



## Exchange Online migration with contentGATE

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## Introduction

This guide provides a detailed explanation of how contentGATE migrates data from or to Exchange Online (Microsoft 365) and the necessary configuration settings before initiating the migration process.

Exchange Online can be used both as **source** and **target** in contentGATE migration. As a **source**, it allows users to extract emails and other mailbox items for transfer to a target. If selected as **target**, data can be migrated to Exchange Online mailboxes from any email source. To ensure a seamless migration process, contentGATE requires authentication to connect with Microsoft 365 securely. This is accomplished by registering an application in the **Microsoft Entra ID** (previously called Azure portal). The application in Microsoft Entra ID allows contentGATE to access Exchange Online resources without traditional username and password authentication. This approach improves security and reduces the risk of compromised passwords.

The following section will guide you through the **app registration** process in Entra ID and the configuration required for contentGATE to connect with Exchange Online as a source or target.

## Microsoft Entra ID app registration for Microsoft 365 migration

This section explains how to **register** an **application** in the Azure portal, which enables contentGATE to authenticate and establish a connection with the Exchange Online using **modern authentication**.

**Important:** The registration of the Azure AD application can be **automated** using the following script. The script needs to be downloaded and saved on a computer and started with PowerShell.

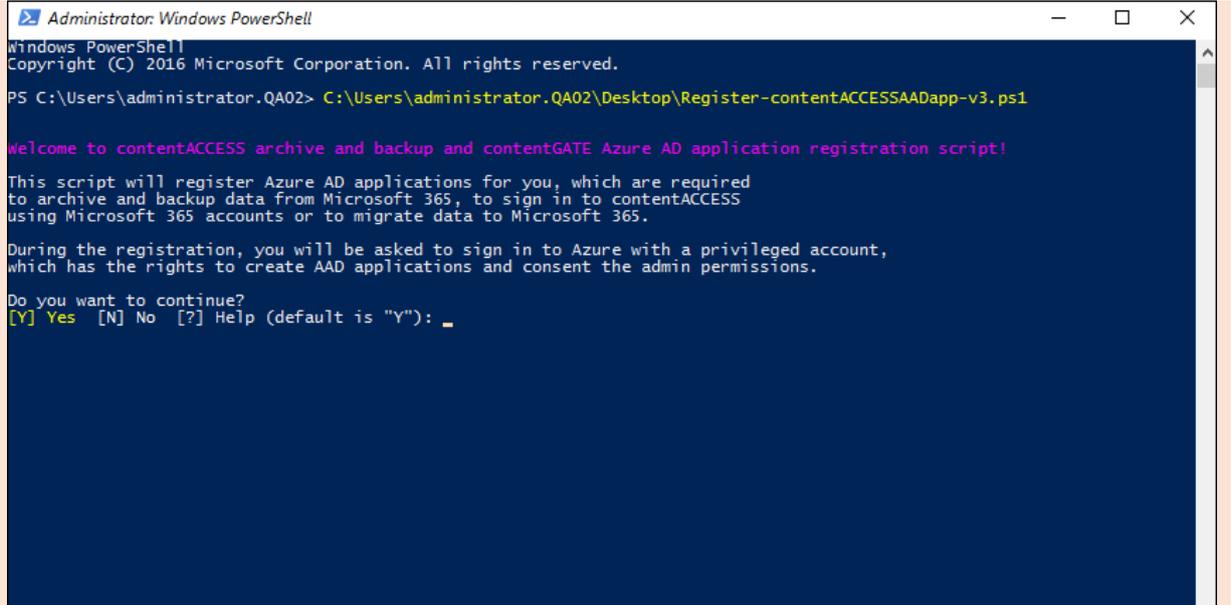
```
Set-ExecutionPolicy -ExecutionPolicy Unrestricted -Scope CurrentUser
```

```
cd ([Environment]::GetFolderPath("MyDocuments"))
```

```
Invoke-WebRequest -Url "https://static.contentaccess.cloud/appregistration/Register-contentACCESSAADapp-v3.ps1" -OutFile "Register-contentACCESSAADapp.ps1"
```

```
.Register-contentACCESSAADapp.ps1
```

Please ensure that Windows PowerShell is run as **Administrator** for this process to execute correctly.



```
Administrator: Windows PowerShell
Windows PowerShell
Copyright (C) 2016 Microsoft Corporation. All rights reserved.

PS C:\Users\administrator.QA02> C:\Users\administrator.QA02\Desktop\Register-contentACCESSAADapp-v3.ps1

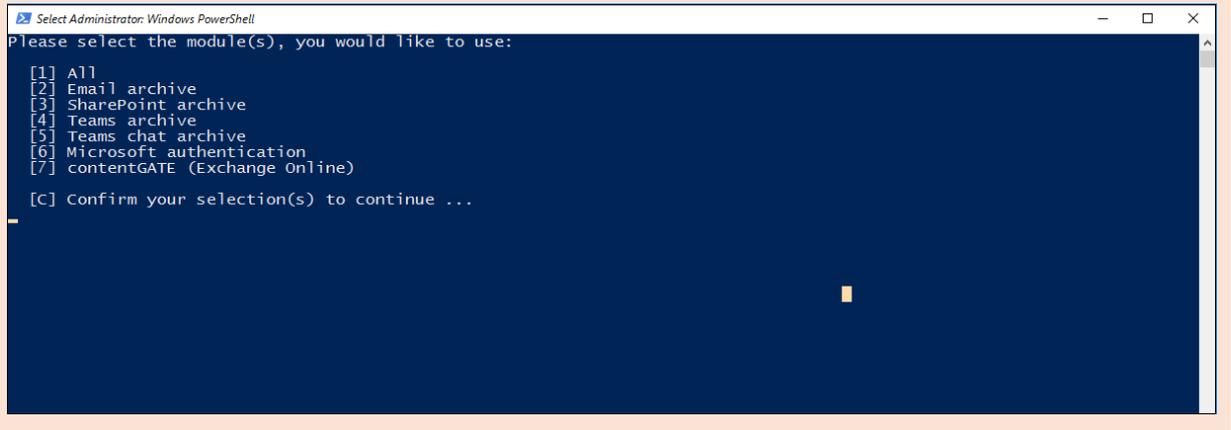
Welcome to contentACCESS archive and backup and contentGATE Azure AD application registration script!

This script will register Azure AD applications for you, which are required
to archive and backup data from Microsoft 365, to sign in to contentACCESS
using Microsoft 365 accounts or to migrate data to Microsoft 365.

During the registration, you will be asked to sign in to Azure with a privileged account,
which has the rights to create AAD applications and consent the admin permissions.

Do you want to continue?
[Y] Yes [N] No [?] Help (default is "Y"): _
```

Once the script is ready to be installed, select the option marked “contentGATE (Exchange Online)” for contentGATE.



```
Select Administrator: Windows PowerShell
Please select the module(s), you would like to use:

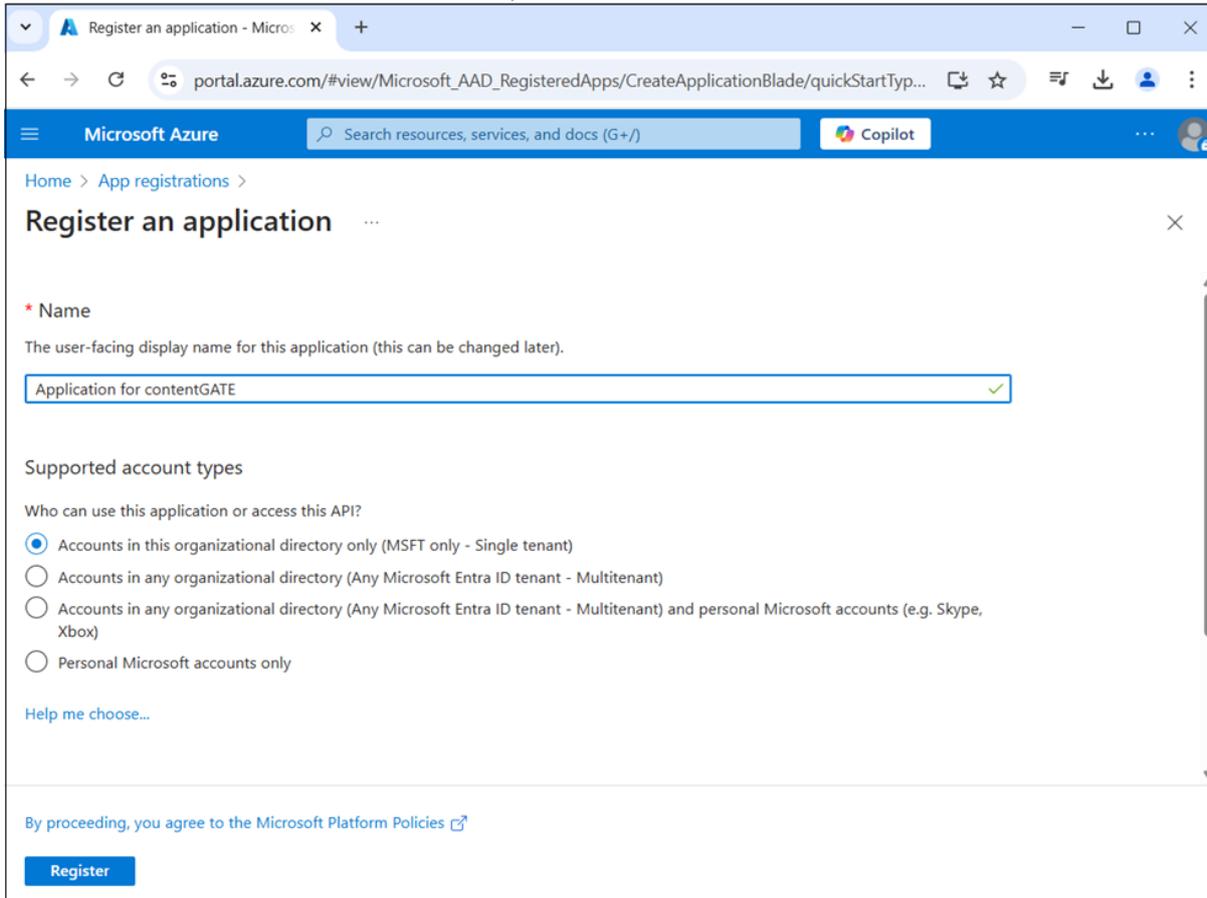
[1] All
[2] Email archive
[3] SharePoint archive
[4] Teams archive
[5] Teams chat archive
[6] Microsoft authentication
[7] contentGATE (Exchange Online)

[C] Confirm your selection(s) to continue ...

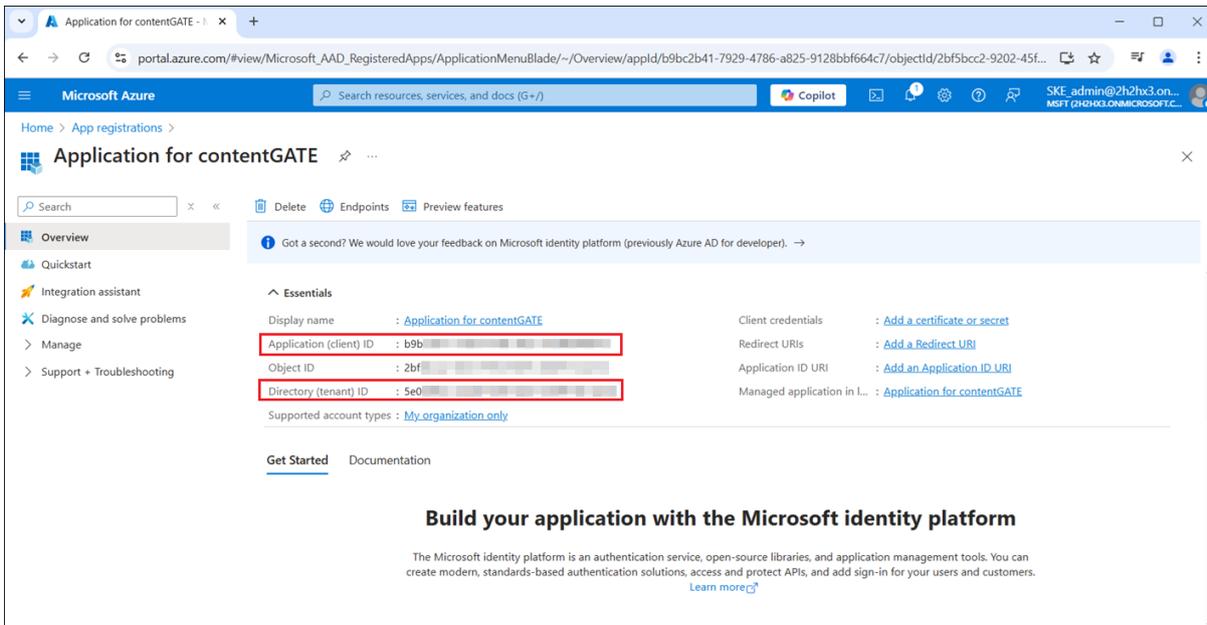
_
```

### Manual application registration

Navigate to the [Entra ID](#). Go to **App registration** -> **+New registration**. Provide the application details, the only required field to modify is the **application name**; other fields can remain as default. Click the **Register** button.

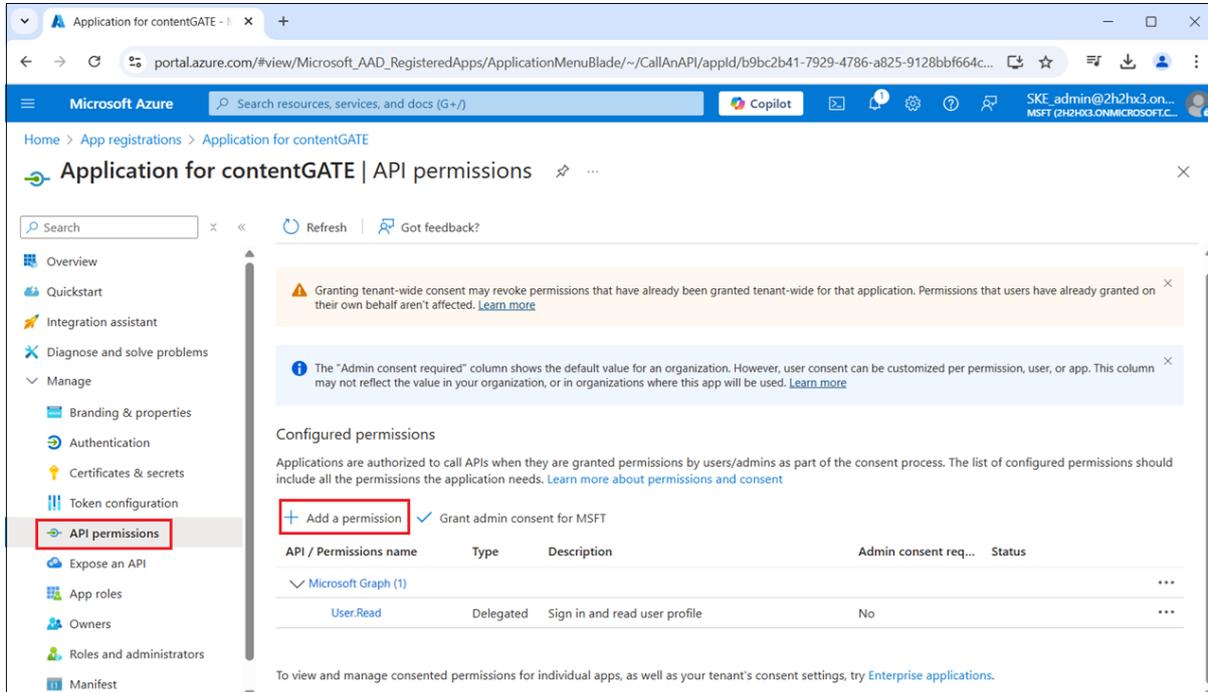


Once the app is registered, the **Application ID** and **Tenant ID** will be displayed on the app's **Overview** page. These values will be entered in contentGATE, so please mark them down.

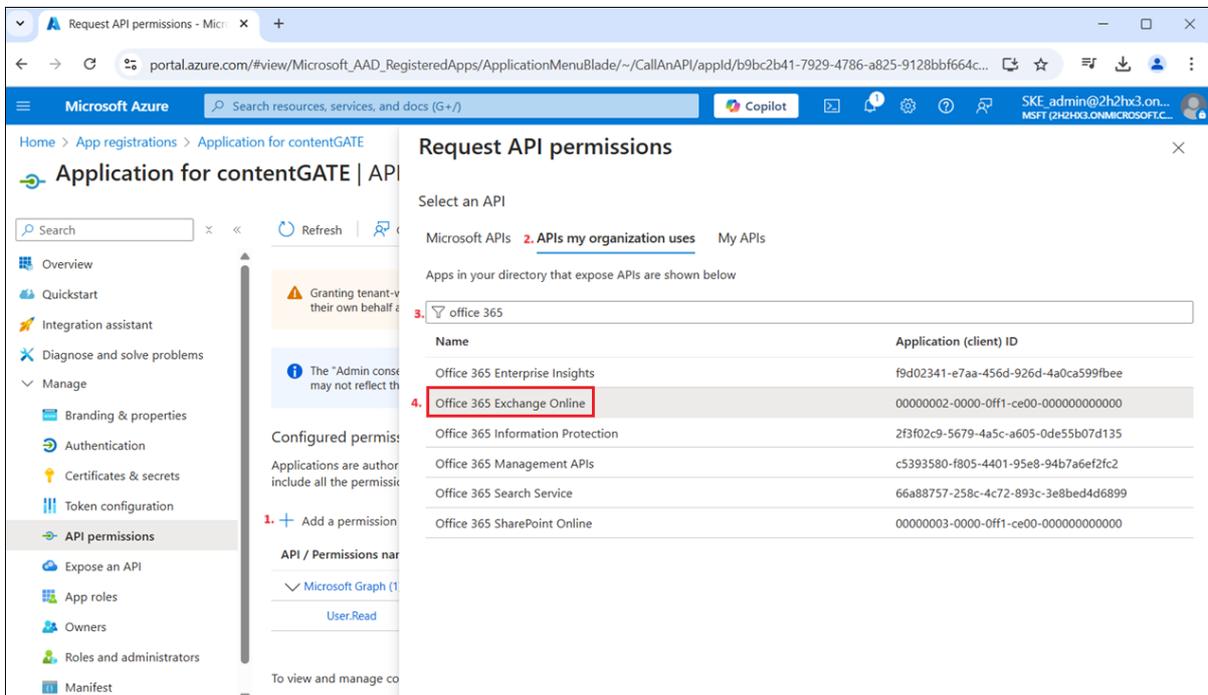




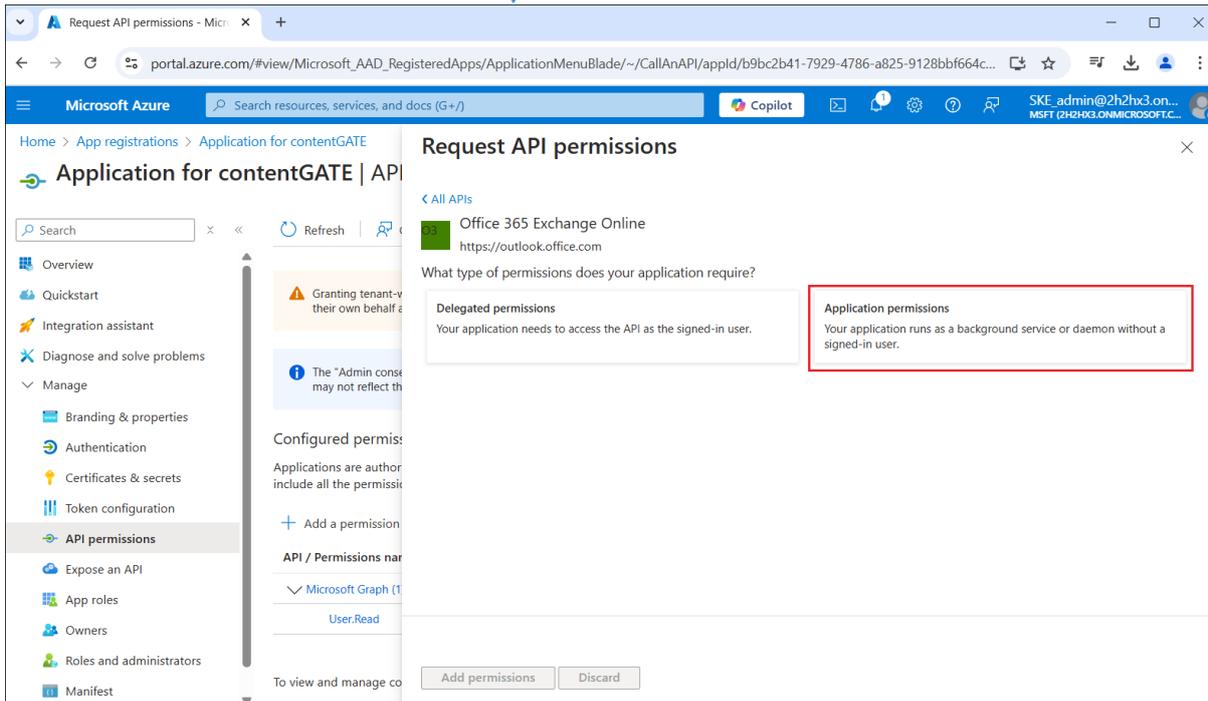
The next step is to assign the necessary **permissions** to the application. Click the **API permissions** button in the left menu of the application details page. When the configured permissions page loads, click the **+Add a permission** button and select the appropriate API.



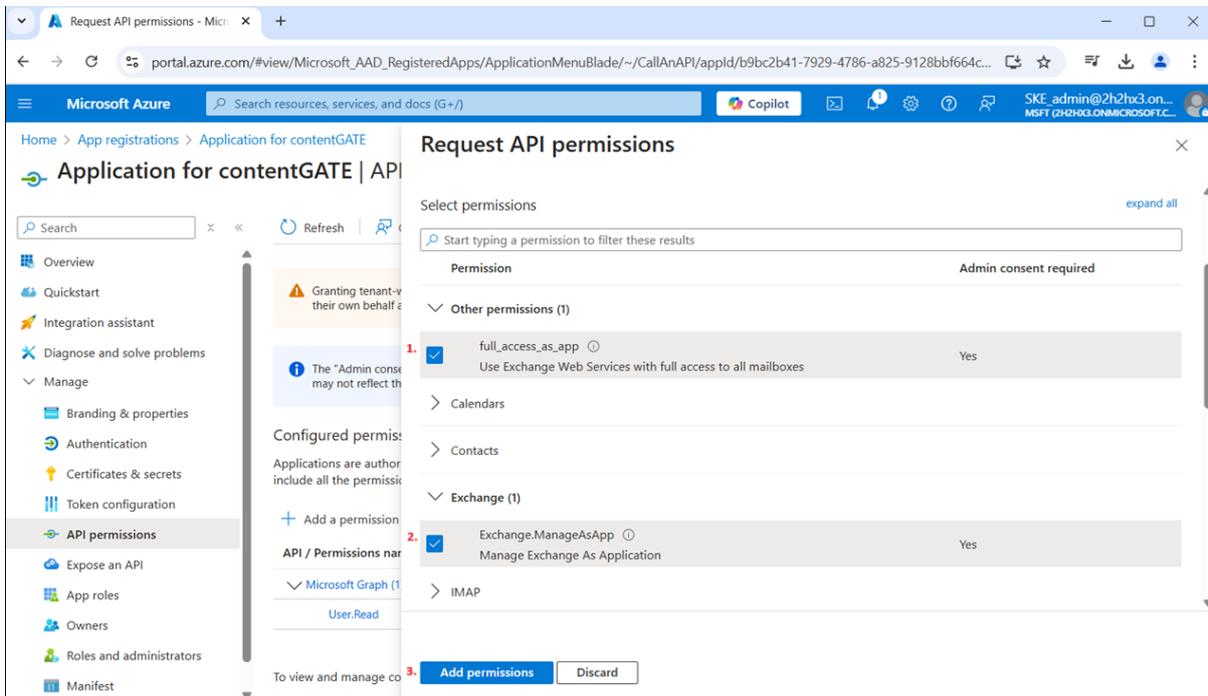
On the **Request API permissions** tab, search for **Office 365 Exchange Online** and select it.



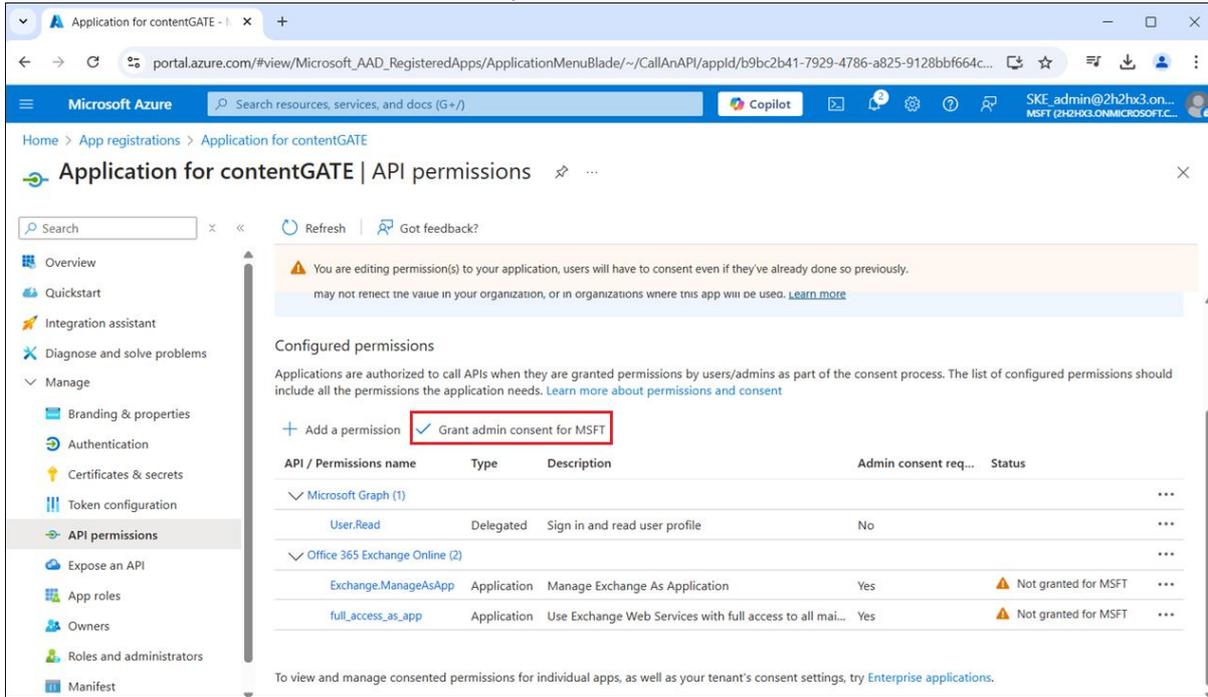
Then select **Application permissions**, and the available permissions will be listed.



