

dSHIFT

dSHIFT Migrator for SharePoint 2013

Getting Started Guide v1.0

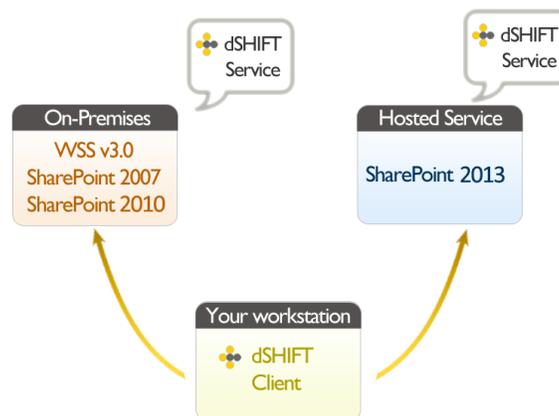
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Introduction

The dSHIFT Migrator is a one-stop solution to migrate data to SharePoint 2013. The dSHIFT Migrator is also capable of restructuring and reorganizing SharePoint data during migrations by simply dragging and dropping contents from source to destination, and even lets you perform import or export operations, send site-wide notifications and a lot more – all with just a few clicks.

The dSHIFT Online Migration Tool is built on top of SharePoint's migration APIs, and uses the latest Microsoft technologies in an extensible architecture, providing an easy-to-use migration solution that delivers definite results. Acting as a “black box” Windows service, dSHIFT migrates all data, including sites, lists, templates and security to the target SharePoint 2013 environment. The figure below details how this service interacts with a client application (the “dSHIFT client”) to perform migrations.



As shown above, the dSHIFT client (front-end GUI) is installed on any workstation in the same network. Since it has been designed to work remotely, the dSHIFT client does not have to be installed on the source server. However, if it is more convenient to do so, running the client from the source server is still possible.

On the other hand, the dSHIFT Windows service must be installed on the source server with appropriate credentials and access rights. Please use an account that has SharePoint Administrator, Database Administrator, and Local Administrator rights, such as the account used for the SharePoint Timer service.

Supported Migration Scenarios

The dSHIFT Migrator for SharePoint 2013 supports migrations from any of the following source platforms to either SharePoint 2013 or SharePoint 2013 Online:

- Windows SharePoint Services (WSS) v3.0
- SharePoint 2007
- SharePoint Foundation 2010
- SharePoint Server 2010
- Office 365 (SharePoint Online)
- SharePoint 2013

Installation Steps

1. Installing the dSHIFT Client

Before you begin installation of the dSHIFT Client, please ensure the following prerequisites are in place:

1. An account with appropriate local administrator level access rights.
2. .NET Framework 3.5 SP1 or higher.
3. Internet access.

Once these prerequisites are in place, download the installation package on the workstation where you wish to install the dSHIFT Client, unzip the package and run the “dSHIFT Setup” file as an Administrator (Shift + Right-click → Run as Administrator) to begin installation.

The installation steps are as follows:

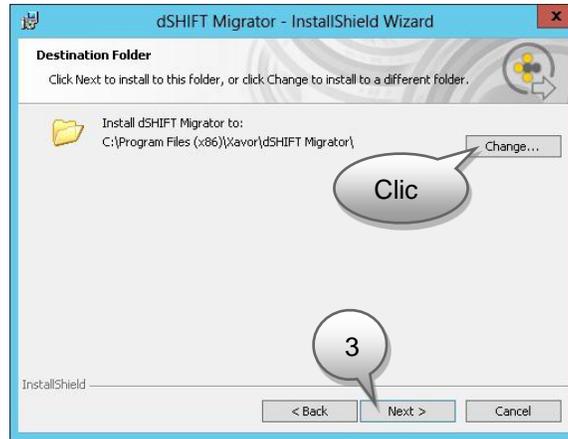
1. On the Welcome screen, click “Next”.



2. Review the Download Software License Agreement, and if you wish to accept the terms then click on the radio button to select “I accept the terms in the license agreement” then click “Next”.



3. By default, the dSHIFT Client is installed under the Program Files folder but if you wish to change the location then click Change and select the desired location where you wish to install, and then click “Next”.



4. Click “Install” to begin the installation or click “Back” if you want to review or change any of the installation settings.



5. Once the installation is complete, click “Finish” to close the installation wizard.



2. Installing the dSHIFT Service

Once the dSHIFT client is successfully installed, you can begin with installation of the dSHIFT Windows service on each on-premises SharePoint server (source, destination, or both, depending on your specific migration plan). Please ensure the following prerequisites are in place:

1. An account with appropriate access rights as Local Admin, Database Admin and SharePoint Admin.
2. .NET Framework 3.5 SP1 or higher (4.0 or higher for SharePoint 2013 servers).
3. Access to the source SharePoint server.
4. For installations over the network, please verify that the Computer Browser service is running.

