

# Email migration from Metalogix Archive Manager Exchange Edition to contentACCESS Email archive



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## 1 Introduction

This guide will explain how contentGATE migrates data from **Metalogix Archive Manager Exchange Edition (MAM EE)** to **contentACCESS Email archive** and the required settings before starting the migration process.

## 2 Source and target environment

### 2.1 Source environment

Windows server with **Metalogix Email Archive Exchange Edition**.

### 2.2 Target environment

Windows server with **contentACCESS Email archive**.

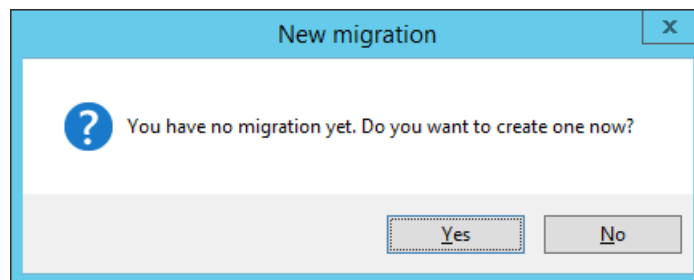
**Note:** Both the source and the target side can host the contentGATE application.

## 3 contentGATE installation

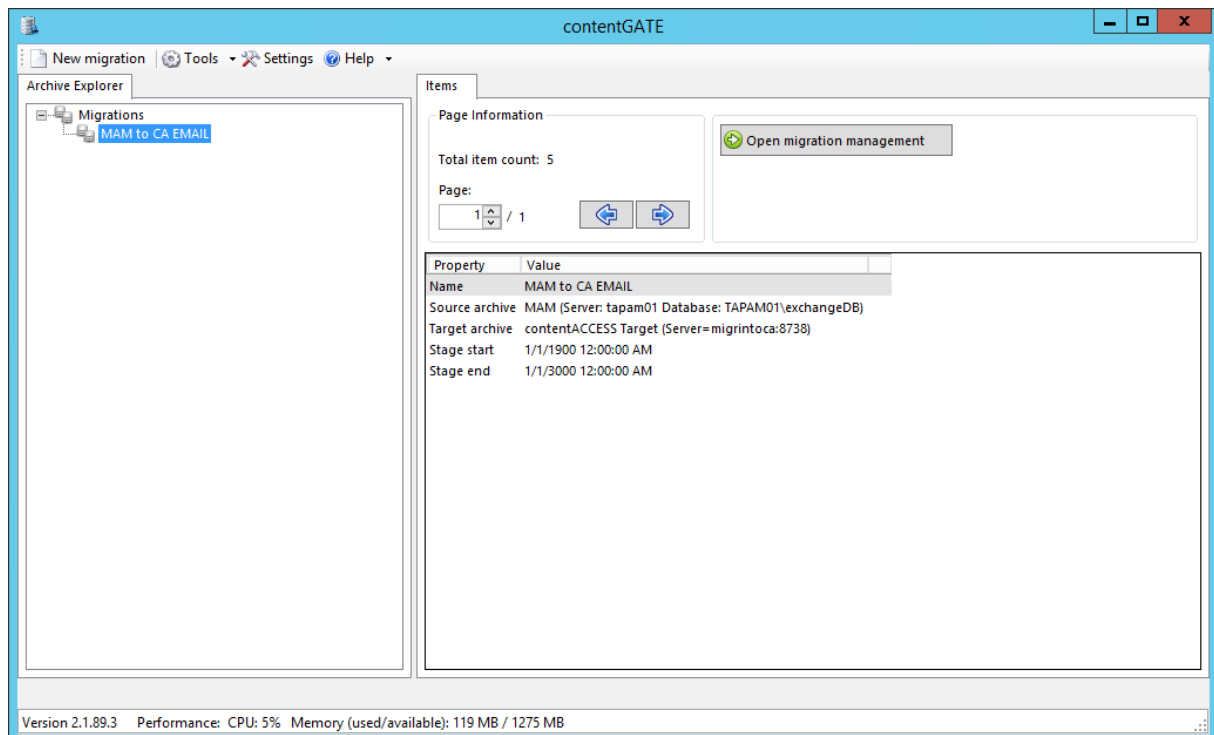
Installation of contentGATE is common for all migration types and is described on [this](#) page.

## 4 contentGATE welcome interface

When contentGATE is started for the first time, no migration is defined. The application prompts you to create one. You can click **No**. New migration unit can be created anytime by clicking on the **New migration** option in the toolbar. The migration creation/configuration process is described later in this guide (chapter [Creating new migration project](#)). First, the interface and general settings are detailed.



The contentGATE welcome interface features a toolbar, offering easy access to general settings and functions:





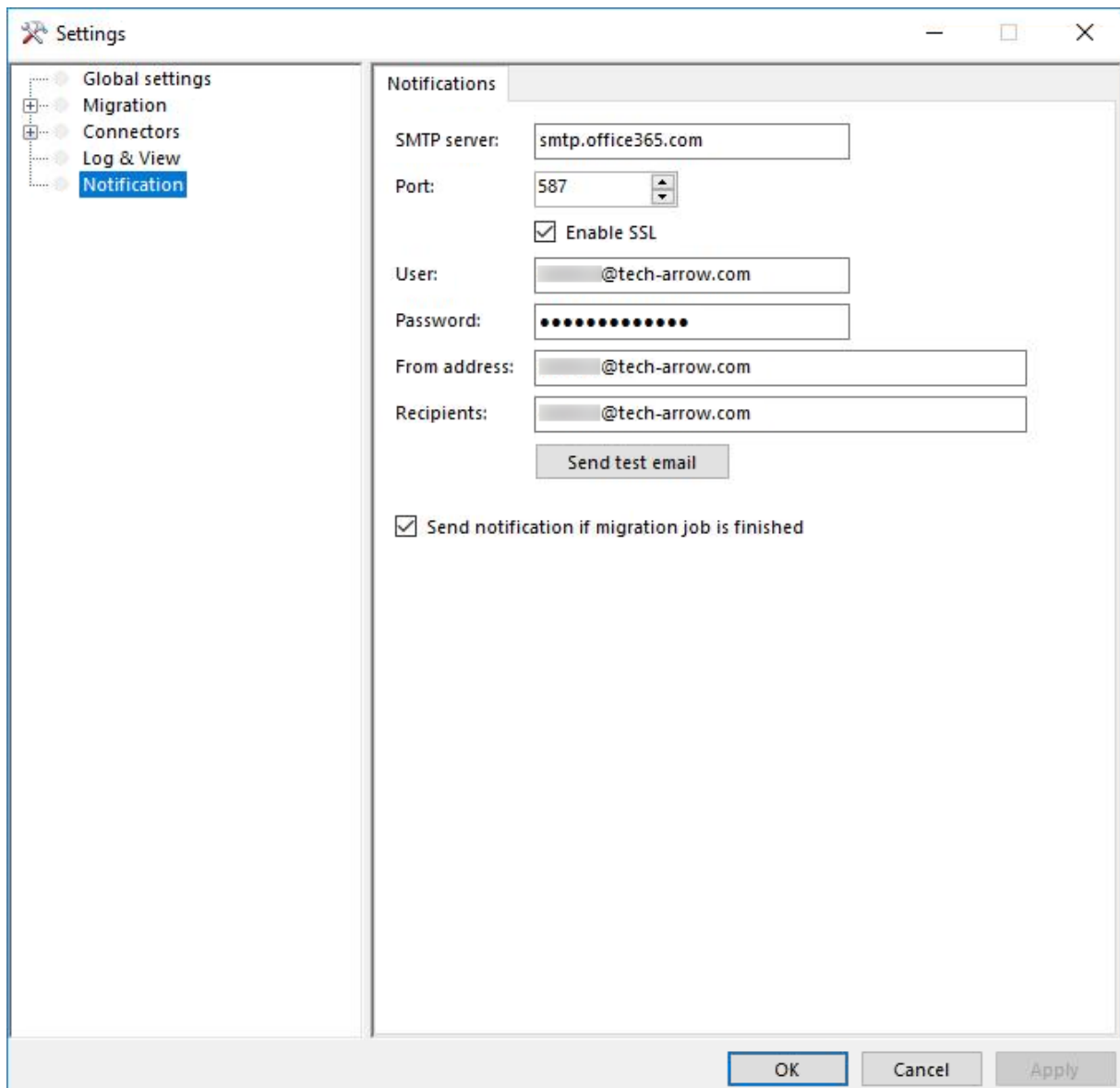
- **New migration** – creates a new migration unit under which the source archive, target archive, user mapping etc. can be configured
- **Tools** – connector specific tools are accessible from here

**Note:** *These tools can be disregarded for this migration.*

- **Settings** – the general contentGATE settings and individual connectors (archives) settings are accessible from here.

**Note:** *For **MAM EE to contentACCESS** migration only the Exchange servers must be added to the Exchange settings configuration section. More information in chapter [Configuring Exchange server settings](#).*

If you would like contentGATE to send you notification email when migration job is finished, you can configure it in this section.



The screenshot shows a 'Settings' window with a sidebar on the left containing the following items: Global settings, Migration, Connectors, Log & View, and Notification (which is highlighted in blue). The main area is titled 'Notifications' and contains the following fields and controls:

- SMTP server:** A text box containing 'smtp.office365.com'.
- Port:** A spinner box set to '587'.
- Enable SSL:** A checked checkbox.
- User:** A text box containing '@tech-arrow.com'.
- Password:** A text box filled with dots.
- From address:** A text box containing '@tech-arrow.com'.
- Recipients:** A text box containing '@tech-arrow.com'.
- Send test email:** A button.
- Send notification if migration job is finished:** A checked checkbox.

At the bottom right of the window are three buttons: 'OK', 'Cancel', and 'Apply'.

**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.

- **Help** – information about license, version etc.

The user interface below the toolbar is divided into two panes:

- **Archive Explorer** pane with a list of created migrations. Initially the pane is empty.
- **Items** pane that displays the content of a node selected in the Archive Explorer pane. Initially the pane is empty.

Use the **Open migration management** button to open the management interface of an advanced migration project that is selected in the **Archive Explorer** pane.

The **Page information** section in the **Items** pane allows you to adjust and handle items per page functionality.

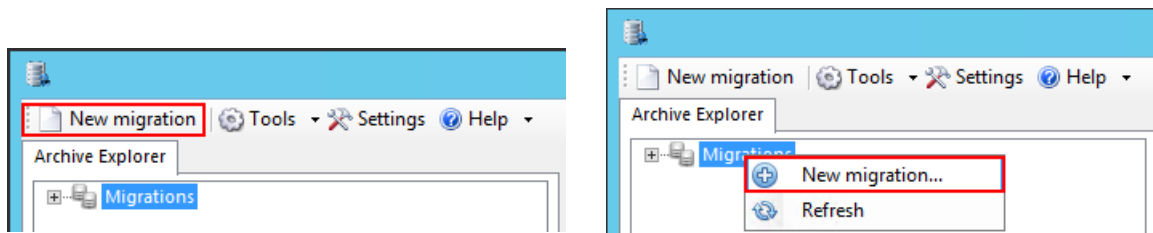
## 5 Migration “How to”

This chapter will describe how to create and configure a new migration project managing the migration of archived emails from **Metalogix Archive Manager Exchange Edition** to **contentACCESS Email archive**. The configuration process can be divided into 2 main stages:

- 1st. **Creating the migration project** – a new migration project is created using the **contentGATE's welcome interface** described above; the Exchange server settings must be done using this interface, too (subchapters [5.1](#)–[5.2](#))
- 2nd. **Configuring the migration project** – the configuration of the **migration project** is done on its **own management interface**; the migration process is triggered from this interface, too (subchapters [5.3](#) – [5.6](#))

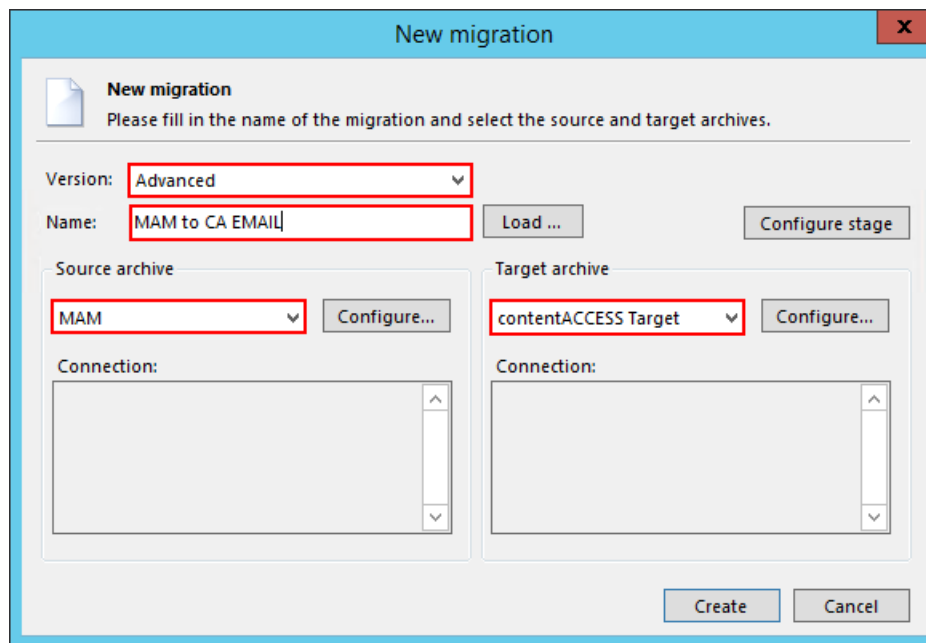
### 5.1 Creating a new migration project

The desired migration can be defined by using the “**New migration**” button, which is reachable on the toolbar and also in the context menu of the contentGATE. By clicking this button, the **New migration** window opens.



In the **New migration** dialog:

- Select the “Advanced” version from the “Versions” dropdown list.
- Name your migration project.
- Configure the Source archive and Target archive connection settings (more details in section [Specifying Source and Target archive connection settings](#)).

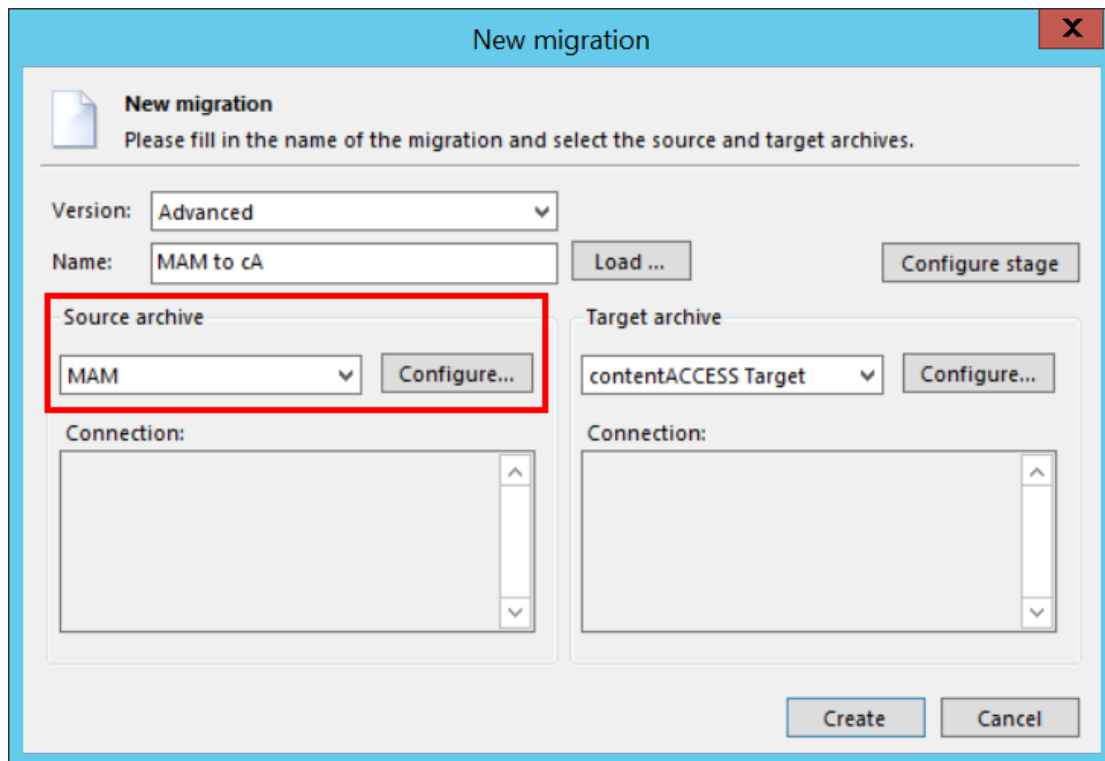


### 5.1.1 Specifying Source and Target archive connection settings

#### The Source archive (Metalogix Archive Manager Exchange Edition – MAM EE)

To configure the **MAM** connection, select it in the **Source archive** dropdown-list and click the **Configure** button in the dialog.





**New migration**

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

Version: Advanced

Name: MAM to cA Load ... Configure stage

**Source archive**

MAM Configure...

Connection:

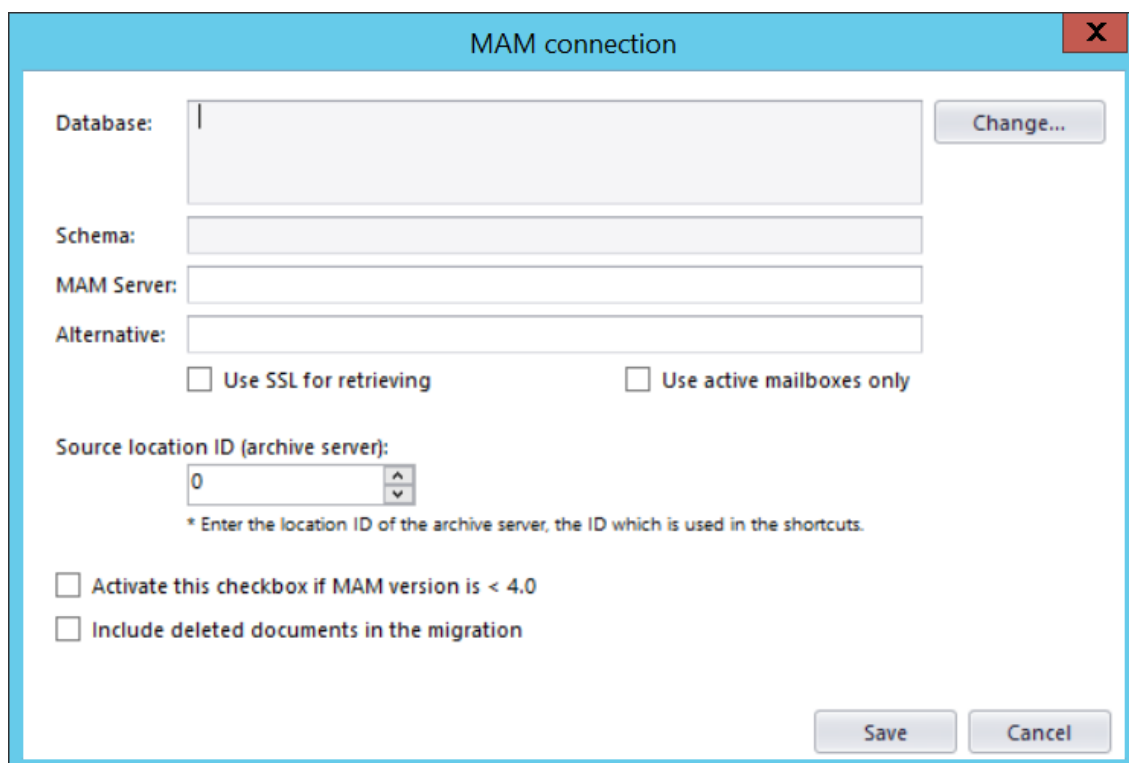
**Target archive**

contentACCESS Target Configure...

Connection:

Create Cancel

The **MAM connection** dialog opens. First, you will be required to configure the MAM database connection. Click on **Change...** button.



**MAM connection**

Database:  Change...

