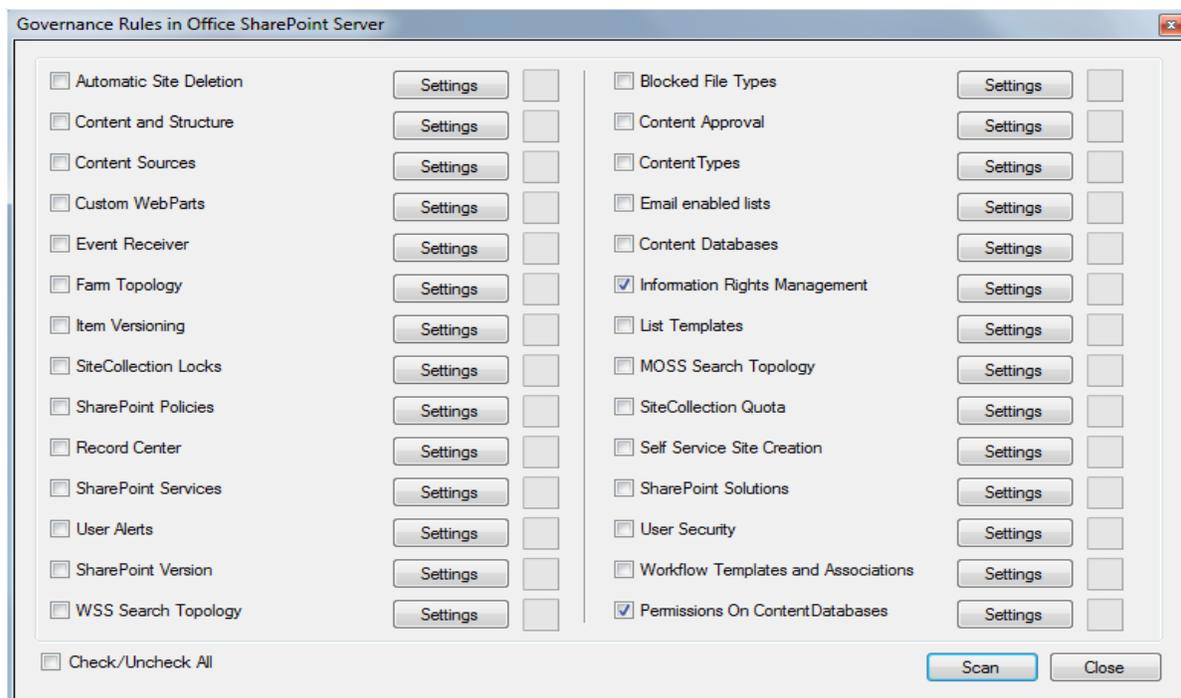
This option also lets you modify or delete an existing site collection in the similar manner.

13. Governance Rules

The governance feature can be used to help govern your Office SharePoint Server 2007 IT service, or your enterprise’s information architecture. This feature provides policies and guidelines that make the content of Web Application in Microsoft Office SharePoint Server 2007 both manageable for IT and also effective as a business tool. Governance Rules can be accessed from Governance Rules icon in the toolbar or from the *Tools* menu as shown in the screenshot below:



Selecting the Governance rules and upon making the selection, click on the “Scan” button.



The descriptions of these rules are as follows:

- **Automatic Site Deletion**
This rule shows the names of Site collections on which the Automatic site deletion option is enabled.
- **Blocked File Types**
This rule shows the file types that are blocked on the Web Application(s).
- **Content and Structure**
This rule shows an overview of content & structure of Farm, Web Application, Site Collection or List.
- **Content Approval**
This rule shows whether the content approval is enabled on the List or Lists in Web, Site Collections, Web Application or Farm or not.
- **Content Sources**
This rule shows the start addresses (URLs) in the Content Source(s).
- **Content Types**
This rule shows an overview of the Content Types in Web or List, and where they are used.
- **Custom Web Parts**
This rule shows if Custom Web Parts are present and places they are used.
- **Email enabled lists**
This rule shows which Lists are email enabled and their respective email alias.
- **Event Receiver**
This rule shows if there are any custom Event Receivers and where are they attached.
- **Content Databases**
This rule shows information about Content Database, its size and free space on drive it is residing.
- **Farm Topology**
This rule shows an overview of the Farm Topology.
- **Information Rights Management**
This rule shows the SharePoint Library on which Information Rights Management is enabled.
- **Item Versioning**
This rule shows whether versioning is enabled on a SharePoint List/Library or not.

-
- **List Templates**
This rule shows a listing of List Templates on Site Collection.
 - **Site Collection Locks**
The rule shows information of locks applied on Site Collection(s).
 - **MOSS Search Topology**
The rule shows an overview of the MOSS Search Topology.
 - **SharePoint Policies**
This rule shows the policies applied on Site Collection or Content Types.
 - **Site Collection Quota**
This rule shows a listing of Quota templates and a list of Site Collection(s) with quota limits.
 - **Record Center**
This rule shows a listing of Record Centers and their respective rules.
 - **Self Service Site Creation**
This rule shows if Self-Service Site Creation is enabled on Web Application(s).
 - **SharePoint Services**
This rule shows a list of services running on local server.
 - **SharePoint Solutions**
This rule shows a list of solutions deployed on SharePoint Farm.
 - **User Alerts**
This rule shows a listing of user alerts.
 - **User Security**
The rule shows the rights of the specified user on Site, Web, List or Item.
 - **SharePoint Version**
This rule shows the version of the SharePoint installed on the specified Server.
 - **Workflow Templates and Associations**
This rule shows a listing of Workflows and their associations.
 - **WSS Search Topology**
This rule shows an overview of the WSS Search Topology.
 - **Permissions on Content Databases**
This rule shows the rights of account provided to Xavor SharePoint Extensions on Databases.