Locate the **full\_access\_as\_app** permission from the **Other permissions** category and the **Exchange\_ManageAsApp** permission from the **Exchange** category, then click the **Add permissions** button.

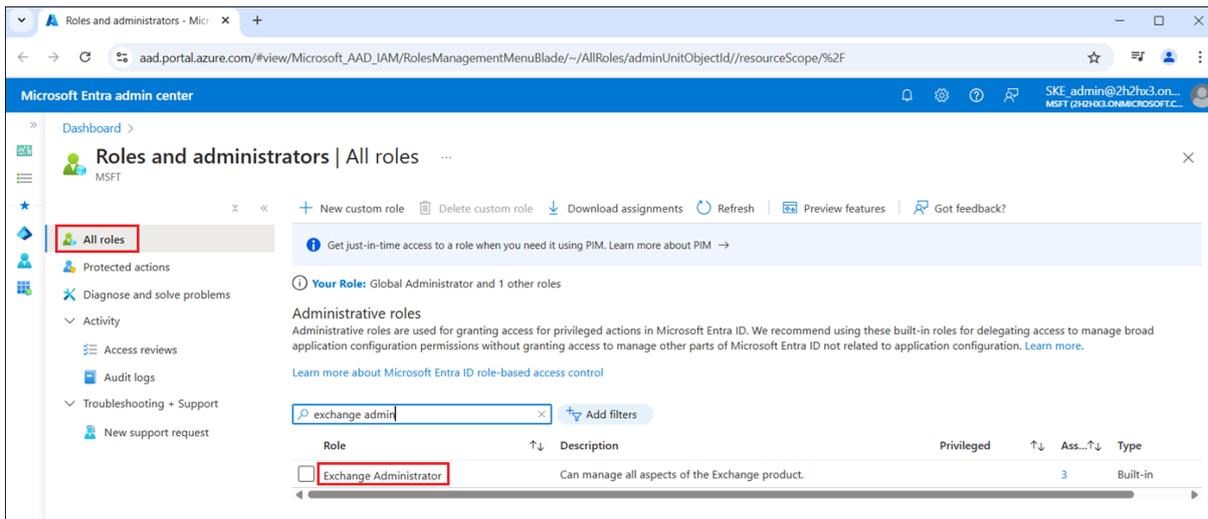


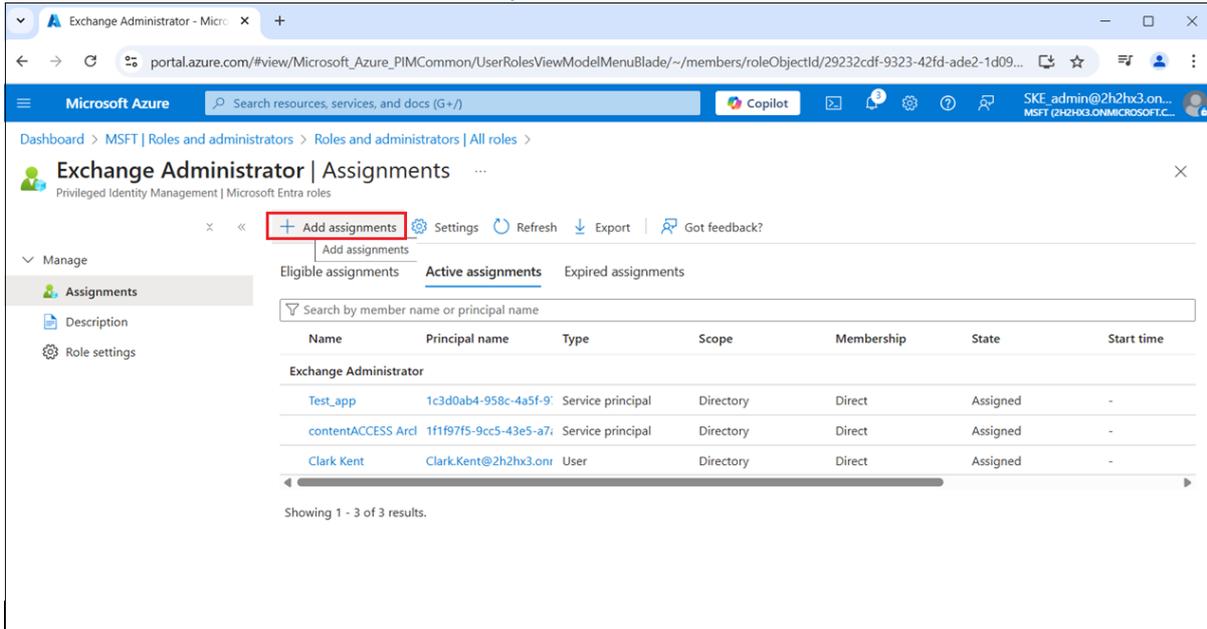
Once the permissions have been assigned, an administrator must **grant consent** for them. Click the **Grant admin consent for 'Tenantname'** button.



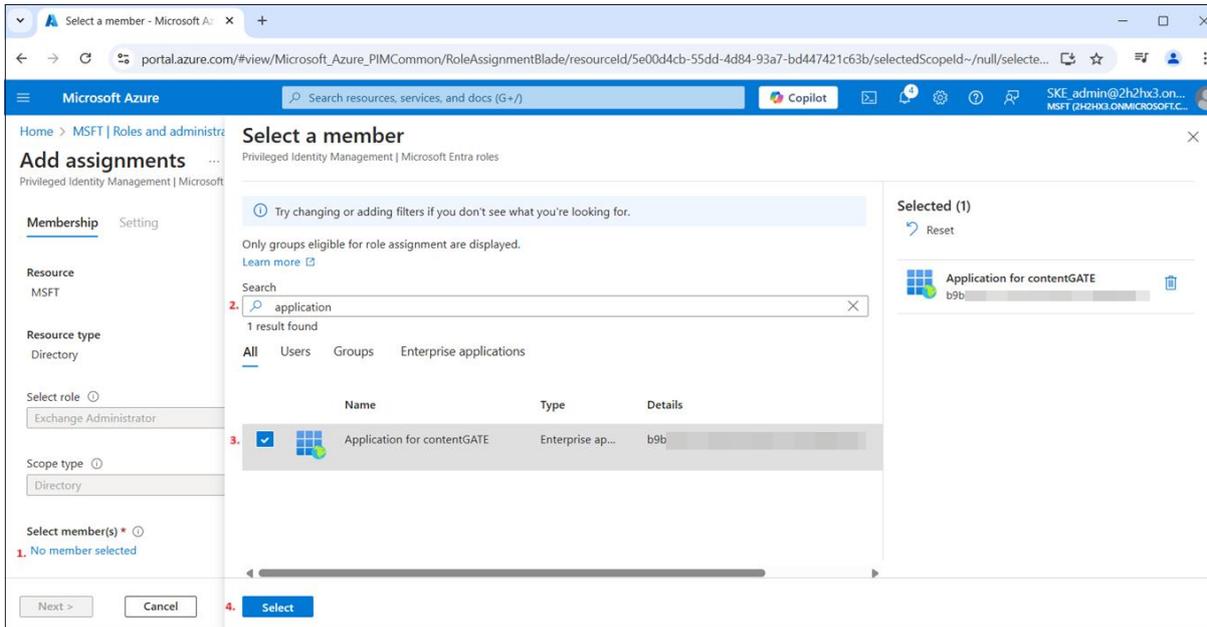
The **Exchange\_ManageASApp** permission allows the application to connect to PowerShell but does not automatically grant access to PowerShell commands or Exchange objects. Access to **Exchange objects** is managed through **Role-Based Access Control (RBAC)**. This means that the App registration must be assigned either the **Exchange Administrator** role or the **Exchange Recipient Administrator** role.

To assign the role, navigate back to the Entra ID page, then go to [Roles and Administrators | All roles](#), select **Exchange Administrator** from the list, and click on it.

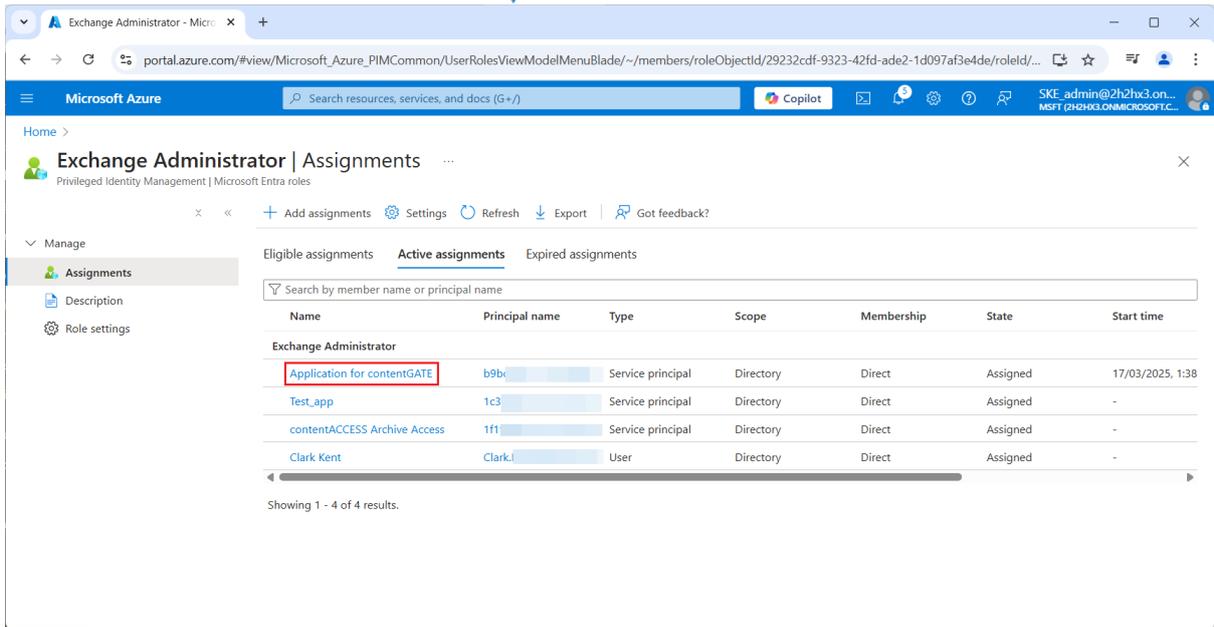




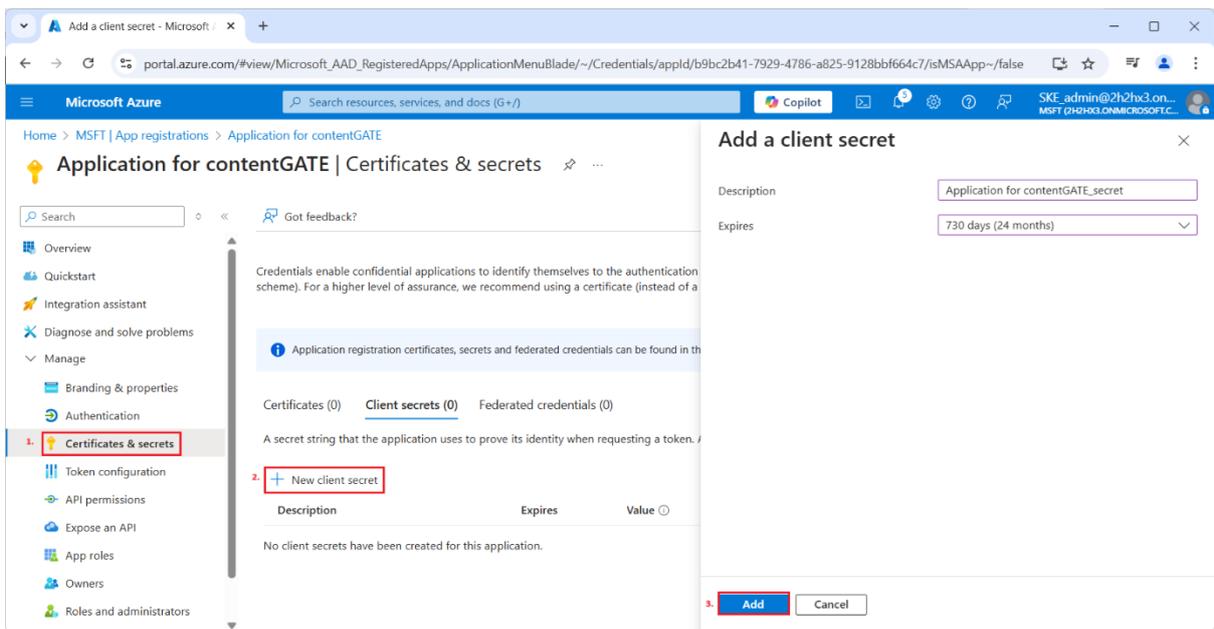
Click the **Add assignments** button, search for the App registration (e.g., 'Application for contentGATE' in our example) and assign it to the role. The App registration is categorized as a 'Service Principal'.



The roles will be listed on the **Exchange Administrator | Assignments** page now.



After assigning roles, return to the application settings and add a new client secret by clicking on the **+New client secret** button. This is required for some plugins and client applications.



Once the client secret is generated, **copy** and **store** it in a secure location for future use. The client secret is **required** when configuring the Exchange Server connection in contentGATE with **modern authentication**.

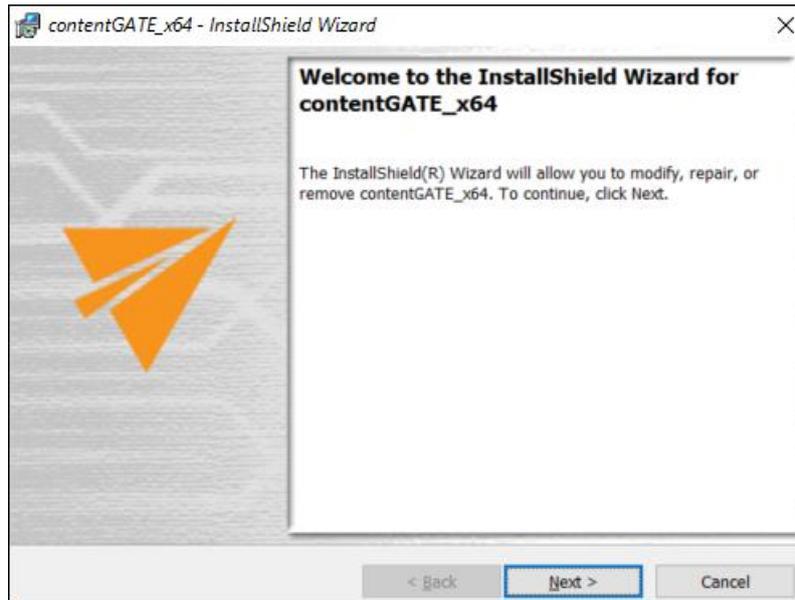
**Note:** Client secrets have a **limited** lifespan (usually one year). A new client secret must be generated annually, and all affected contentGATE configurations must be **updated** accordingly.



Once all settings are configured, contentGATE can establish a secure connection to Exchange Online using modern authentication via PowerShell.

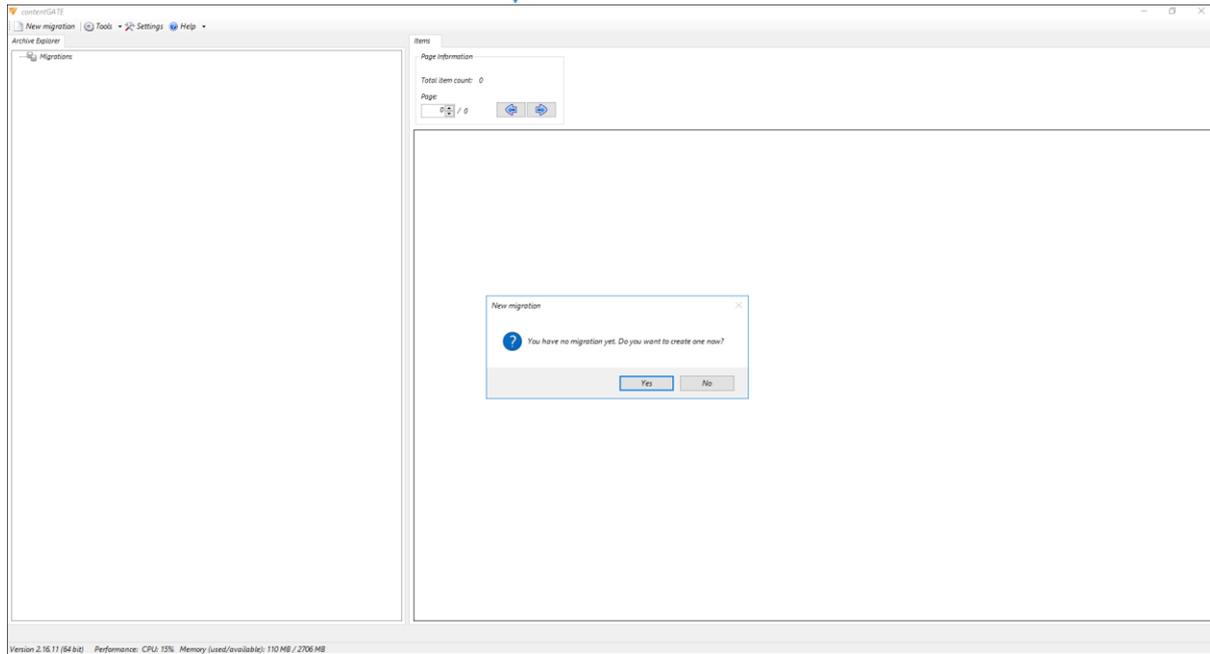
## Installation of contentGATE

The installation process for contentGATE is standard across all migration types. Detailed installation instructions are available on [this](#) page.



### contentGATE welcome interface

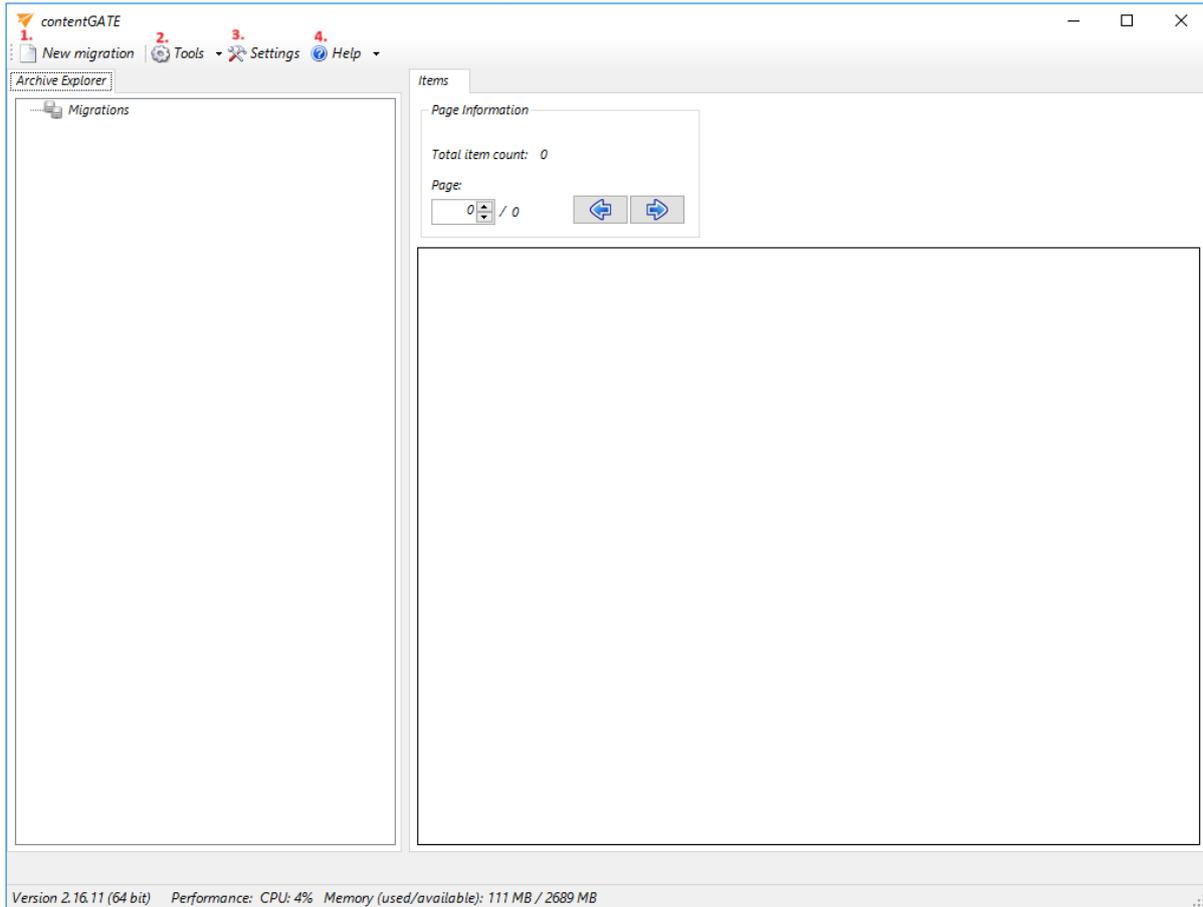
When contentGATE is launched for the first time, no migration is defined. The application will prompt the user to create a new migration project.



Users can either proceed with creating a migration or skip this step and define migrations later. A new migration can be created anytime by selecting the **New migration** option in the toolbar.

The welcome interface provides a toolbar with access to essential settings and functions:

1. **New migration** – creates a new migration unit to configure the **source** and **target** archive, the version, stage, etc.
2. **Tools** – connector-specific tools (not required for this migration)
3. **Settings** – general contentGATE settings and connector (archive) settings
4. **Help** – information about the license, version etc.

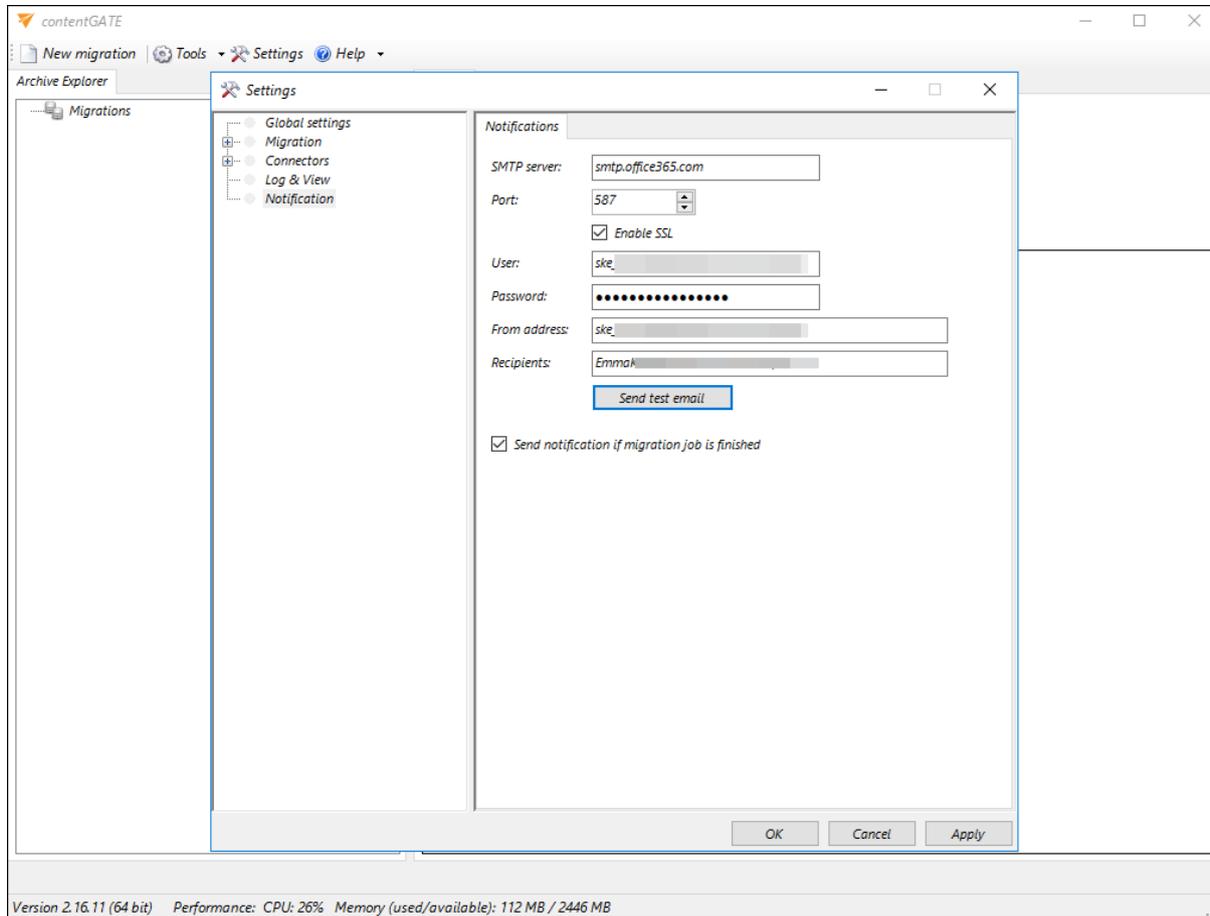


If you would like contentGATE to send you notification email when migration job is finished, you can configure it in Settings tab. Click on the **Notification** option, then configure the following:

- **SMTP server:** the SMTP server that you want to connect to
- **Port:** 25 or 587 (for secure connection)
- **Enable SSL:** check this checkbox if you want your secure connection to use the SSL (Secure Socket Layer) protocol to encrypt communication
- **User and Password:** credentials of the user you want to authenticate with
- **From address:** email address from which the notification emails will be sent (the email address of the authenticated user)
- **Recipients:** email addresses that will be receiving notification emails from the job; multiple addresses need to be separated by semicolon



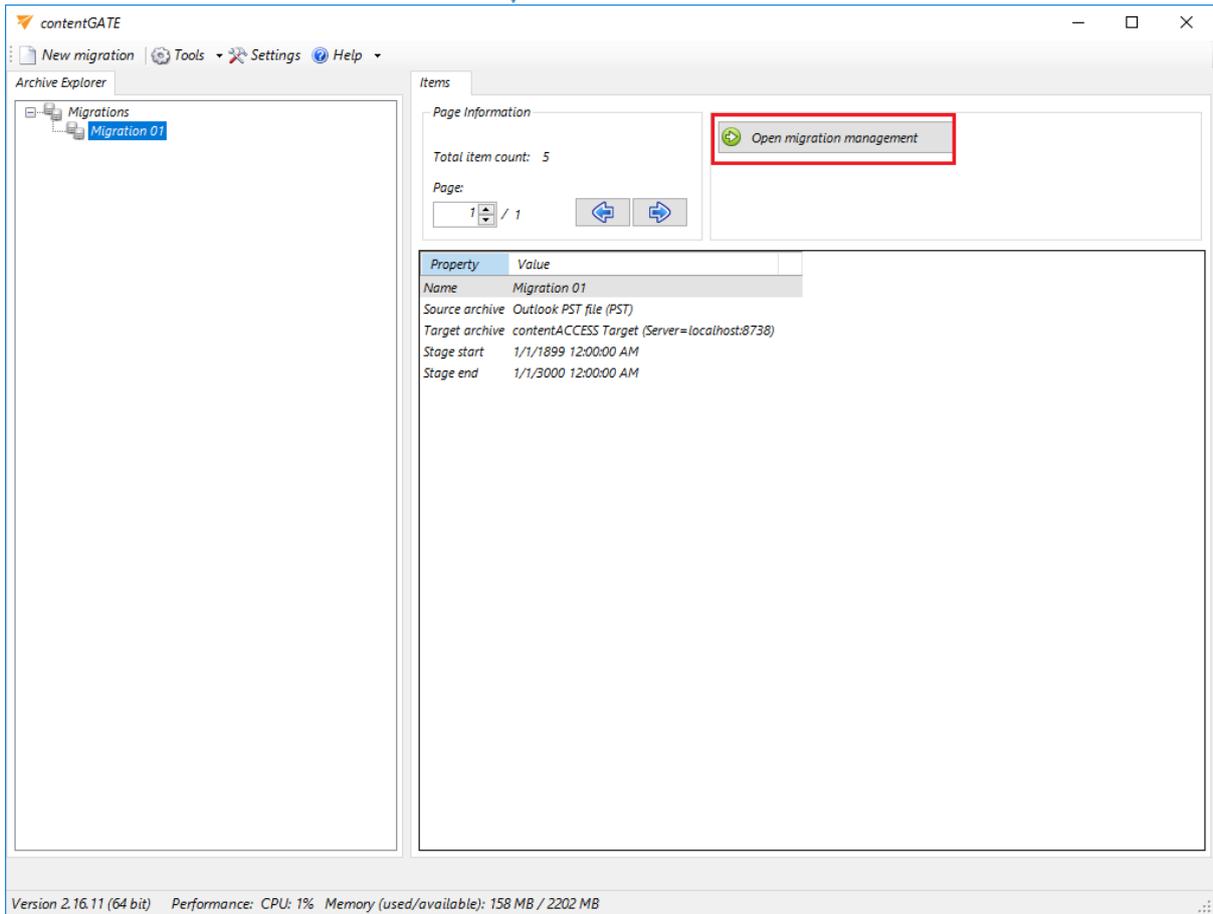
- **Send notification emails if migration job is finished:** do not forget to check this checkbox, otherwise notifications won't be sent. No matter if you stop it manually or it finishes by itself, the email will be sent.