Once the prerequisites are in place, open the installation package on the source SharePoint server, unzip the file and run “dSHIFT Service Setup” as an Administrator (Shift + Right-click → Run as Administrator) to begin installation. Please note that due to .NET compatibility limitations, the installation package contains one service setup file for SharePoint 2013 and a separate service setup file for all prior versions of SharePoint.

The installation steps are as follows:

1. To advance through the dSHIFT service installation wizard, click Next.



2. Type in the username and password of an account that has 3 levels of access rights (Local Admin, Database Admin and SharePoint Admin). A good example of such an account is the one used by the SharePoint Timer service or SharePoint Installer account. Click Next to continue.



3. By default, the dSHIFT service is installed under the Program Files folder. If you wish to change the location, click Change and select the desired installation location. Click Next to continue.



4. Click "Install" to begin the installation or click "Back" if you want to review or change any of the installation settings.



5. Once the dSHIFT service installation is complete, click Finish to close the installation wizard.



- To ensure that the dSHIFT Service has installed successfully and is running, please click the Start menu, type “service.msc” in the Start menu search box and press Enter to open the Services dialog. Scroll down to the dSHIFT Service to confirm that it has started. Also verify that the Computer Browser service is running.



Once the Migrator client is installed on your workstation and the Migrator service is running successfully on the source server, you can then proceed with product activation.

Activation Steps

The dSHIFT Migrator must be activated before it can be used for SharePoint migrations. Unregistered copies display the Activation dialog upon launch. The Activation dialog can also be accessed from the Registration menu.

NOTE: Always Launch as Administrator

To ensure full application functionality, please run the dSHIFT Migrator as an Administrator (Shift + Right-click → Run as Administrator). To configure the application to always run with Administrator credentials, right-click its icon, choose Properties, select the Compatibility tab and check the “Run this program as an administrator” check box.

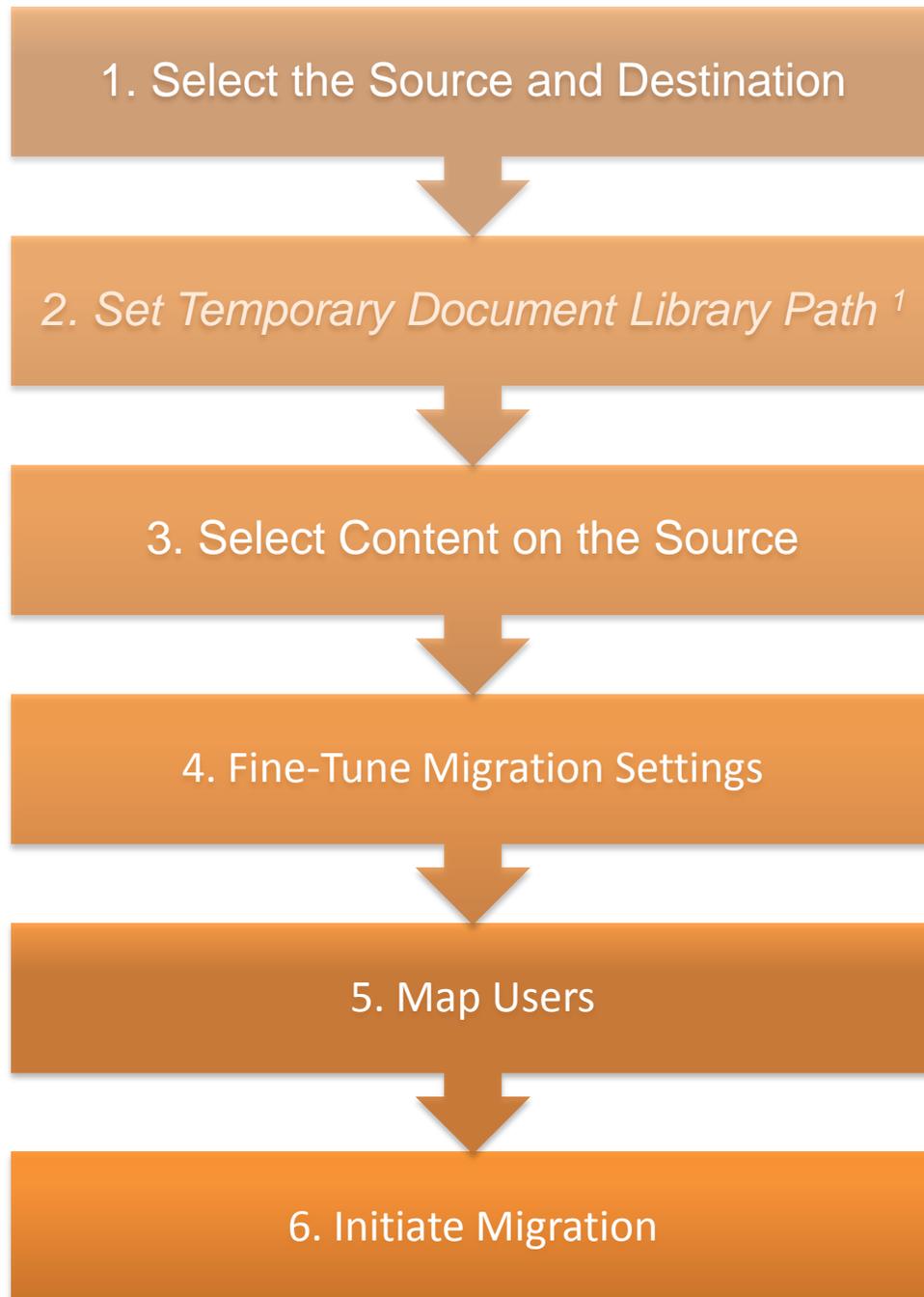
- In order to activate the dSHIFT Migrator, please copy/paste or type in the license key that has been issued to you in the activation dialog. If you’ve downloaded the software from dshift.com, then your trial license key will be sent to the email address specified in the download form.
- If you’ve not received the license key yet, then click “Don’t have license key? Click here to request trial license” in the activation dialog.