Schema:

MAM Server:

Alternative:

☐ Use SSL for retrieving ☐ Use active mailboxes only

Source location ID (archive server): 0

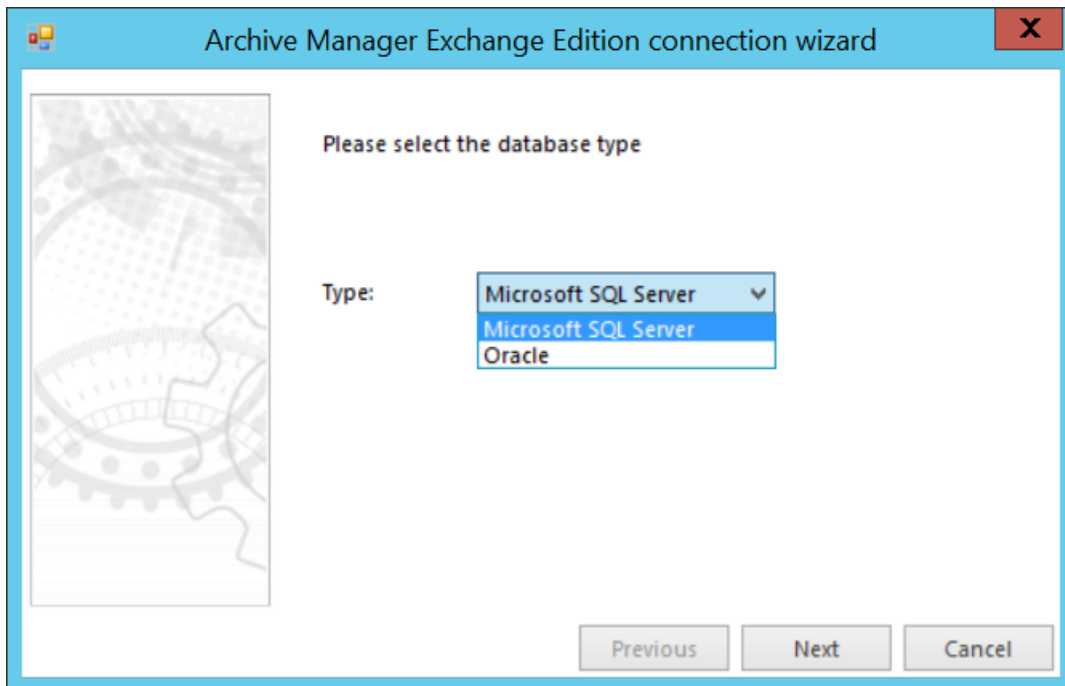
\* Enter the location ID of the archive server, the ID which is used in the shortcuts.

☐ Activate this checkbox if MAM version is < 4.0

☐ Include deleted documents in the migration

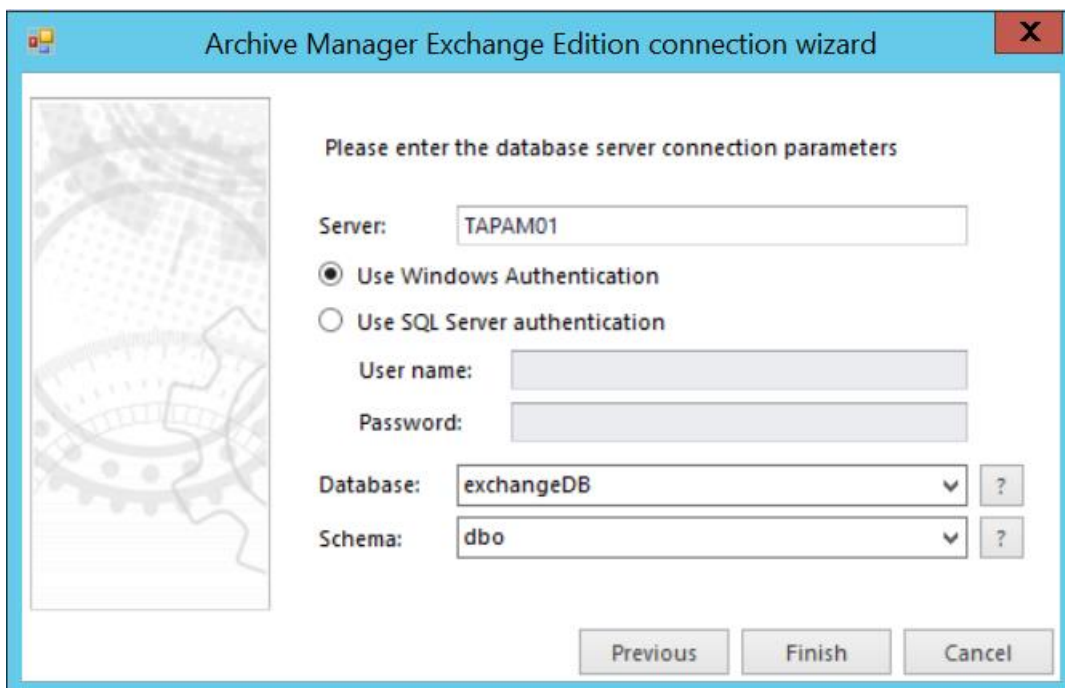
Save Cancel

Select the database type from the dropdown list. Click **Next**.



The screenshot shows the first step of the 'Archive Manager Exchange Edition connection wizard'. The title bar reads 'Archive Manager Exchange Edition connection wizard'. The main instruction is 'Please select the database type'. On the left is a decorative graphic of interlocking gears. The 'Type:' label is followed by a dropdown menu currently showing 'Microsoft SQL Server'. The dropdown list is open, showing three options: 'Microsoft SQL Server' (highlighted), 'Microsoft SQL Server', and 'Oracle'. At the bottom right are three buttons: 'Previous', 'Next', and 'Cancel'.

Specify the database server and the applicable database user credentials. You may use either Windows integrated authentication or specify an explicit user. The **Database** list lists all databases on the selected server. Pick the one where you have your desired data. Enter the scheme and click **Finish**.



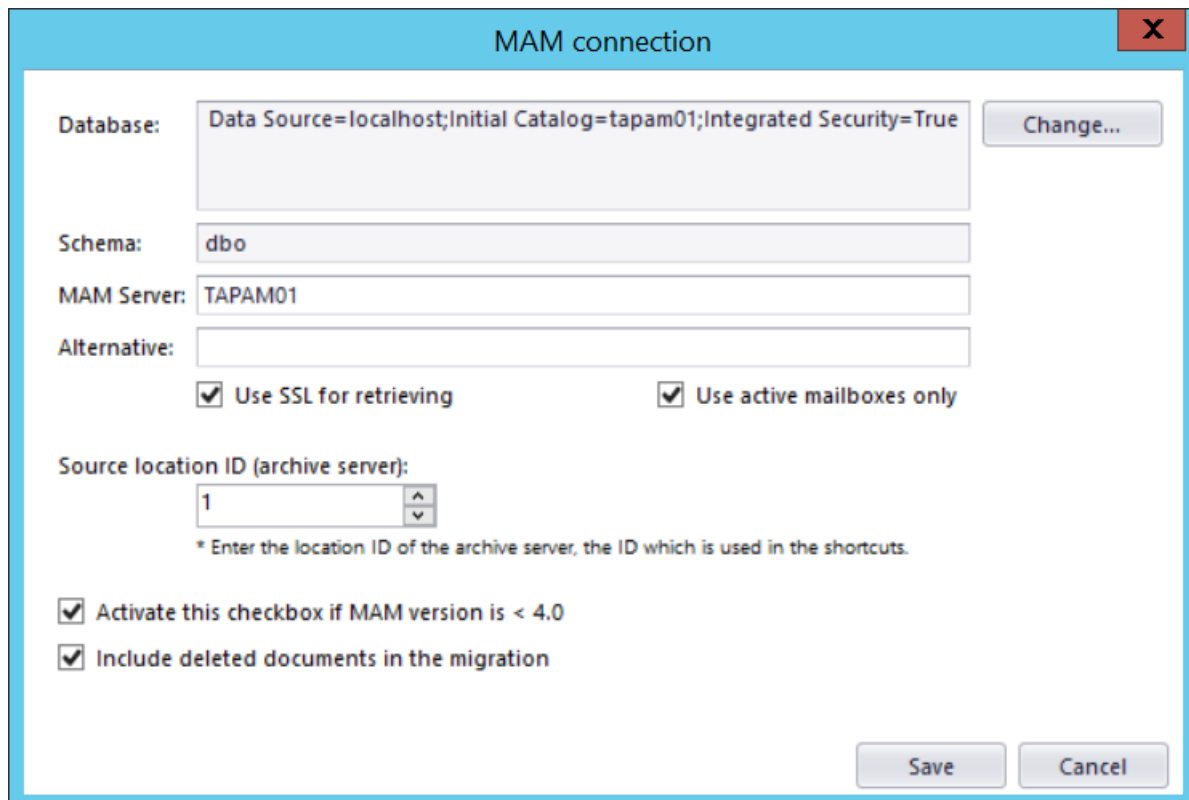
The screenshot shows the second step of the 'Archive Manager Exchange Edition connection wizard'. The title bar reads 'Archive Manager Exchange Edition connection wizard'. The main instruction is 'Please enter the database server connection parameters'. On the left is the same decorative gear graphic. The 'Server:' label is followed by a text box containing 'TAPAM01'. Below this are two radio buttons: 'Use Windows Authentication' (selected) and 'Use SQL Server authentication'. Below the radio buttons are two text boxes for 'User name:' and 'Password:'. At the bottom are two dropdown menus for 'Database:' (showing 'exchangeDB') and 'Schema:' (showing 'dbo'), each with a question mark icon to its right. At the bottom right are three buttons: 'Previous', 'Finish', and 'Cancel'.

Back in the initial dialog specify the **Source MAM server**. It is highly recommended to specify here the MAM retrieve server name. Use “localhost” if the MAM retrieve server is on the local server, where also contentGATE is installed. If you want to use SSL for retrieving or use only active mailboxes for the migration, check the respective checkboxes.

**Source location ID** must be defined due to shortcut retrieve. The location ID of MAM can be found in MAM.

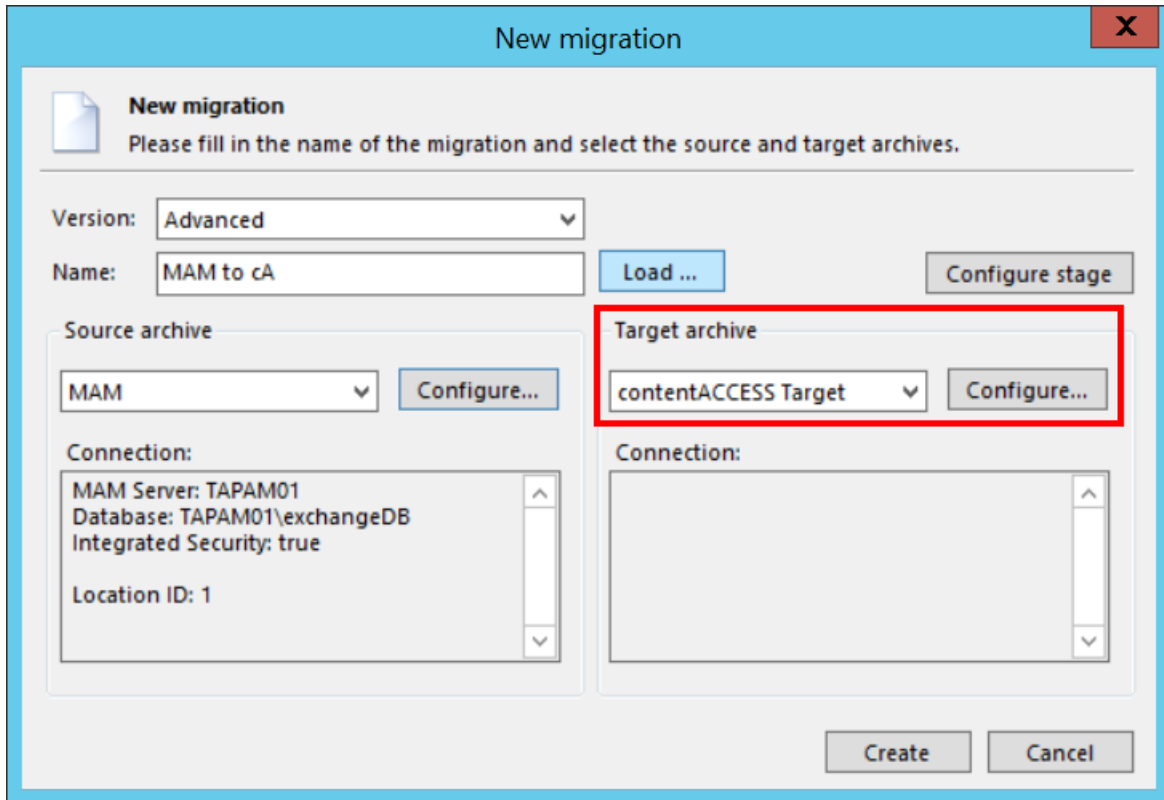
**Note:** Please ignore the text written with small letters.

If MAM version is lower than 4, the **Activate this checkbox if MAM version is < 4.0** checkbox must be activated. If the user wants to include also deleted documents in the migration, the last checkbox must be checked. Click **Save** to save your settings.



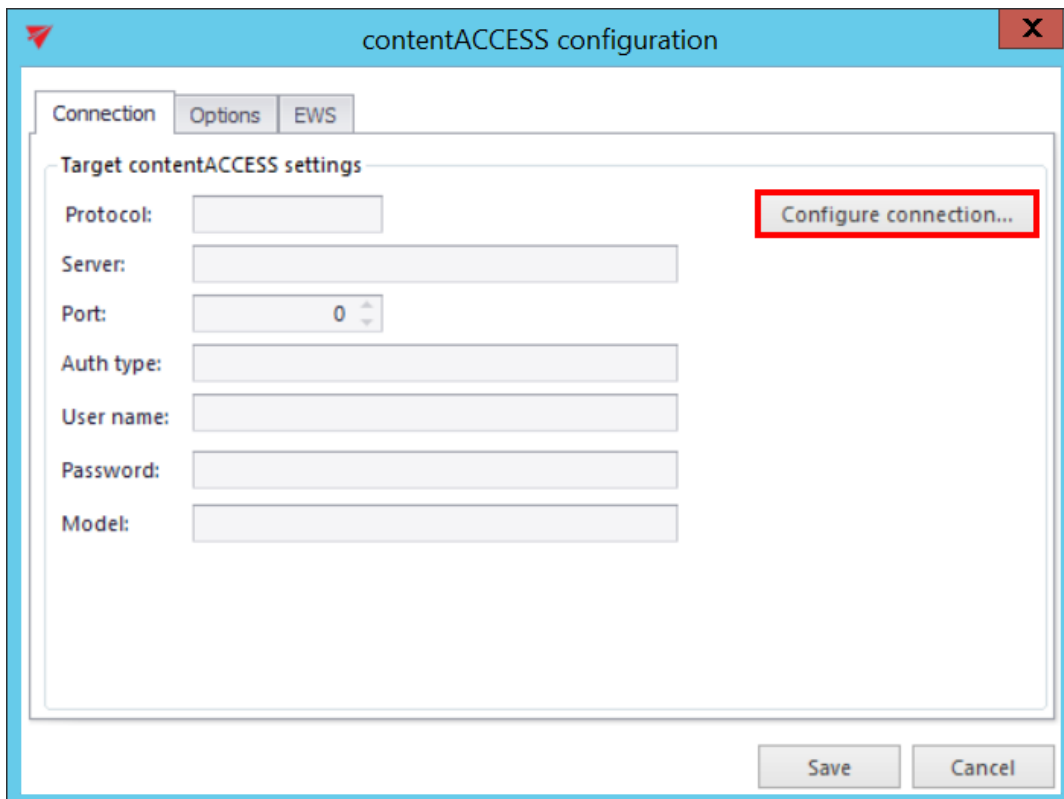
### The Target archive (contentACCESS Email archive)

Choose **contentACCESS Target** from the list of target archives and click on **Configure**.



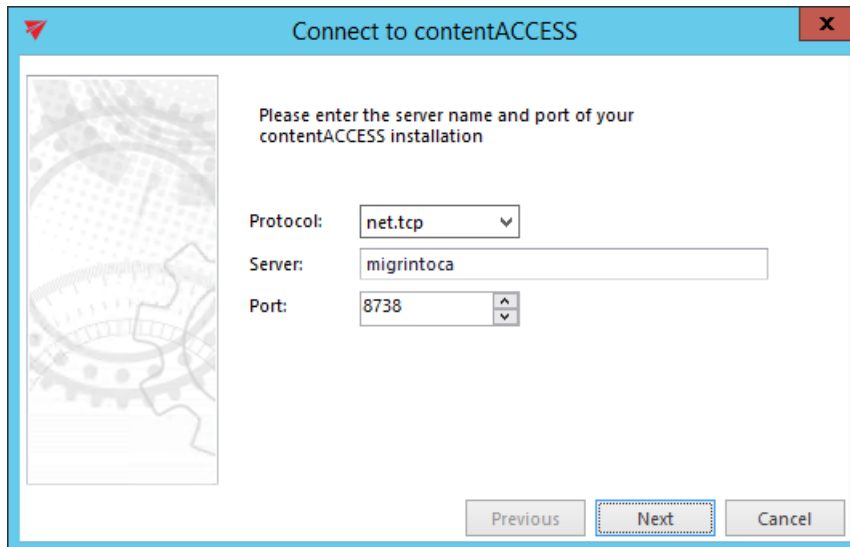
The "New migration" dialog box is shown with a blue title bar and a close button (X). It contains a "New migration" section with a document icon and instructions: "Please fill in the name of the migration and select the source and target archives." Below this, there are fields for "Version:" (set to "Advanced") and "Name:" (set to "MAM to cA"). A "Load ..." button is next to the name field, and a "Configure stage" button is to the right. The "Source archive" section has a dropdown set to "MAM" and a "Configure..." button. Below it, a "Connection:" text box contains "MAM Server: TAPAM01", "Database: TAPAM01\exchangeDB", "Integrated Security: true", and "Location ID: 1". The "Target archive" section is highlighted with a red rectangle; it has a dropdown set to "contentACCESS Target" and a "Configure..." button. Below it, a "Connection:" text box is empty. At the bottom are "Create" and "Cancel" buttons.

Click "Configure connection ..." in the next dialog.



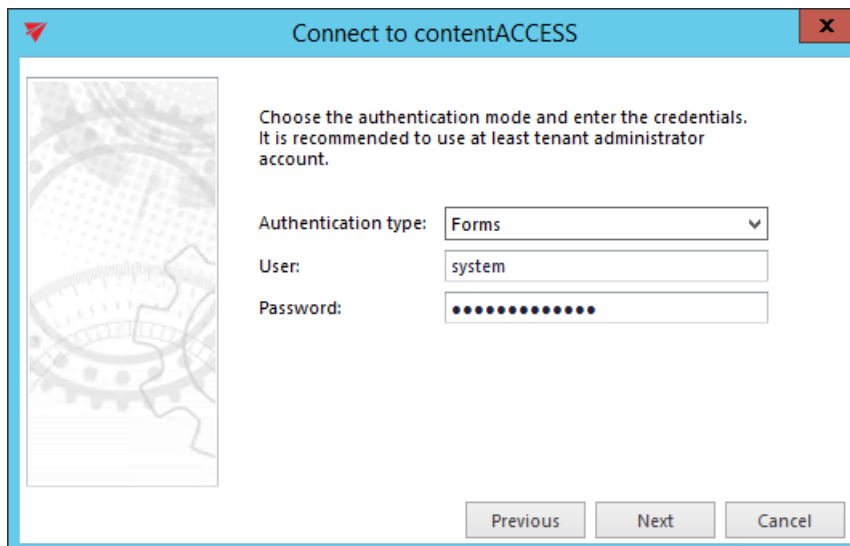
The "contentACCESS configuration" dialog box is shown with a blue title bar and a close button (X). It has three tabs: "Connection" (selected), "Options", and "EWS". The "Target contentACCESS settings" section contains fields for "Protocol:", "Server:", "Port:" (set to 0), "Auth type:", "User name:", "Password:", and "Model:". A "Configure connection..." button is highlighted with a red rectangle. At the bottom are "Save" and "Cancel" buttons.

Further enter the server name and port of your contentACCESS installation and click “Next”.