The interface consists of two main panes:

- **Left pane:** Archive Explorer, where the newly created migrations are listed
- **Right pane:** Displays content based on the selected node in the Archive Explorer section

The **Open management button** allows access to advanced migration project settings. The **Page information** section helps adjust the paging settings.



## Migration "how to"

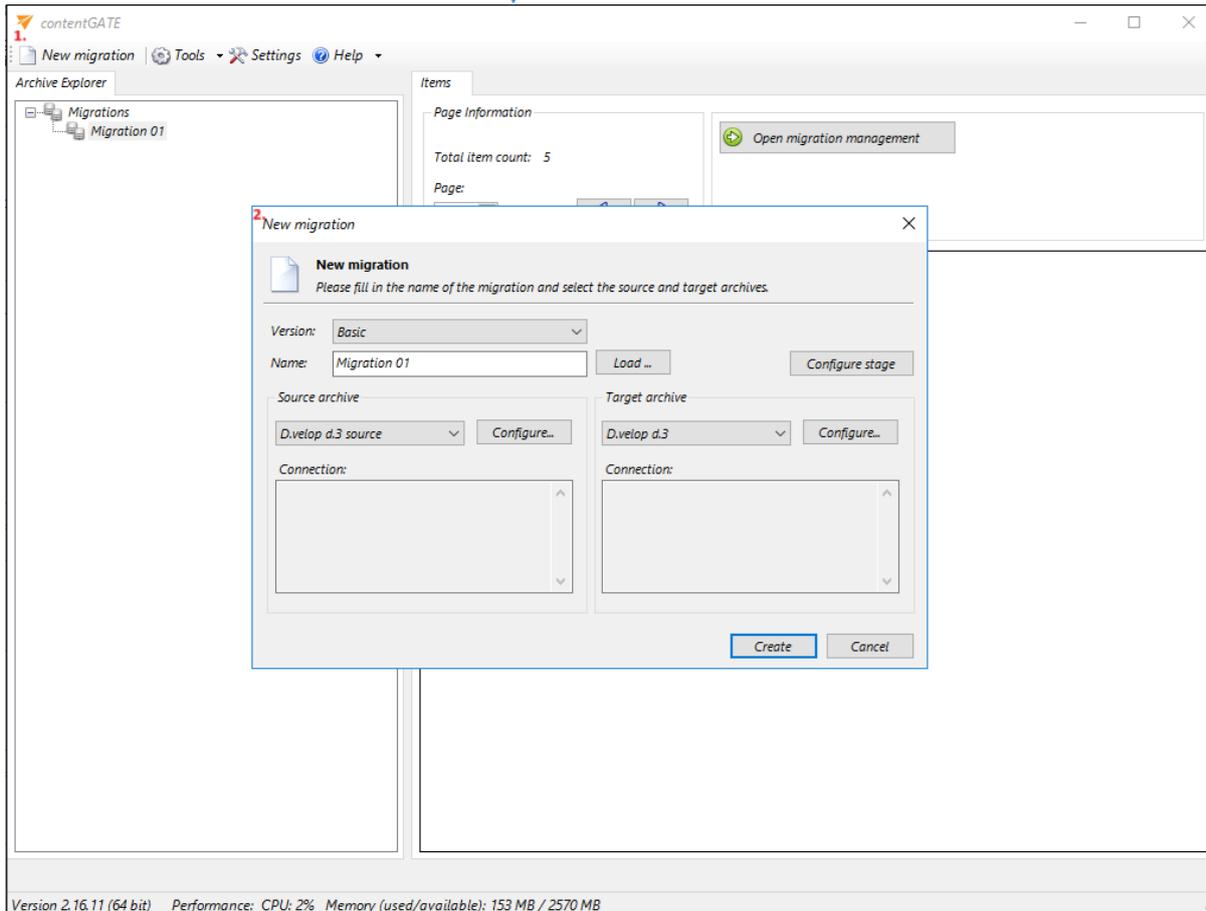
This chapter outlines the steps to create and configure a migration project for:

- Emails from Exchange Online to a selected target location
- Emails from a selected source location to Exchange Online
- Emails from the Exchange Online to contentACCESS Archive

**Note:** These options are just examples demonstrating the configuration of Exchange Online in contentGATE. Additionally, any other element from the dropdown menu can be selected as the source or target location for migration when paired with Exchange Online.

## Creating a new migration project

To define a migration, click the **New migration** button available on the toolbar or in the context menu. This opens the New migration dialog.



Here, the following sections needs to be configured:

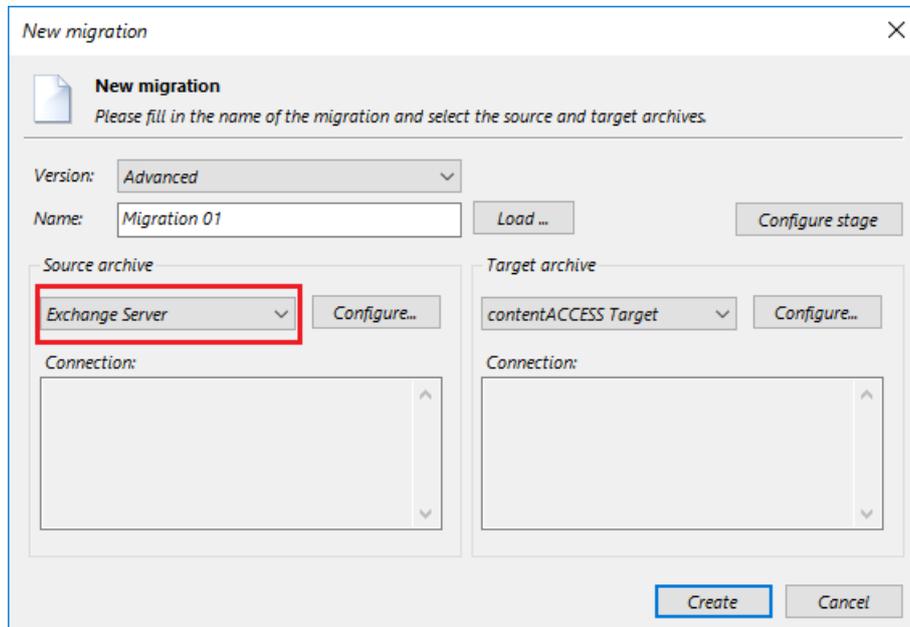
- **Version:** select Advanced from the dropdown menu
- **Name:** provide a unique name for the migration project. You can also select an already existing migration project by pressing the **Load...** button.
- **Source archive:** first, select the source archive from the dropdown menu, then click the **Configure...** button. The configuration page varies depending on the selected option
- **Target archive:** define the target location from the dropdown menu. Then configure it through the **Configure...** button. The configuration page varies depending on the selected target archive.

These configuration pages and the setting of the Exchange Online will be described in detail in the following sections.

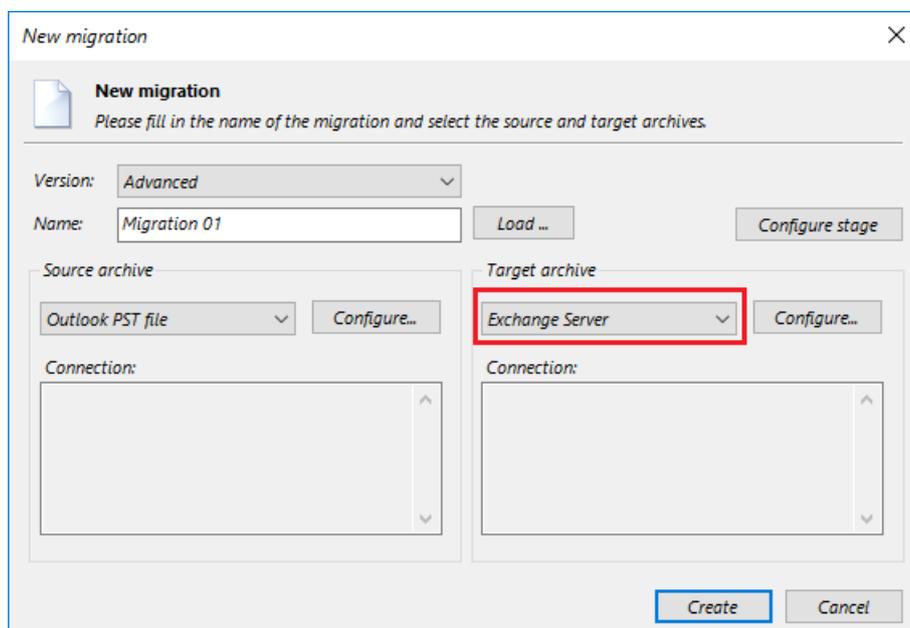


## Specifying Exchange Online as source or target archive

In this section, we will go through the Exchange Online configuration as source or target archive for the migration. The configuration in both cases is the same. First, select the **Exchange Server** option from the drop-down menu, then click the **Configure...** button.



Screenshot: Exchange Online configured as source archive



Screenshot: Exchange Online configured as target archive

The **Exchange Connection Form Source** dialog opens, where you can select either **Microsoft 365** or **On-Premises Exchange Server**. We will continue the configuration with the **Microsoft 365** option.



Under the **Exchange** tab, in the **M365 connection** section, the EWS address and PowerShell address are **automatically filled in**. You only need to complete the **modern authentication** section. This is where you will need the app registration mentioned in the [Microsoft Entra ID app registration for Microsoft 365 migration](#) section.

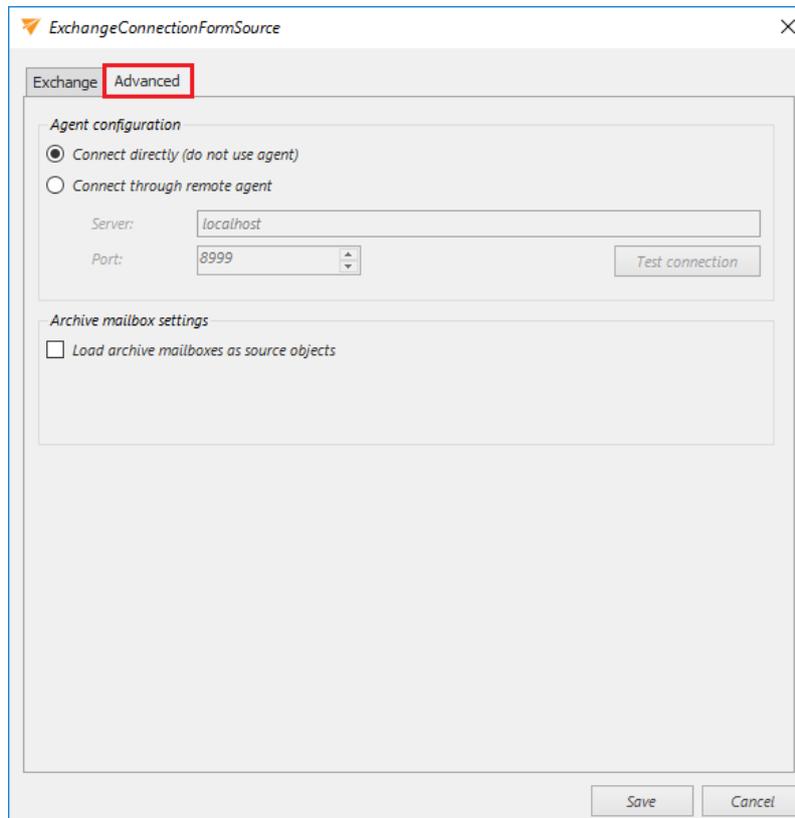
From the Entra ID, you will need the **Application ID**, **Tenant ID**, and **Client Secret**. Additionally, you will need to provide a **Test email** address. The user specified here must have access to both the **Exchange Server** and the **registered application**. Once the configuration is complete, we recommend running a **test connection** using the **Test** button.

The screenshot shows the 'ExchangeConnectionFormSource' dialog box with the 'Exchange' tab selected. The 'Advanced' sub-tab is also visible. Under the 'M365 connection' section, the 'Microsoft 365' radio button is selected, and the 'On-premises Exchange Server' radio button is unselected. The 'EWS address' field is filled with 'https://outlook.office365.com/EWS/Exchange.asmx' and the 'PowerShell address' field is filled with 'https://ps.outlook.com/powershell'. The 'Modern authentication' section contains fields for 'Application id' (filled with 'b9b...'), 'Tenant id' (filled with '5e0...'), and 'Client secret' (filled with a series of dots). The 'Test email address' field is filled with 'ske...'. A 'Test connection' button is located below the 'Test email address' field. At the bottom of the dialog, there are 'Save' and 'Cancel' buttons. A link at the bottom of the dialog reads: 'For more information about how to configure modern authentication, please visit this link'.

On the **Advanced** tab, you can choose how contentGATE connects to the Exchange Server: **directly** (establishes a direct connection without requiring a remote agent) or through a **remote agent** (uses a remote agent for the connection). In the case of a connection through a remote agent, the server and port values are automatically filled in and should be kept as they are. You can also select the **Load archive mailboxes as source objects** option, in which case



contentGATE will load the in-place archives separately. This allows to use the primary mailboxes and the in-place archive mailboxes independently.



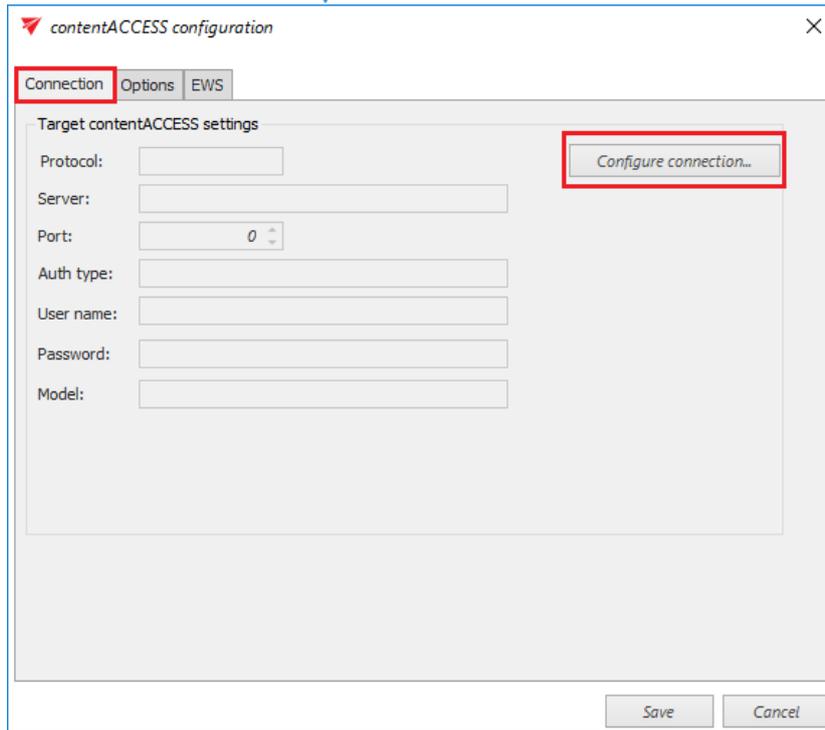
Once you configured all required settings, click the **Save** button on the pop-up window.

### Specifying contentACCESS Archive as target archive

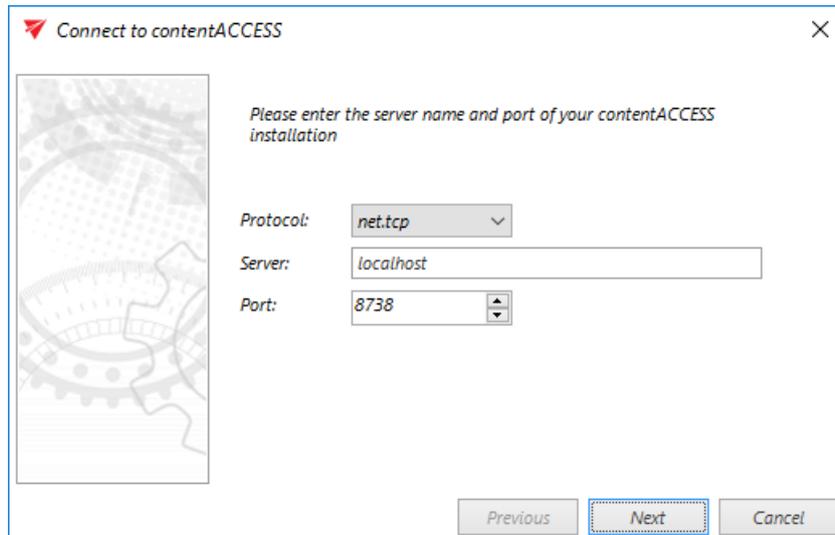
In this scenario, the **contentACCESS Archive** is configured as a **contentACCESS target** using **modern authentication**.

First, we select contentACCESS Target from the **Target archive** dropdown menu, then click the **Configure...** button. The pop-up window consists of three tabs: Connection, Options, and EWS.

In the **Connection** tab, we configure the Target contentACCESS settings using the **Configure connection...** button.



First, enter the server name and port of your contentACCESS installation, then click **Next**.



Choose the authentication type to be used to connect to contentACCESS and enter the applicable user credentials. It is recommended to use an account with at least **tenant administrator-level permissions**. Click **Next**.



The next dialog will list all available models based on your **contentACCESS** license. Choose the Email Archive model, which will be the **target** of this migration, and click **Finish**.

Back in the initial dialog, switch to the **Options** tab. Use the **Change** buttons to set the following:

- **Default retention category:** to specify the time period, during which the email message will be stored
- **Default shortcut type:** it is the primary method used for creating shortcuts. In the case of Exchange Online source, there are no shortcuts (just emails) so we recommend selecting the “**Keep original**” shortcut type.
- **Shortcut type for Backup:** in the case of Exchange Online source, there are no shortcuts (just emails) so we recommend selecting the “**Keep original**” shortcut type.



**contentACCESS configuration** [X]

Connection Options **EWS**

Default retention category: CA\_12M [Change..]

Default shortcut type: CA\_original [Change..]

Shortcut type for 'Backup': CA\_original [Change..]

File archive migration: Migrate all versions (if available)

File archive migration: Use virtual move (if available)

File archive migration: allow to restore shortcuts for long file names

[Save] [Cancel]

The available retention categories/shortcut types to be used in the target archive are listed based on the contentACCESS settings. Click the **Change...** button to select the required option from the dropdown list.

**Note:** The File Archive migration settings do not need to be configured when migrating emails to or from Exchange Online.

The **EWS** tab needs to be configured only if shortcuts are being migrated. Since there are no shortcuts in Exchange Online, this tab can be left unconfigured.

Once the source and target archive connection is set, click on **Create** in the very first **New Migration** dialog.



New migration

**New migration**  
Please fill in the name of the migration and select the source and target archives.

Version:

Name:

Source archive

Connection:

Target archive

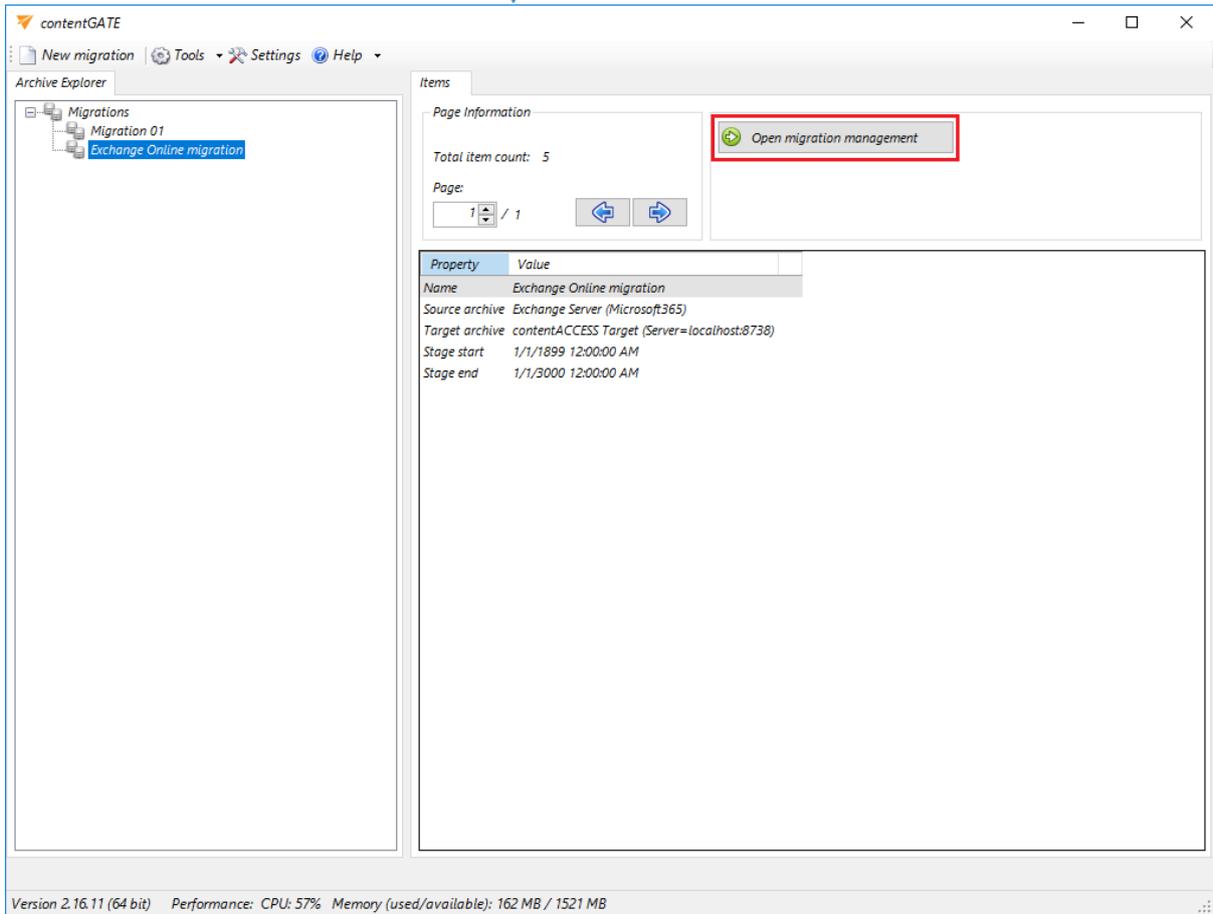
Connection:

The migration project is now added to the **Archive Explorer** pane of contentGATE.

## Migration project configuration

As mentioned earlier, we will demonstrate the Exchange Online migration process with Exchange Online configured as the source archive and contentACCESS as the target archive.

First, open the *Exchange Online migration* project using the **Open Migration Management** button.