- Fill in the registration form with name, email, phone and company details, and then click “OK”. You will receive a license key at the specified email address. Please use this key to activate the dSHIFT Migrator.



The Migration Process

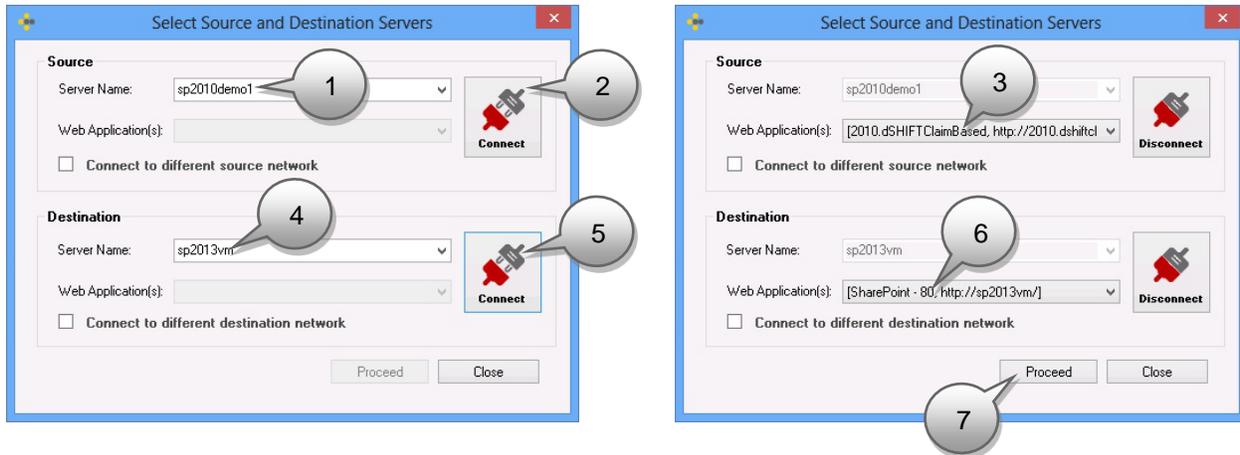


¹ Only required for migrations to Office 365 (SharePoint Online).

1. Select the Source and Destination (Office 365 Only)

When you launch the application, a pop-up window will appear, requesting credentials for the source and destination servers.

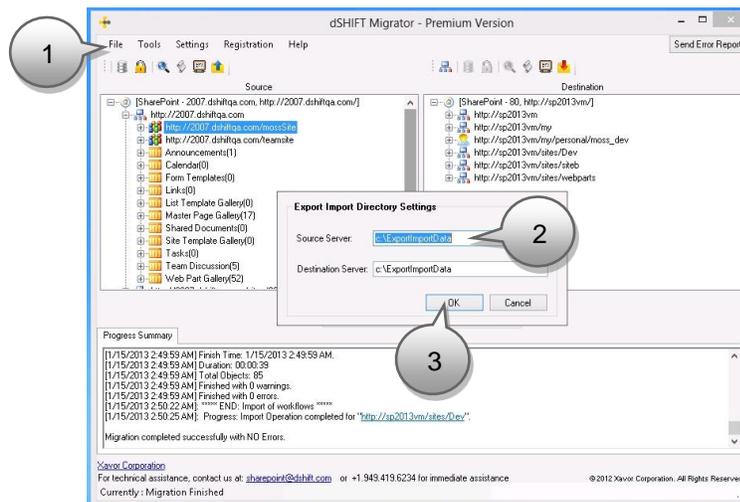
1. In the Source section, enter the address of the source that you wish to migrate.
2. Click Connect to connect to the SharePoint source.
3. Select the desired source web application from the WebApplication(s) drop-down menu.
4. In the Destination section, enter the address of the SharePoint 2013 destination server.
5. Click Connect to connect to the SharePoint 2013 destination.
6. Select the desired source web application from the WebApplication(s) drop-down menu.
7. Click Proceed to continue to the main Migrator screen.