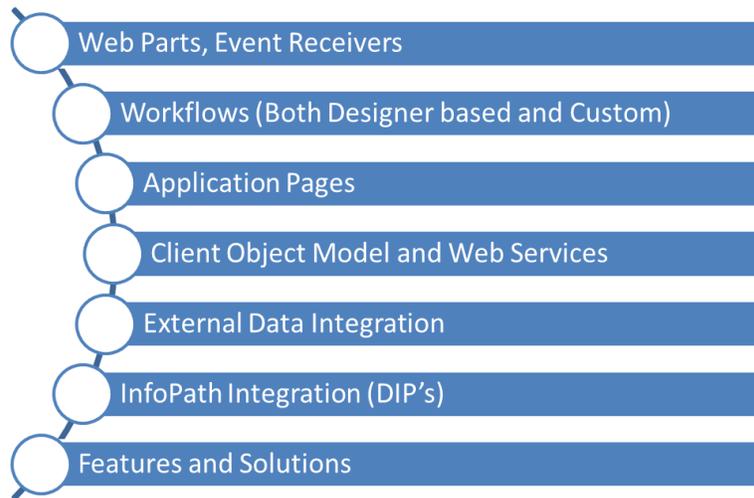
14. Migration Features Summary

- Pre-Migration Scanning
- Schedule Migration Operations
- Batch Migration Operations
- Managing Server Notification
- Backup & Restore
- Import or Export
- Managing Site Collections
- Governance Rules
- **Content & Permission Migration**
 - ✓ Migrate All List Types
 - ✓ Migrate SharePoint Site Collections
 - ✓ Migrate SharePoint MySites
 - ✓ Migrate SharePoint Sites
 - ✓ Migrate SharePoint Blogs
 - ✓ Migrate SharePoint Wikis and Enterprise Wikis
 - ✓ Migrate SharePoint Publishing Sites
 - ✓ Migrate SharePoint Meeting Workspaces
 - ✓ Migrate SharePoint Recurring Meeting Workspaces
 - ✓ Migrate SharePoint Multi-Tab Meeting Workspaces
 - ✓ Selecting Content Database for Migration Target
 - ✓ Migrate SharePoint OOTB Lists
 - ✓ Migrate SharePoint Lists with Versions
 - ✓ Migrate SharePoint Document Libraries with Versions
 - ✓ Migrate SharePoint Form Libraries
 - ✓ Migrate SharePoint Issue Lists
 - ✓ Migrate SharePoint Surveys
 - ✓ Migrate SharePoint Discussion Boards
 - ✓ Migrate SharePoint Calendars and Events
 - ✓ Migrate SharePoint Link Lists
 - ✓ Migrate SharePoint Image Libraries

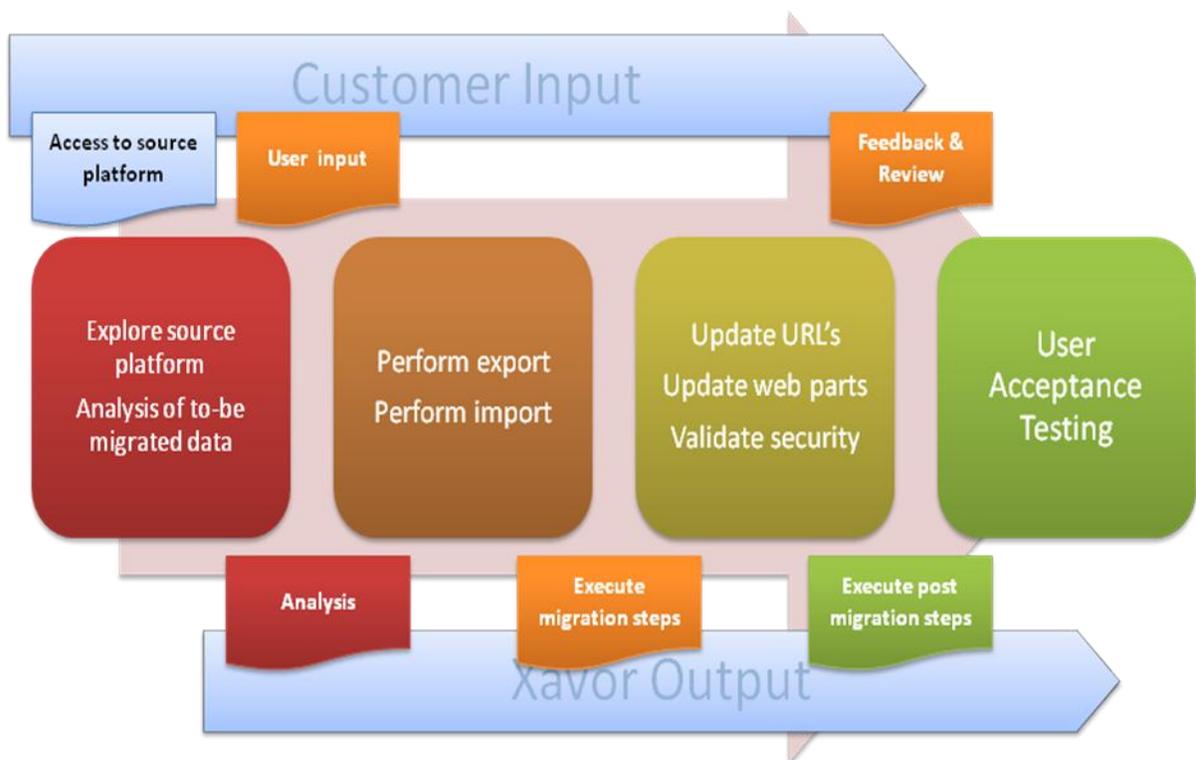
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- ✓ Migrate SharePoint Custom Lists
 - ✓ Migrate SharePoint Folders
 - ✓ Migrate SharePoint Sub-Folders
 - ✓ Migrate SharePoint Items
 - ✓ Restructure or Reorganize SharePoint Lists/Libraries
 - ✓ Migration Activity Logging
 - ✓ Metadata Migration (Authorship Columns)
 - ✓ Metadata Migration (Custom Metadata)
 - ✓ Copy Master Page Gallery
 - ✓ Migrating Using Custom Templates
 - ✓ OOTB Web Part Migration
 - ✓ Web Part View Customization Migration
 - ✓ Publishing SharePoint Web Pages
 - ✓ Migrating Items with its Versioning
 - ✓ Navigation Copying (Global and Quick Launch)
 - ✓ Migrate Views
 - ✓ Migrate Item Level Permissions
 - ✓ Migrate Document Libraries
 - ✓ Migrate Look-up Fields/Lists
 - ✓ Preserve Document/Item IDs
 - ✓ Migrate in Batch
 - ✓ Permissions Copying for SharePoint Sites/Lists/Folder/Items
 - ✓ User Copying
 - ✓ Migrate Security/Security Groups from WSS 3.0, MOSS 2007 & SharePoint 2010
 - ✓ Migrate Groups
 - ✓ Allow Copying of Deleted Active Directory Users
 - ✓ Migration of Ghosted/Un-Ghosted Pages
 - ✓ Preserve Approval Status
 - ✓ Migration of Content Types
 - ✓ Updates Navigation URL's and links (Global and/or Quick launch) Automatically
 - ✓ Review Post Migration Report