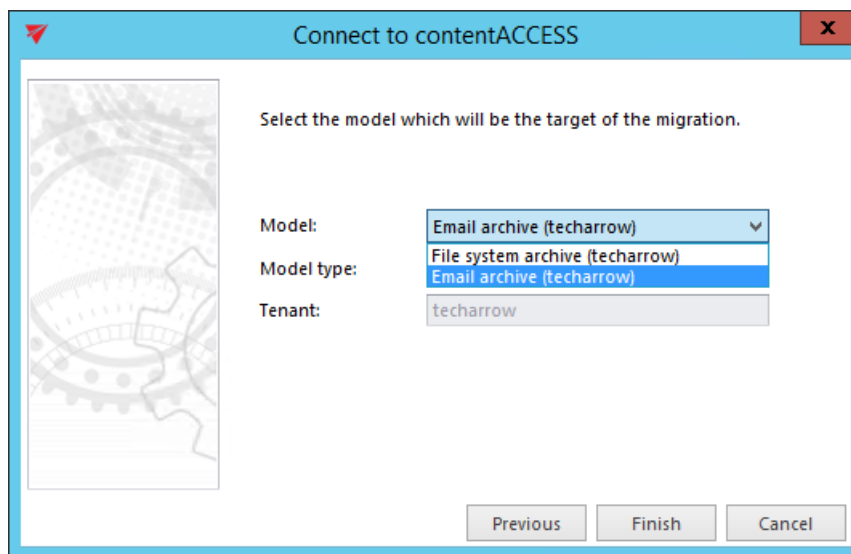
The dialog box titled "Connect to contentACCESS" has a blue header bar with a red close button. The main area contains a light gray background image of interlocking gears. Text inside says: "Please enter the server name and port of your contentACCESS installation". There are three input fields: "Protocol:" with a dropdown menu showing "net.tcp", "Server:" with a text box containing "migrintoca", and "Port:" with a spinner box showing "8738". At the bottom right are three buttons: "Previous", "Next" (highlighted with a blue border), and "Cancel".

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 dialog box titled "Connect to contentACCESS" has a blue header bar with a red close button. The main area contains a light gray background image of interlocking gears. Text inside says: "Choose the authentication mode and enter the credentials. It is recommended to use at least tenant administrator account.". There are three input fields: "Authentication type:" with a dropdown menu showing "Forms", "User:" with a text box containing "system", and "Password:" with a masked text box showing 12 dots. At the bottom right are three buttons: "Previous", "Next" (highlighted with a blue border), and "Cancel".

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

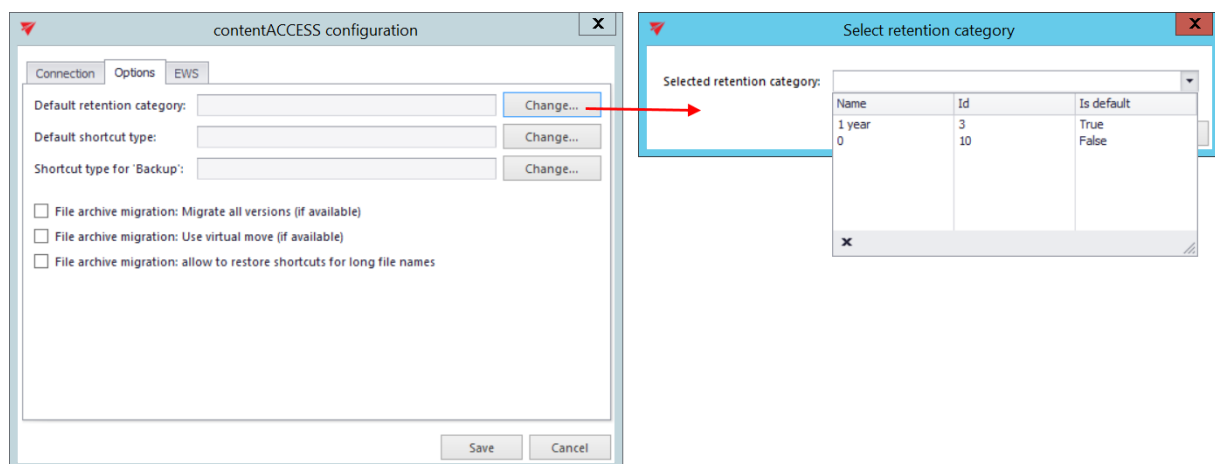


Back in the initial dialog switch to the “**Options**” tab. Use the “**Change**” buttons to set the

- default retention category,
- default shortcut type and
- shortcut type for “Backup”

that will be applied to the messages/shortcuts migrated into contentACCESS Email archive.

The available retention categories/shortcut types to be used in the target archive are listed based on the contentACCESS settings.

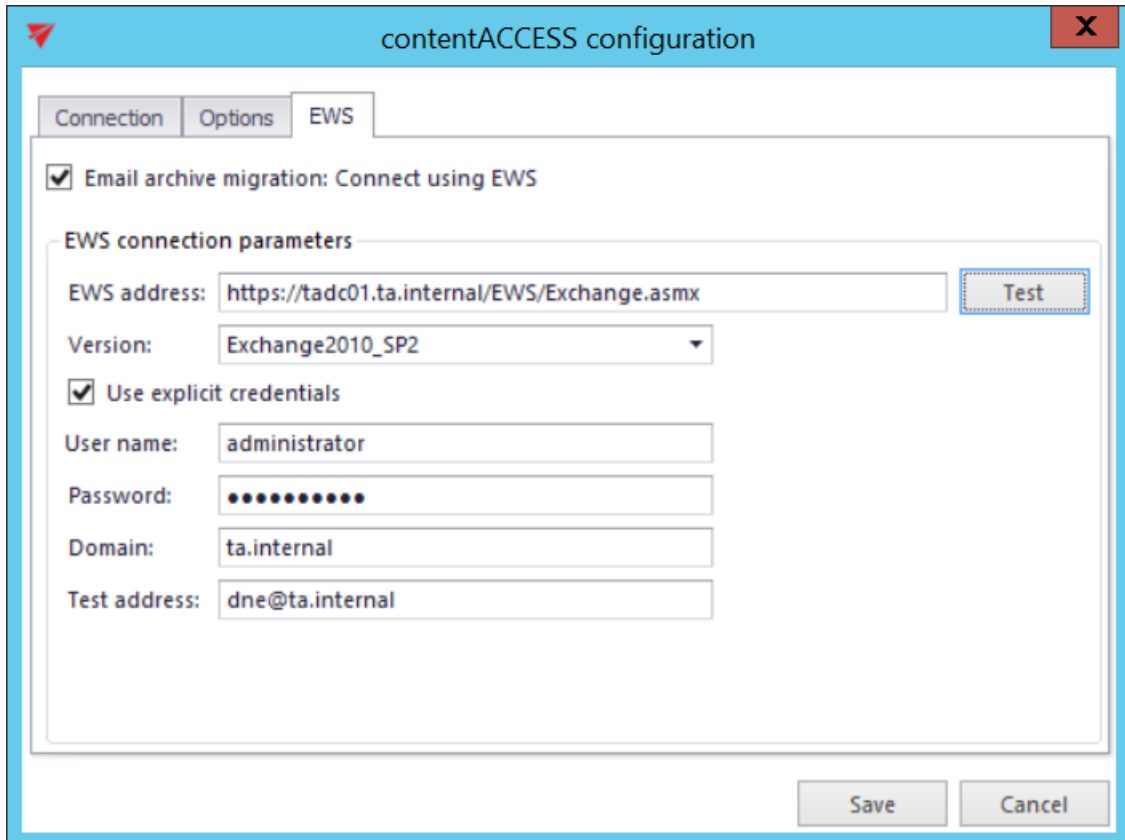


**File archive migration** checkboxes are unavailable for this type of migration, so please ignore these settings.



The screenshot shows a configuration window titled "contentACCESS configuration" with a red close button in the top right corner. It has three tabs: "Connection", "Options", and "EWS". The "Options" tab is selected. Inside the "Options" tab, there are three text input fields with "Change..." buttons to their right: "Default retention category:" with the value "1 year", "Default shortcut type:" with the value "HTML", and "Shortcut type for 'Backup':" with the value "HTML". Below these fields are three unchecked checkboxes: "File archive migration: Migrate all versions (if available)", "File archive migration: Use virtual move (if available)", and "File archive migration: allow to restore shortcuts for long file names". At the bottom right of the dialog are "Save" and "Cancel" buttons.

It is also possible to connect to contentACCESS via Exchange Web Services. To do this, click on the **EWS** tab and check the **Email archive migration: Connect using EWS** checkbox. Fill in the EWS address and select the EWS version of the server, where your email provider is running. Check the **Use explicit credentials** checkbox and enter the applicable credentials if necessary. Further specify the **Domain** name and Test address.

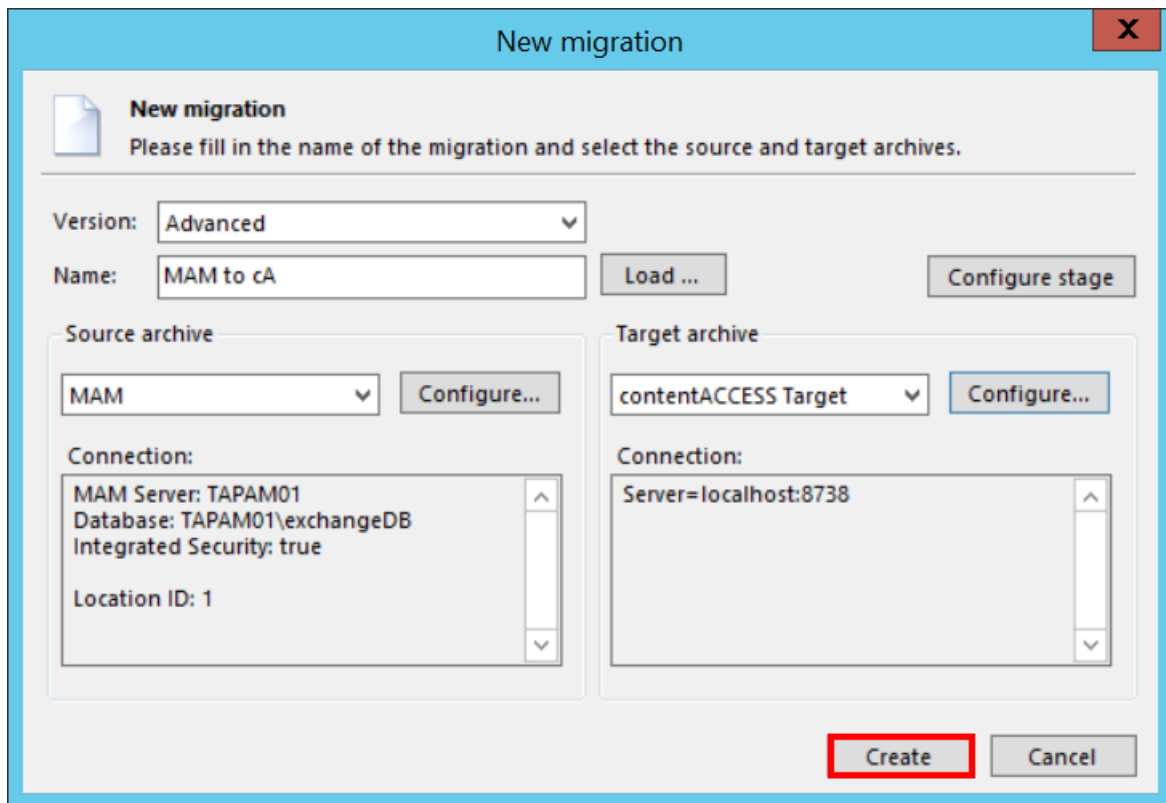


The image shows a screenshot of the 'contentACCESS configuration' dialog box. It has a blue title bar with a red 'X' button. Below the title bar are three tabs: 'Connection', 'Options', and 'EWS'. The 'EWS' tab is selected. Inside the dialog, there is a checkbox labeled 'Email archive migration: Connect using EWS' which is checked. Below this is a section titled 'EWS connection parameters'. It contains several fields: 'EWS address' with the value 'https://tadc01.ta.internal/EWS/Exchange.asmx' and a 'Test' button; 'Version' with a dropdown menu showing 'Exchange2010\_SP2'; 'Use explicit credentials' which is checked; 'User name' with the value 'administrator'; 'Password' with a masked field of dots; 'Domain' with the value 'ta.internal'; and 'Test address' with the value 'dne@ta.internal'. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

Click "Save".

Once the source and target archive connection is set, click on "Create" back in the very first "New migration" dialog:





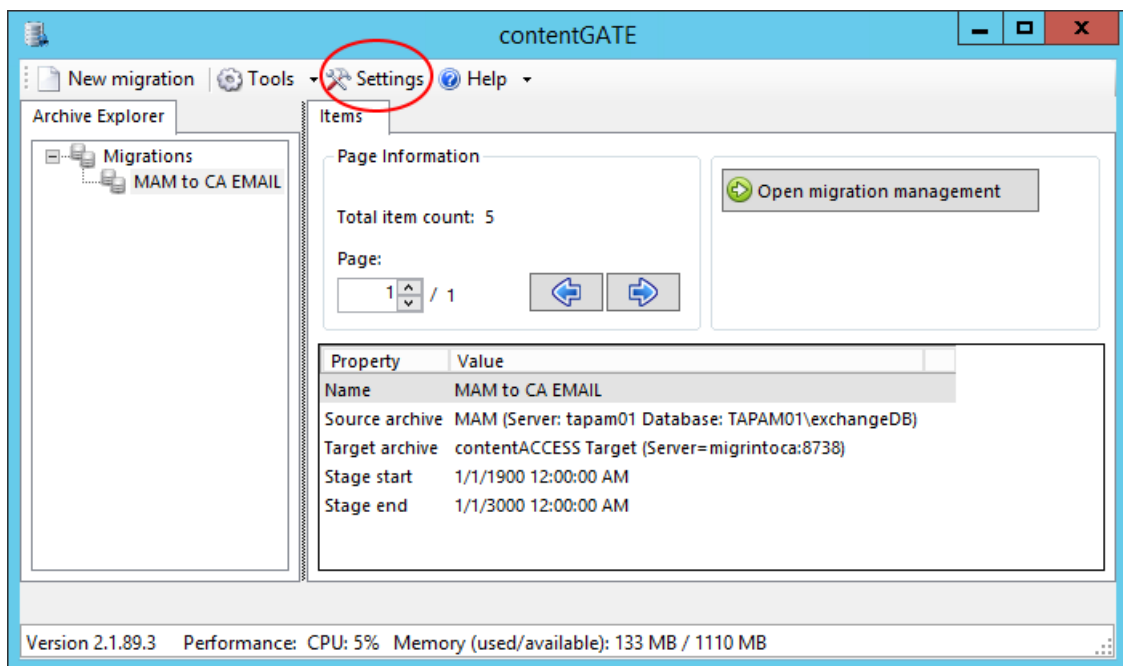
The migration project is now added to the Archive Explorer pane of contentGATE.

Now, the Exchange server must be added to the Exchange settings pane.

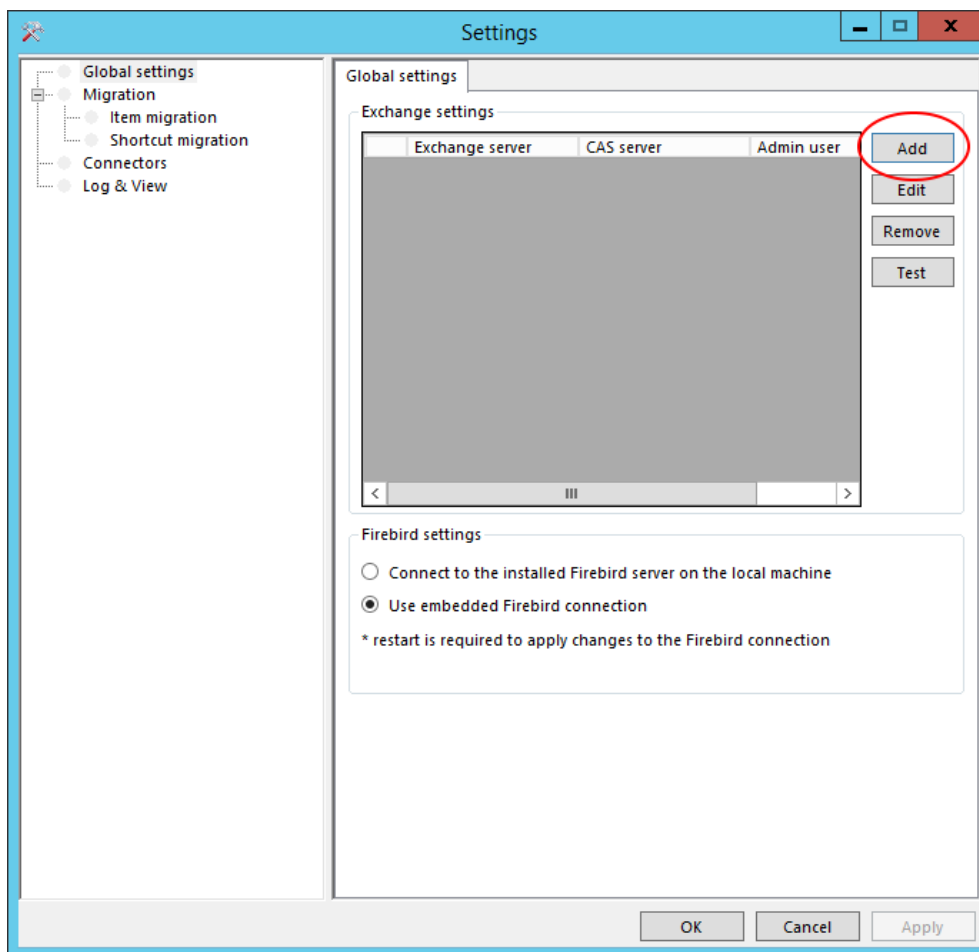
## 5.2 Configuring Exchange server settings

Exchange server settings must be configured to ensure an access to the necessary data on the Exchange server. If multiple Exchange servers are used, all of them must be set here.

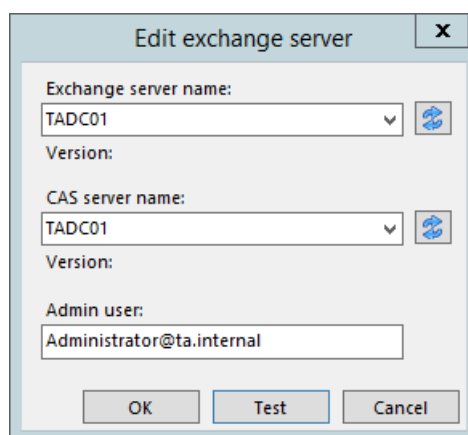
Open the **Settings** dialog from the toolbar of contentGATE:



By default, the **Global settings** node is selected in the dialog's navigation pane. Click on "Add" in the pane and add the Exchange server(s) that you use.



You will be required to specify the CAS server name, too. Further set the admin user's mailbox on the Exchange and verify your settings by using the "Test" connection button in the same dialog.



**If the connection to the Exchange server fails, please verify the following:**

- Are you logged on with the superuser?
- Has the superuser access to the given mailbox?
- Is MS Outlook installed?
- Is the server name entered correctly?

**Note:** Try to enter the full qualified name or the name of the domain controller as the CAS server.

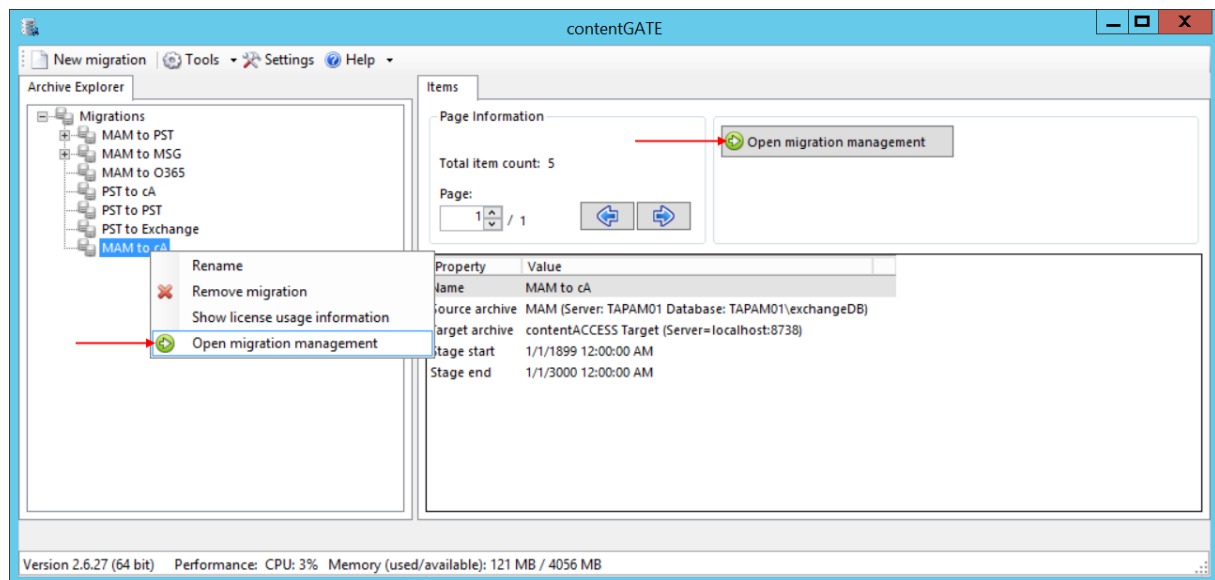
- Is the specified mailbox really located on the entered Exchange Server?