2. Set Temporary Document Library Path

SharePoint migration is a 3-step process: export, upload and import. First, an export is performed on the on-premises SharePoint server. The exported data is then uploaded to a temporary document library in SharePoint Online, and then it is imported into the desired web on the destination.

1. In the File menu, click Settings → Import Export Document Library.
2. Enter the path that the source data will be exported to and then imported from. For a typical migration, the same path should be used for both fields.
3. Click “OK” to save the document library path.



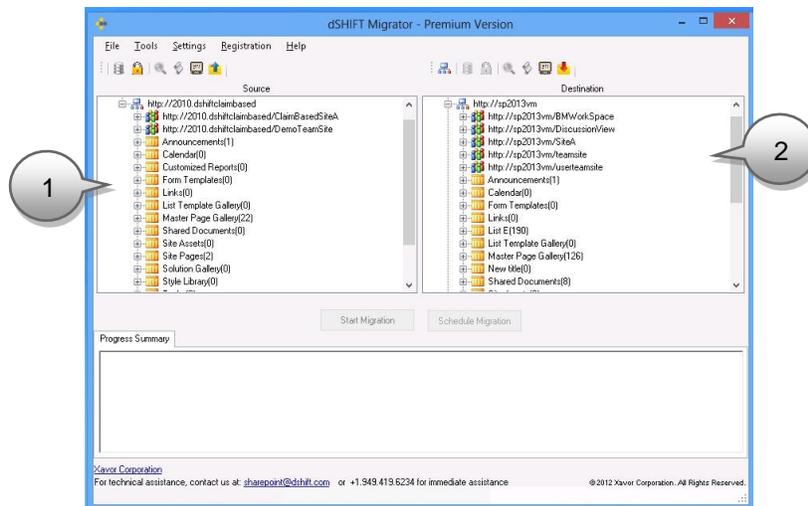
3. Selecting What to Migrate

NOTE: Migrating Site Collections to Office 365

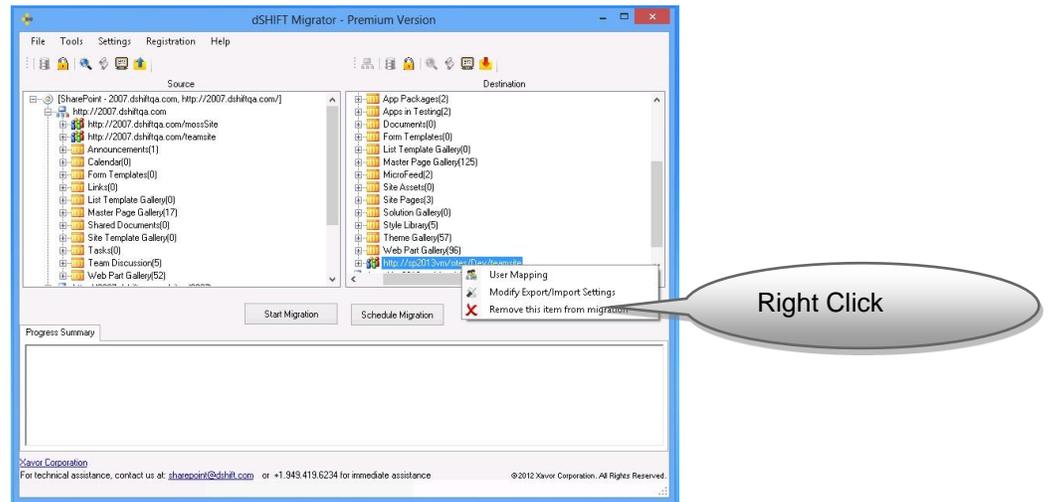
If you wish to migrate an entire **site collection** to Office 365, some additional actions are required before performing these steps. Please refer to “Migrating Site Collections to Office 365” for details.

The main screen displays the source farm’s web applications in the Source panel on the left, and the destination’s site collection hierarchy in the Destination panel on the right.

4. Select the sites, webs, and sub-webs in the Source panel that you wish to migrate. Multiple webs can be selected in the Source panel by holding down the Control key on your keyboard while clicking.
5. Drag the selected webs to their desired locations in the Destination panel.



To remove a web that was dragged to the Destination panel, right-click the web and select “Remove this item from migration”.