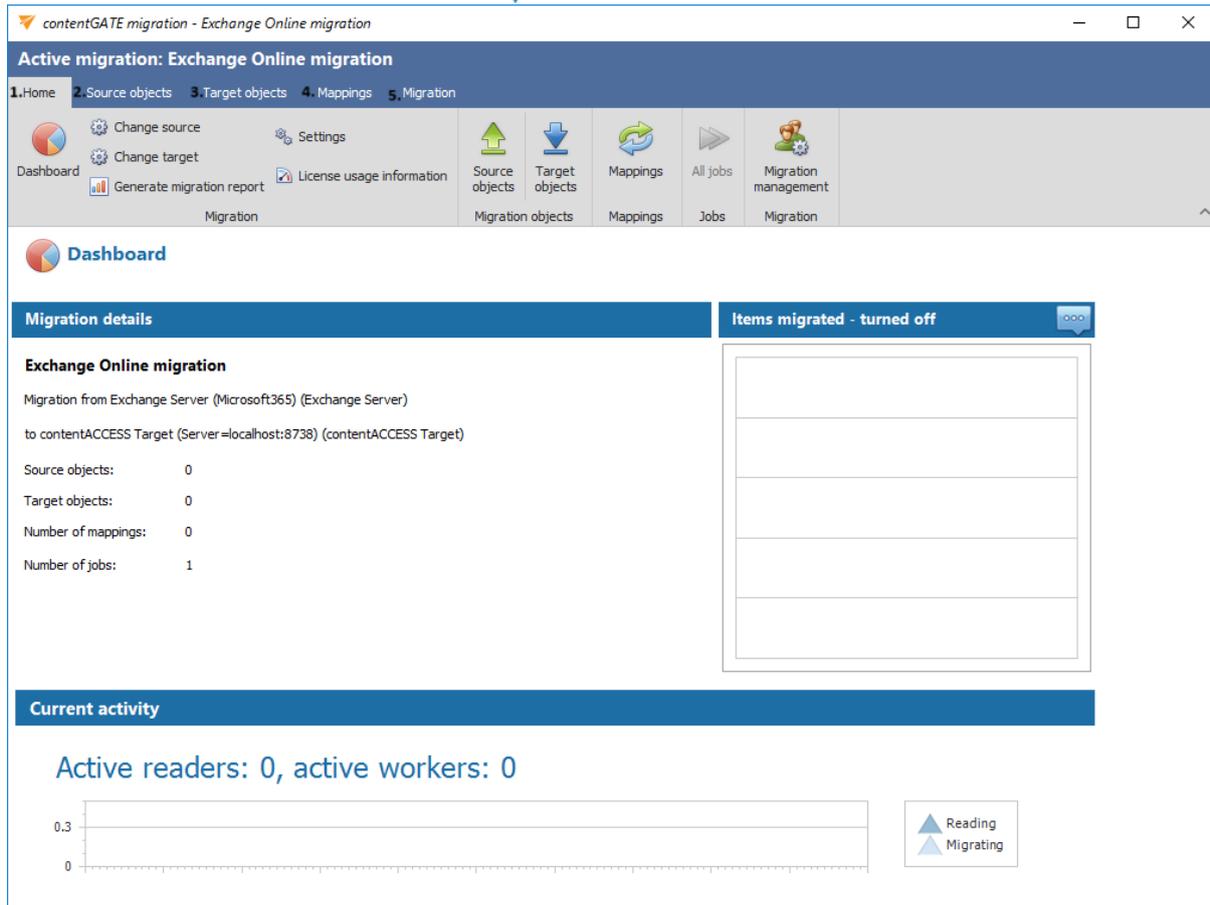


Now, we will walk through the configuration settings of the newly created migration project. These configurations allow you to set:

- The exact mailboxes to be migrated or excluded from the migration process
- The specific migration workflow
- Migration options

### Interface overview

The migration project's settings are available in the respective sections of the migration's management interface.



The following settings are available in these sections:

## 1. Home

Migration settings can be viewed, and connector settings can be viewed or edited on this page.

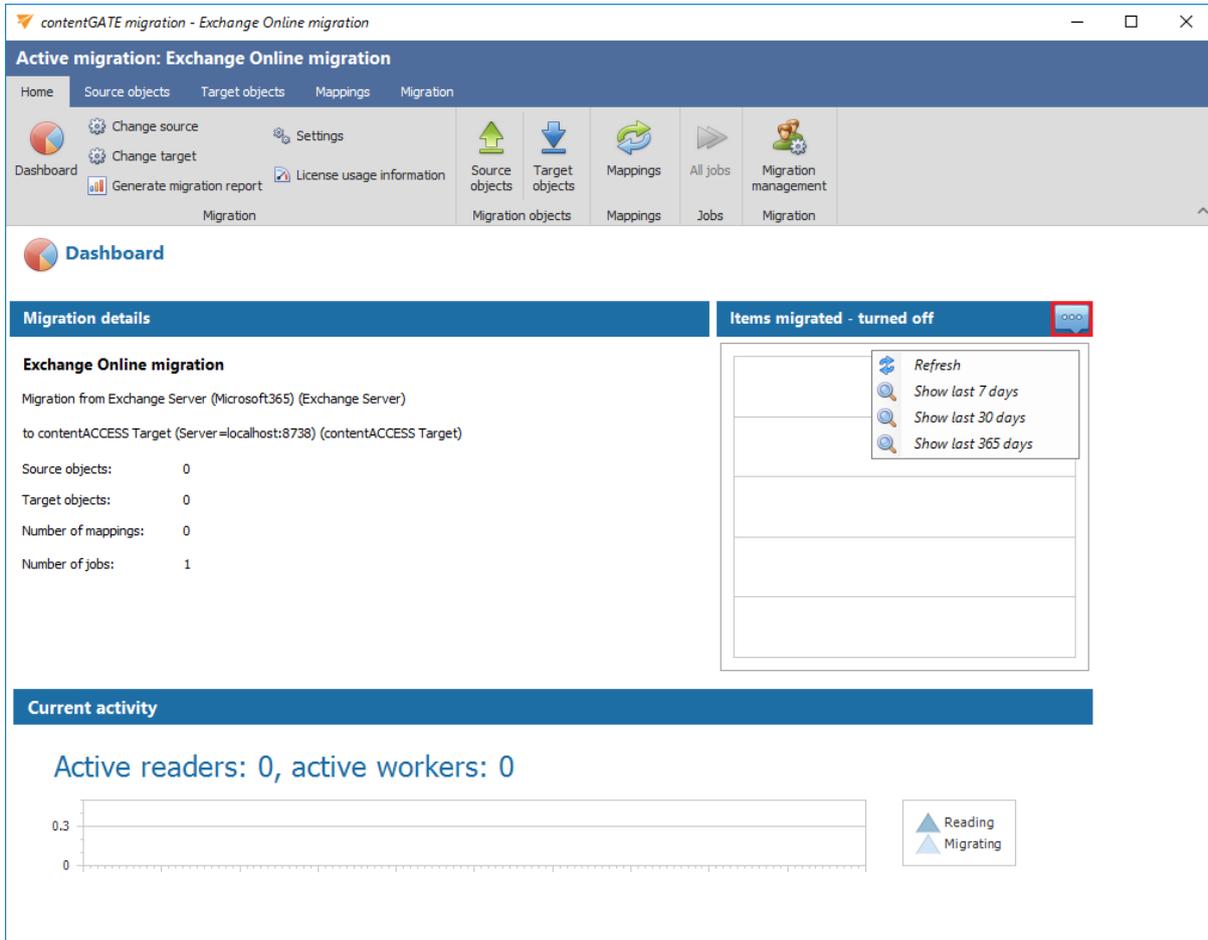
The toolbar on this page features the following options:

- **Change source** – Edit source archive connections using this option
- **Change target** – Edit target archive connections using this option
- **Generate migration report** – Create an overall migration report for all mappings using this option (more details [here](#))
- **Settings** – Configure item filtering settings, global settings, and performance settings here (more details [here](#))
- **License usage information** – Displays the data volume and number of items in the migration
- **Retention mapping** – Map source retention categories to target retention categories here



- **Dashboard** – Displays the basic parameters of the source and target connectors

The graph in the Migration details section displays the number of migrated items in the last 7, 30, or 365 days. The time period can be adjusted using the triple-dot menu in the top right corner of the graph. Hover your cursor over the graph to display the information. Initially, the value is “0”.



The current activity of reader and worker threads can also be viewed using the graph at the bottom of the window.

## 2. Source objects

This section displays the list of source objects (in this case Exchange Online) available on the source connector. Initially, the grid is empty. Source objects can be loaded either manually or automatically. (For more details, click [here](#).)



contentGATE migration - Exchange Online migration

Active migration: Exchange Online migration

Home **Source objects** Target objects Mappings Migration

Select manually Create mappings  
 Load all Show contents Refresh  
 Remove Properties

Manage source objects

**Source objects**

Type	Name	Path	Content type	Creation date	Modification date	Status	EmailAddress	ExchangeServer
?	#c	#c	#c	=	=	=	#c	#c

### 3. Target objects

Target objects (mailboxes already provisioned in the contentACCESS Email archive) can be loaded here either manually or automatically. The list collects the targets of the migration – where the data will be migrated. The list is initially empty, and objects can be added either manually, or all of them can be loaded at once. (For more details, click [here](#).)

contentGATE migration - Exchange Online migration

Active migration: Exchange Online migration

Home Source objects **Target objects** Mappings Migration

Select manually Remove Find shortcuts in the mailbox  
 Load all Properties Create users for shortcut migration  
 Refresh

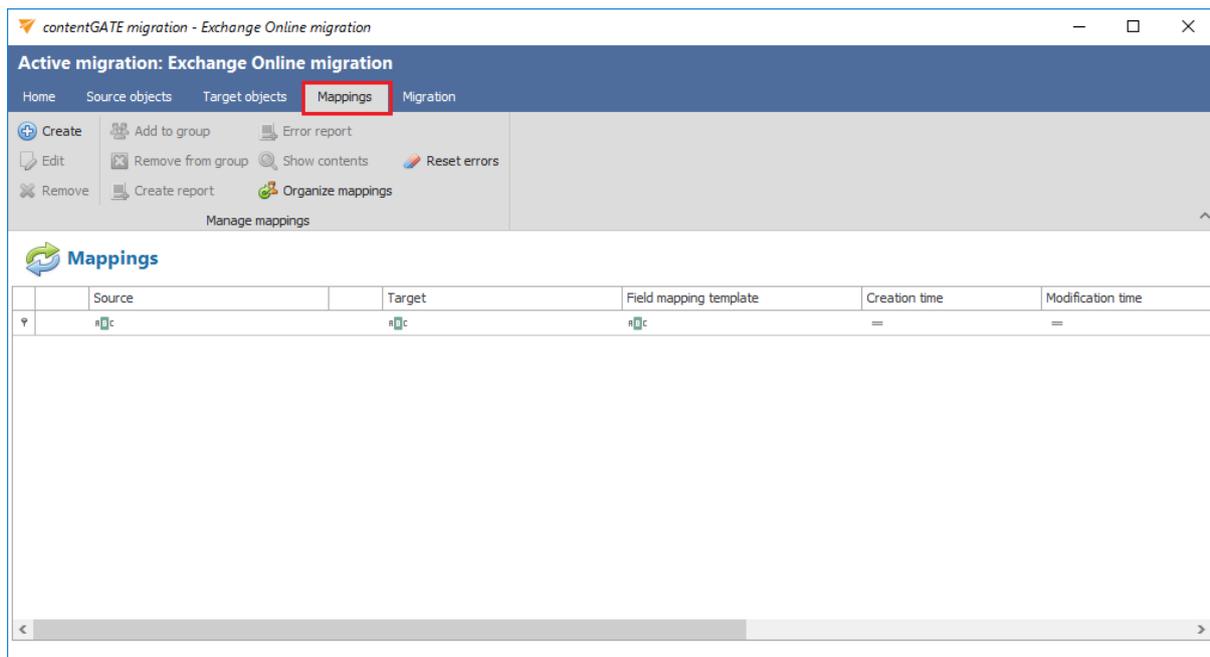
Manage target objects

**Target objects**

Type	Name	Path	Content type	Creation date	Modification date	Status	EmailAddress	ExchangeServer
?	#c	#c	#c	=	=	=	#c	#c

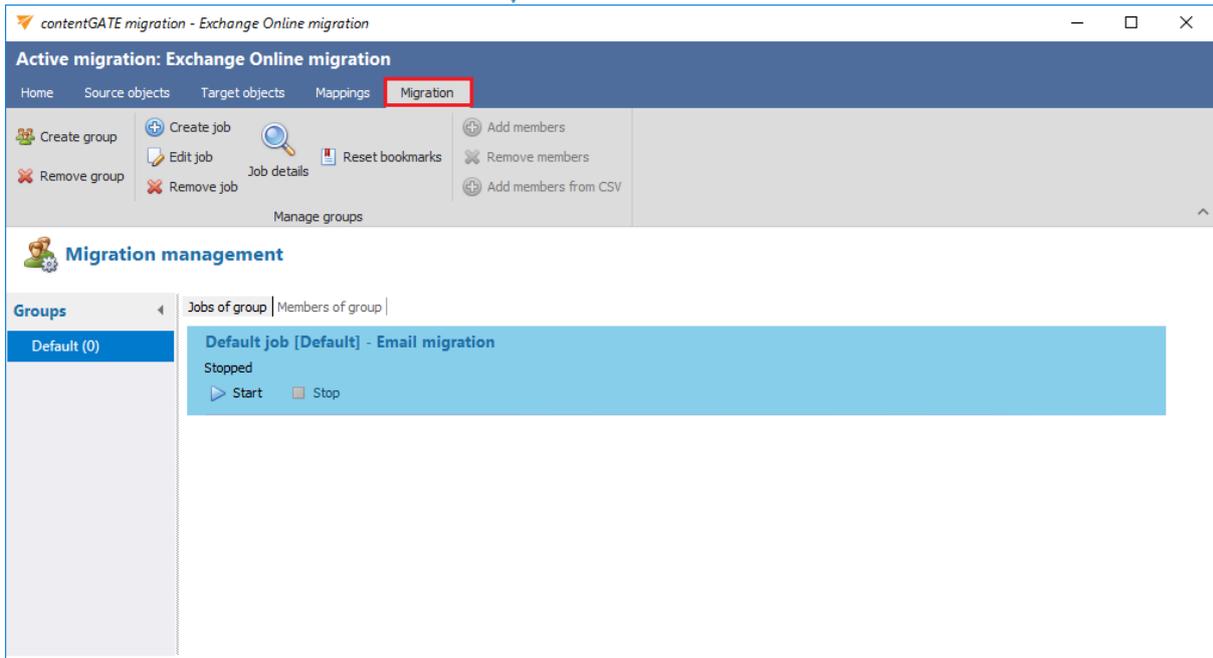
### 3. Mappings

During migration, Exchange Online mailboxes are assigned to contentACCESS archive mailboxes. This process is called **object mapping**, where each source mailbox is assigned to exactly one target. Multiple source mailboxes can be mapped to the same target mailbox, allowing mailbox merging. Mapping can be done manually or automatically, using the email address or mailbox name to match source objects with target objects. Any items that cannot be mapped automatically must be mapped manually. (For more details, click [here](#).)



### 4. Migration

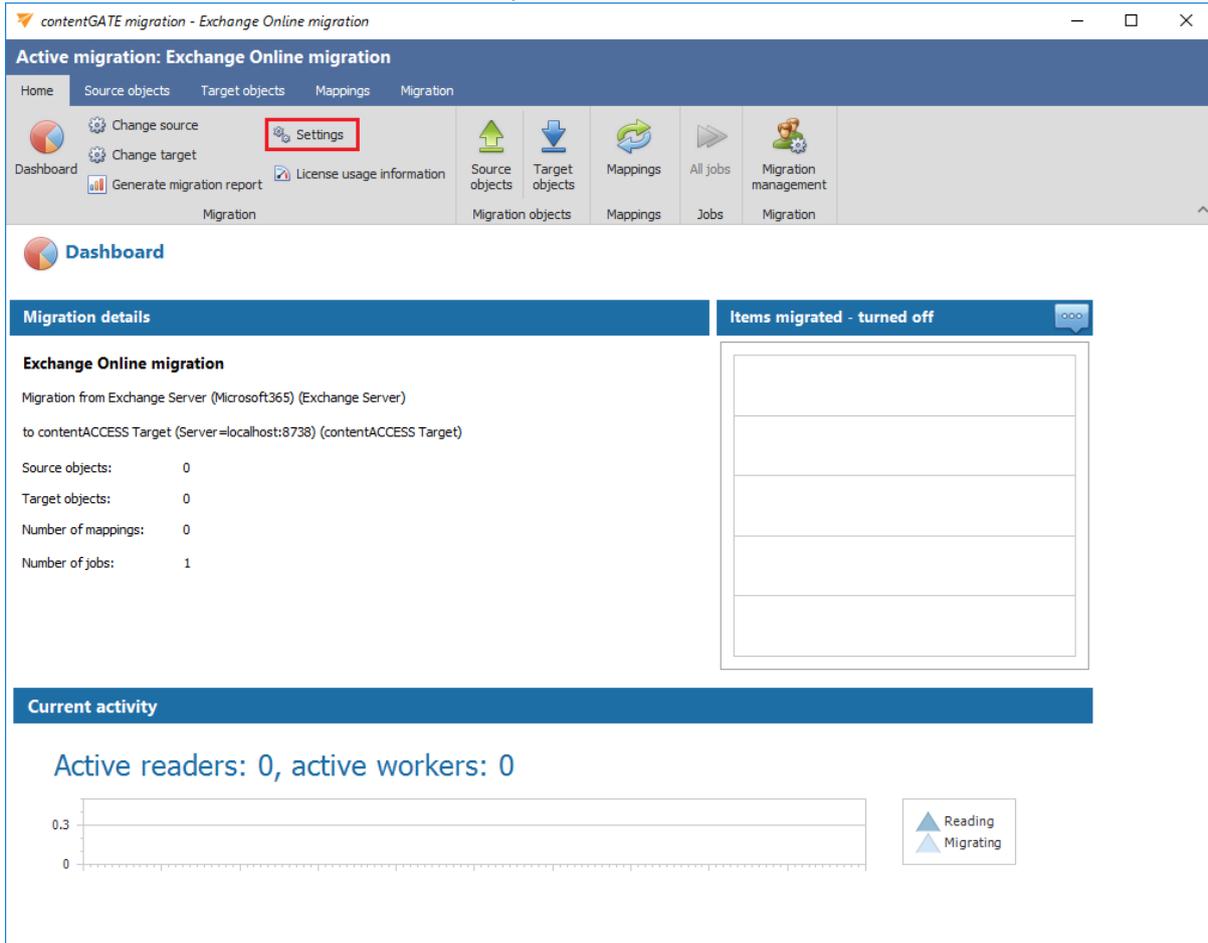
Migration jobs and groups can be created and viewed on this tab. The workflow of a migration is defined in the migration job. Typically, there are two types: item migration workflow and shortcut migration workflow. In this scenario, the shortcut migration workflow is not applicable, so we will omit it. A migration job must always be assigned to a migration group, as only the mailboxes added to groups can be migrated. (For more details, click [here](#) for jobs and [here](#) for groups.)



All the above-mentioned sections are initially **empty**. To configure these settings, refer to the following sections of this user guide.

### Default project settings

Before you start configuring a migration job, you can set default settings that will be applied to your migration project. To configure these default settings, click on **Settings** in the **Home** tab's toolbar.



The **Migration settings** window will open. The navigation pane of this window features three types of settings:

- Global settings
- Filtering settings
- Performance settings

### 1. Global settings

The following options can be configured here:

**a) Email migration** – the *“If folder path is unknown, use this path”* option specifies a target mailbox folder for mailbox items whose path cannot be found during the migration process. By default, items without folder path information are saved into the ‘Unknown’ folder, but this folder can be changed here. In this section, you can also configure several options, including



whether to perform shortcut migration, remove unread flags from emails, limit recipients (and to what extent), convert emails to .msg format, and more.

**b) Shortcut migration** – when checked, the option “*Preserve shortcut properties during the shortcut migration*” does the following:

**Important:** Although this section is described on this page, the Shortcut migration settings can be left unconfigured, as there are no shortcuts in Exchange Online.

- finds a shortcut in the mailbox
- reads properties that can be preserved (categories, follow-up flags, read status, etc.)
- migrates the item 1:1 – the item will remain exactly the same as it is in the source archive
- upgrades the shortcut (creates a new item from the .msg file)
- applies properties that can be preserved on the new shortcut)

**Note:** Information such as category, follow-up flags, read status, etc., are Outlook/user-specific information and may change multiple times during an email’s lifetime. Therefore, these should be considered user-specific information, not email-specific.

This option is recommended if the migration needs to be fully compliant. The migrated message remains as is, but the user’s shortcut retains the user-specific Outlook information.

In this section, you can also modify the migrated email before it is transferred to the target system by selecting the option ***Modify migrated message by applying the actual shortcut properties on it*** will modify the migrated email before it is transferred to the target system. In this case, the following happens:

- finds a shortcut in the mailbox
- reads properties that can be preserved (categories, follow-up flags, read status, etc.)
- reads the message from the source archive and applies properties that can be preserved on the message
- migrates the modified message to the target archive
- upgrades the shortcut (creates a new item from the modified .msg file)



The properties that can be preserved are applied to the new shortcut.

This option is recommended if the customer requires updating the status of migrated emails to their current status. The email is modified during the shortcut migration, so it cannot be considered a fully compliant migration.

**Important:** If the item migration has already finished on the given mailbox, the option **Modify migrated message by applying the actual shortcut properties on it** no longer applies, because the email was already migrated 1:1 to the target archive and cannot be modified later. Therefore, plan the migration strategy in advance, especially the sequence of migration.

c) **Public folders** – If explicit public folder settings need to be configured, it is possible to allow and configure them here.

The screenshot shows the 'Migration settings' dialog box with the following sections:

- Global settings:**
  - a) Email migration:**
    - If folder path is unknown, use this path:
    - Create shortcut in mailbox during migration
    - Remove the unread flag from the items during migration
    - Limit the number of recipients to
    - Remove the envelope from envelope journal messages
    - Convert ANSI messages to Unicode format
    - Add the 'Received' header to EML file if missing
    - Always convert email to MSG format
  - b) Shortcut migration:**
    - Preserve shortcut properties during shortcut migration
    - Modify migrated message by applying the actual shortcut properties on it
    - Shortcut pattern
  - c) Public folders:**
    - Use explicit public folder settings
    - Exchange Server:
    - Email address:

A 'Close' button is located at the bottom right of the dialog.

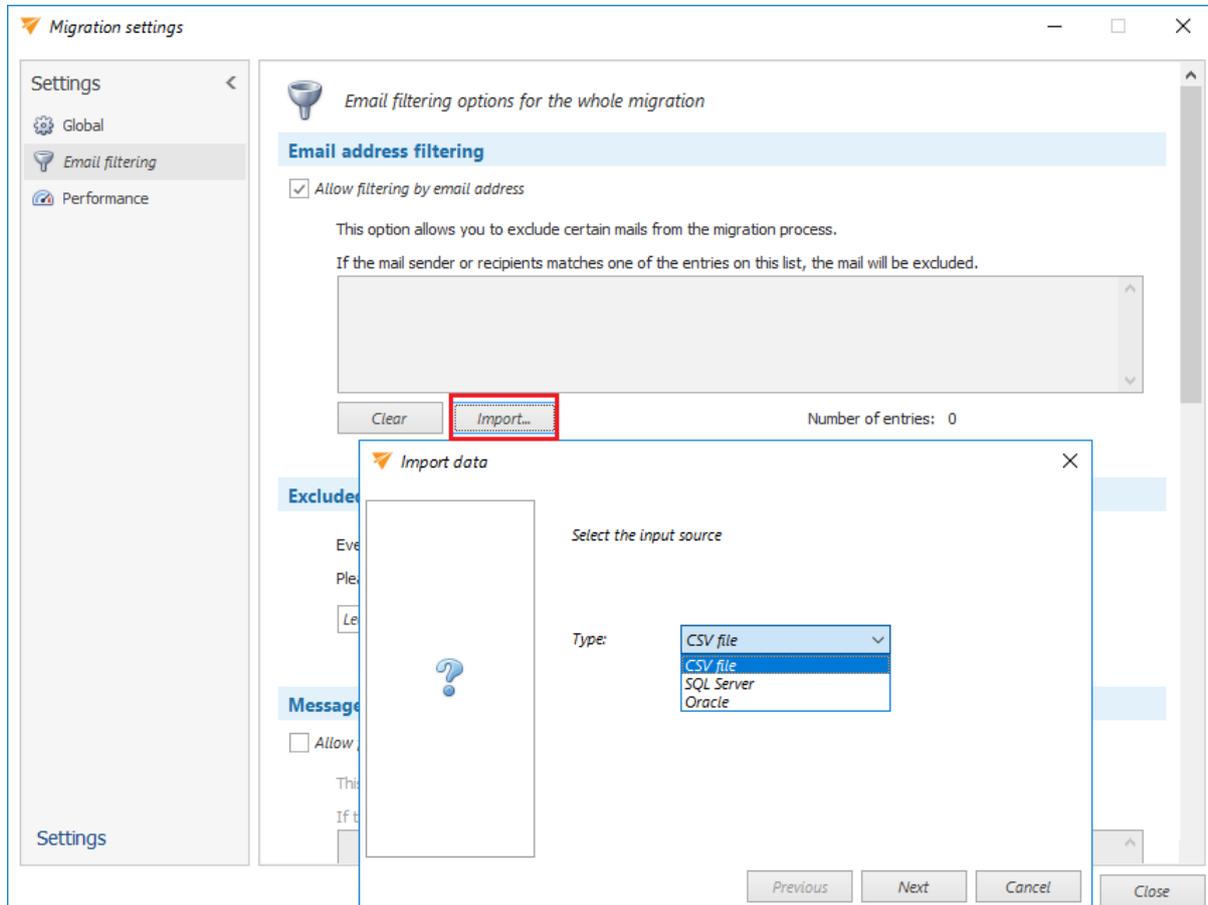
## 2. Email filtering

a) **Email address filtering** – this settings allow you to exclude certain mailboxes from the migration process. The list of mailboxes to be excluded can be imported from a **CSV file**, a **SQL database** connected to the source archive, or from **Oracle** used by the source archive. Multiple lists



of entities to be excluded can be imported. Existing entries will not be deleted; the list will only be updated.

To add mailboxes to be excluded, click the **Import** button, select the import type, and specify the items that should not be processed by the migration project.



**b) Exclude shortcut handling** – even if certain mailboxes are excluded from the migration, shortcuts pointing to the excluded mailboxes may still exist. The dropdown list allows the administrator to choose what to do with these shortcuts:

- leave them untouched
- replace them with the original item
- delete them

**Important:** The Exclude shortcut handling settings needs to be configured only if shortcuts are being migrated. Since there are no shortcuts in Exchange Online, this tab can be left unconfigured.



c) **Message class filtering** – this option allows the exclusion of emails whose message class matches any of those listed.

d) **Date filtering** – process only emails within the specified timeframe.

e) **Size filtering** – this option allows you to include emails based on their size

f) **Filtering by document ID** – exclude documents based on the document id in the database. To do this, you will need to select the database containing the document identifiers by clicking the **Browse...** button.

g) **Subject filtering** – this option allows you to exclude emails whose subject matches any of those listed in this section. The list of emails to be excluded can be imported from a **CSV file**, a **SQL database** connected to the source archive, or from **Oracle** used by the source archive.