The necessary settings on the contentGATE interface are ready now.

Now, the migration project (MAM to CA EMAIL) can be configured.

## 5.3 Migration project configuration

Open the MAM to CA EMAIL migration's management interface from the node's context menu (or via the "Open migration management" button in the **Items** pane).



By clicking the "Open migration management" button, its management interface opens. Now we will walk through the configuration settings of our newly created migration project. These configurations enable to set

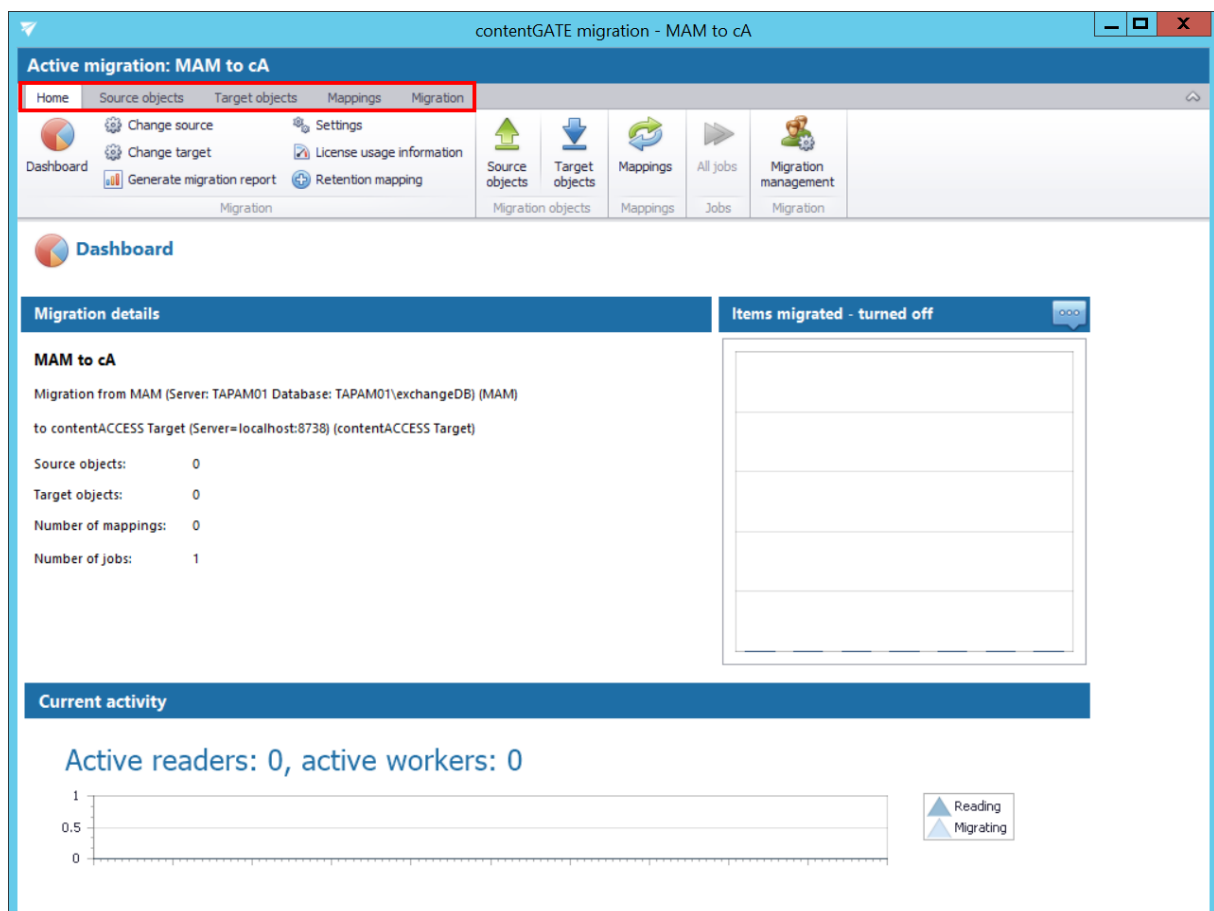
- the exact mailboxes to be migrated/excluded from the migration process



- the exact migration workflow (email and shortcut migration)
- the retention category migrations
- migration performance etc.

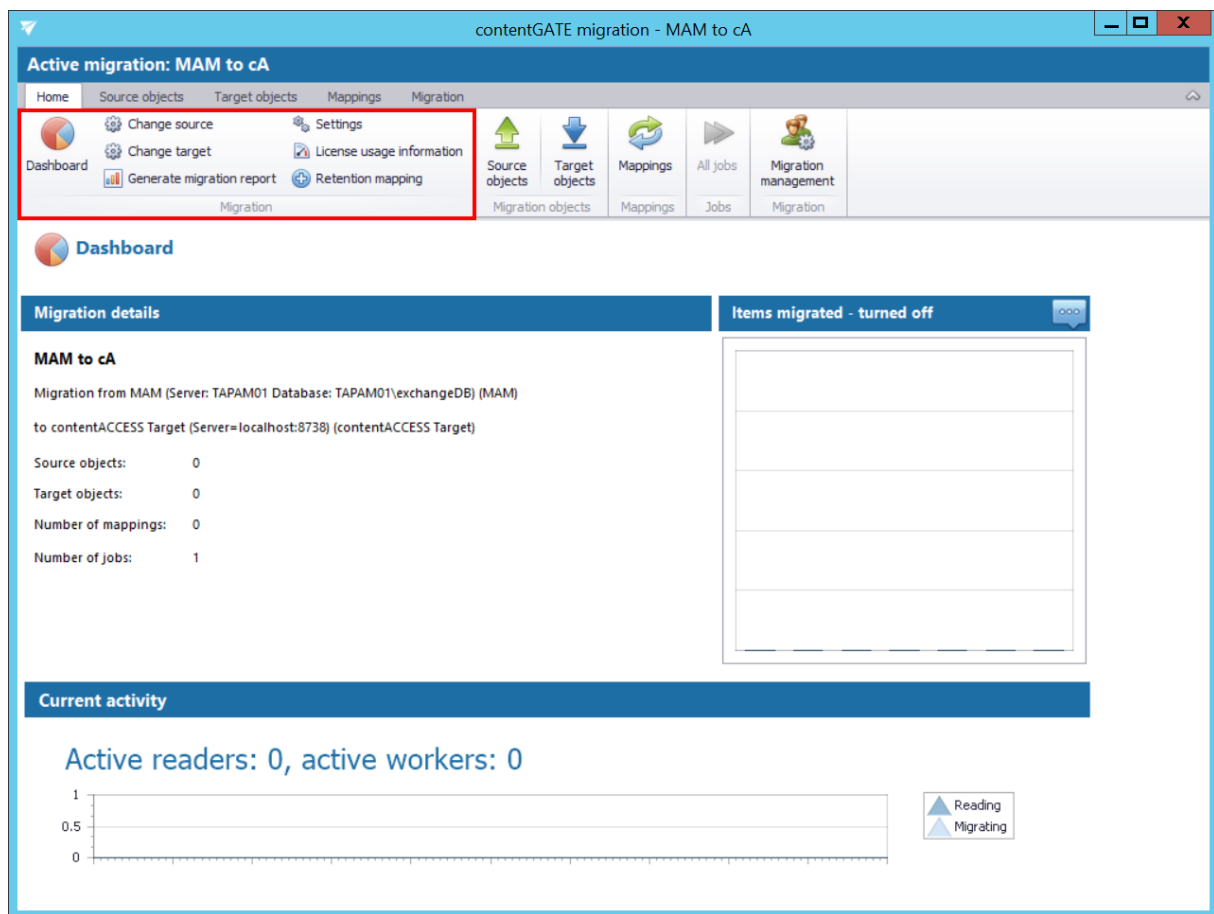
### 5.3.1 Interface overview

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:

- **Home** – Migration settings can be viewed and connector settings can be viewed or edited on this page.



The toolbar of this page features the following options:

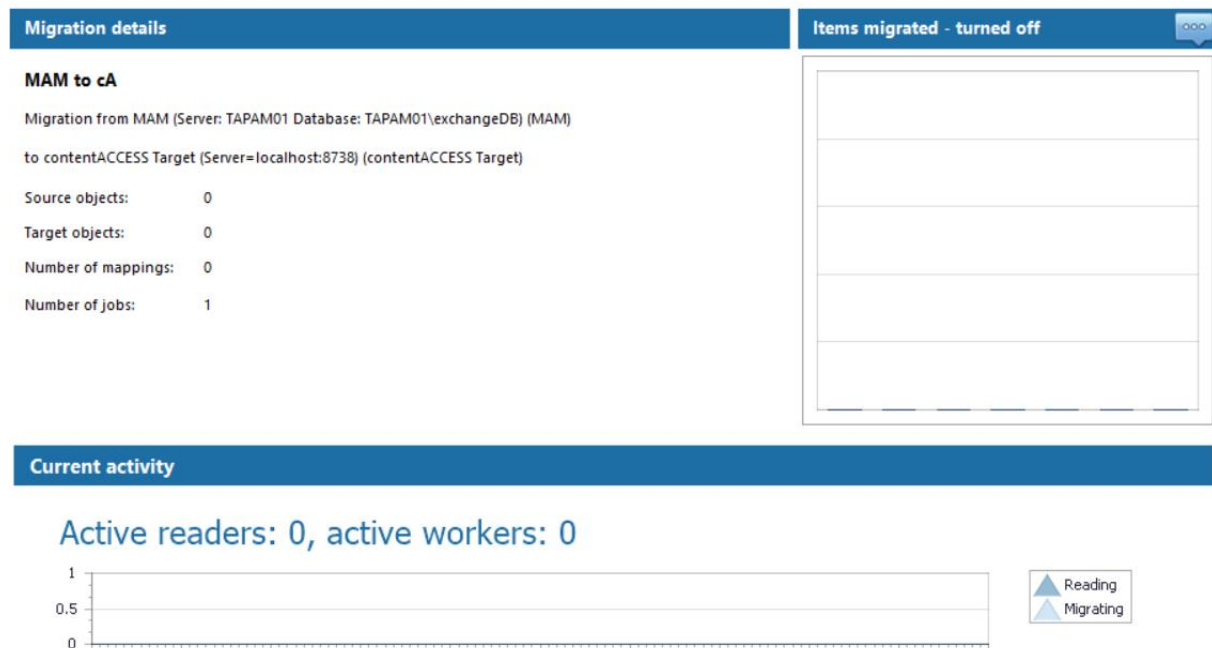
- **Change source** – source archive connections can be edited using this option
- **Change target** - target archive connections can be edited using this option
- **Generate migration report** – an overall migration report for all mappings can be created using this option (more details [here](#))
- **Settings** – item filtering settings, global and performance settings can be configured here (more details [here](#))
- **License usage information** – displays the data volume and number of items in the migration
- **Retention mapping** – source retention categories can be mapped to target retention categories here
- **Dashboard** – displays the basic parameters of the source and target connectors

The graph in section “Migration details” displays the number of migrated items in the last 7, 30 or 365 days. The time period is configurable using the triple dot menu in the right upper corner



of the graph. Move with your cursor over the graph and the information gets displayed. Initially the value is “0”.

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



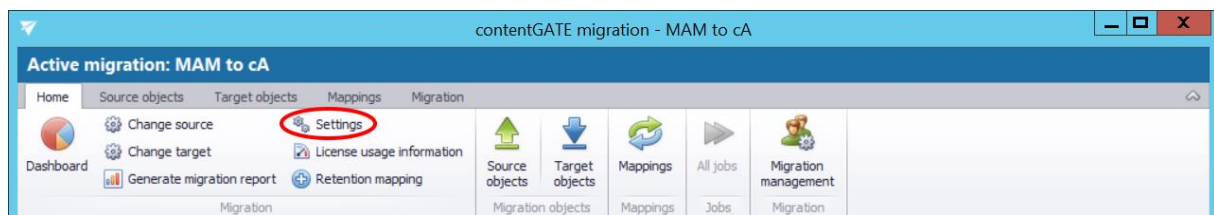
- **Source objects** – This section represents the list of the source objects (in this case Outlook PST files) that are available on the source connector. Initially the grid is empty. Source objects can be loaded either manually or automatically. (For more details click [here](#).)
- **Target objects** - Target objects (mailboxes already provisioned in the contentACCESS Email archive) can be loaded here either manually or automatically. The grid collects the targets of the migration – WHERE the data will be migrated. The list is initially empty and the objects can be added either manually, or it is possible to load them all. (For more details click [here](#).)
- **Mappings** – Before starting the archive migration procedure, the PST objects must be mapped to the provisioned objects in the contentACCESS Email Archive. This action is called **object mapping**. The objects that have not been mapped cannot be migrated. Object mappings are specified in “Mappings” section. Manual and automatic mappings are both enabled. (For more details click [here](#).)

- **Migration** – Migration jobs and groups can be created and viewed on this tab. The workflow of a migration is defined in the migration job. The job's workflow defines what exactly will be migrated. A migration job must be always assigned to a migration group, because only the mailboxes added to groups can be migrated. (For more details click [here](#) (jobs) and [here](#) (groups)).

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

### 5.3.2 Default project settings

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



The “Settings” window opens. The navigation pane of this window features 3 types of settings:

- **Global settings**
- **Filtering settings**
- **Performance settings**

#### Global settings

Use this option to specify a target mailbox folder for mailbox items with path that cannot be found during the migration process. By default, the items without the folder path information are saved into folder “Unknown”, but this folder can be changed here.





When checked, the option **Preserve shortcut properties during the shortcut migration** does the following:

- 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 be the exact same as it is in the source archive
- Upgrades the shortcut (creates new item from the .msg file)
- Applies properties that can be preserved on the new shortcut

**Note:** Information like category, follow up flag, read status, etc. are Outlook/user specific information and might be changed multiple times during an email lifetime. Therefore, it can be considered not as email specific, but rather user specific information.

This option is recommended in case the migration needs to be fully compliant. The migrated message is kept as it is, but the shortcut of the user is not losing the user specific Outlook information.

When checked, 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 and do the following:

- Find a shortcut in the mailbox
- Read properties that can be preserved (categories, follow up flags, read status, etc.)
- Read the message from the source archive and apply properties that can be preserved on the message
- Migrate the modified message to the target archive
- Upgrade the shortcut (create new item from the modified .msg file)
- The properties that can be preserved are already available on the new shortcut

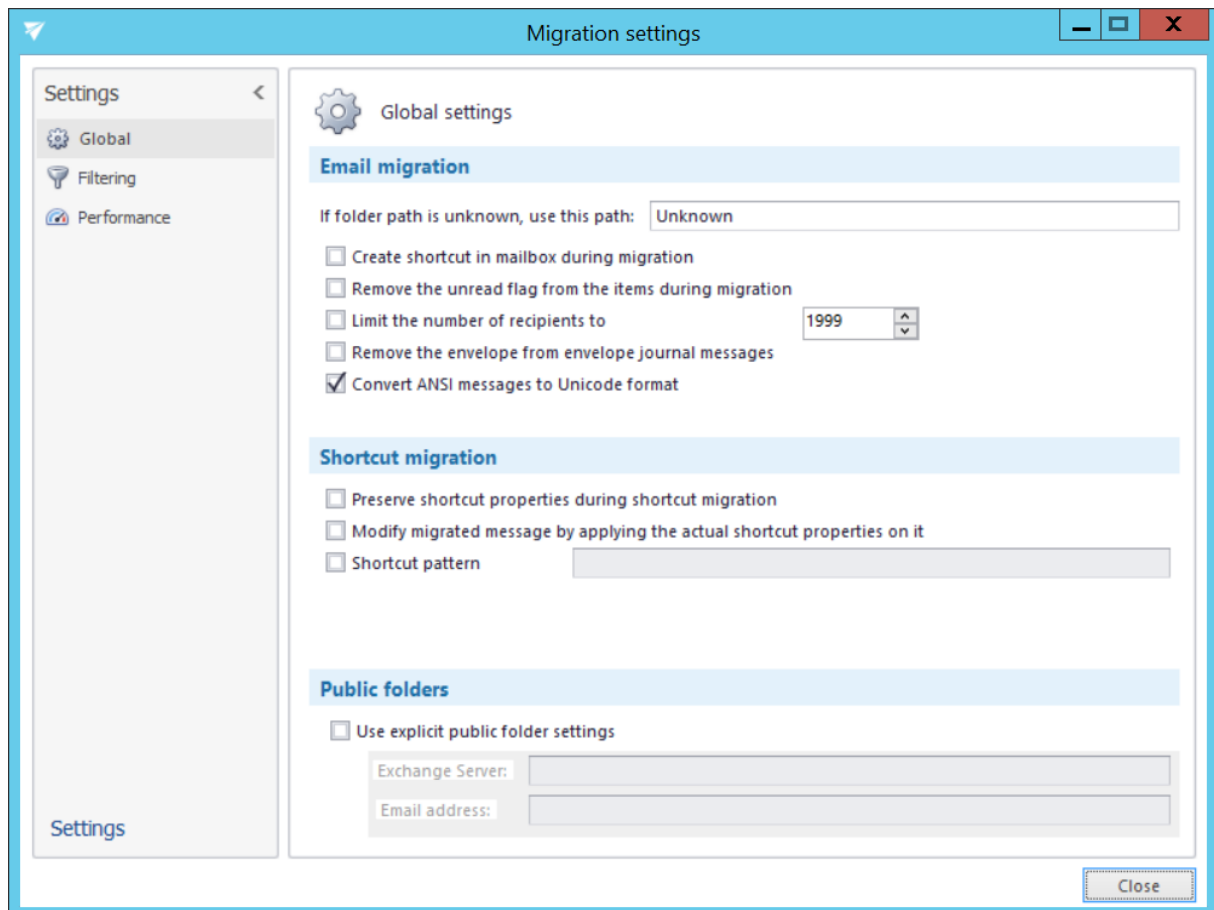
This option is recommended in case the customer requires to "update" the status of the migrated emails to the current status. The email is modified during the shortcut migration; therefore, it can't be considered as fully compliant migration.

**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** makes no sense anymore,



because the email was already migrated 1:1 to the target archive and can't be modified later. Therefore, please plan the migration strategy in advance, especially the sequence of the migration.

If explicit public folder settings need to be configured, it is possible to allow and configure it here.



## Filtering settings

Filtering settings enable to exclude certain mailboxes from the migration process. The list of mailboxes to be excluded can be imported from a CSV file, from an SQL database that the source archive is connected to or from Oracle that the source archive uses. It is possible to import multiple list of entries to be excluded. Already added entries will not be deleted, the list will be only updated.

To add mailboxes to be excluded, click the “import” button, select the import type (CSV file, SQL Server or Oracle) and specify the items that shouldn't be processed by the migration project.



Even if certain mailboxes are excluded from the migration, there can still exist shortcuts pointing to the excluded mailboxes. The dropdown list allows the administrator to decide what to do with these shortcuts:

- leave them untouched
- replace with the original item
- or to delete them.

It is also possible to allow filtering by **Message class**, **Date** and **Size**.