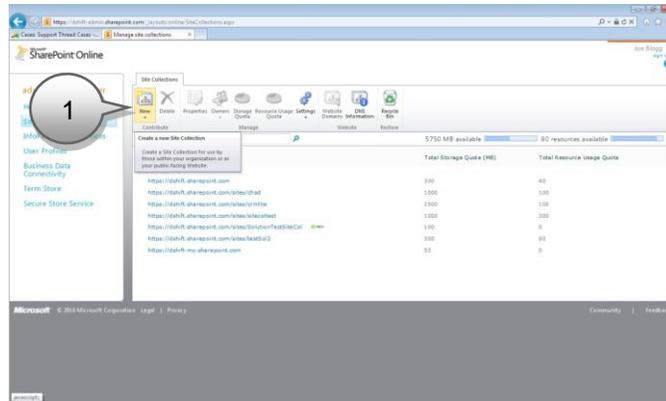


Migrating Site Collections to Office 365

If you wish to migrate an entire site collection to SharePoint Online, it is necessary to create a blank site collection on the destination before the dSHIFT Migrator's main screen is displayed. If this is not done, the destination panel on the right side of the main screen will not display an appropriate target upon which the source site collection can be dragged and dropped.

To create a blank site collection, please perform the following steps:

1. Access the SharePoint Online Administration Center and in the Site Collections ribbon, click New and then click Private Site Collection.



2. In the title section, enter a title for the new site collection.
3. In the Website Address section, enter the new site collection's URL name.
4. In the Template Selection section, click the Custom tab and then click <Select template later...>.
5. In the Administrator section, enter the site collection's primary administrator name.
6. In the Storage Quota section, enter the site collection's maximum storage limit. Sufficient space must be provided to store the content that you wish to migrate.
7. In the Server Resource Quota section, enter the site collection's maximum resource usage limit.
8. Click OK to create the new site collection.

new site collection

Title 2

Web Site Address 3

Template Selection
 2013 experience version will be used
 Select a language:
 Select a template:
 Collaboration Enterprise Publishing Custom 4
 < Select template later... >
 Create an empty site and pick a template for the site at a later time.

Time Zone

Administrator 5

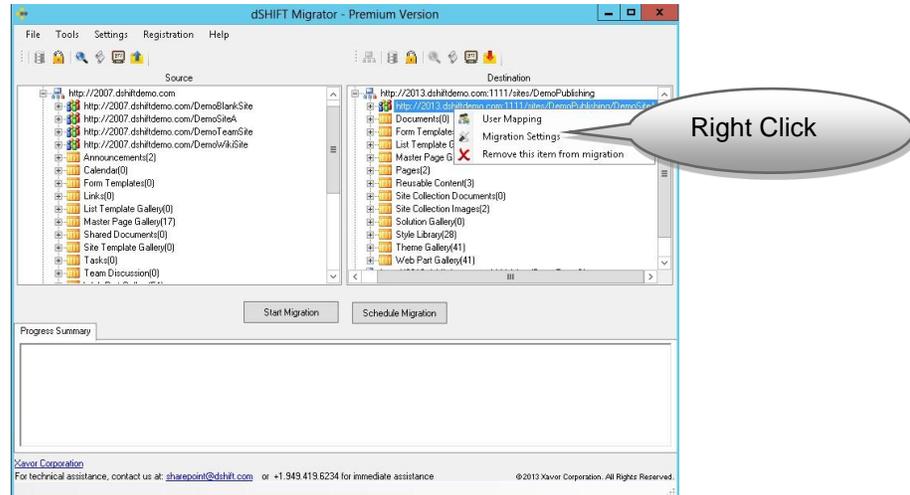
Storage Quota 6 MB of 19450 MB available

Server Resource Quota 7 resources of 3500 resources available

8

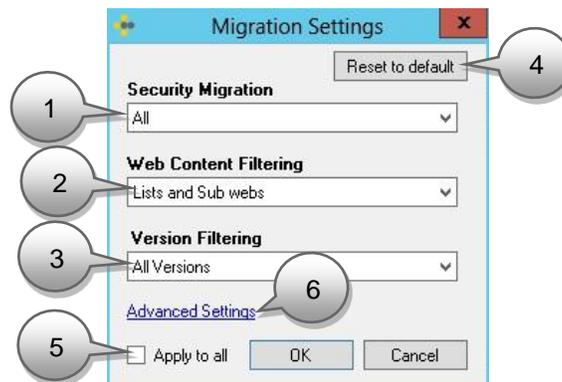
4. Fine-Tune Migration Settings

The migration settings for each web in the Destination panel can be fine-tuned before the migration process begins. Right-click on a web in the Destination panel, and then click “Migration Settings” to open the Migration Settings dialog.