Migration settings
— □ ×

Settings <

- Global
- Email filtering
- Performance

Settings

### Email filtering options for the whole migration

**a) Email address filtering**

Allow filtering by email address

This option allows you to exclude certain mails from the migration process.  
If the mail sender or recipients matches one of the entries on this list, the mail will be excluded.

Clear
Import...
Number of entries: 0

**b) Excluded shortcut handling**

Even if emails are excluded from the migration, there might still be shortcuts present.  
Please decide what to do with the shortcuts which are pointing to excluded emails.

Leave the shortcut untouched

**c) Message class filtering**

Allow filtering by message class

This option allows you to exclude certain mails from the migration process.  
If the message class matches one of the entries on this list, the mail will be excluded.

Save

**d) Date filtering**

Allow filtering by date

This option allows you to include emails based on their date (received or sent date)

Include only emails between 1/1,0001 1/1,0001

**e) Size filtering**

Allow filtering by size

This option allows you to include emails based on their size

Include only emails between 0 0

**f) Filtering by document id**

Allow excluding documents based on database

This option allows you to exclude emails if the document id is in the database

Browse...

**g) Subject filtering**

Allow filtering by email subject

This option allows you to exclude certain mails from the migration process.  
If the mail subject matches one of the entries on this list, the mail will be excluded.

Clear
Import...
Number of entries: 0

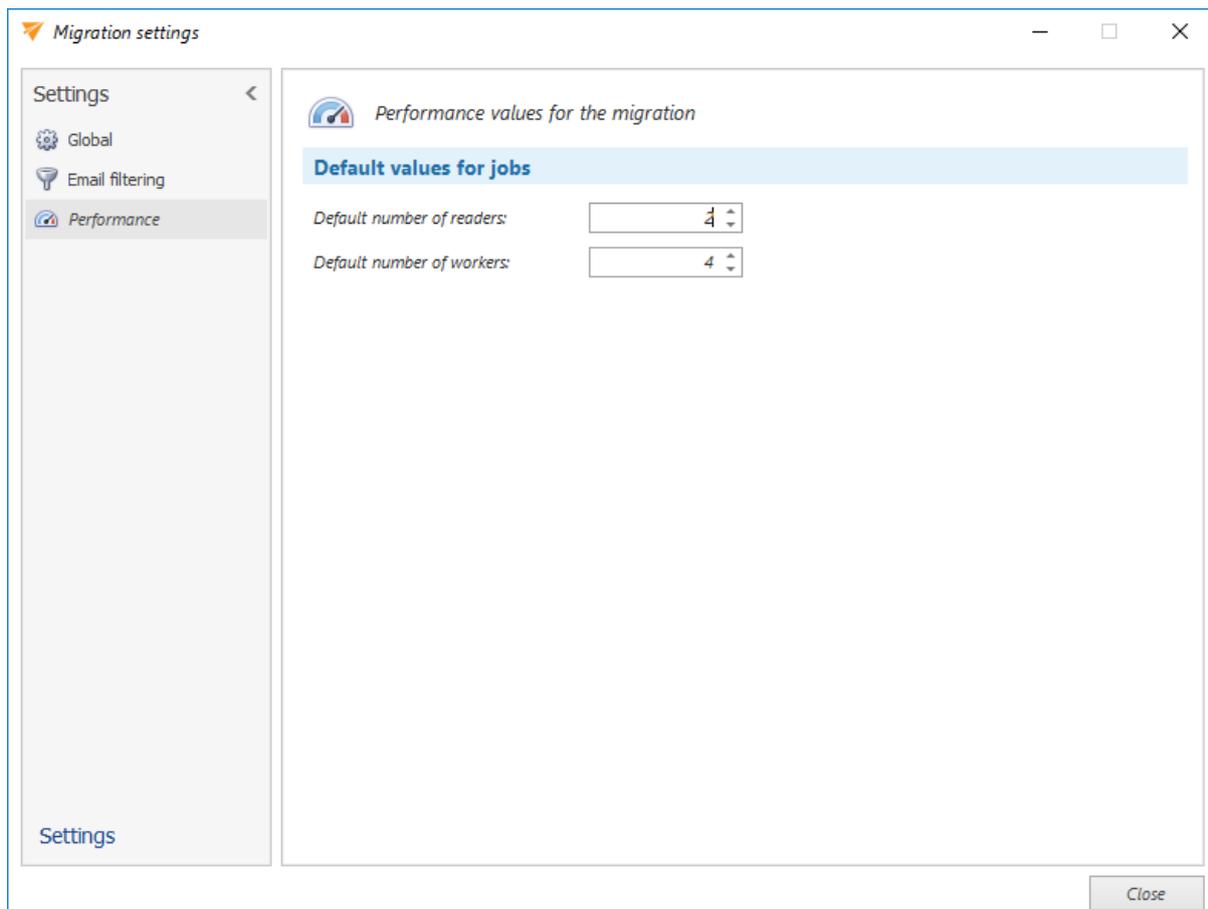
Close



### 3. Performance

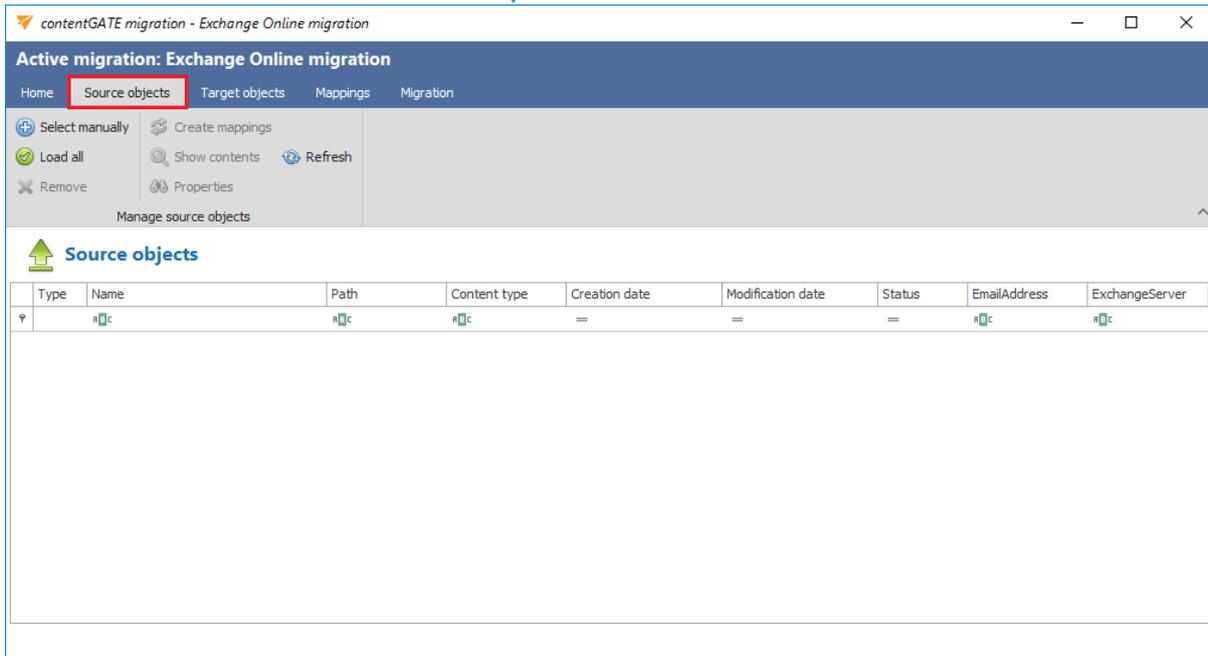
Performance settings allows you to set the **default** performance values for every migration job in a migration project. The administrator can specify the default number of reader and worker threads here. The thread count determines the number of tasks running in parallel. These default values will be prepopulated in the migration job's settings.

**Note:** The thread count can be modified in the job settings. The values defined in the migration job will always take priority.



#### Loading source objects

The **source objects** refer to the available mailboxes in the **source Exchange Online**. Open the **Source objects** tab. The grid on this page is initially empty, and the source mailboxes must be loaded.



You can:

- **Load all** – use this option to load all objects available on the source archive
- **Select manually** – if you don't want to load all available objects from the source connector (e.g. you don't want to migrate everything), you can use this option to select the desired objects manually

When selecting objects manually, the **Migration objects** dialog will open. Select the desired objects from the list and click **Add**. The source objects will then be moved to the lower part of the dialog. The dialog also offers an option to select subfolders of a source object (option **Add folder**). You can also delete the selected objects by clicking on the **Remove** button. Once you selected the required subjects, click **Save**.



**Migration objects**

Select migration objects

Type	Name	Path	Content type	Display name
📁				
📧	Adele Vance		Mailbox	
📧	Alex Wilber		Mailbox	
📧	CAEA-SKEQA		Mailbox	
📧	Diego Siciliani		Mailbox	
📧	Discovery Search Mailbox		Mailbox	
📧	Emma Kent		Mailbox	

Items: 25 Selected: 1

Type	Name	Content type	EmailAddress	ExchangeServer
📧	Clark Kent	Mailbox	Clark.Kent@zh2h...	pa4pr06mb8569

Items: 1 Selected: 0

The selected source objects will now be added to the list.

contentGATE migration - Exchange Online migration

Active migration: Exchange Online migration

Home | Source objects | Target objects | Mappings | Migration

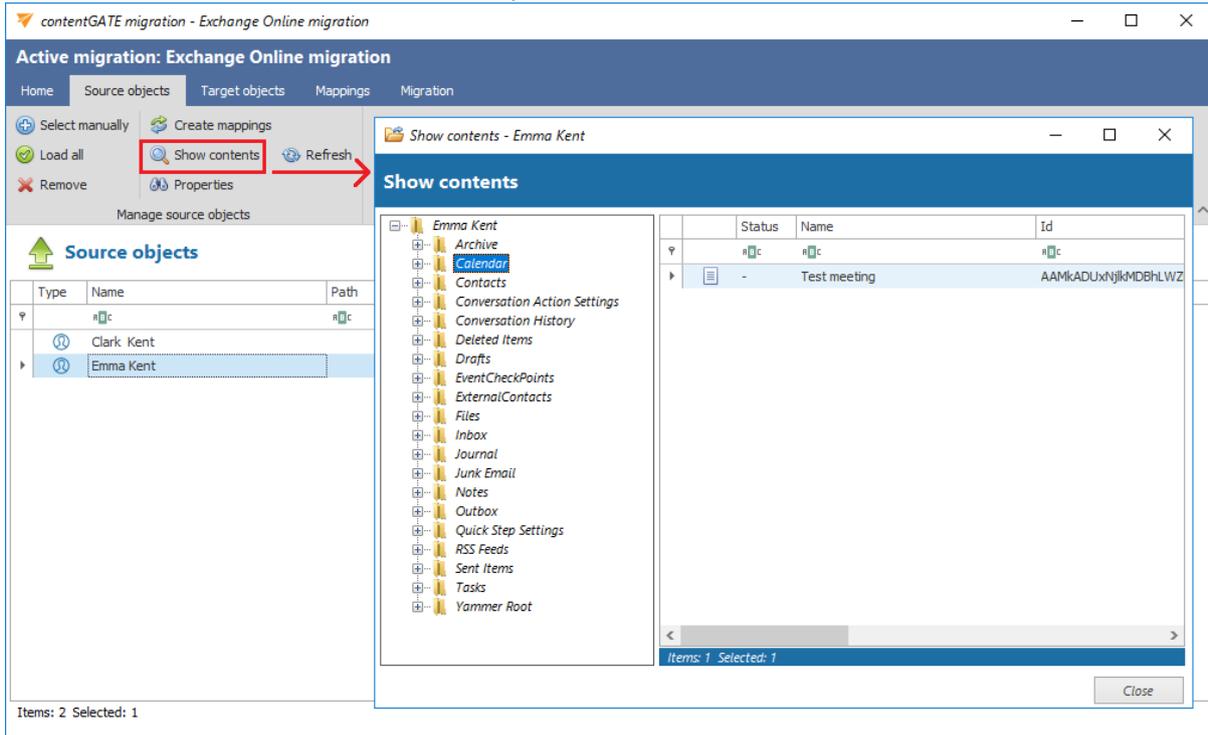
Manage source objects

**Source objects**

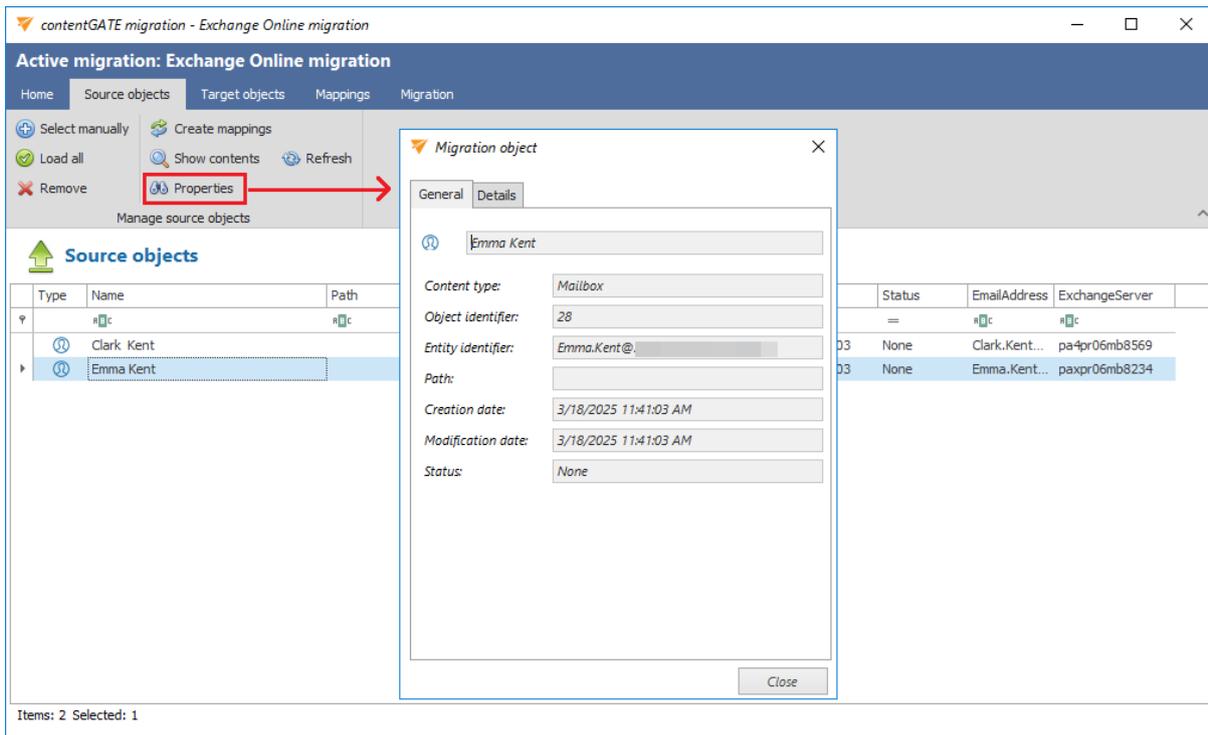
Type	Name	Path	Content type	Creation date	Modification date	Status	EmailAddress	ExchangeServer
📁				=	=	=		
📧	Clark Kent		Mailbox	18/03/2025 11:41:03	18/03/2025 11:41:03	None	Clark.Kent...	pa4pr06mb8569
📧	Emma Kent		Mailbox	18/03/2025 11:41:03	18/03/2025 11:41:03	None	Emma.Kent...	paxpr06mb8234

Items: 0 Selected: 0

You can view mailbox items, attachments, and file versions by using the **Show contents** option in the toolbar.



Use the **Properties** option to view the basic properties of a mailbox.



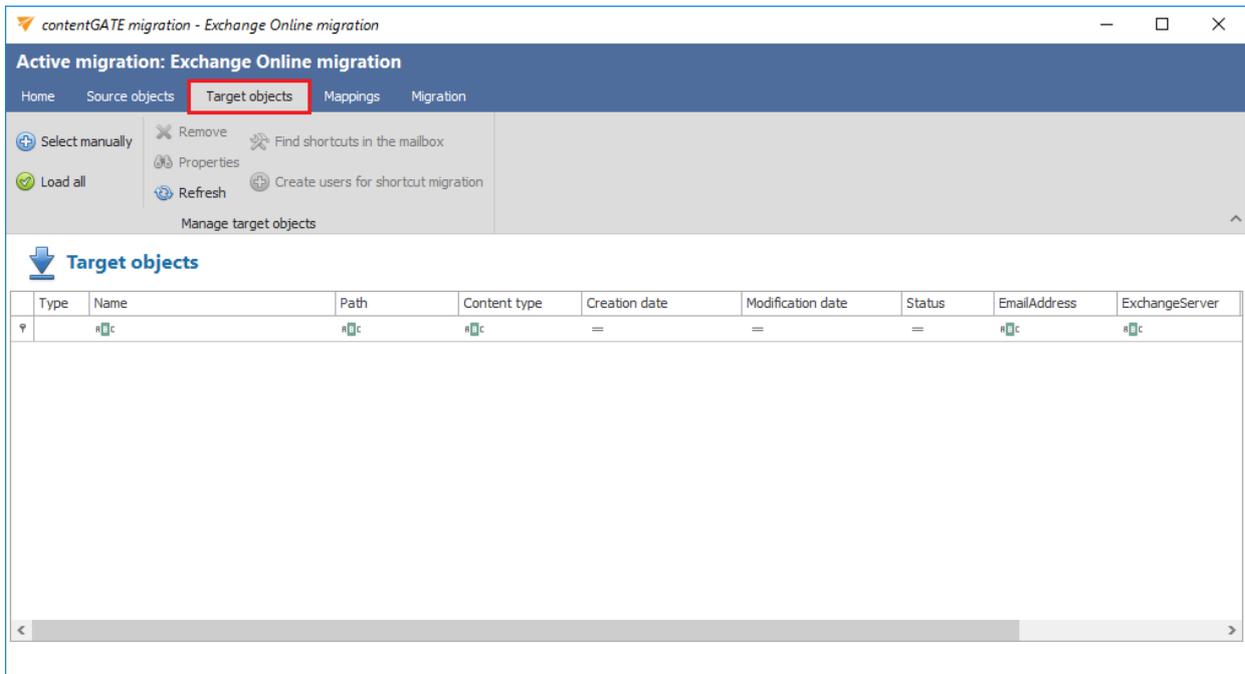
Once the required source objects are loaded, switch to the **Target objects** section.



## Loading target objects

**Target objects** are the provisioned **contentACCESS Email archive** mailboxes.

Open the **Target objects** tab from the toolbar. Initially, the grid is empty. The mailboxes [provisioned](#) in the contentACCESS archive will be loaded on this page. These mailboxes will be the targets of the migration.



You have two options for loading the mailboxes from the contentACCESS archive:

- **Load all** – use this option to load all objects available in the target archive
- **Select manually** – if you do not want to load all available objects from the target connector, you can use this option to manually select the desired objects

When selecting objects manually, the **Migration objects** dialog will open. Select the desired objects from the list and click **Add**. The target objects will then be moved to the lower part of the dialog. The dialog also offers an option to select subfolders of a target object (option **Add folder**). You can also delete the selected objects by clicking on the **Remove** button. Once you selected the required subjects, click **Save**.



**Migration objects**

Select migration objects

Type	Name	Path	Content type	Display name
Mailbox	Diego Sicliani		Mailbox	Diego Sicliani

Items: 1 Selected: 1

Type	Name	Content type	EmailAddress	ExchangeServer	IsPublicFolder	MailboxDN
Mailbox	Alex	Mailbox	Alex	Office365	False	/o=ExchangeLab...

Items: 1 Selected: 0

The selected target objects will now be added to the list.

contentGATE migration - Exchange Online migration

Active migration: Exchange Online migration

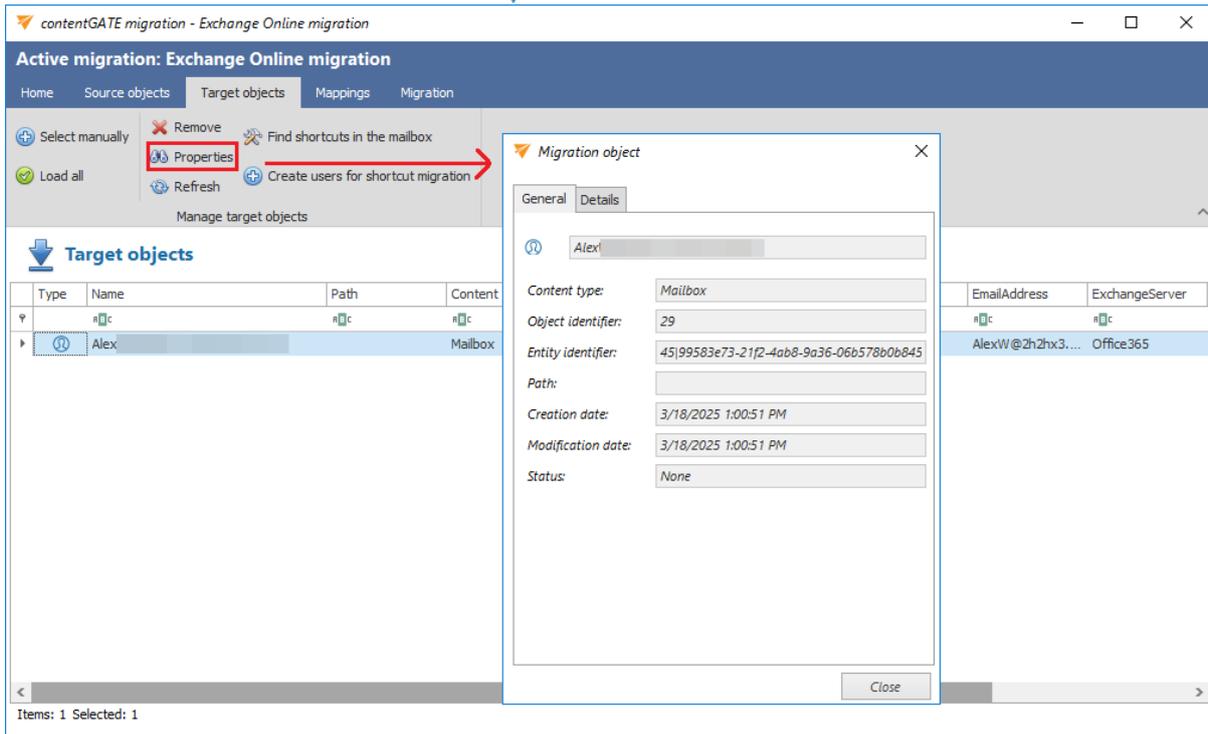
Home Source objects Target objects Mappings Migration

**Target objects**

Type	Name	Path	Content type	Creation date	Modification date	Status	EmailAddress	ExchangeServer
Mailbox	AlexW@2h2hx3.onmicrosoft.com		Mailbox	18/03/2025 01:00:51	18/03/2025 01:00:51	None	AlexW@2h2hx3...	Office365

Items: 1 Selected: 1

Use the **Properties** option to view the basic properties of a mailbox.

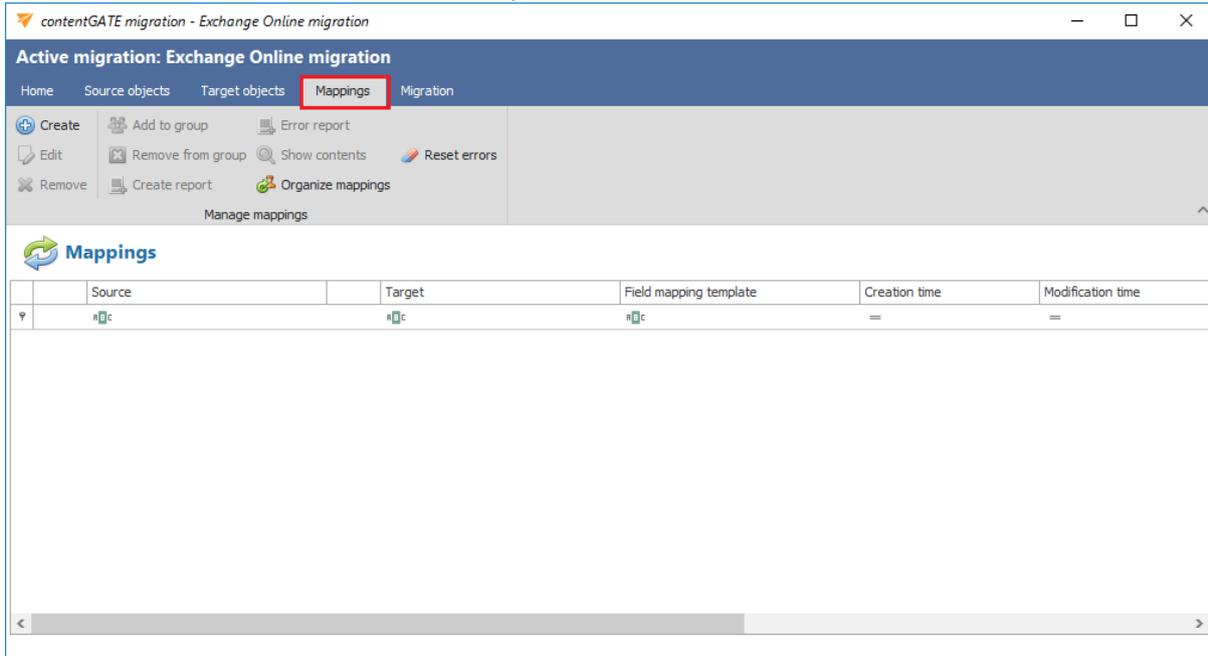


Load the desired objects into the target (where you will **migrate TO**) and then switch to the **Mappings** section.