Settings

Global

Filtering

Performance

Migration settings

Filtering options for the whole migration

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

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

Leave the shortcut untouched

Replace the shortcut with original mail

Delete the shortcut

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

Date filtering

☐ Allow filtering by date
 

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

☒ Include only emails between
 

1/1/0001

1/1/0001

Size filtering

☐ Allow filtering by size

Close

## Performance settings

Performance settings enable to set the default performance values for every migration job of a migration project. The administrator may set here the default number of reader and worker

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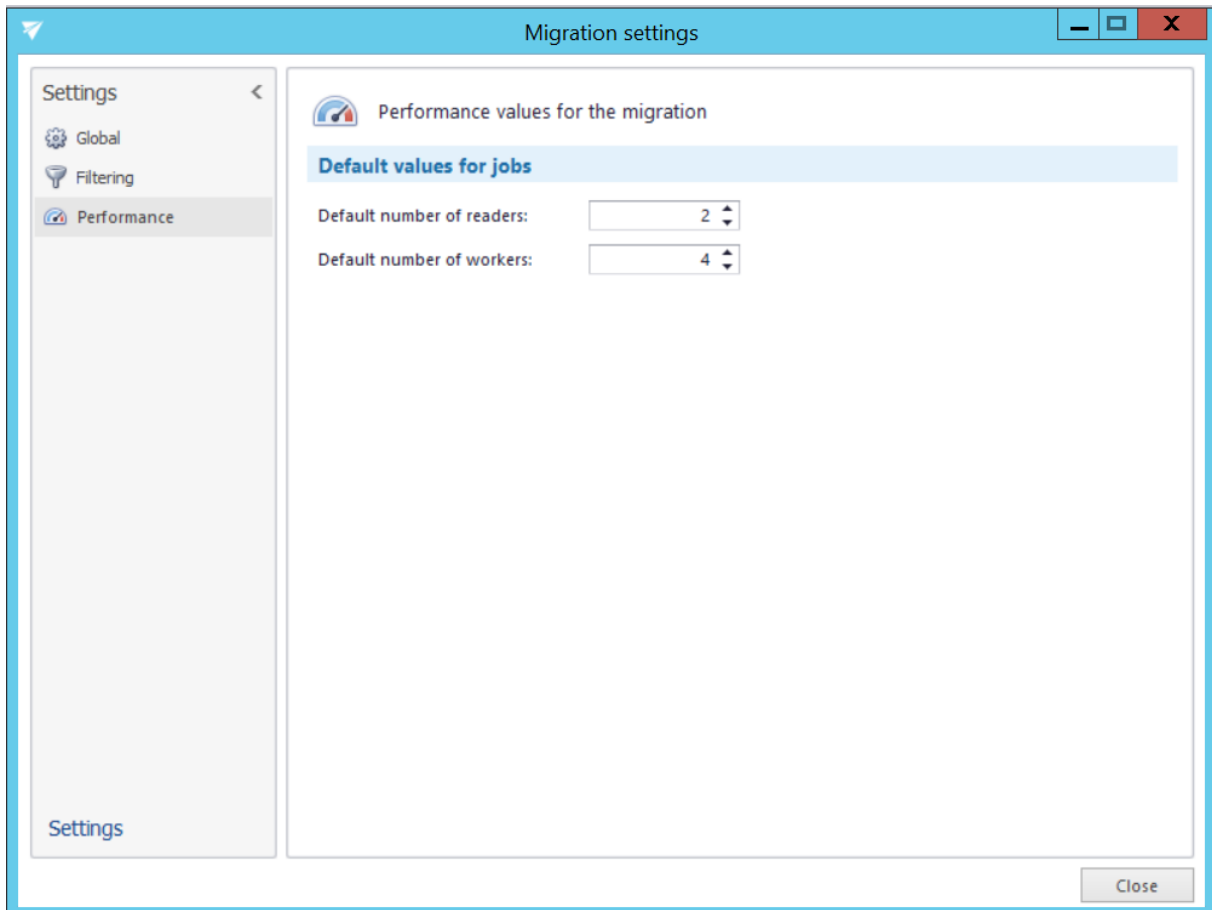
TECH-ARROW, a. s. | Kazanská 5B, 821 06 Bratislava, Slovakia, EU | E-mail: sales@tech-arrow.com | [www.tech-arrow.com](http://www.tech-arrow.com)

Page | 27



threads. The thread count defines the number of tasks running in parallel. The default values will be prepopulated in the migration job's settings.

**Note:** The thread count may be changed in the job settings. Values defined in the migration job have always priority.



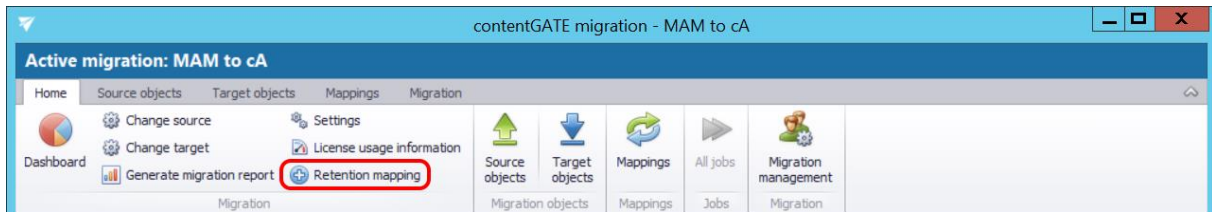
### 5.3.3 Mapping source retention categories to target retention categories

Retention mapping is the action when the retention categories on the source connector are mapped to the retention categories on the target connector.

**Note:** To be able to map retention categories, the source system must return at least one retention category.



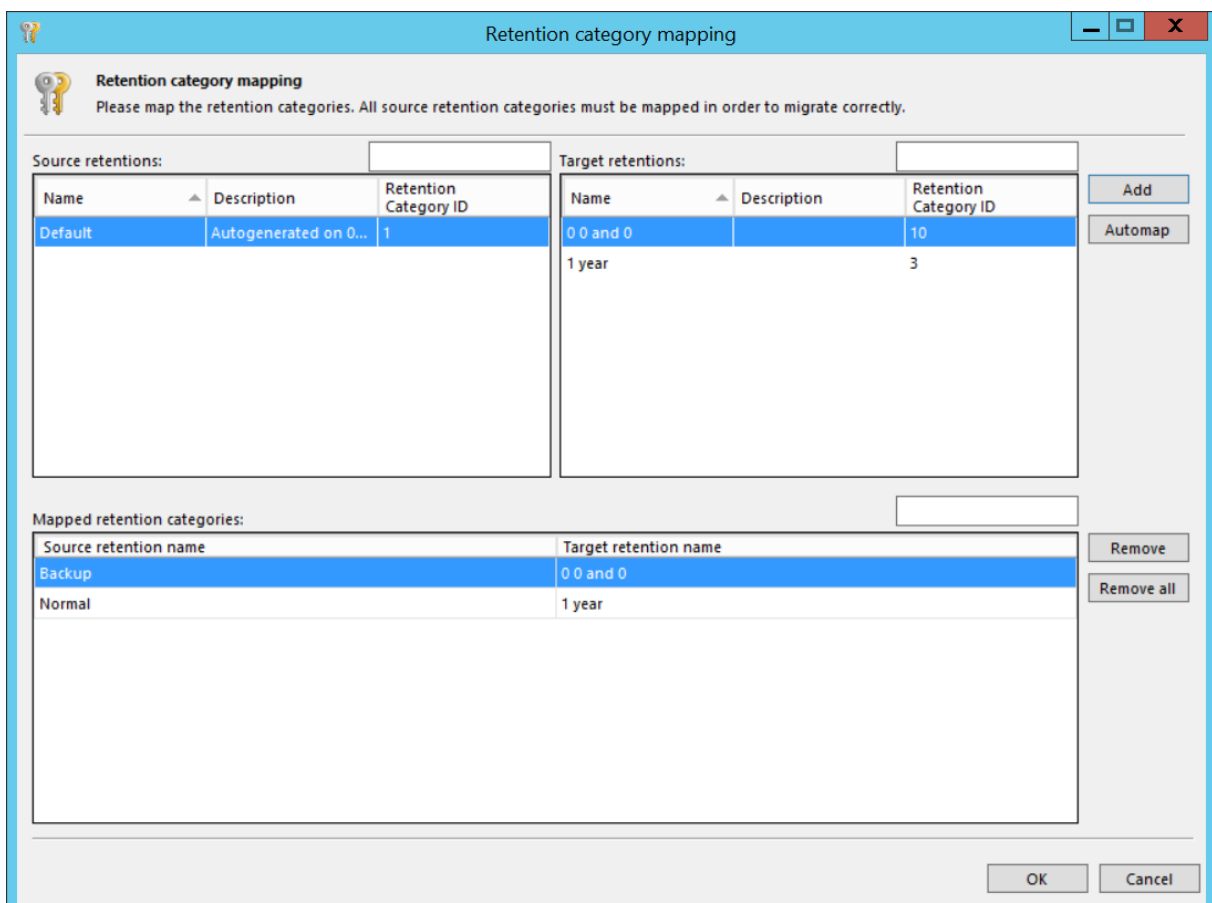
To map together the source and target retention categories click the “Retention mapping” option in the Home page’s toolbar.



The **Retention mapping** dialog opens. The categories on the source connector are listed in the left column, the available target retention categories (based on contentACCESS settings) are listed in the right column.

Use the Automap function to map the categories based on identical names, or map them manually. To map them manually, select the desired one on both sides and click on “Add”.

Further click “OK” to save your changes.



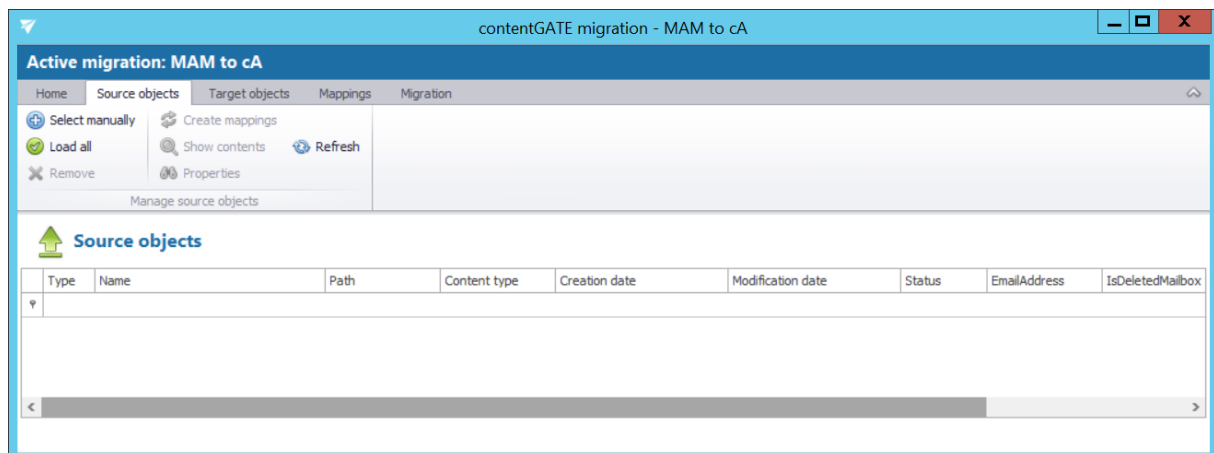
**Note:** One target retention category may have multiple source retentions associated.

### 5.3.4 Loading source objects

**Definition of terms:** source objects = mailboxes available in the source MAM EE archive

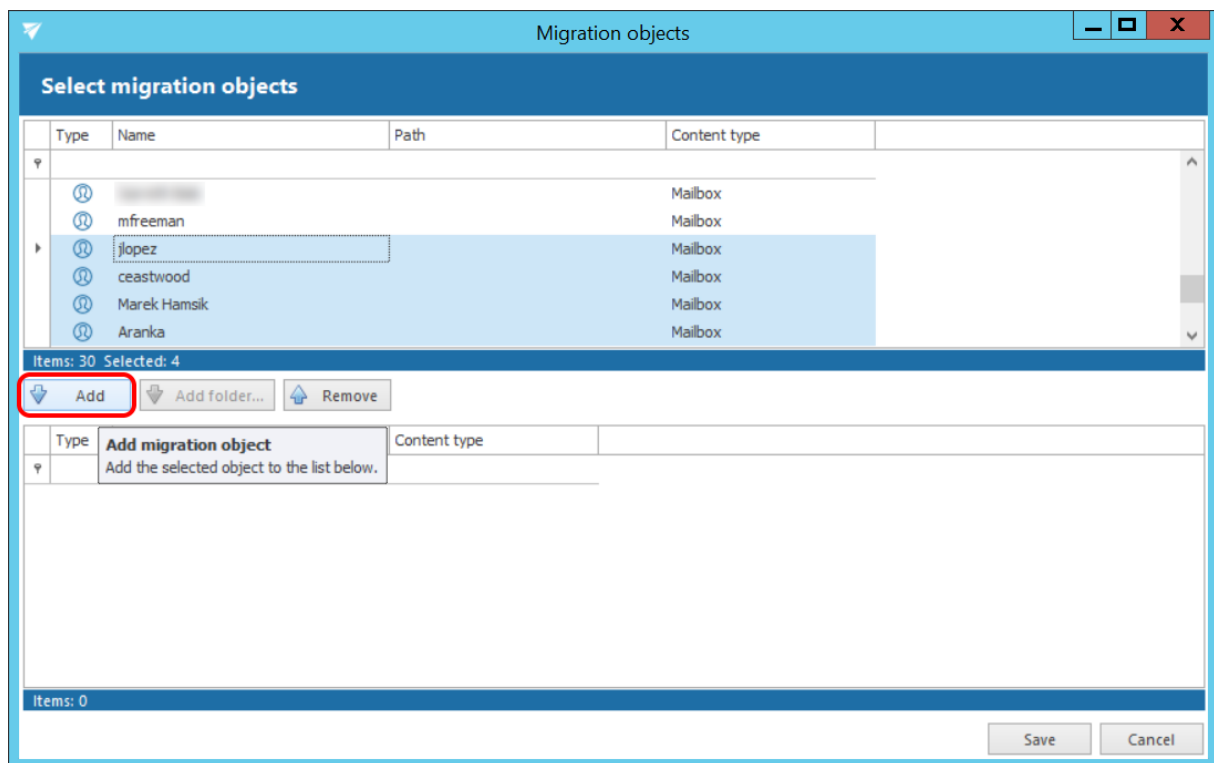
Open the “Source objects” tab. The grid of the page is initially empty and the source mailboxes must be loaded. You have multiple options how to load them:

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

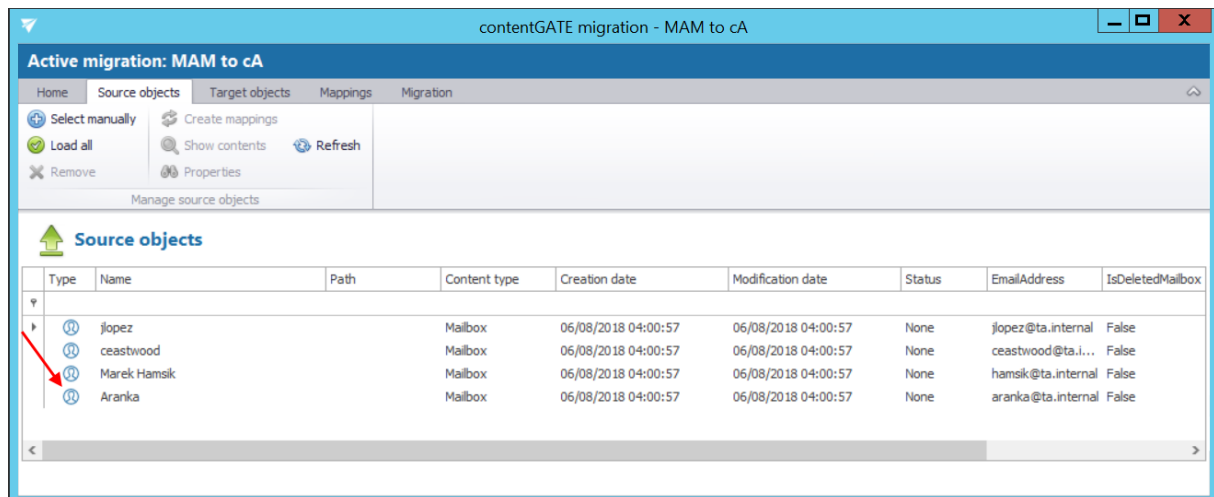


By **manual selection** of the objects the “Migration objects” dialog opens. Pick up the desired objects from the list and click “Add”. The source objects will be shifted to the lower part of the dialog. The dialog offers to select subfolders of a source object, too (option “Add folder”).

Click “Save”.

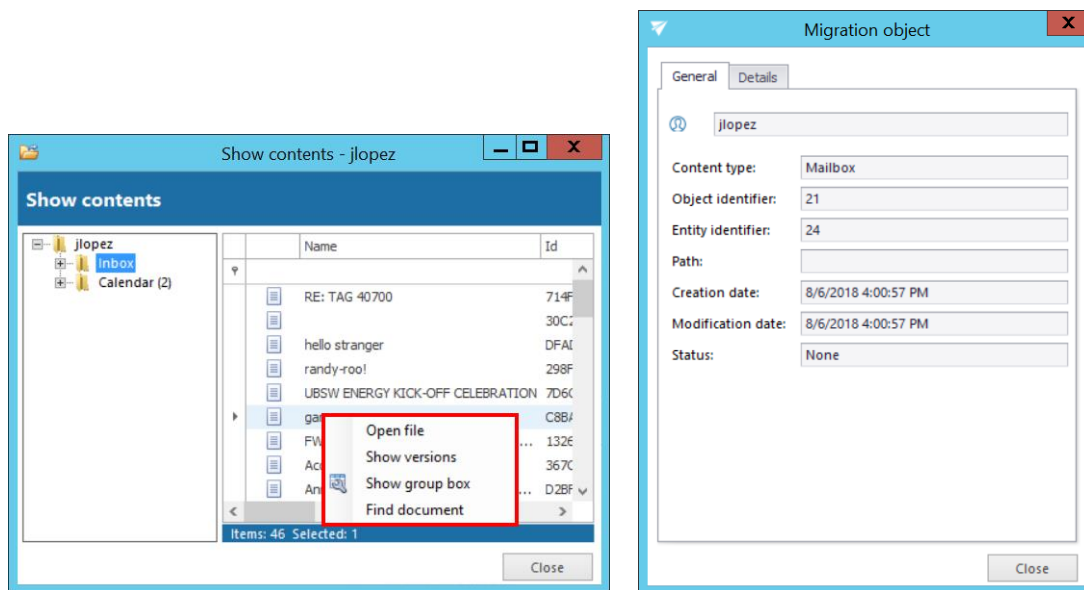


The selected source objects are now added to the grid:



The mailbox items, attachments and file versions may be viewed using the **Show contents** option in the toolbar. Use option **Properties** to view the basic properties of a mailbox.





Show contents of a mailbox item

Mailbox item properties

Once the demanded source objects are loaded, switch to section “Target objects”.

### 5.3.5 Loading target objects

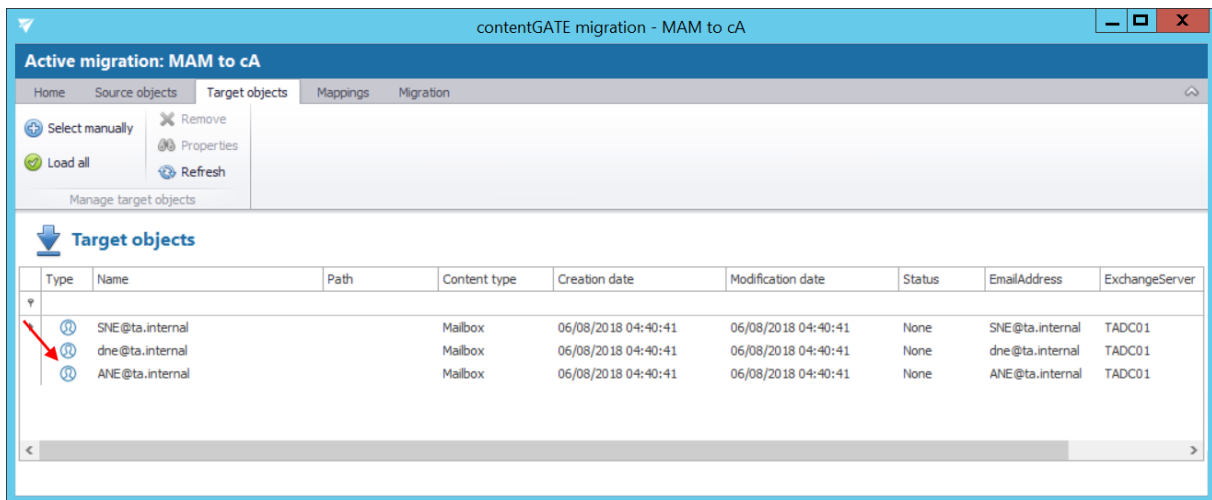
**Definition of terms:** target objects = provisioned contentACCESS Email archive mailboxes

Open the “Target objects” tab from the toolbar. Initially the grid is empty. The mailboxes provisioned in contentACCESS archive are loaded on this page. These mailboxes will be the targets of the migration.

You have multiple options how to load the mailboxes from the contentACCESS archive:

- **Load all** – use this option to load all objects available on the source archive
- **Select manually** – if you do not want to load all available objects from the source connector, you can use this option to pick the desired objects manually.