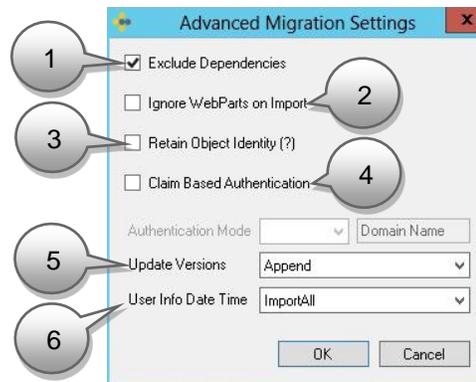
The Migration Settings dialog is used to fine-tune the security, web content filtering, version filtering and version date filtering for each selected web’s content so that only a specific subset of that content is migrated.

1. The Security Migration drop-down menu can be set to migrate all or none of the selected web’s security settings.
2. The Web Content Filtering drop-down menu can limit the selected web’s migration either to the web itself or to include its lists and sub-webs as well.
3. The Version Filtering drop-down menu can limit the selected web’s migration to filter out the version history and choose it either to be the most recent major version, the most recent major and minor versions, or allow all versions of the items in the selected web to be migrated.
4. To revert to the selected web’s default migration settings, click the “Reset to default” button. This allows users to retain all the default settings as these are configured on the source.
5. To apply these migration settings to all items marked for migration, select the “Apply to all” check box. Please note that these settings will have no effect on items to which they are not applicable.
6. If you wish to configure additional migration settings, click the Advanced Settings link to open the Advanced Migration Settings dialog.



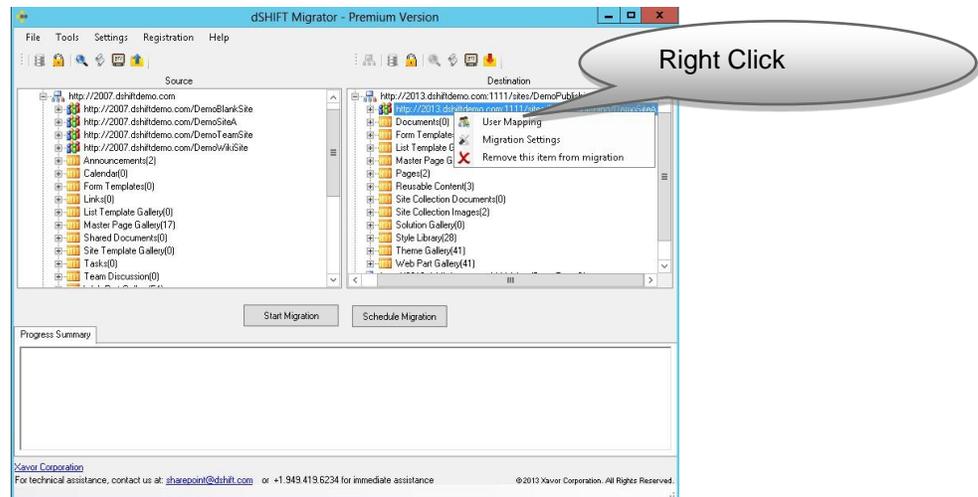
1. The Exclude Dependencies check box is selected by default. This prevents the migration of this item’s dependencies. To migrate this item along with all of its dependencies, clear this check box.

2. Select the Ignore WebParts on Import check box to ignore any web parts associated with this item during migration.
3. Select the “Retain Object Identity (?)” check box to preserve the object’s GUID during the migration process. Otherwise, a new GUID will be assigned to the object. Maintaining the original GUID can be useful while performing incremental migrations.
4. If the Web Application being migrated uses claim-based authentication, select the Claim Based Authentication check box. Use the Authentication Mode and Domain Name controls to provide the appropriate authentication particulars.
5. If document versions already exist on the destination server, use the Update Versions drop-down menu to configure the migration behavior of document libraries. The default option is Append, which appends versions from the source to the destination. If corresponding versions exist on the destination, the Ignore option prevents the migration of versions from the source. The Overwrite option replaces any versions that exist on the destination with the corresponding versions from the source server.
6. Use the User Info Date Time drop-down menu to specify how user and date/time metadata for the object will be migrated. The ImportAll option migrates all associated metadata. The None option ignores all source object metadata. The Replace User with System Account option assigns the SYSTEM account as the object’s owner.