Mapping source objects to target objects

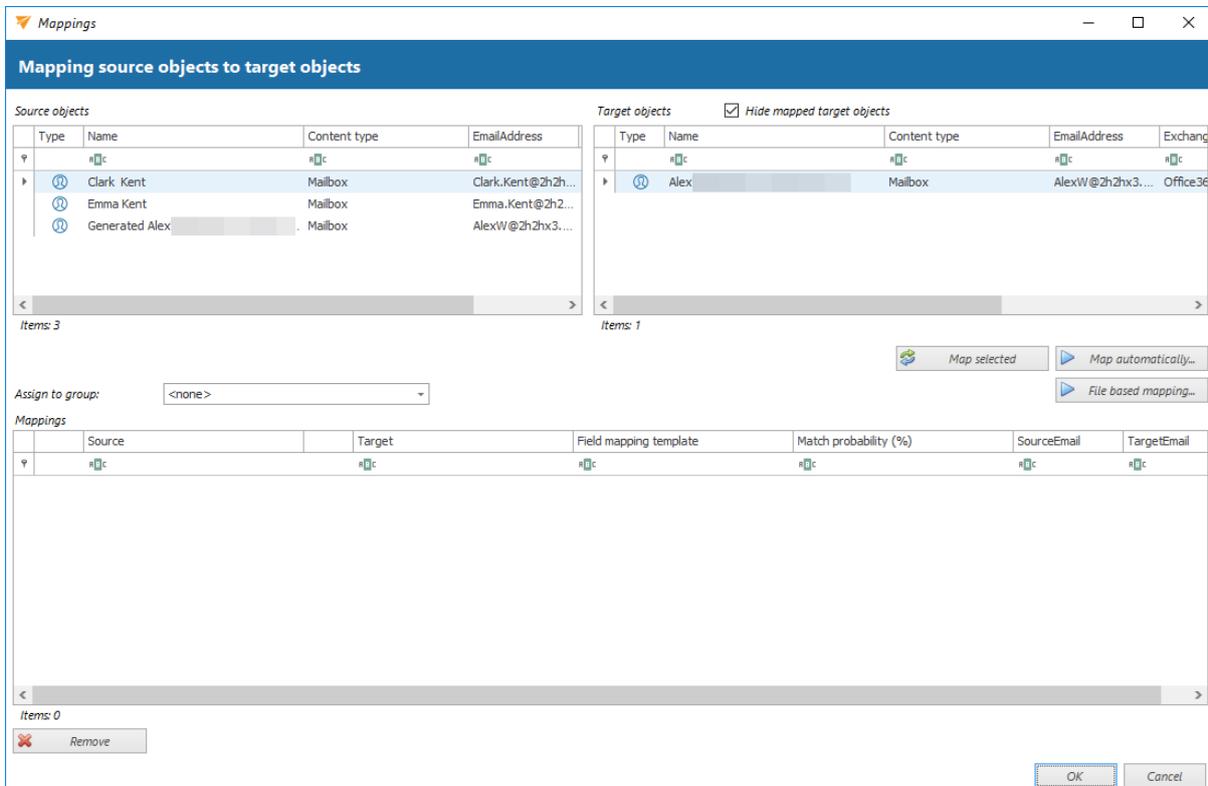
**Note:** The **Error report** and **Reset errors** buttons are explained in the section **Migration reports**.

Open the **Mappings** tab and click **Create** in the toolbar to create the desired object mapping(s).



The Mappings dialog displays:

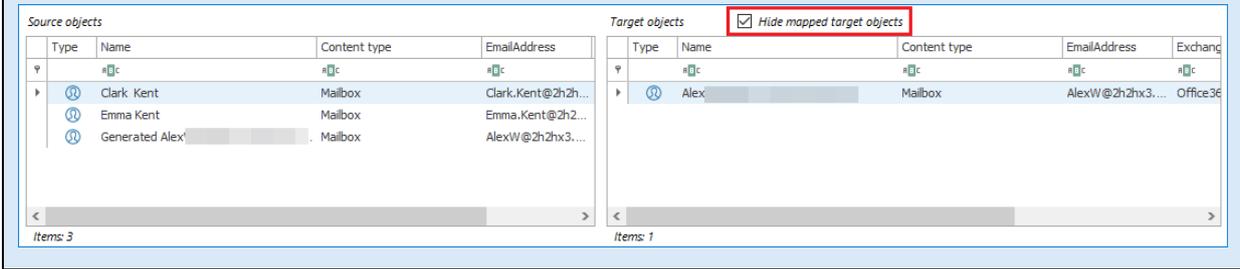
- The **source object(s)** to be migrated on the **source side**
- The **target object(s)** where the source objects will be migrated to on the **target side**



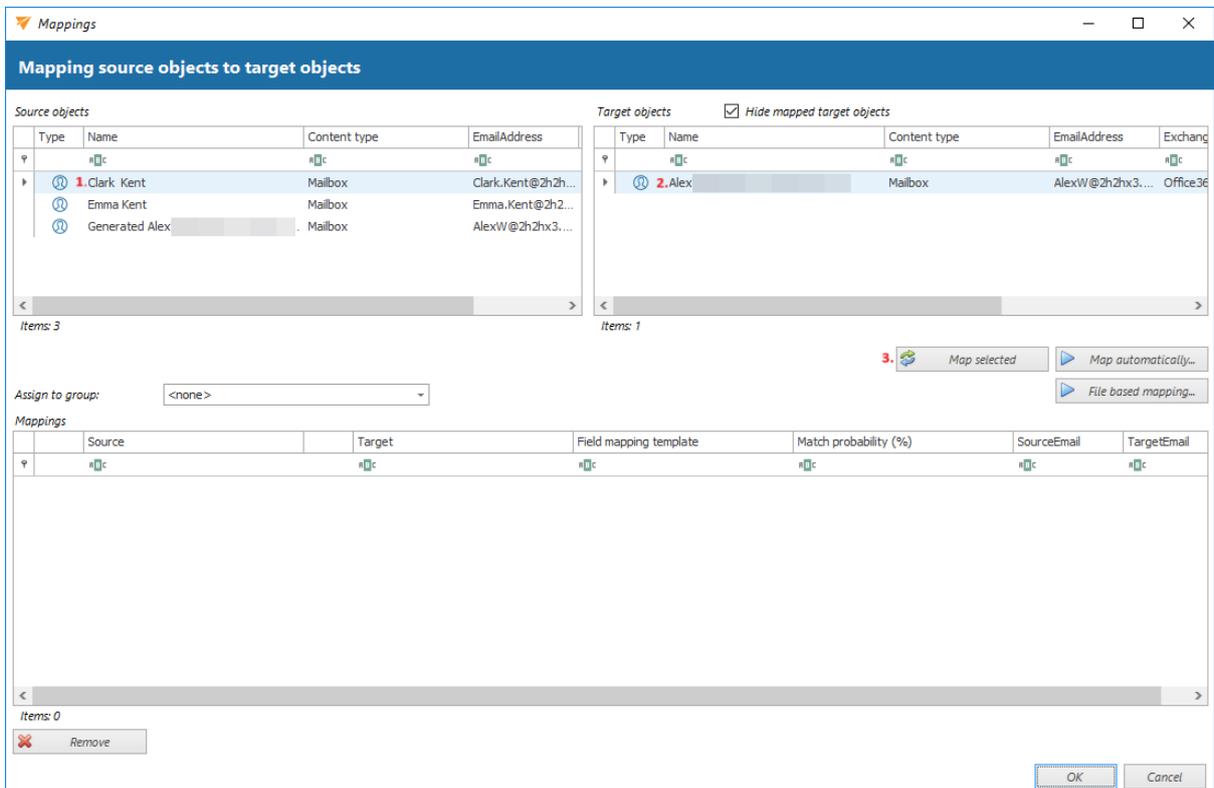
**Note:** A source object can only be mapped to one target, but a target object may be associated with multiple source objects. This action is called merging. If you want to associate multiple



source objects with the same target, uncheck the **Hide mapped target object** option above the grid.



Mappings can be specified **manually** or **automatically**. For **manual selection**, select each source and target one by one, and map them together using the **Map selected** option. The added mappings will be shifted to the lower part of the **Mappings** dialog. Click **OK** to add them to the grid.



You can also remove the selected mapping by clicking the **Remove** button. In this case, the selected objects will appear again in the Source and Target columns, allowing you to create **new mappings**.



**Mappings**

**Mapping source objects to target objects**

**Source objects**

Type	Name	Content type	EmailAddress
Mailbox	Emma Kent	Mailbox	Emma.Kent@2h2...
Mailbox	Generated AlexW@2h2hx3.onmicroso...	Mailbox	AlexW@2h2hx3...

Items: 2 Selected: 1

**Target objects**  Hide mapped target objects

Type	Name	Content type	EmailAddress	Exchange
Mailbox		Mailbox		

Items: 0 Selected: 1

Assign to group: <none>

Map selected | Map automatically... | File based mapping...

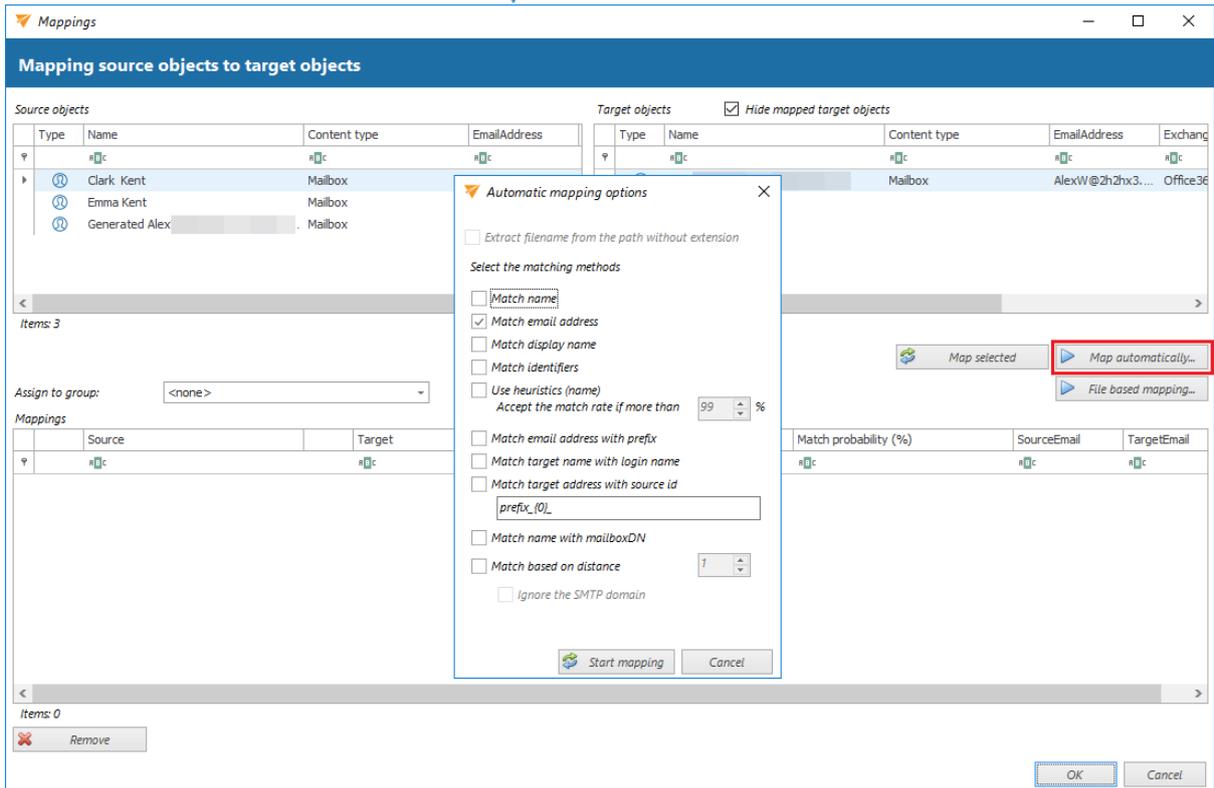
Mappings	Source	Target	Field mapping template	Match probability (%)	SourceEmail	TargetEmail
Clark Kent	AlexW@2h2hx3.onmicrosoft.com		None		Clark.Kent@2h2h...	AlexW@2h2hx...

Items: 1

Remove | OK | Cancel

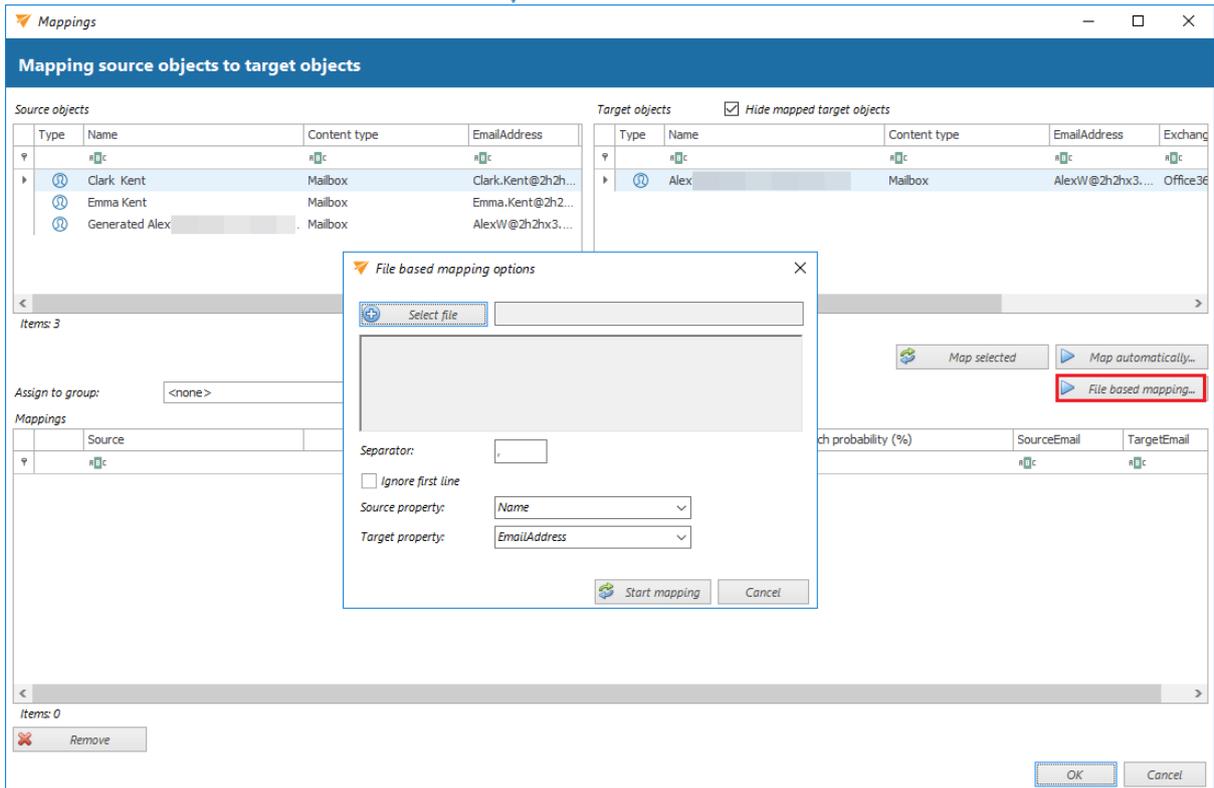
To use automatic mapping, click the **Map automatically** button, and select the mapping criteria. There are 10 auto-mapping methods available, including the name, email address, display name, identifiers (object ID, entity ID, etc.), address name with prefix (the part before the “@” symbol), match target name with login name, etc. Once the criteria are selected, click the **Start mapping** button, and the objects will be paired automatically.

**Note:** If no matches are found by the auto-mapping, the application will warn you. In this case, the user will need to map the objects manually.

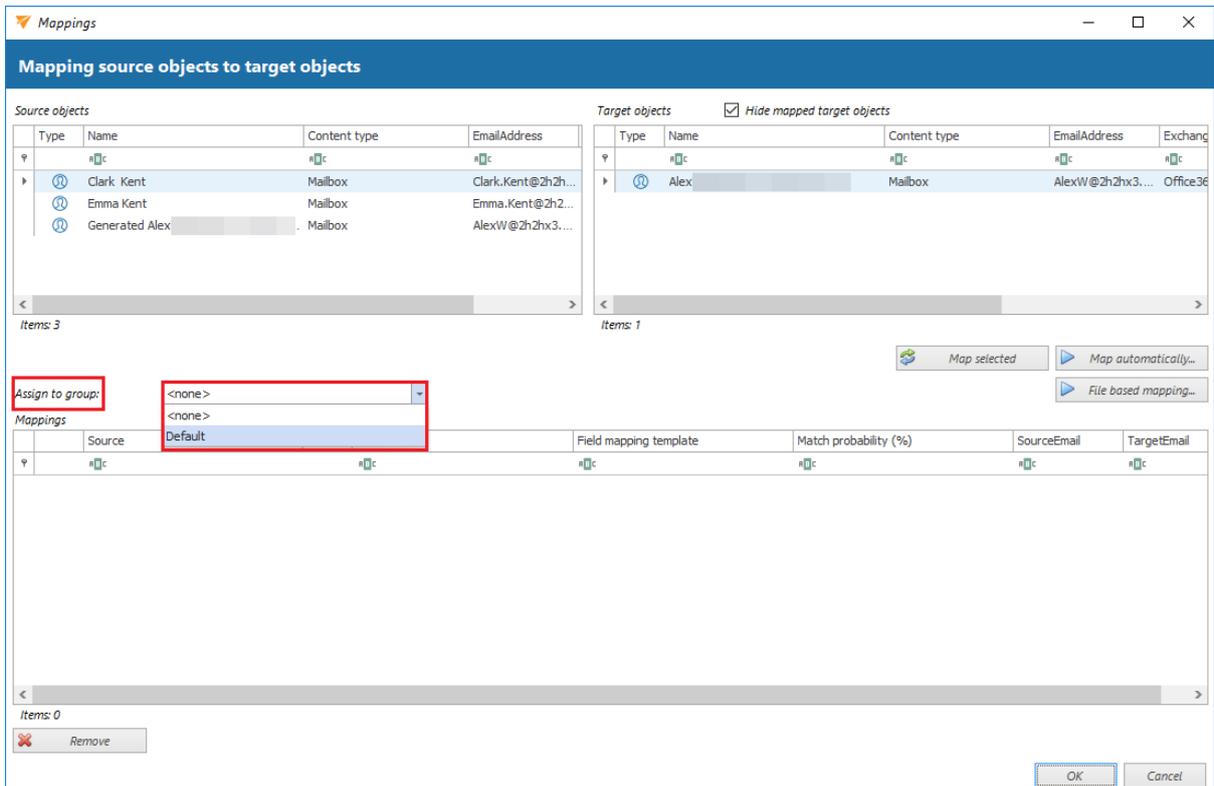


**Note:** Mapped objects are marked in green in both the source and target grids, while unmapped objects are blue.

It is also possible to map objects based on a **.CSV file**. Click on **File-based mapping** in the Mappings dialog and select the desired file. Specify the property separator. If you want to ignore the first line of text in your file (e.g., header), check the **Ignore first line** checkbox. Then, select the Source and Target properties from the dropdown lists. Click on **Start mapping**. The remaining steps are the same as manual and/or automatic mapping.



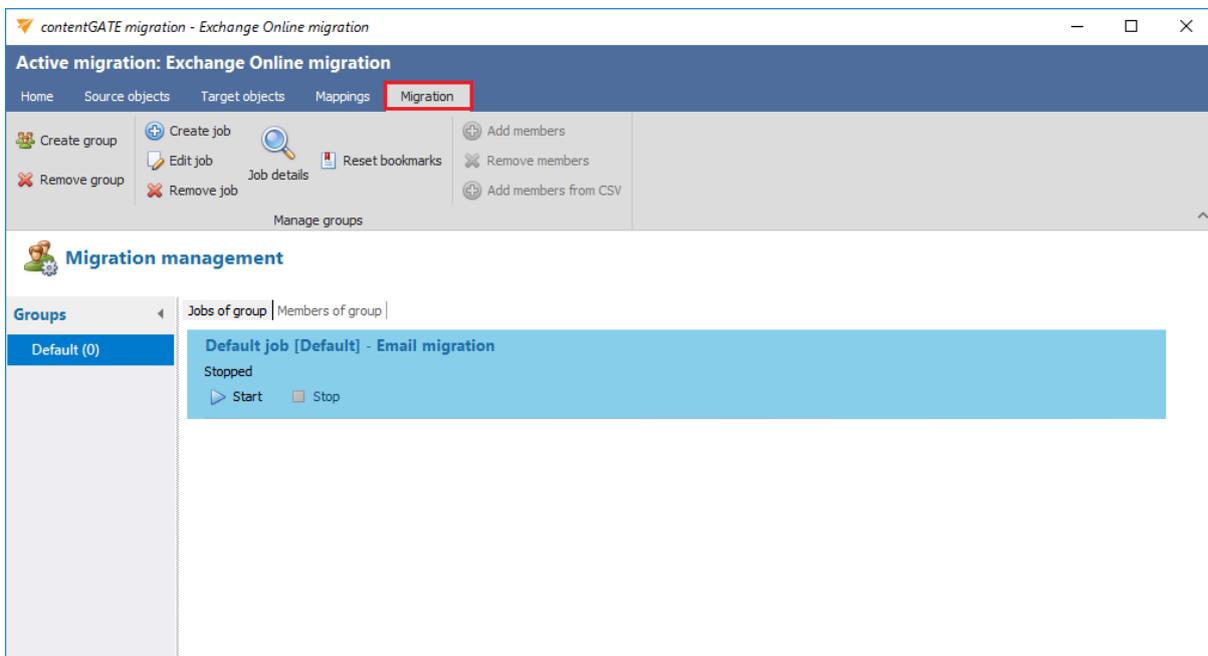
Additionally, you can assign the mapping to a **Group** directly from the Mappings tab. Select the desired group from the **Assign to group** dropdown list. By default, only the **Default** group is available in the dropdown list. If you wish to use a different group, new groups need to be created first on the [Migration](#) tab.



## Creating migration group(s) and adding group members

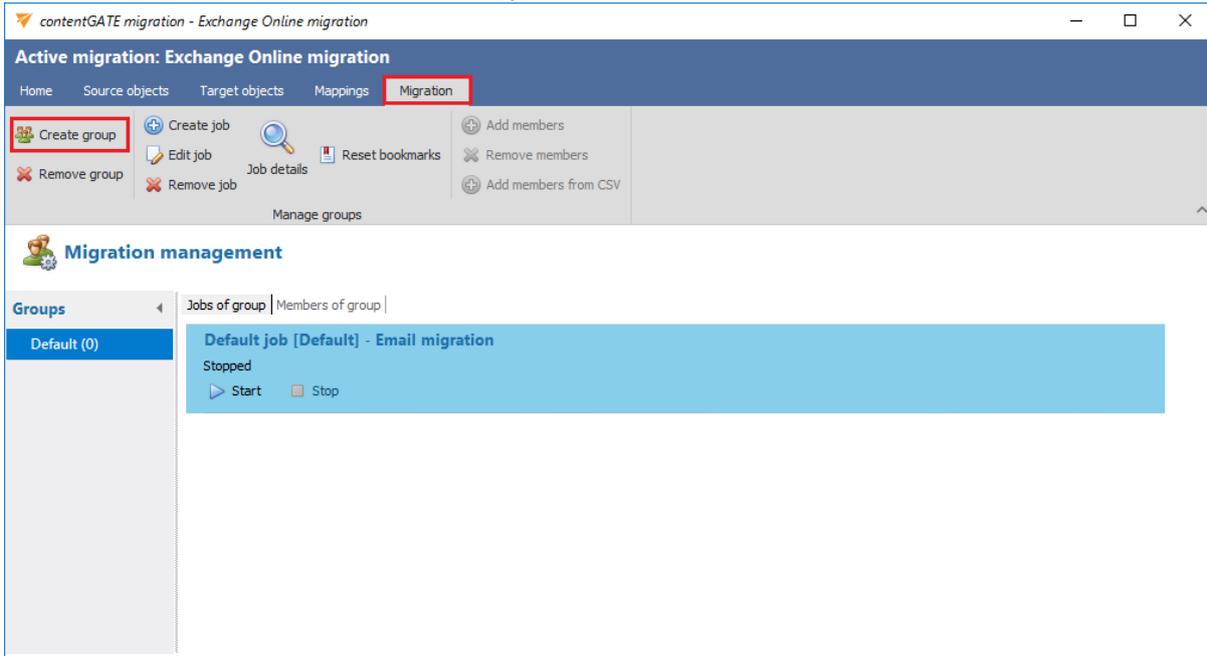
In the next step, we need to **create** a migration group and **associate** our mapped mailboxes with it. Since a migration can only be started at the group level, mailboxes that are not part of a group cannot be processed.

**Group management** makes the migration process more transparent and manageable. It simplifies tracking which mailboxes have already been migrated and helps define priorities – allowing the most important mailboxes to be migrated first.

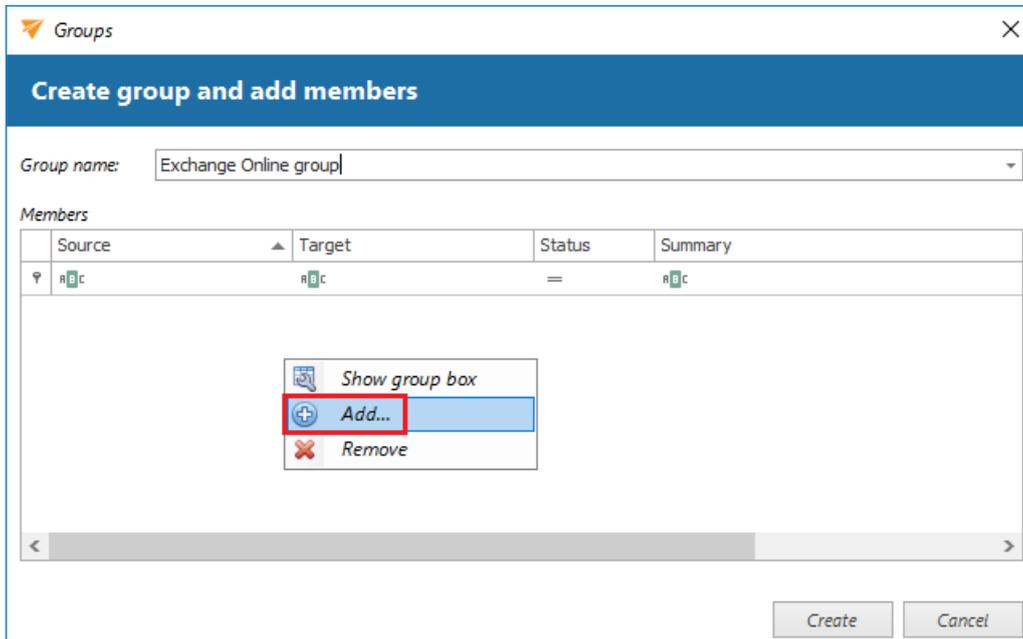


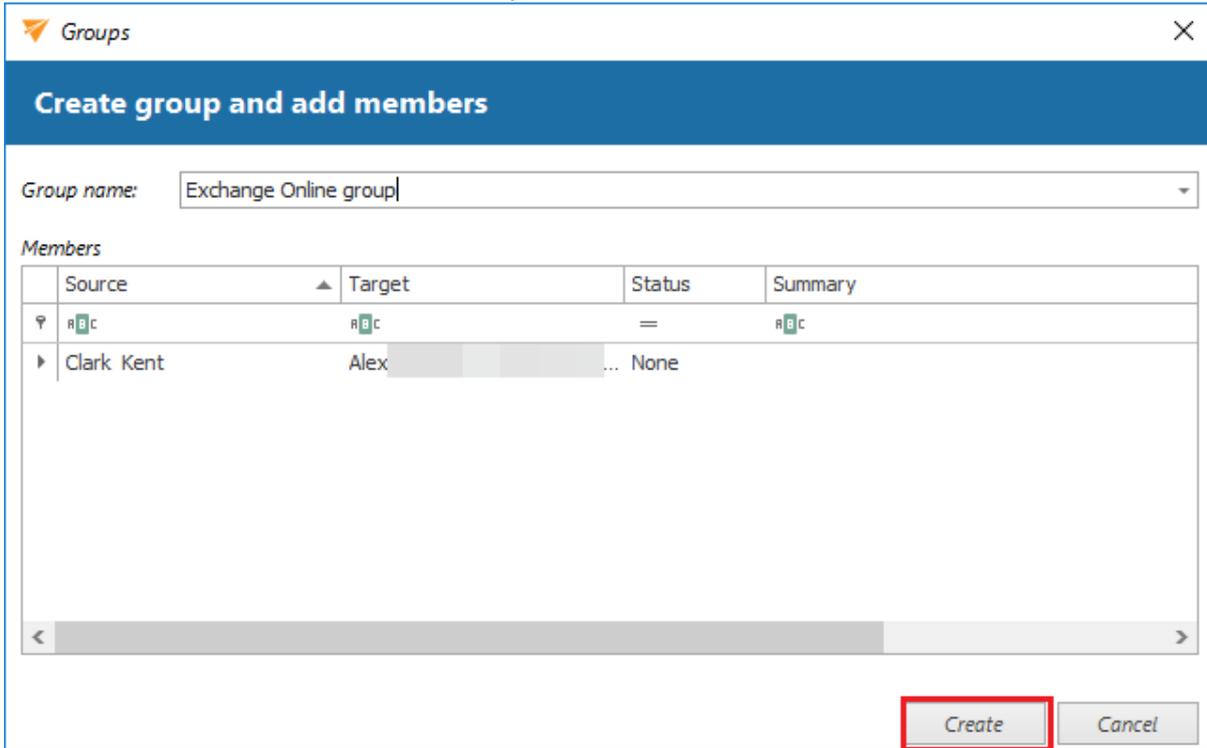
## Creating a migration group and adding members

Navigate to the **Migration** tab. Initially, there is a **Default group** available. If you don't want to use the default group, click **Create group** in the toolbar to create a new one.