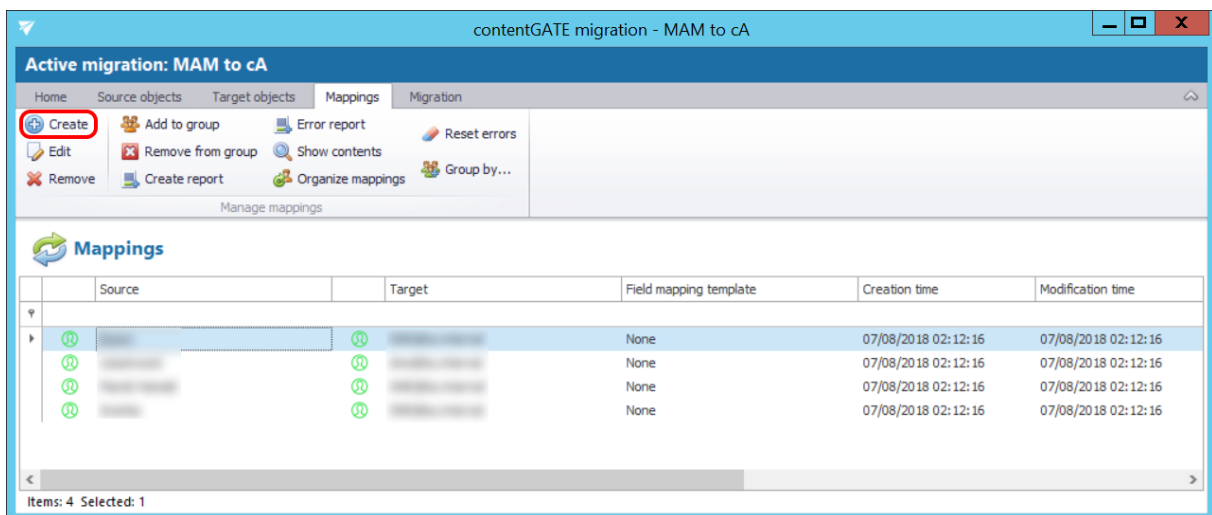
**The process is the same as with the source objects.** Load the desired objects on the target (where you will migrate TO) and switch to section “Mappings”.



### 5.3.6 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 features the

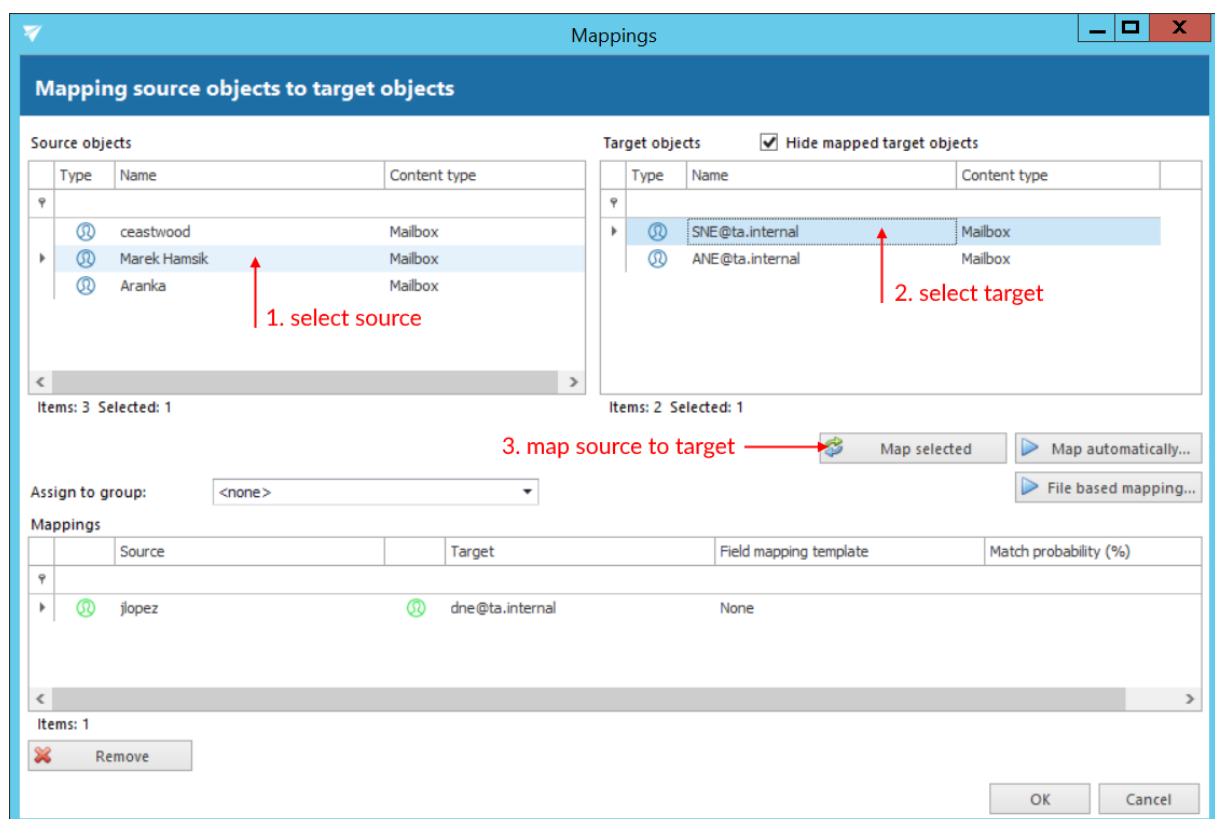
- **source** object(s) TO BE MIGRATED on the source side, and
- **target** object(s) WHERE the source objects can be migrated on the target side.

**Note:** One source object can be mapped to one target only, but one target object may be associated to multiple source objects. This action is called **merging**. Wish you associate multiple source objects to the same target, uncheck the “Hide mapped target object” option above the grid.

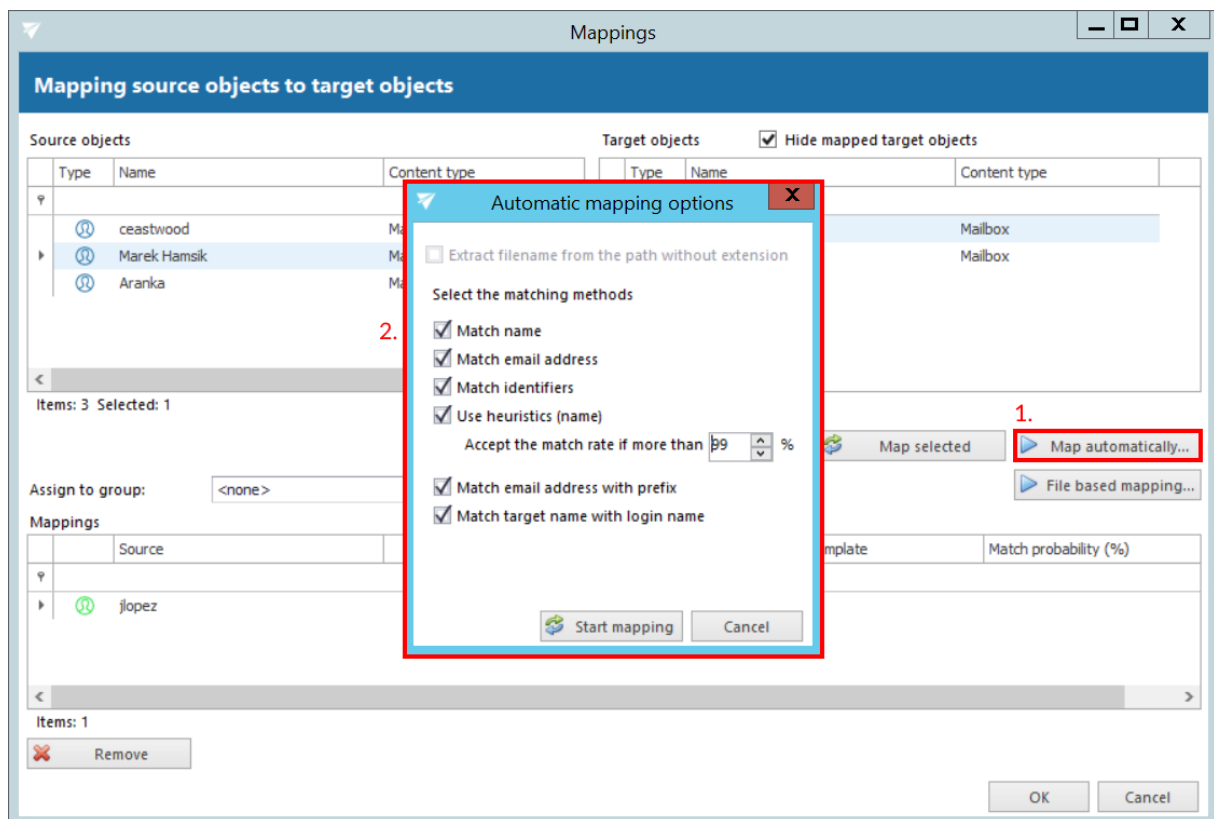
Mappings may be specified either

- manually or
- automatically.

By **manual selection** select each source and target one-by-one, and map them together using the “Map selected” option.



Wish you use **automatic mapping**, 1) click on the “Map automatically” button and 2) select the mapping criteria.



There are 3 auto-mapping methods available:

**Match name** – maps the objects based on name

**Match email address** – maps the source to target based on the email address included in the object properties

**Match identifiers** – maps the source to target based on the IDs included in the object properties (e.g. object ID, entity ID etc.)

**Use heuristics (name)** and accept match if rate is more than the selected amount

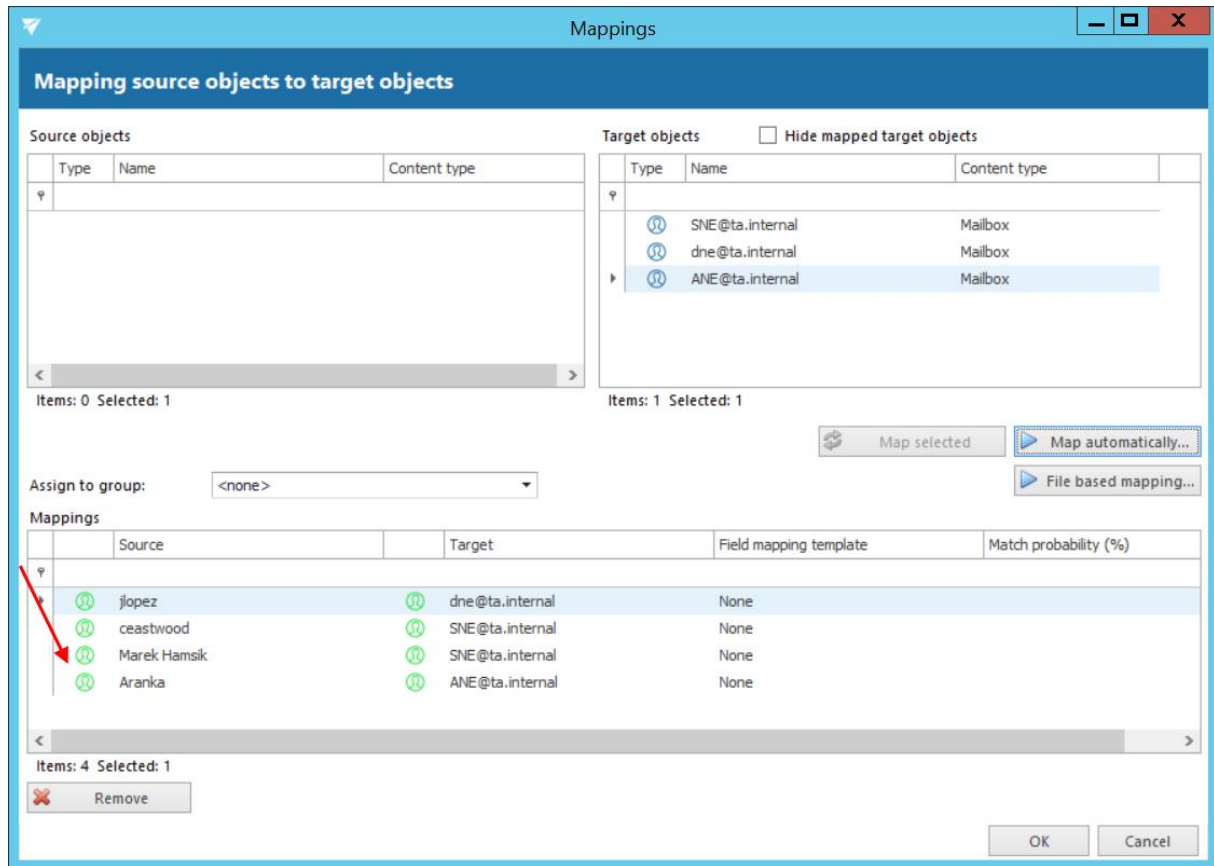
**Match email address with prefix** – map email addresses with the same email prefix (part of email address that appears left of the “@” symbol)

**Match target name with login name** – maps the objects if the target name matches the login name of the source.

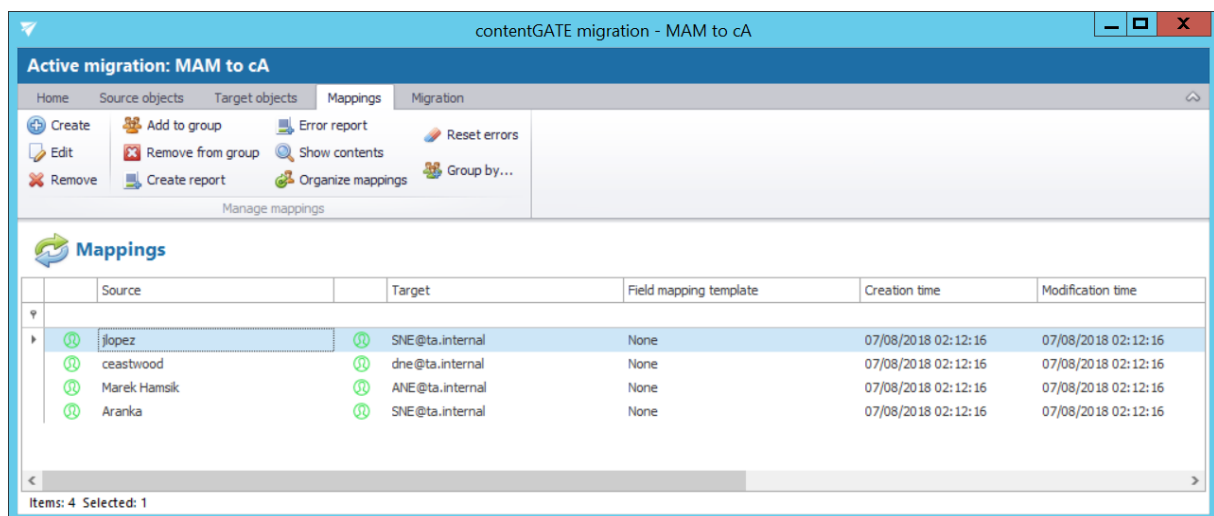
Once the criteria are selected, click on the “**Start mapping**” button, and the objects will be paired automatically.

**Note:** If no matches have been found by the automap, the application will warn about it. In this case the user needs to map the objects manually.

Added mappings are shifted to the lower part of the **Mappings** dialog.

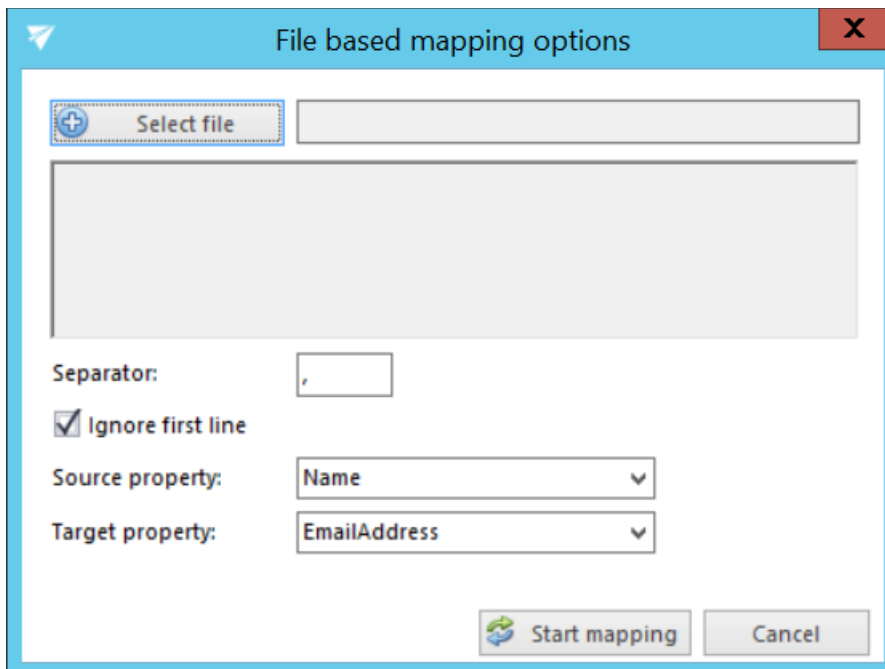


Click "OK" to add them to the grid.



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

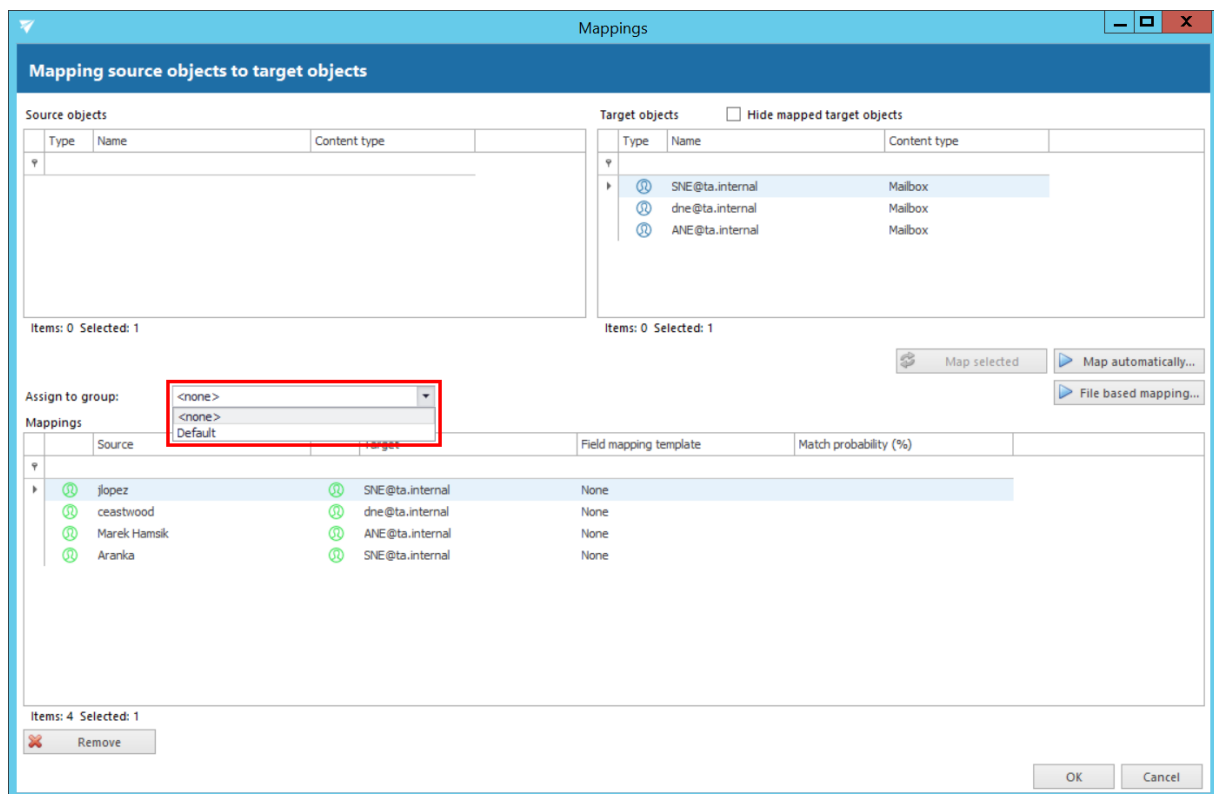
It is also possible to map objects based on a .CSV file. Click on **File based mapping** in the mappings dialog and select the desired file. Specify the **separator** of the properties. If you want to ignore the first line of text in your file (e.g. header), check the **Ignore first line** checkbox. Select the **Source** and **Target** properties from the dropdown lists respectively. Click on **Start mapping** and then **Apply changes**. The remaining steps are the same as when mapping manually and/or automatically.



The dialog box titled "File based mapping options" contains the following elements:

- A "Select file" button with a plus icon and an adjacent text input field.
- A large empty rectangular area for file content or preview.
- A "Separator:" label followed by a text input field containing a comma (,).
- A checked checkbox labeled "Ignore first line".
- A "Source property:" label followed by a dropdown menu showing "Name".
- A "Target property:" label followed by a dropdown menu showing "EmailAddress".
- At the bottom right, two buttons: "Start mapping" (with a green arrow icon) and "Cancel".