15. Migrating Customizations

Xavor supports the concept of migrating customizations and the customized features in which users can personalize the migration jobs according to their specific needs and standards. Xavor also offers custom development services especially for SharePoint 2010, including but not limited to the following:



Following diagram enlightens how Xavor can help in migrating customized features and make this work in the newer SharePoint 2010 environments.



For details on migrating customizations and custom development, email us at sharepoint@xavor.com

16. Frequently Asked Questions

Q. I've installed XSPM Client. Do I have to install XSPM Extensions on source and destination servers?

A. Yes, the XSPM Extensions should be installed on both source and destination servers.

Q. I am unable to install XSPM extensions and the installation hangs after providing the credentials.

A. While installing the XSPM extensions on source and destination, please provide SharePoint installer service account on source or destination machines or use the same account under which SharePoint Timer Service is running. This account should've SharePoint Admin, DB Admin and Local Admin rights.

Q. I am unable to connect or see the sites in Migrator's screen. What should I do?

A. Kindly check that the firewall is disabled, and port 18989 is open for communication, and importantly the XSPM services are running with the appropriate access rights.

Q. Can we remotely perform migrations using XSPM tool?

A. Yes, XSPM architecture supports this and you can perform migration operations remotely.

Q. My source or destination server is on a different domain. How should I connect?

A. On the source or destination selection screen, click on the checkbox that says "connect to a different source/destination network" and provide appropriate credentials in this format "domain\user" and "password". Please ensure that the account that is used must have appropriate access rights.

Q. The "Start Migration" button is disabled. What should I do?

A. The "Start Migration" button remains disabled until you drag-n-drop item(s) from left (source) to right (destination) window. Once it is done then Click on "Start Migration" to perform migration.

Q. I am unable to drag-n-drop items from source to destination. How should I do it?

A. You must drop the selected items in a container on the destination site. The container is typically a site collection level whereby you can drop the items which were dragged from the source.

Q. How quickly the data is migrated from source server to the destination server?

A. It depends upon the size of the content and number of items which are to be migrated to destination web application. The smaller the size of the content the shorter will be the time span of migration.

If you feel that your query is not answered here, please feel free to email us at sharepoint@xavor.com or call the helpdesk on +1 949 419 6234.