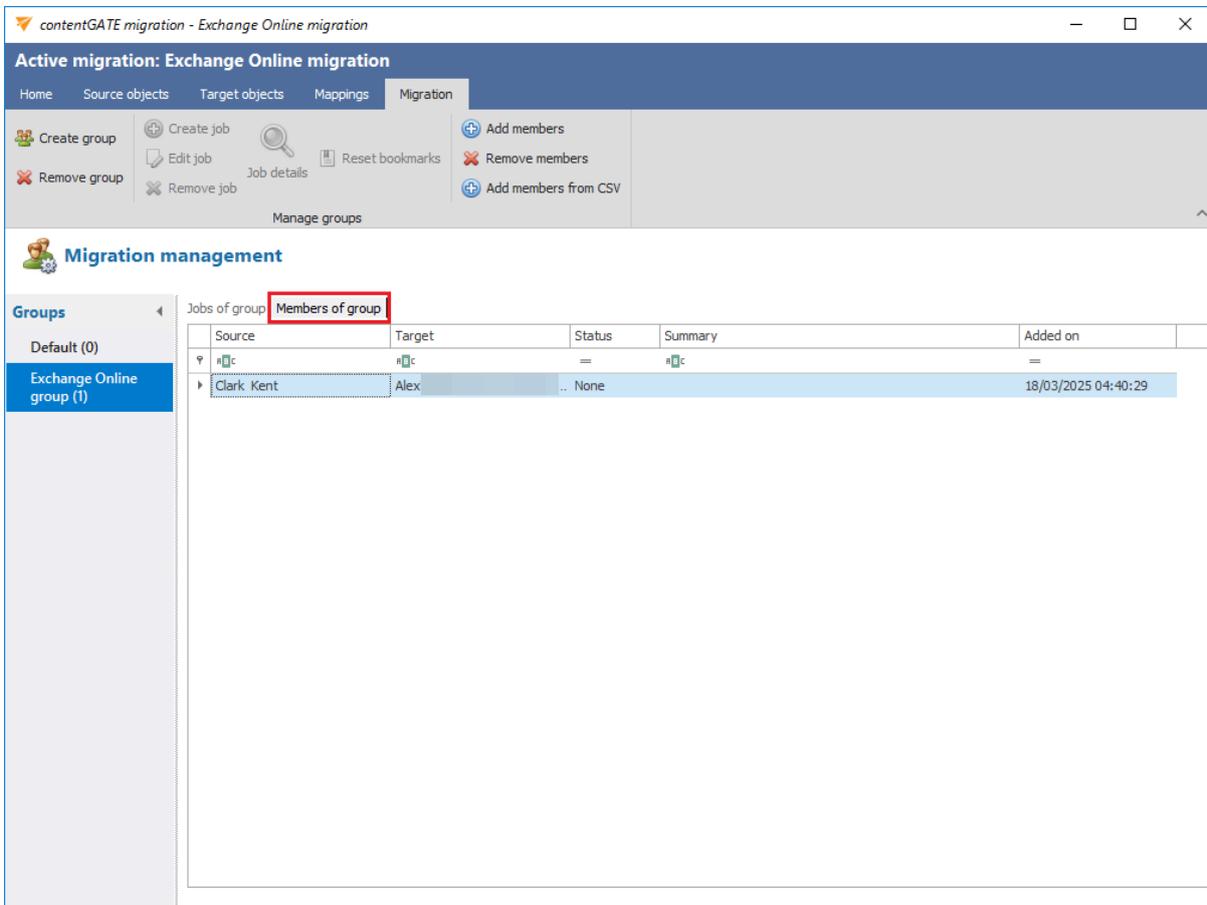


In the **Groups** dialog, enter a group name and add members using the context menu. A pop-up dialog will appear, displaying all available mappings that can be added to the group. Select the desired mappings and click **Select**. Then click the **Create** button.



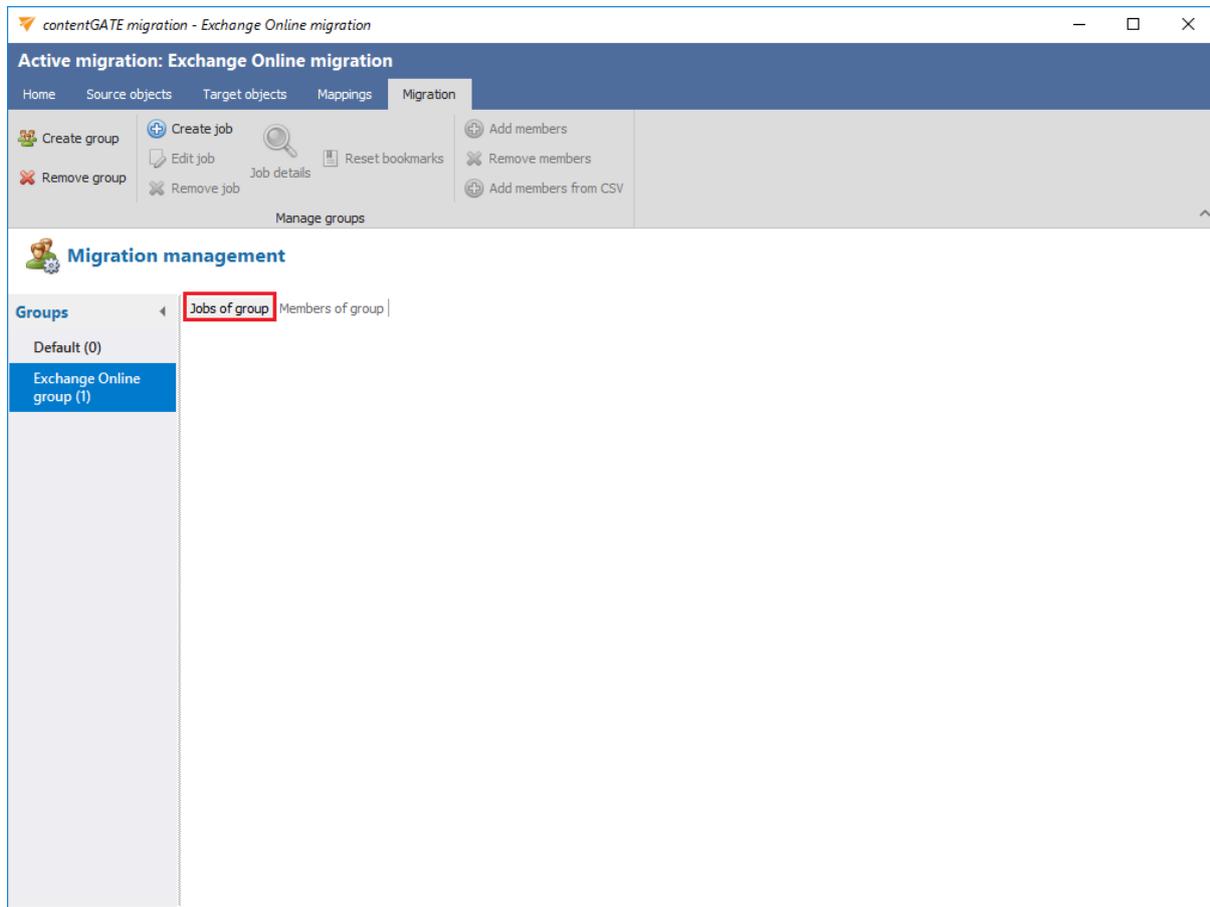


The selected mailboxes will now be added to the **Members of group** grid, as shown in the image below.





At this point, the **Jobs of group** grid is still empty. In the following section, we will learn how to add (email) migration job to the migration group.

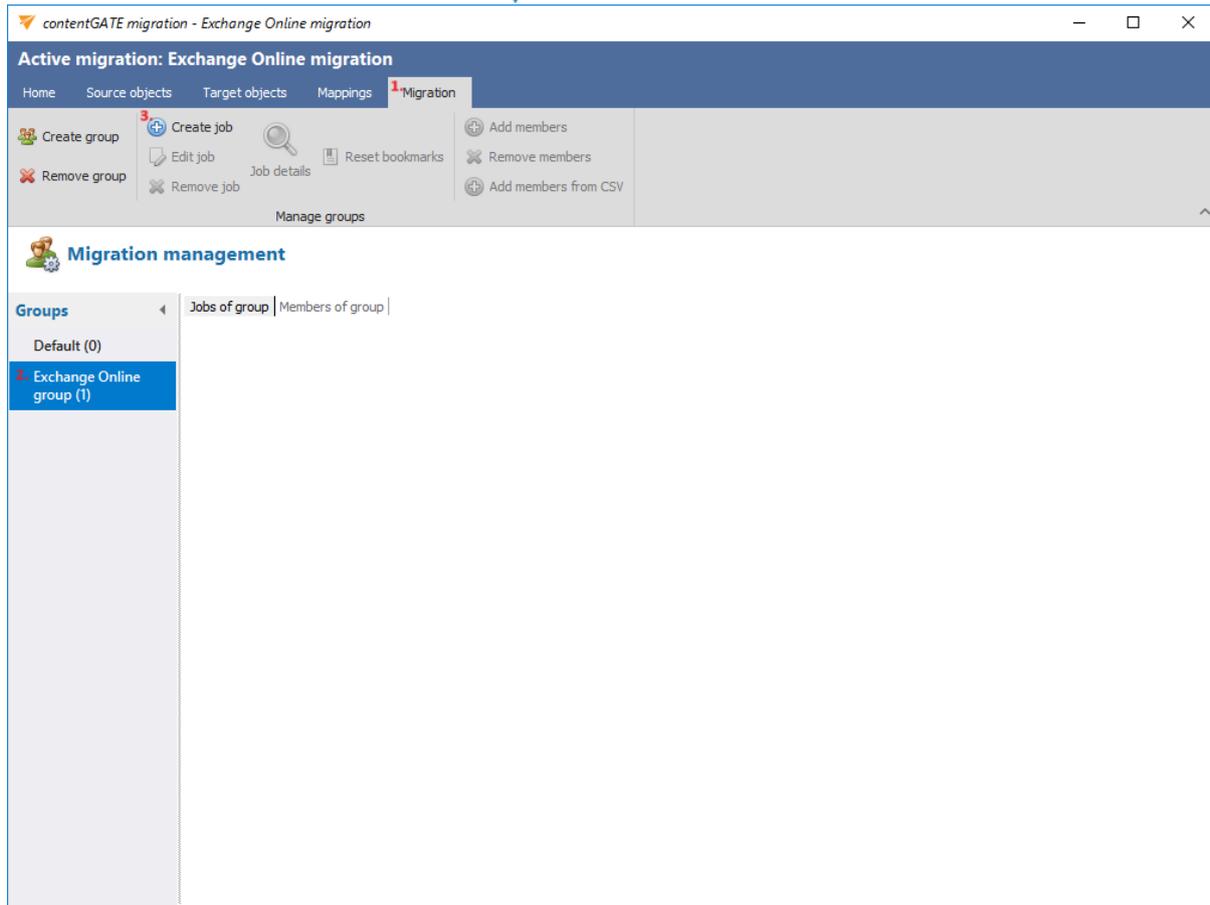


### Creating migration job(s) to your migration project

A migration job manages the migration process and defines exactly what will be migrated. When migrating from another source to Exchange Online or from Exchange Online to the contentACCESS Email Archive, we recommend selecting the **Email migration** option as the **migration workflow** from the dropdown menu.

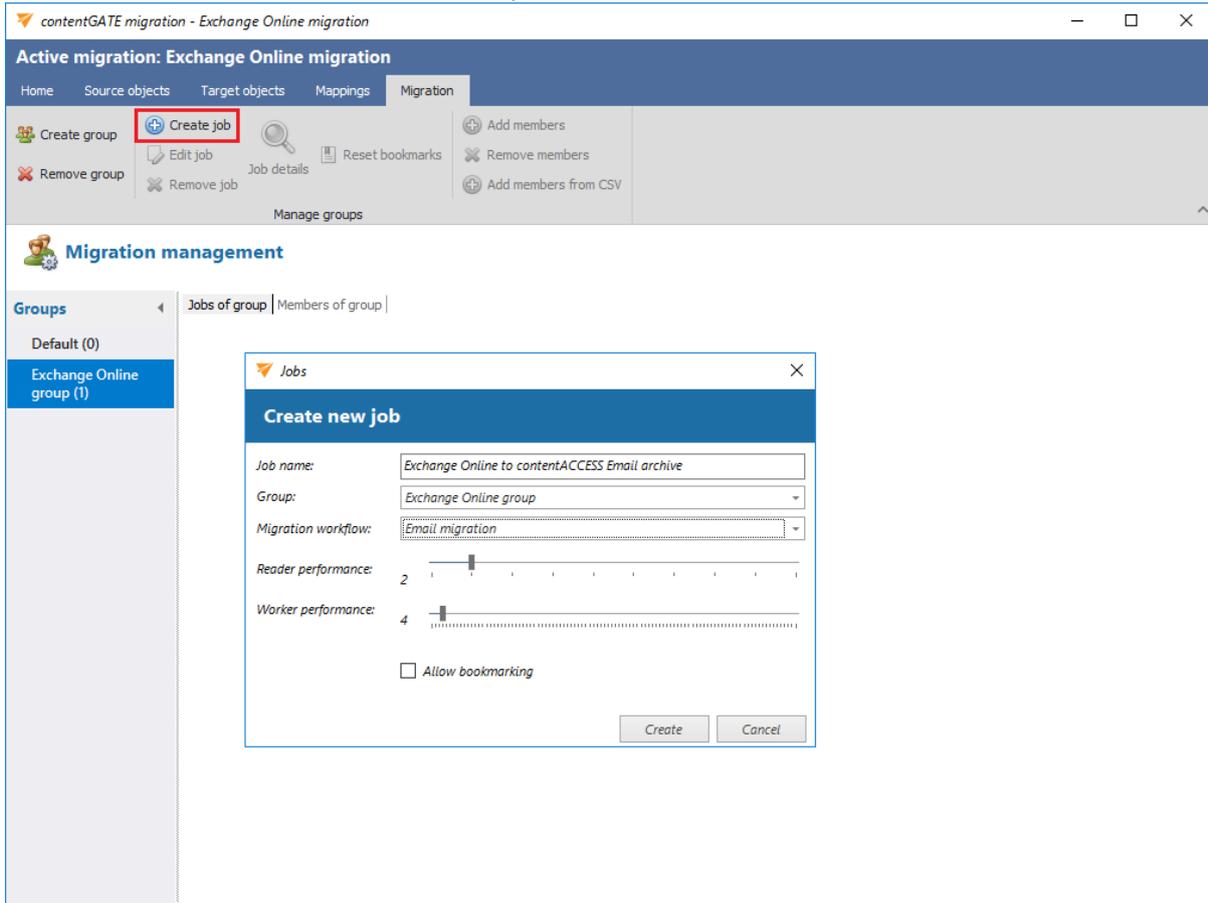
A migration job must always be assigned to a migration group. To create a new job:

1. navigate to the **Migration** page
2. select the desired **migration group** in the left panel
3. click **Create job** in the toolbar



Clicking the **Create job** button opens the **Create new job** dialog, where you must:

- **name** the job
- assign the job to a migration **group** – if created from the Group Management tab, the group is already preselected
- specify the **migration workflow** – multiple options are available from the dropdown menu, but we will need the **Email migration** option for Exchange Online
- adjust **thread performance** – defaults to the values in the [Default project settings](#), but migration job settings take priority



The screenshot shows the 'contentGATE migration - Exchange Online migration' application window. The 'Migration' tab is selected, and the 'Create job' button is highlighted with a red box. A 'Create new job' dialog is open, displaying the following configuration:

- Job name: Exchange Online to contentACCESS Email archive
- Group: Exchange Online group
- Migration workflow: Email migration
- Reader performance: 2
- Worker performance: 4
- Allow bookmarking

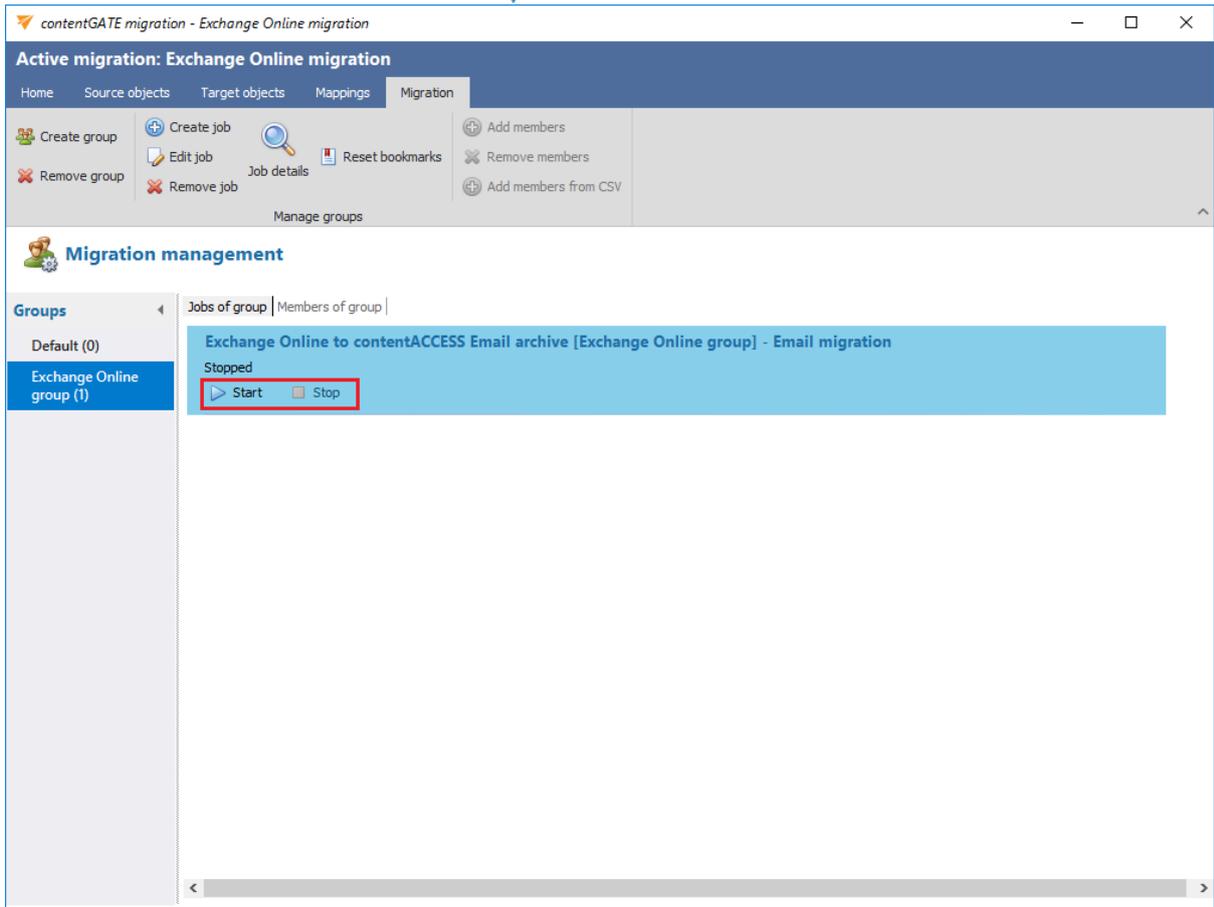
If the **Allow bookmarking** checkbox is selected, the migration tool will save the progress at the last successfully migrated item. This is useful when handling large datasets or long-running migrations.

Once all configurations complete, you can now start the **migration process**.

## Starting the migration

The migration job can be started from the **Jobs** grid on the **Migration** page. It can also be **stopped** or **paused** from this grid. If paused, the migration will resume from the point where it was interrupted.

Click on **Start** in the grid and wait for the job to complete the migration process.



The current thread activity can also be monitored on the **project's dashboard**.



contentGATE migration - Exchange Online migration

**Active migration: Exchange Online migration**

Home | Source objects | Target objects | Mappings | Migration

Dashboard | Change source | Settings | Source objects | Target objects | Mappings | All jobs | Migration management  
 Change target | License usage information | Migration objects | Mappings | Jobs | Migration  
 Generate migration report

**Dashboard**

**Migration details** | **Items migrated - turned off**

**Exchange Online migration**  
 Migration from Exchange Server (Microsoft365) (Exchange Server)  
 to contentACCESS Target (Server=localhost:8738) (contentACCESS Target)

Source objects: 3  
 Target objects: 1  
 Number of mappings: 1  
 Number of jobs: 2

**Current activity**

Active readers: 0, active workers: 1

▲ Reading  
 ▲ Migrating

If you try to close the project management interface while one or more migration jobs are still running, the application will prompt the administrator with options:

- Keep them running – allows the tasks to complete in the background
- Stop the job(s) – halts the migration process



contentGATE migration - Exchange Online migration

**Active migration: Exchange Online migration**

Home Source objects Target objects Mappings Migration

Create group Create job Add members  
 Remove group Edit job Remove members  
 Job details Reset bookmarks Add members from CSV  
 Remove job

Manage groups

**Migration management**

Groups Jobs of group Members of group

Default (0)  
 Exchange Online group (1)

**Exchange Online to contentACCESS Email archive [Exchange Online group] - Email migration**

Running Last started at 3/18/2025 8:00:23 PM.  
 Start Stop Pause

**Running jobs**

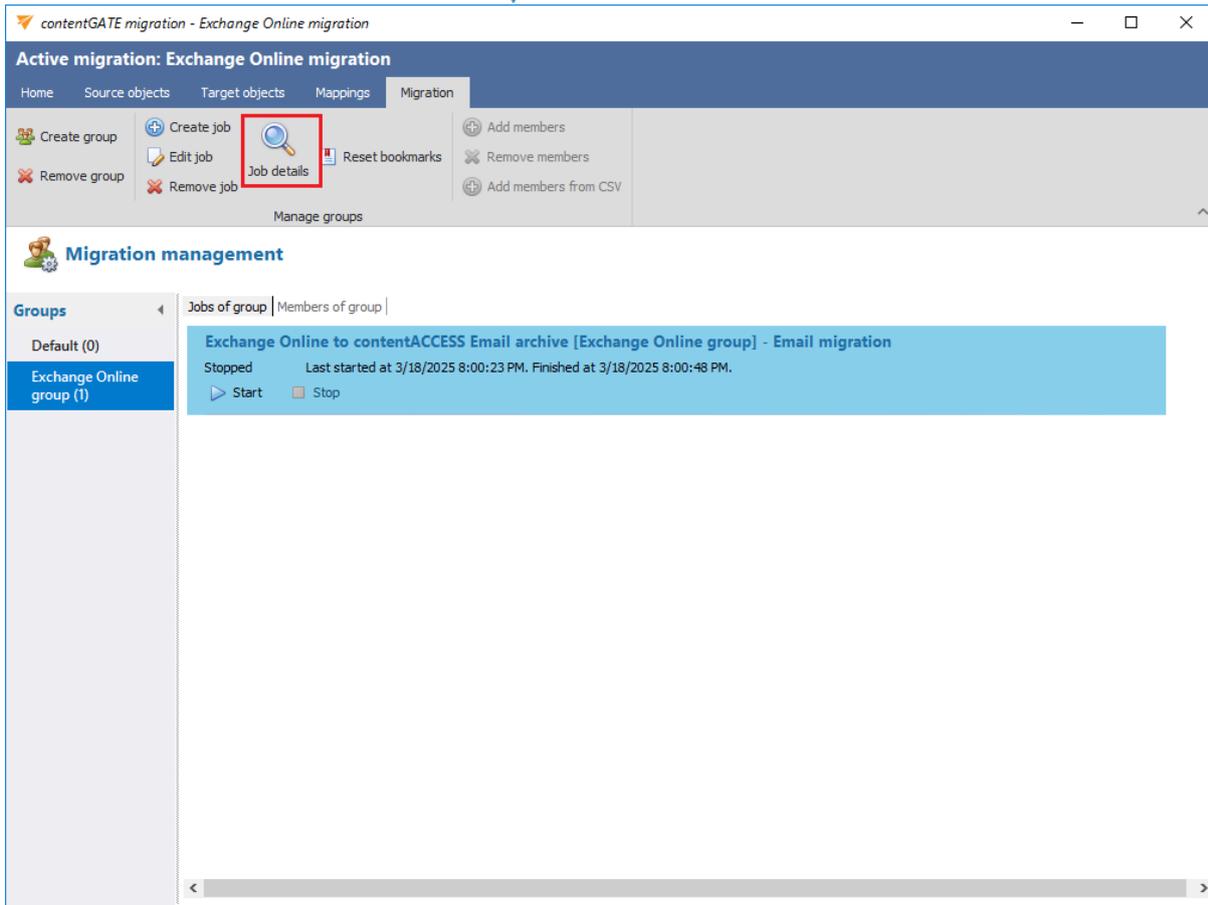
Some jobs are still running in the background.  
 Do you want to keep the jobs running or do you want to stop the jobs?