It is also possible to assign the mapping to a **Group** directly from the **Mappings** tab. Select the desired group from the **Assign to group** dropdown list.



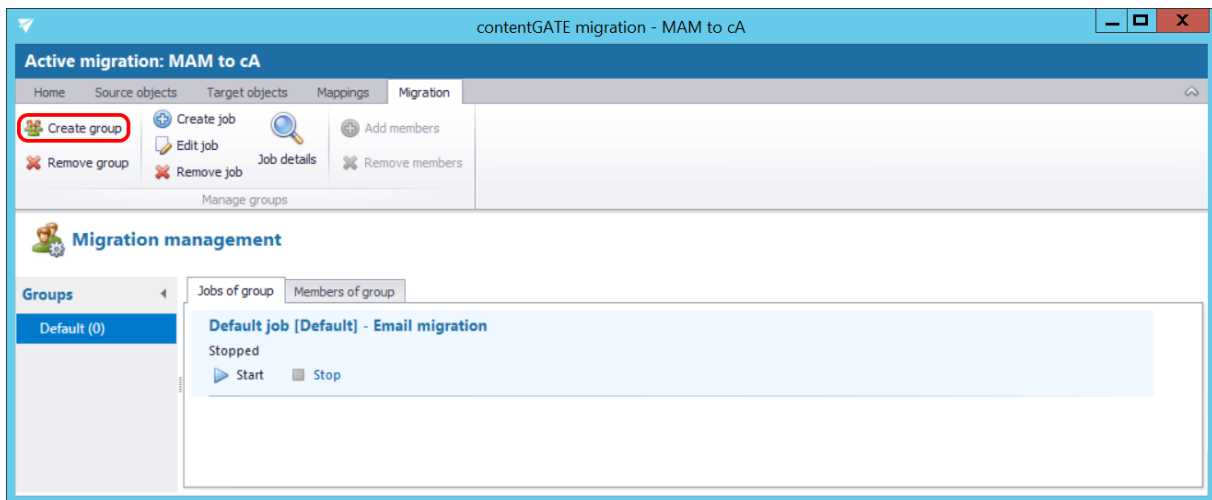
In next steps we will learn how to create a migration group and add our mapped mailboxes to this group.

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

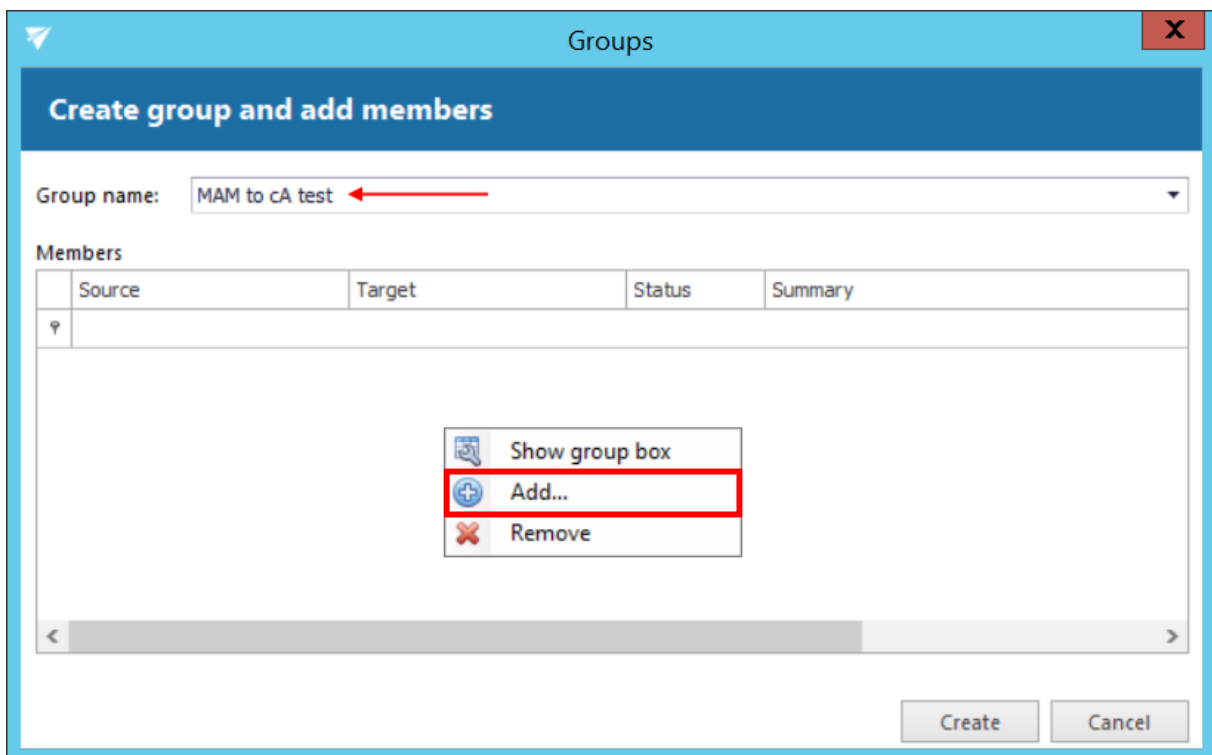
In the next step we need to create a migration group and associate our mapped mailboxes with it. Since a migration can be started on group level only, mailboxes that are not group members cannot be processed.

Group management makes the migration process more transparent and manageable. It makes easier to check which mailboxes have been already migrated, and it also helps to define priorities, i.e. to migrate the most important mailboxes in the first round.

**Create a migration group and add members to it.** Navigate to “Migration” tab. As you can see, there is initially a **Default** group. Click “Create group” in the toolbar to create a new group (if you don’t want to use the default one).




Name the group and add members to it using the context menu:



The next pop-up dialog displays all available mappings that can be added to the group. Pick the desired mappings and click “Select”.





Mappings

X

Select mappings

Available mappings

	Source	Target	Status	Summary
♀				
	jlopez	SNE@ta.internal	None	
	ceastwood	dne@ta.internal	None	
	Marek Hamsik	ANE@ta.internal	None	
▶	Aranka	SNE@ta.internal	None	


<

>

Select

Cancel

In the next pop up dialog click “Create”.



Groups

X

Create group and add members

Group name: MAM to cA test

Members

	Source	Target	Status	Summary
♀				
▶	jlopez	SNE@ta.internal	None	
	ceastwood	dne@ta.internal	None	
	Marek Hamsik	ANE@ta.internal	None	
	Aranka	SNE@ta.internal	None	

<

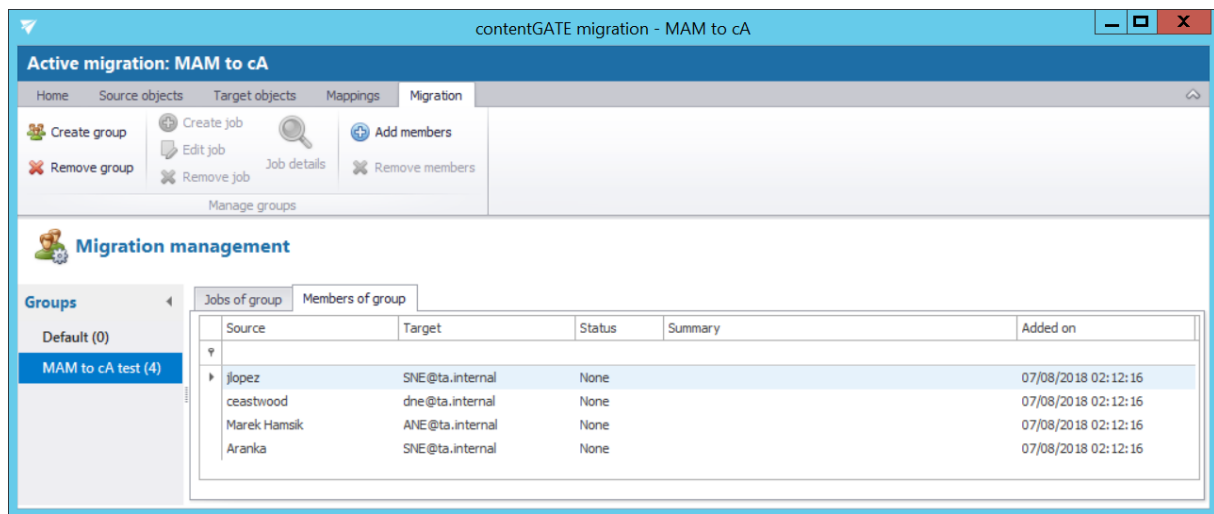
>

Create

Cancel



Mailboxes to be migrated are now added to the “Members of group” grid as seen on the picture below:



The “Jobs of group” grid is still empty. In the following subchapter we will learn how to add migration job(s) to our migration group. There will be 2 jobs created: 1<sup>st</sup> for email migration, 2<sup>nd</sup> for shortcut migration (shortcut conversion).

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

A migration job manages the migration process and it defines, what will be migrated exactly. At migration to *contentACCESS Email archive* 2 migration jobs are available:

- **Email migration job**
- **Email shortcut migration job**

The administrator decides the migration strategy:

- Migrate everything from the source archive
- Migrate live data only

If everything must be migrated, the recommended workflow is to create 2 jobs: **Email migration job** and **Email shortcut migration job**.



The **Email migration** job migrates all email data from the source archive in the background, not visible to the user. The **Email shortcut migration** job is started after the first one is finished and it converts the active emails (shortcuts) of the user.

If only live data must be migrated, it is recommended to create only the **Email shortcut migration job**.

This job migrates only those emails which are referenced in the mailbox. And in the same operation the shortcuts are converted as well.

**Note:** *The job crawls the normal, backup and delayed MAM EE shortcuts in the mailbox as well.*

**Important:** Items that do not have a backup, delayed or normal MAM EE shortcut in the mailbox will not be migrated! This step must be done by a separate **Email migration job** if needed.

The recommended workflow is to start an **Email migration job** first and after it is done, the **Email shortcut migration job** can be started, too.

However, in special cases **Email shortcut migration job** may be used as first.

The **Pros and Cons** of the selected migration strategy are the following:

**Using data migration first, then shortcut migration:**

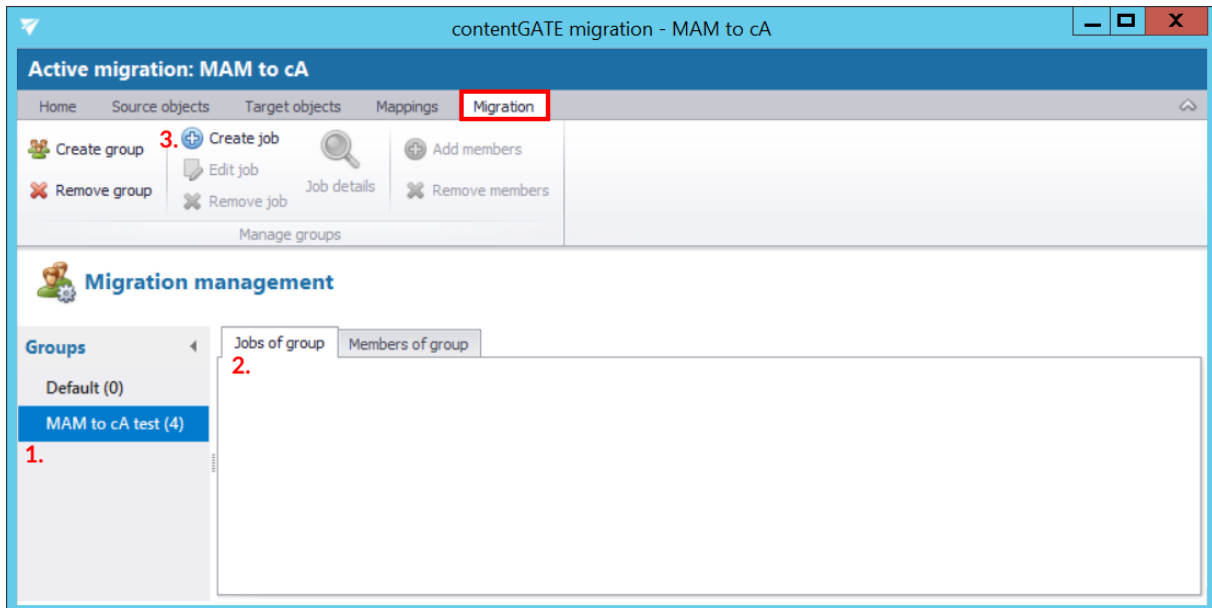
- ✔ All archive data will be ready when it comes to shortcuts – the conversion takes less time
- ✔ All archive data is available to the user for search
- ✔ There is a 1:1 copy of the source archive
- ✔ Easier organization of the users – the users can be switched to new archive in an organized way
- Longer time until a user can be switched to the new archive
- No actualizations to emails

**Using shortcut migration first, then data migration:**

- ✔ Ability to actualize live data (i.e. some combination of connectors allows to modify the mail during the migration – active folder path, shortcut properties, etc.)
- ✔ The folder path will be up to date
- ✔ Live data is available asap, rest of the data can be migrated later (user can work with the new archive asap)

- ➔ Search is limited until everything is migrated

A migration job is always assigned to a migration group. It can be created on the **Migration** page, with 1. selecting the group in the pane, 2. switching to “Jobs of group” tab and 3. clicking option “Create job” in the toolbar:



By clicking the toolbar button, the “Create new job” dialog opens, which requires to:

- **name** the job
- assign the job to a **group** – The group is already selected, if the job is created to a group directly (from the Group management tab). The job will process the members of this migration group.
- specify the migration **workflow** - The workflow defines what will be migrated by the job. By migrating to *contentACCESS Email archive* 3 options are available:

**Email migration** – migrates all email data from the source archive (MAM EE) to the target archive (contentACCESS Email archive). After the email migration is completed, the shortcut migration can be started.

**Email shortcut migration** – converts the source MAM shortcuts (that point to the source archive) to new contentACCESS shortcuts (so that they point to the target contentACCESS archive)



- adjust **thread performance**; this is set to the default values specified in [Default project settings](#). The configurations of the migration job have always priority.

Based on the recommended workflow, we set up 2 jobs to the **MAM to cA test** group created above. The 1<sup>st</sup> job will migrate only emails of this group, the 2<sup>nd</sup> job will migrate shortcuts after the first job is ready.

Now every configuration is done and you can proceed with the migration.

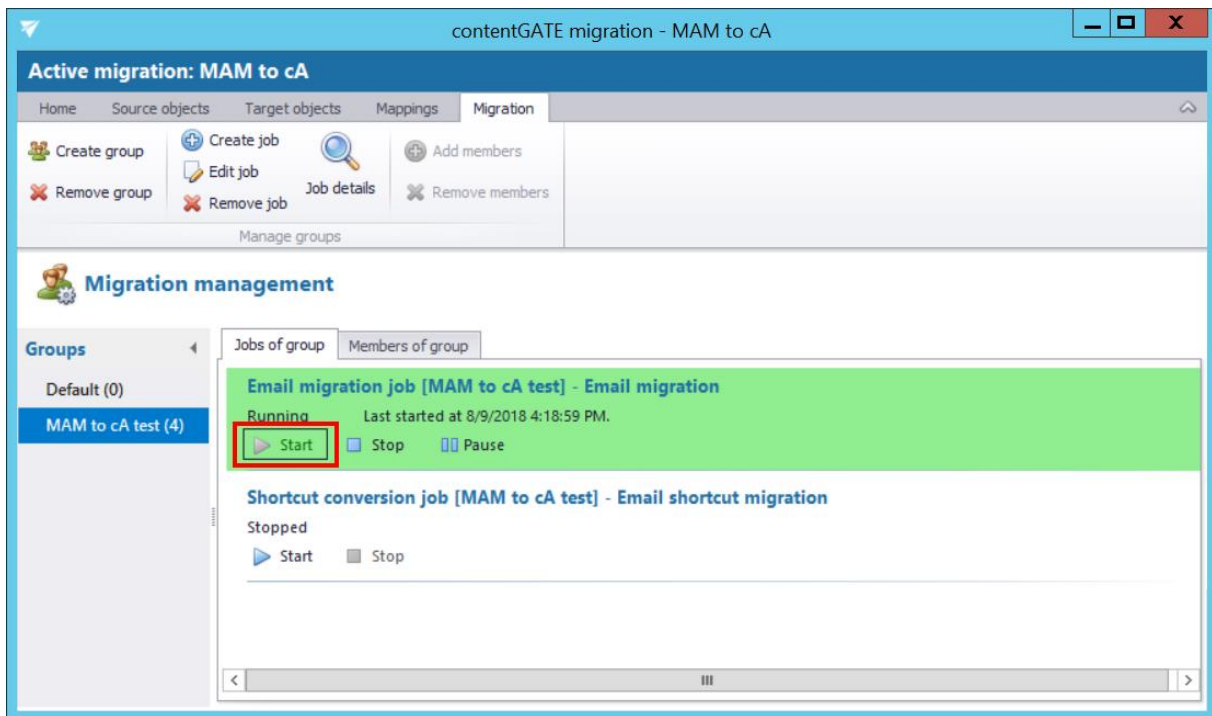
## 5.4 Starting the migration

The migration job can be started from the grid of jobs on the **Migration** page.

The job can be stopped or paused from this grid, too. If paused, the migration will continue from the point where it was aborted.

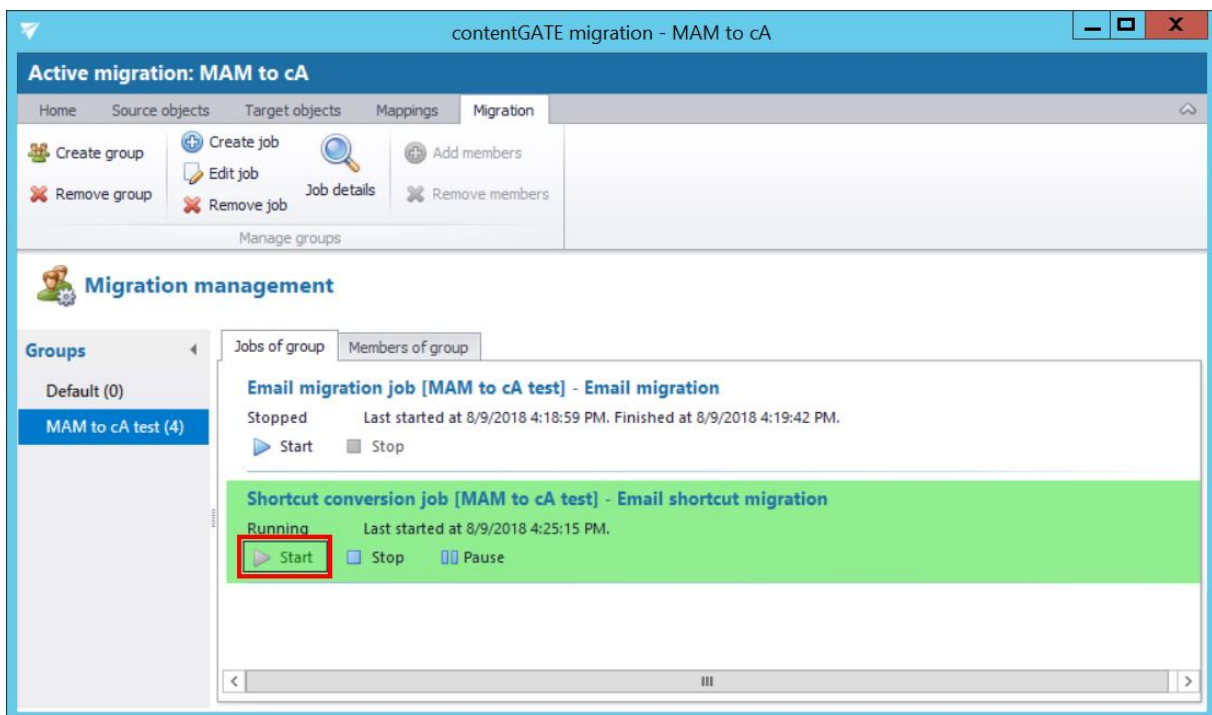
### 5.4.1 Starting the Email migration job

As mentioned above, the Email migration job must be started first. Click on “start” in the grid and wait until the job completes the migration process.