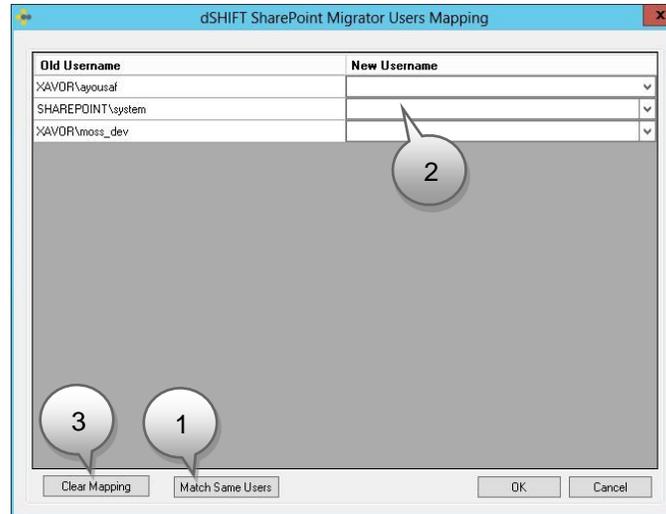
5. Map Users

The User Mapping dialog is used to intelligently map user accounts from the source server to the destination server. To access the User Mapping dialog, right-click on a web in the Destination panel, and then click “User Mapping”.



The User Mapping dialog lists user accounts from the source server in the “Old Username” column on the left, and allows them to be mapped to the appropriate destination user accounts, listed in the “New Username” column on the right.

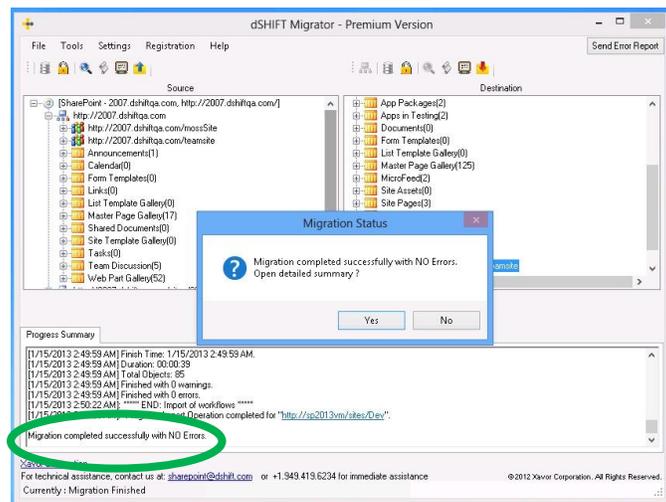
7. Click the “Match Same Users” button to automatically map destination user accounts to source user accounts with the same name.
8. A user account on the source server can be mapped to a destination user account manually by selecting it from the drop-down menu in the “New Username” column.
9. Click the “Clear Mapping” button to remove all user mappings.



6. Initiate Migration

Once all webs from the Source panel have been moved to their desired locations in the Destination panel, click the “Start Migration” button to initiate the migration process. The time required for the migration to complete depends on network speed, server hardware, and the amount of data and number of items to be migrated.

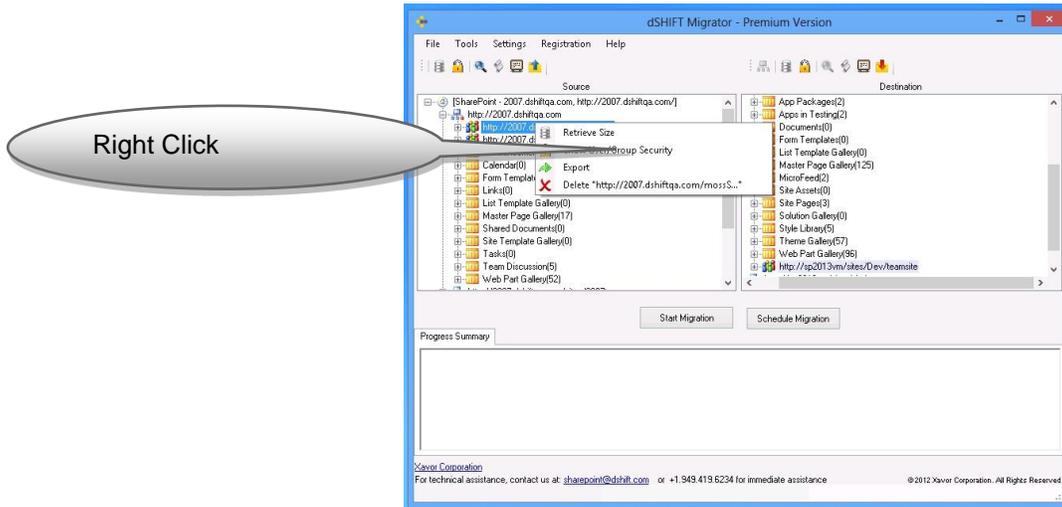
The following screenshot shows a successfully completed migration:



Additional Migrator Features

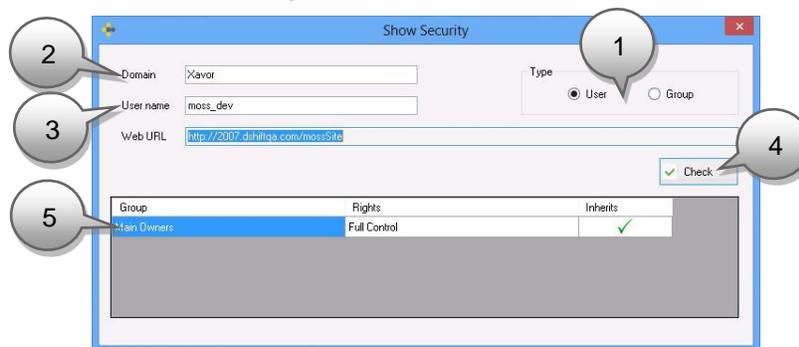
View User or Group Security

The View User or Group Security dialog shows the selected web's user and group rights. Right-click on a web in the Source panel, and then click "Show User/Group Security" to access the User or Group Security dialog.



The User or Group Security dialog is a quick search feature to find a specific user or group's permissions for the selected web within the dSHIFT Migrator.

1. Select whether to search for a user or group.
2. Enter the domain on which the user or group exists.
3. Enter the user or group name to search for.
4. Click "Check" to fetch the user or group's permissions.
5. The panel at the bottom of the dialog displays the specified user or group's permissions, and whether these permissions are inherited from the web's parent.

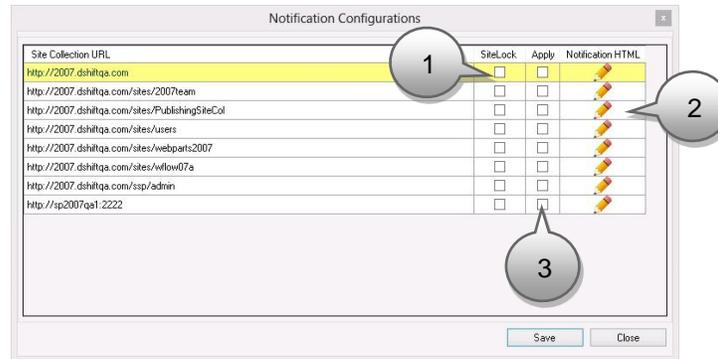


Manage Server Notifications

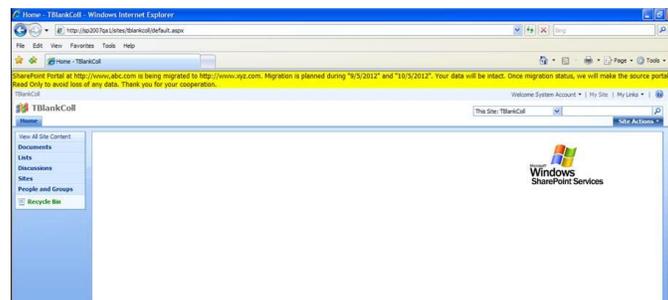
The Manage Server Notifications dialog is used to post notifications on the source server's site collections. It also allows changes to site collections to be disabled so content is not updated during migrations. Click "Manage Server Notifications" in the Tools menu or click the Notifications icon () in the toolbar at the top of the main screen to access this dialog.

The Manage Server Notifications dialog displays the URLs for each site collection, and allows an HTML notification banner to be displayed at the top of each SharePoint site.

1. To prevent a site collection from being modified, check its SiteLock box.
2. To edit a site collection's notification banner, click its pencil icon in the Notification HTML column.
3. To apply the notification banner to a site collection, check its Apply box.

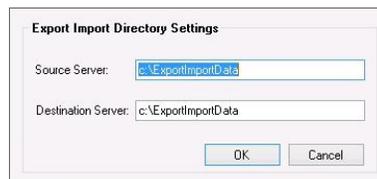


The drafted message will be displayed on specified site collections in the following manner:



Import/Export

The Import and Export features can be accessed from the Tools menu. Click on the "Export" option to export your site collections, and when you wish to import them, click on the "Import" option from the Tools menu.



Migration Features Summary

- Managing Server Notifications
- Import/Export
- Managing Site Collections
- Migrate SharePoint Site Collections
- 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 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
- Migration Using Custom Templates
- OOTB Web Part Migration
- Migrate Web Part View Customizations
- Publish SharePoint Web Pages
- Migrate Items with Version Information
- 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
- Copy Users
- Migrate Groups
- Migrate Security Groups
- Copy Deleted Active Directory Users
- Migrate Ghosted/Un-Ghosted Pages, Preserve Approval Status
- Migration of Content Types
- Auto-update Navigation URLs, Global or Quick Launch Links
- Review Post Migration Report

If this user manual has not answered your question, please have a look at the [FAQs](#) or email us at sharepoint@dshift.com, or call our helpdesk at +1 949 419 6266.