	Name	Group	Workflow
▼	*c	*c	*c
▶	Exchange Online to contentACCE...	Exchange Online ...	contentACCESS...

Keep running Stop jobs

## Job details

The details of a **job's last run** can be viewed in the **Job details** section, accessible by clicking on the **Job details** option in the **Migration** toolbar. If the job is currently running, its **real-time progress** will be displayed.



How to access job details:

1. select the group containing the desired job
2. click Job details to open the Job details window

The **Job details** window consists of four tabs:

### 1. Overview

Displays a summary of the job's last run or its current progress.



Job details
- □ ×

**Job details: Exchange Online to contentACCESS Email archive**

Overview
Report
Messages
Activity

**Exchange Online to contentACCESS Email archive [Exchange Online group] - Email migration**

Running Last started at 3/18/2025 7:57:26 PM.

Job started.

**Job progress**

Overall progress:

0 %

Objects:

Finished	Failed	Total	Average speed	Current speed	Elapsed time	Migrated size
0	0	1	0.00	0.00	00:00:00:01	0 B

Items:

Migrated	Failed	Skipped	Excluded	Total
0	2	0	0	125

**Object progress**

<span style="color: green;">■</span> Finished 0	<span style="color: red;">■</span> Failed / Unfinished 0	<span style="color: gray;">■</span> Waiting 1
---	--	---

**Item progress**

<span style="color: green;">■</span> Migrated 0	<span style="color: red;">■</span> Failed 2	<span style="color: orange;">■</span> Skipped 0	<span style="color: black;">■</span> Excluded 0
<span style="color: gray;">■</span> Waiting 123			

## 2. Report

Lists source and target objects. Shows total migrated items, as well as filtered, last migrated, and failed items. The data can be sorted by column headers.



Job details

Job details: Exchange Online to contentACCESS Email archive

Overview Report Messages Activity

TaskID	Source	Target	Reading completed	Completed	Total	Filtered	Migrated	Failures
1	Clark Kent	AlexW@2h2hx3.onmicrosoft.com	Yes	Yes	164	164	164	0

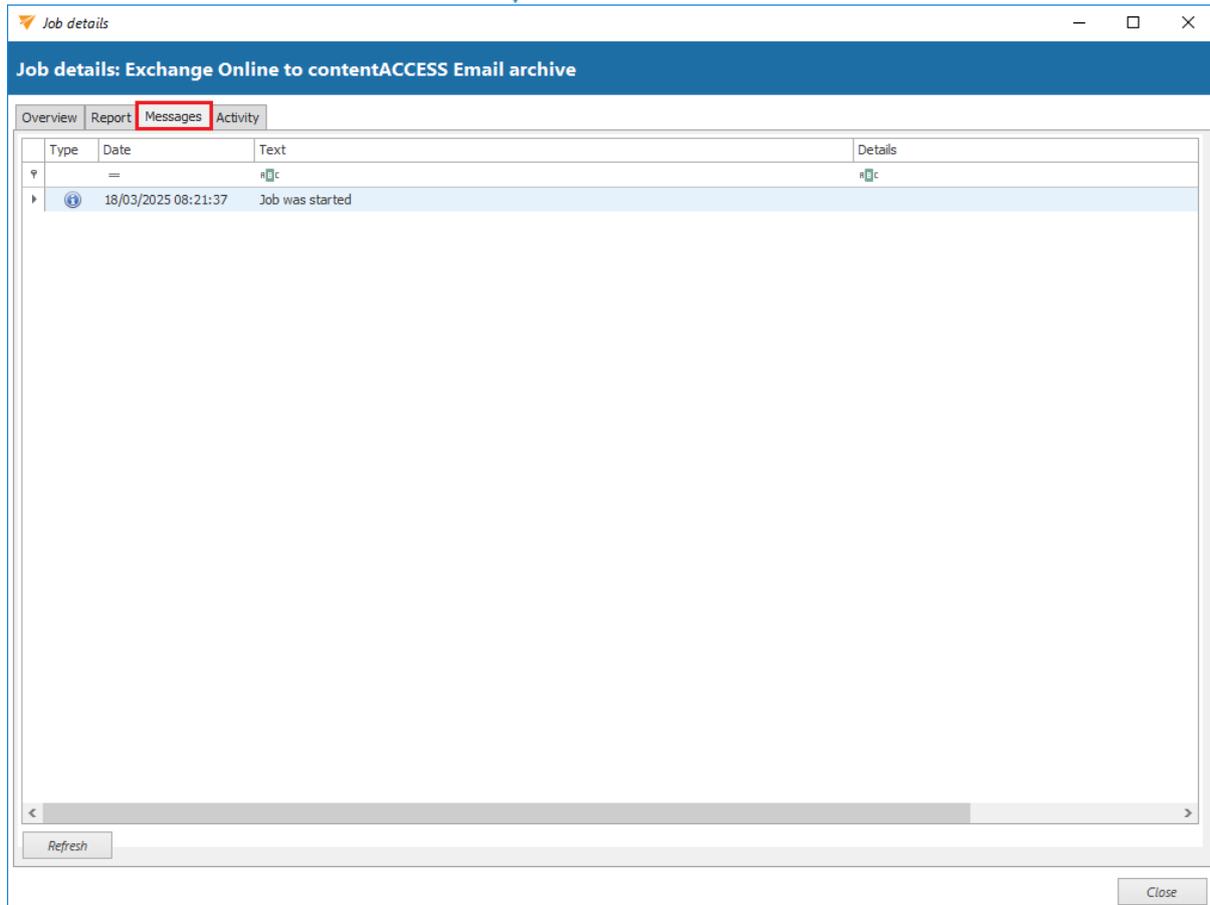
Close

### 3. Messages

Provides a detailed log of **job activities**, including

- start time
- pause/stop actions
- number of processed items
- errors and failures (if any)

The message grid consists of the following columns: Type, Date, Text, and Details. Sorting and manual refresh (via the **Refresh** button) are available.



Job details

Job details: Exchange Online to contentACCESS Email archive

Overview Report Messages Activity

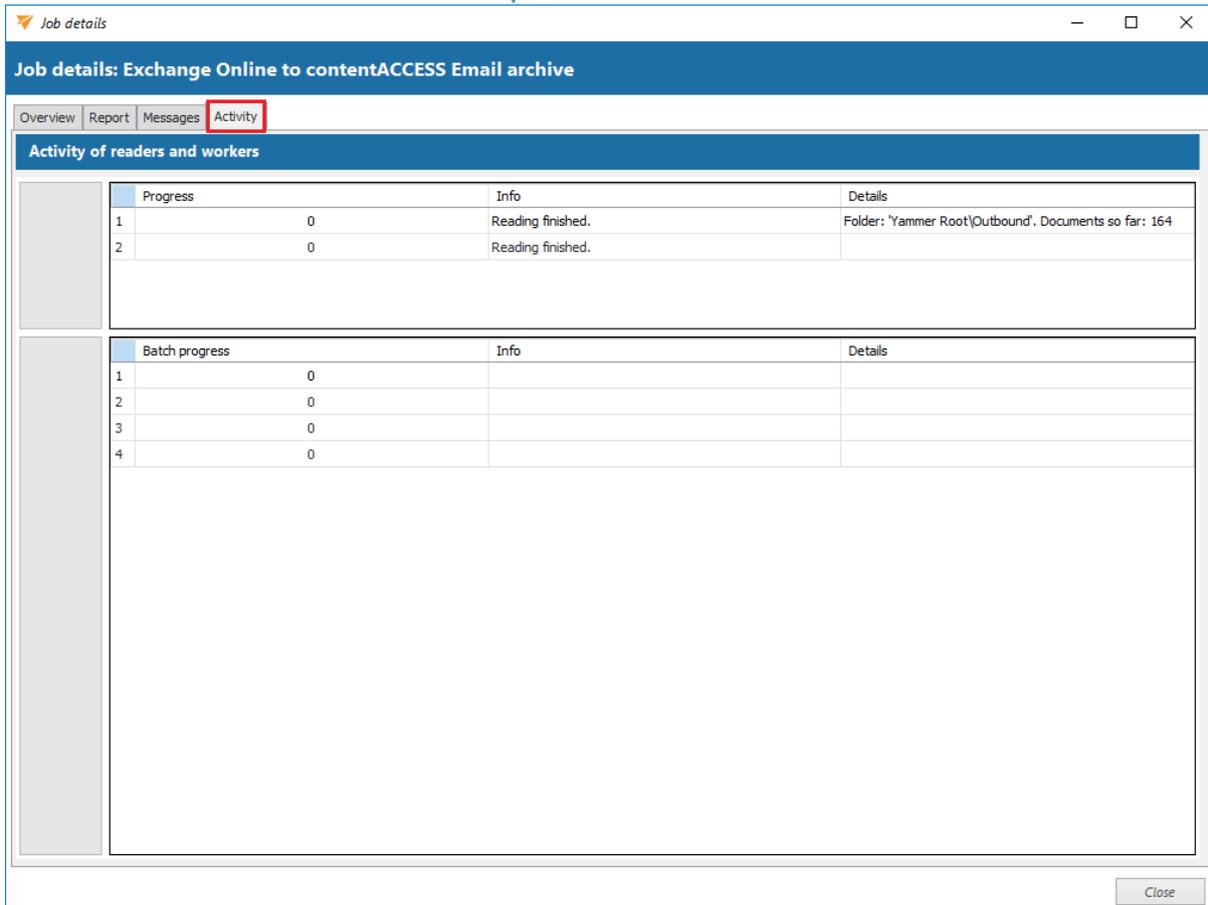
Type	Date	Text	Details
	18/03/2025 08:21:37	Job was started	

Refresh Close

#### 4. Activity

Displays the progress of **reading** and **working threads**, and shows **batch progress**. The Batch progress table is filled by the reading thread, which groups documents into batches and pre-fills common information.

**Note:** A migration batch is a collection of documents that belong to the same mapping (task).



Job details

Job details: Exchange Online to contentACCESS Email archive

Overview Report Messages **Activity**

Activity of readers and workers

Progress	Info	Details
1	0	Reading finished.
2	0	Reading finished.

Batch progress	Info	Details
1	0	
2	0	
3	0	
4	0	

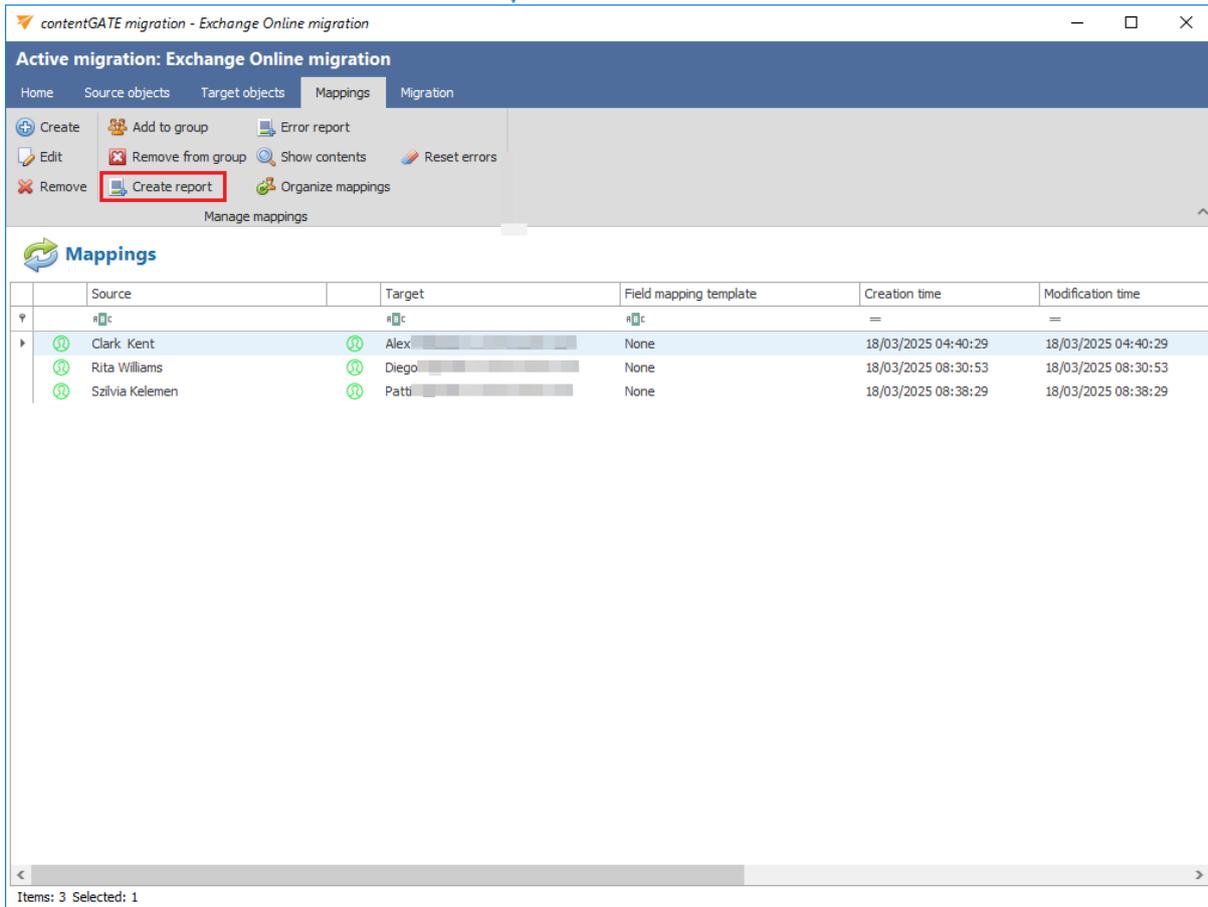
Folder: 'Yammer Root\Outbound'. Documents so far: 164

Close

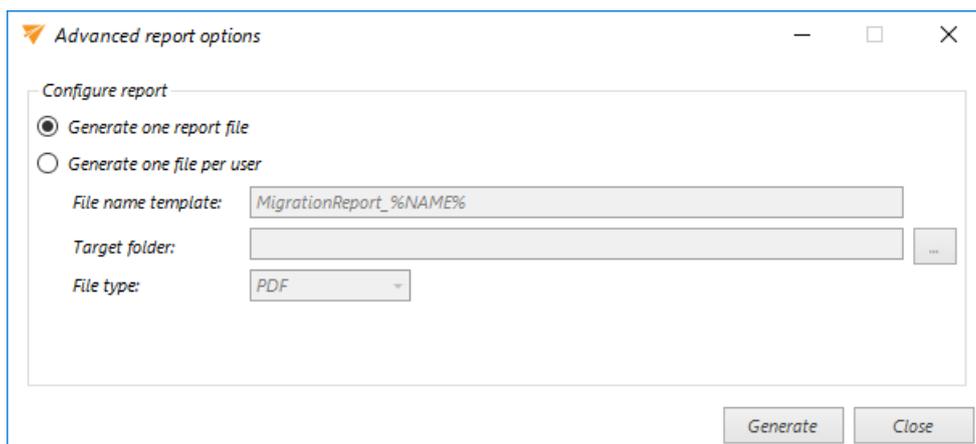
## Migration report and error handling

A **migration report** is used to document the results of a data migration in a chosen format. Reports can be accessed at any time to verify whether the migration was completed successfully. Reports can be generated for the **entire migration project** or for **specific mapped objects**. The **project-level report** includes the overall migration status, detailed information about item migration for all objects in the project, as well as shortcut migration details. To generate this report, navigate to the Dashboard and click on “Generate migration report” in the toolbar. The **object-level report** provides general information about the selected object, its migration status, and detailed migration data specific to that object.

To create this report, go to the **Mappings** tab and click on **Create report** in the toolbar.



In the **Advanced Report Options** pop-up window, you can configure how the report will be generated: either as a **single report file** or as **separate files per user**. If you choose to **generate one file per user**, you will need to enter a file name template and select the target folder. Currently, only PDF is supported as the file type.





Migration report

Export To

- PDF File  
Adobe Portable Document Format
- HTML File  
Web Page
- MHT File  
Single File Web Page
- RTF File  
Rich Text Format
- DOCX File  
Microsoft Word 2007 Document
- XLS File  
Microsoft Excel 2000-2003 Workbook
- XLSX File  
Microsoft Excel 2007 Workbook
- Image File  
BMP, GIF, JPEG, PNG, TIFF, EMF, WMF

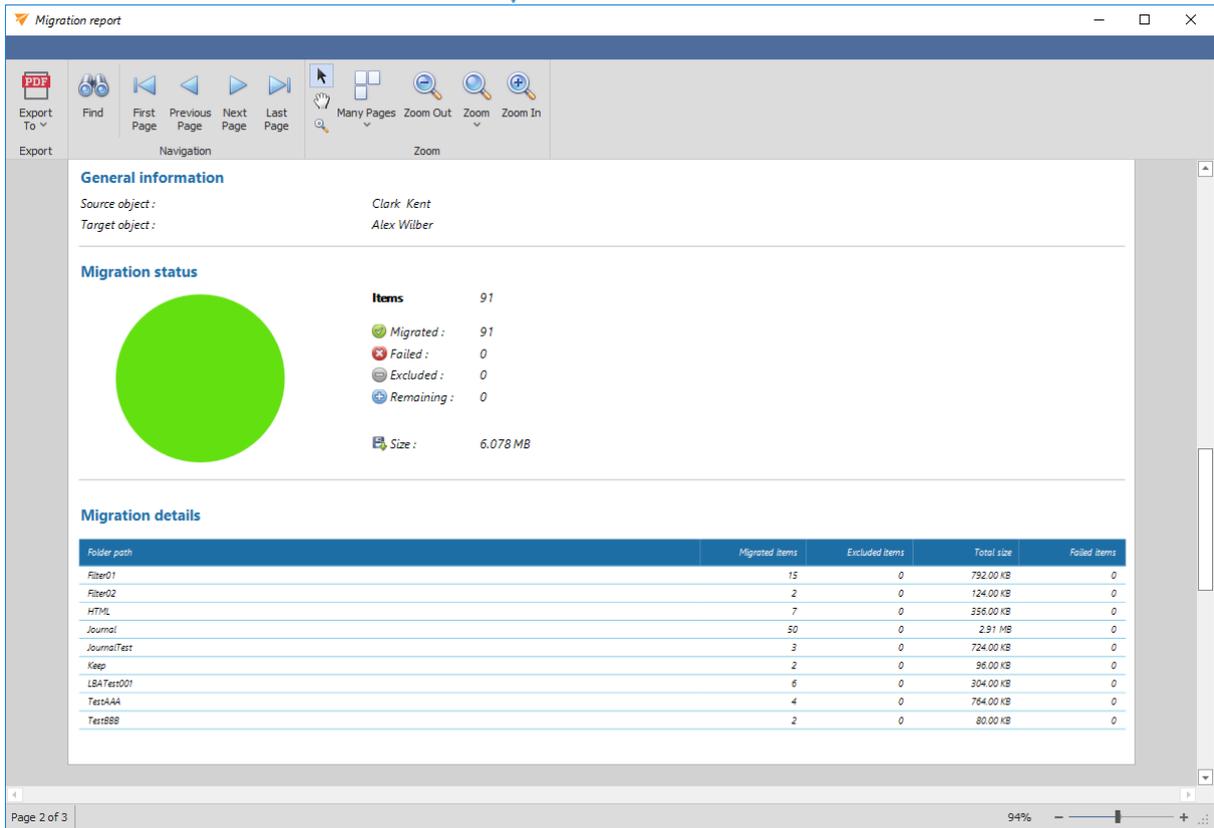
your vision of technological evolution

### Migration report

## "Exchange Online migration"

**Date:** 2025.03.18 20: 51:29  
**Source archive:** Exchange Server (Microsoft365)  
**Target archive:** contentACCESS Target (Server=localhost:8738)

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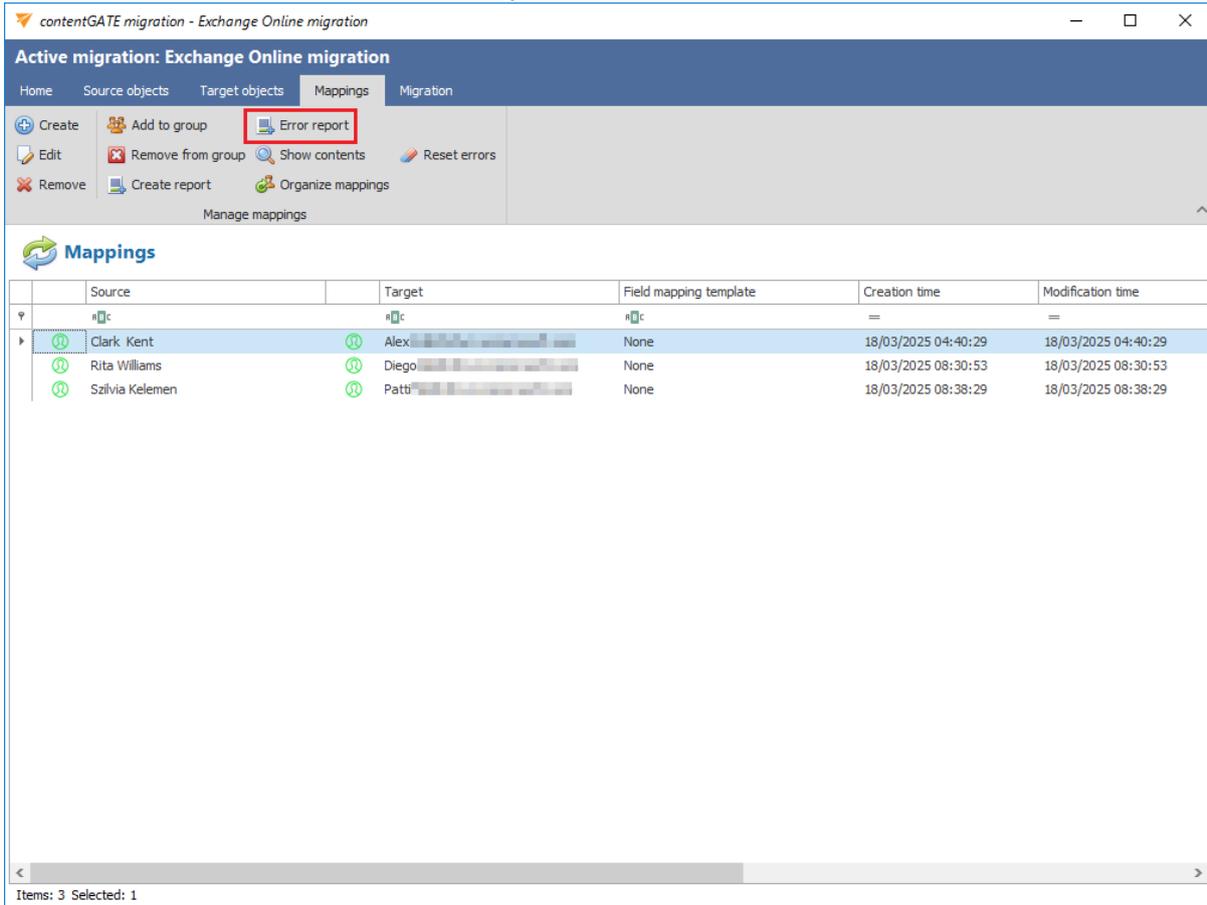


Reports can be saved in various formats, including PDF, HTML, MHT, RTF, XLS, XLSX, and several image file formats.

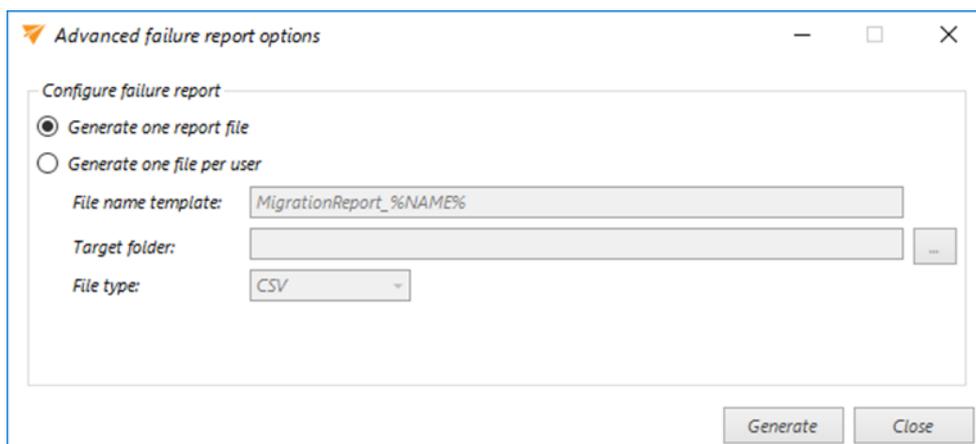
### Error Handling

To better track and manage errors, the **Mappings** tab provides two essential tools.

The **Error Report** function saves migration failures or errors related to a selected mapping. The report is generated in CSV format and can be created by clicking the **Error report** button in the Mappings tab.



In the **Advanced failure report options** pop-up window, you can configure how the report will be generated: either as a **single report file** or as **separate files per user**. If you choose to **generate one file per user**, you will need to enter a file name template and select the target folder. The report is generated in CSV format.



The **Reset Errors** function is used to reset shortcut migration errors. This is especially helpful if shortcuts no longer exist in the mailbox but still appear in the migration report. To reset the errors, click the **Reset errors** button.

contentGATE migration - Exchange Online migration

Active migration: Exchange Online migration

Home Source objects Target objects **Mappings** Migration

Create Add to group Error report  
 Edit Remove from group Show contents **Reset errors**  
 Remove Create report Organize mappings

Manage mappings

### Mappings

	Source	Target	Field mapping template	Creation time	Modification time
+	#c	#c	#c	=	=
+	Clark Kent	Alex'	None	18/03/2025 04:40:29	18/03/2025 04:40:29
+	Rita Williams	Diego	None	18/03/2025 08:30:53	18/03/2025 08:30:53
+	Szilvia Kelemen	Patil	None	18/03/2025 08:38:29	18/03/2025 08:38:29

Items: 3 Selected: 1

A confirmation pop-up will appear – click **Reset** to finalize the process.

Reset migration errors

Reset options

Reset shortcut migration errors. If the shortcut migration found shortcuts which have failed, but they no longer exist, the migration report still calculates them as failures.

Reset

Close