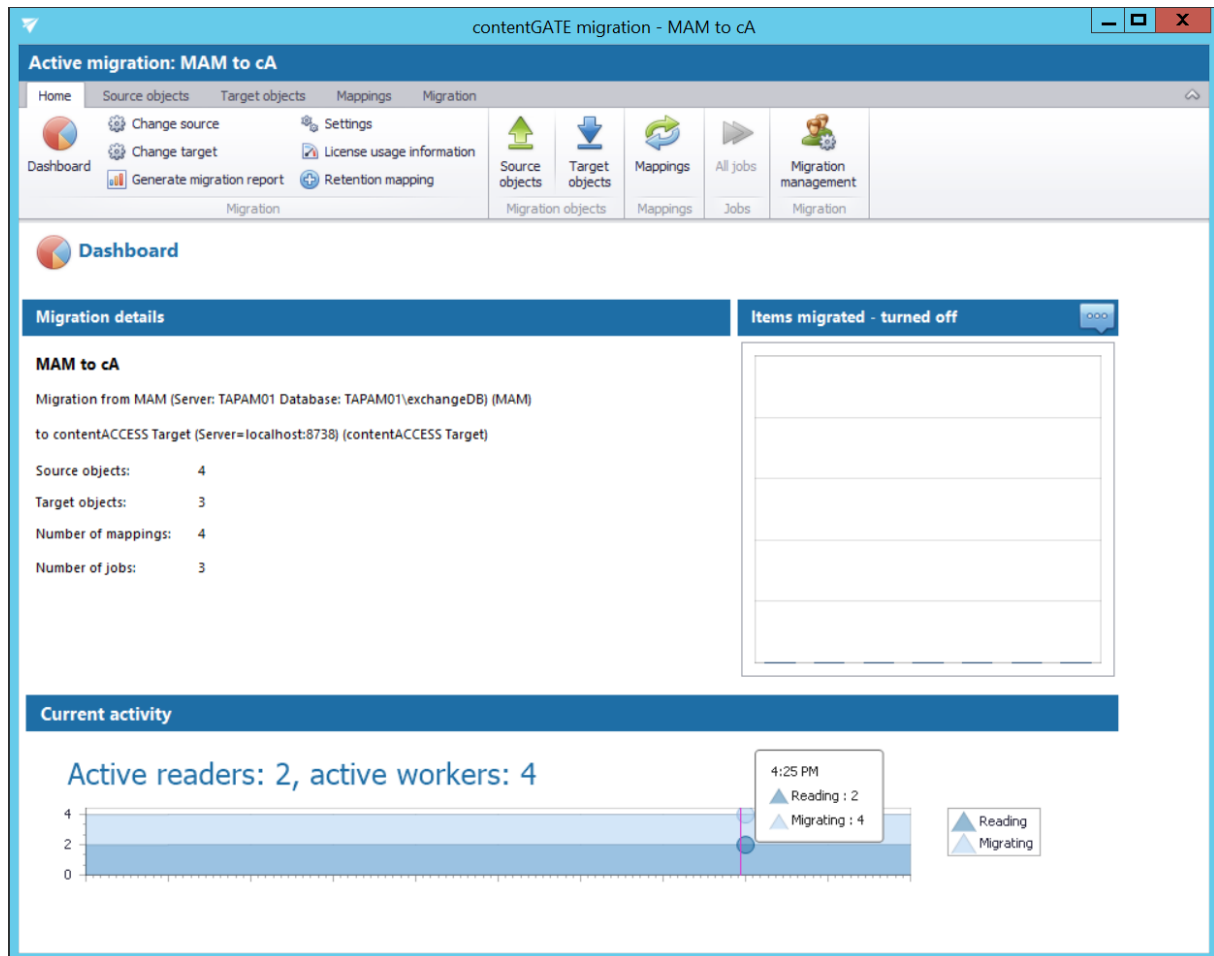


### 5.4.2 Starting the Shortcut conversion job

After the email migration is completed the shortcut conversion can be started. Start it from the grid:

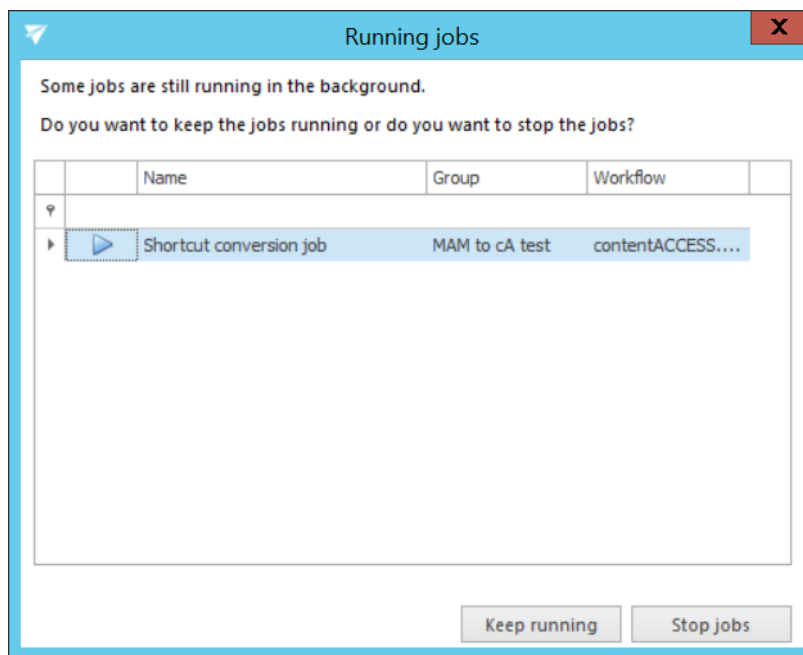


The current thread activity can be checked on the project's dashboard, too:



If the project management interface is closed when one or more migration job(s) are already running, the application will prompt about this. The administrator can choose what to do with the running job(s):

- keep them running – this option allows to complete the tasks in the background
- stop the job(s)

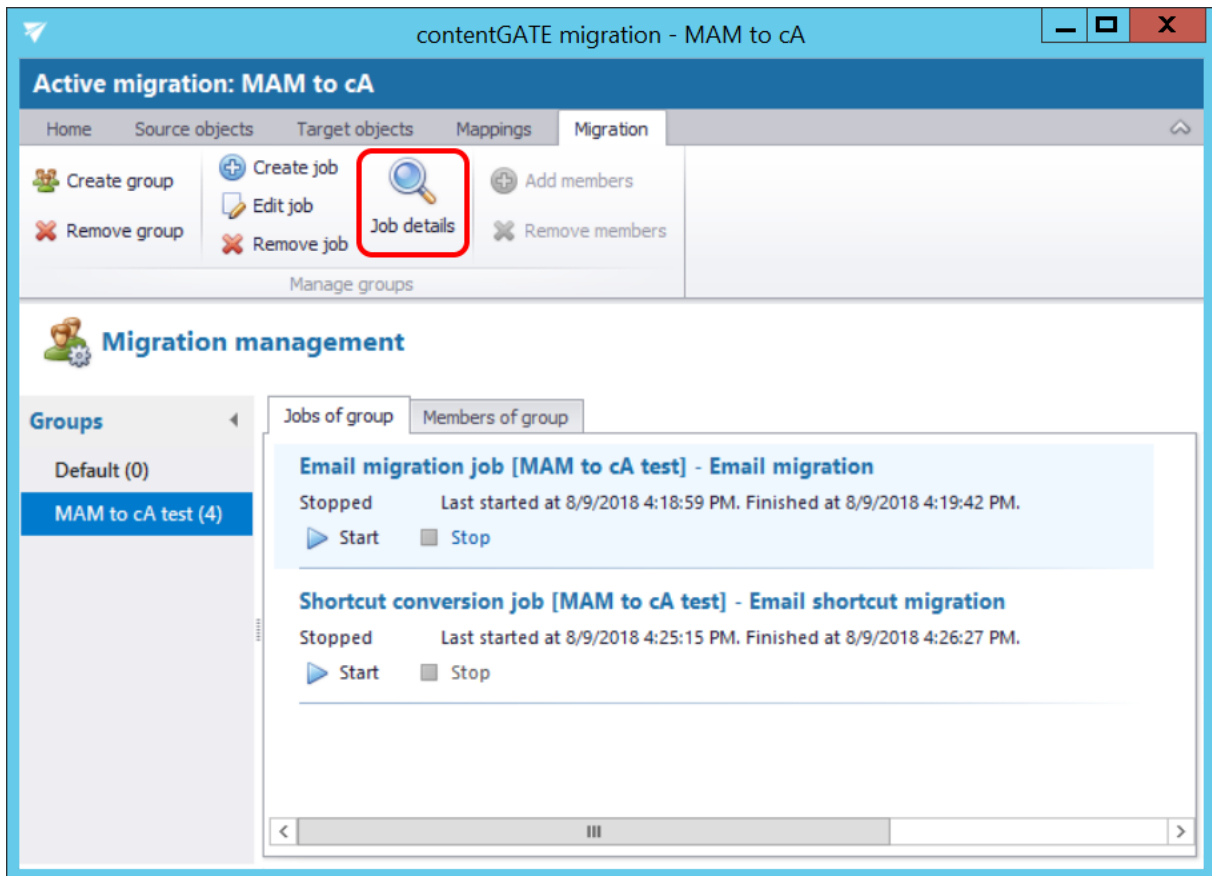


## 5.5 Job details

The details of a respective job's last running can be viewed in jobs details, which are accessible by clicking on the **Job details** option in the **Migration** toolbar. In case that the job is currently running, the current progress will be displayed.

Select the group with the desired job, click **Job details** and the **Job details** window will open.

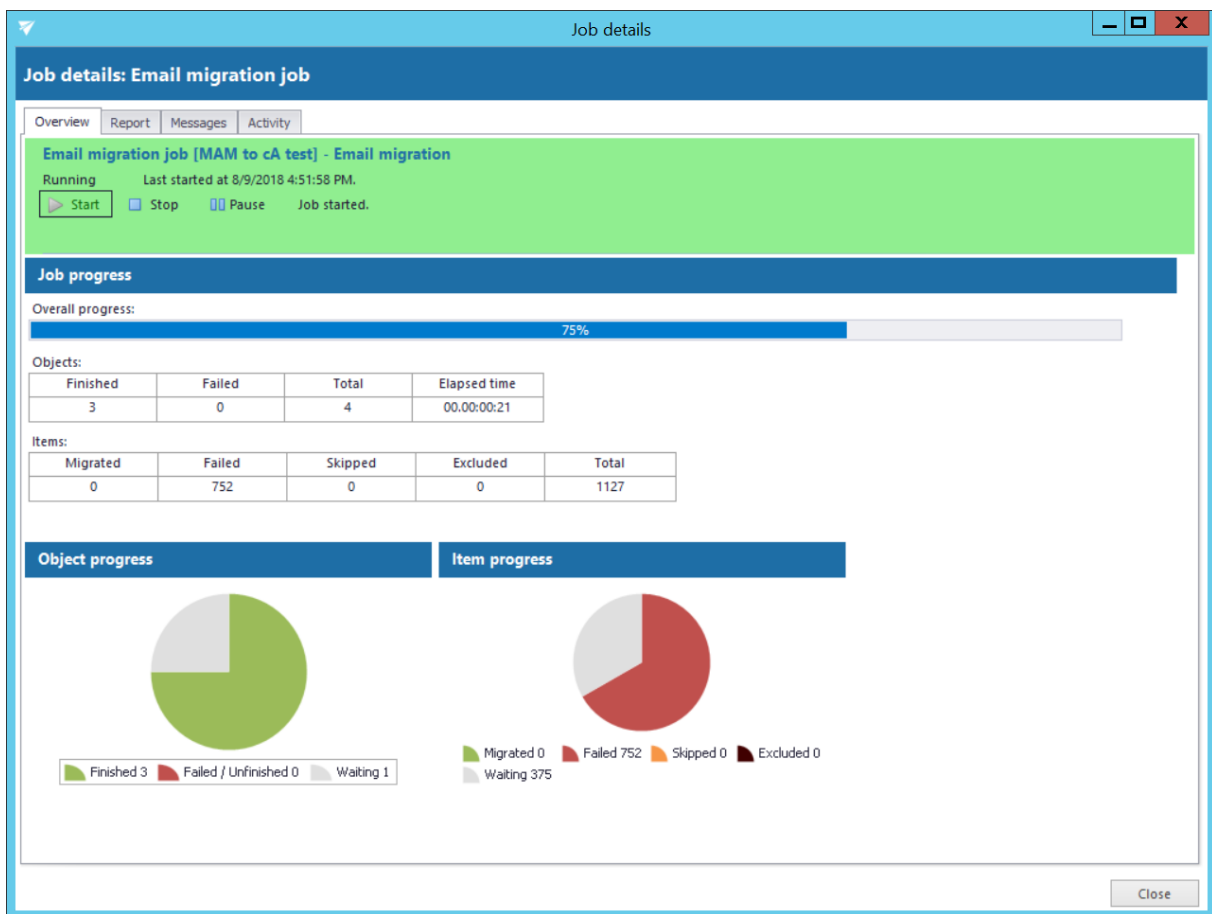




The window consists of 4 tabs:

➤ **Overview**

An overview of the selected job's last run/current running can be viewed here.



## ➤ Report

The tab features the source and the target objects, the total number of migrated items, the number of filtered, last migrated and failed. The user may sort by these column headers, too.

Job details

### Job details: Email migration job

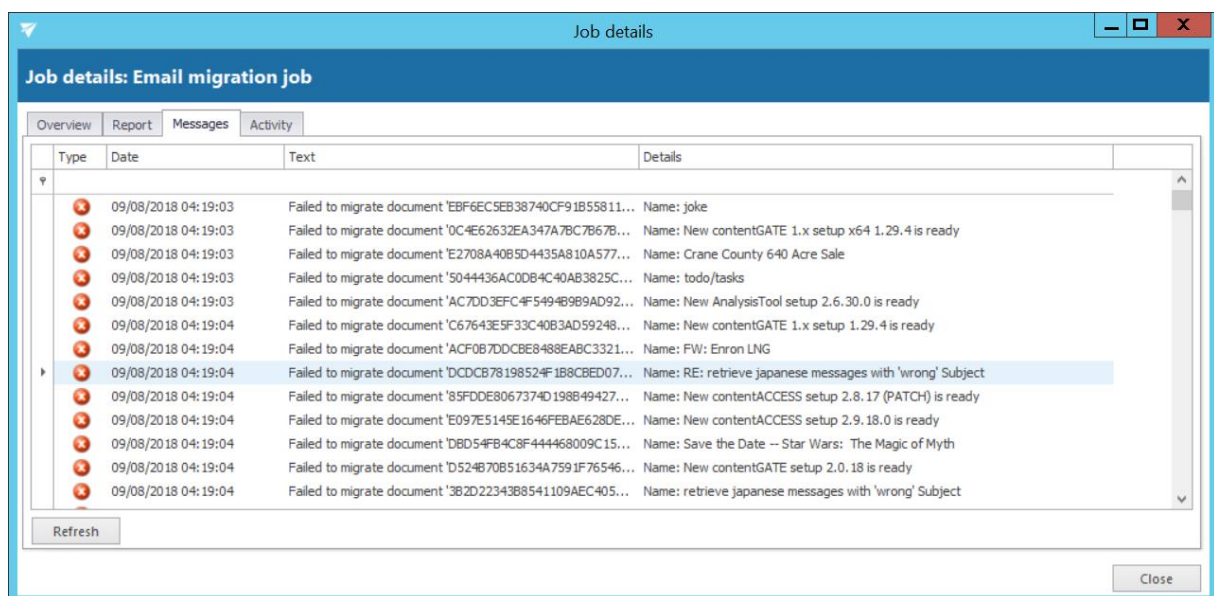
Overview | Report | Messages | Activity

TaskID	Source	Target	Reading completed	Completed	Total	Filtered	Migrated	Failures
19	jlopez	SNE@ta.internal	Yes	Yes	69	69	0	69
20	ceastwood	dne@ta.internal	Yes	Yes	20	20	0	20
21	Marek Hamsik	ANE@ta.internal	Yes	Yes	847	847	0	847
22	Aranka	SNE@ta.internal	Yes	Yes	191	191	0	191

Close

## ➤ Messages

The **Messages** tab shows the last activities of the selected job in more details; when the job was started, if the job was paused/stopped, how many items the given job processed etc. Any possible failures in the migration process can be easily detected here. The messages related to the job's running are listed in a grid consisting of the following columns: Type, Date, Text and Details. Sorting by these columns is enabled. The grid of messages can be refreshed by clicking the “**Refresh**” button at the bottom of the window.



## ➤ Activity

The **Activity** tab features the

- progress of reading and working threads
- batch progress

The **Batch progress** table is filled by the reading thread that is grouping the documents into batches and pre-fills the common information.

**Note:** Migration batch is a collection of documents belonging to the same mapping (task).

Job details: Email migration job			
Overview	Report	Messages	Activity
Activity of readers and workers			
Progress	Info	Details	
1	0	Reading finished. Folder: 'Inbox\Test'. Documents so far: 846	
2	0	Reading finished. Folder: 'Sent Items'. Documents so far: 190	
Batch progress	Info	Details	
1	0		
2	0		
3	0		
4	0		

## 5.6 Migration reports

A migration report is used to keep the results of the data migration in a document of optional format. The reports can be viewed at any time in the future to verify, that the migration has been completed successfully.

A report can be created to the:

- a) **migration project as a whole** (e.g. project "MAM to CA EMAIL" like in this use case) – this report contains the
  - **status of the migration project**
  - **item migration details** of all objects available in the migration project
  - **shortcut migration details** of all objects available in the migration project

This report type can be created from the dashboard using the “**Generate migration report**” option in the toolbar

- b) **mapped object(s)** – this report type contains the

- **general information** about the selected migration object
- **migration status** of the selected migration object
- **migration details** of the selected migration object



This report type can be created from the **Mappings** tab using the “Create report” option in the toolbar.

The screenshot shows the 'contentGATE migration - MAM to cA' window. The 'Mappings' tab is active, and the 'Generate migration report' button is highlighted with a red rectangle. The interface includes a dashboard with migration details for 'MAM to cA', showing source and target objects, mappings, and jobs. A 'Current activity' section shows 0 active readers and 0 active workers.

The screenshot shows the 'Migration report' for 'MAM to CA EMAIL'. It displays the source archive as 'MAM (Server: tapam01 Database: TAPAM01\exchangeDB)' and the target archive as 'contentACCESS Target (Server=localhost:8738)'. The report is generated by contentGATE.

The screenshot shows the 'Migration report for "MAM to CA EMAIL"'. It displays the migration status with a green circle icon, indicating success. The report includes item migration details and shortcut migration details.

Source object	Target object	Success	Excluded	Failures	Remaining	Size
mfreeman	mfreeman@ta.internal	14	0	0	0	7.98 MB
jlopez	jlopez@ta.internal	46	0	0	0	2.77 MB
ceastwood	ceastwood@ta.internal	20	0	0	0	995.50 KB

Source object	Target object	Success	Failures
mfreeman	mfreeman@ta.internal	14	0
jlopez	jlopez@ta.internal	46	0
ceastwood	ceastwood@ta.internal	20	0



Screenshot A: Migration report for project “MAM to CA EMAIL”

contentGATE migration - MAM to cA

Active migration: MAM to cA

Home Source objects Target objects Mappings Migration

Create Add to group Show contents  
Edit Remove from group Organize mappings  
Remove **Create report** Group by...

Manage mappings

### Mappings

	Source	Target	Field mapping template	Creation time	Modification time	Me
▶	jlopez	SNE@ta.internal	None	07/08/2018 02:12:16	07/08/2018 02:12:16	MA
	ceastwood	dne@ta.internal	None	07/08/2018 02:12:16	07/08/2018 02:12:16	MA
	Marek Hamsik	ANE@ta.internal	None	07/08/2018 02:12:16	07/08/2018 02:12:16	MA
	Aranka	SNE@ta.internal	None	07/08/2018 02:12:16	07/08/2018 02:12:16	MA

Items: 4 Selected: 1

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## Migration report

“MAM to CA EMAIL”

Source archive: MAM (Server: tapam01\exchange08)  
Target archive: contentACCESS Target (Server=localhost:8738)

contentGATE

TECH-ARROW, a.s. | Kazanská 5B, 821 06 Bratislava, Slovakia, EU | IČO (Company ID): 45 914 290 | IČ DPH (VAT): SK2023151284  
Contact: Phone: +421 220 741 794, +421 220 741 796 | E-mail: sales@tech-arrow.com | www.tech-arrow.com

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### Migration report for jlopez

General information

Source object: jlopez  
Target object: jlopez@ta.internal

Migration status

Items: 45  
Migrated: 45  
Failed: 0  
Excluded: 0  
Remaining: 0  
Size: 2.772 MB

Shortcuts: 45  
Success: 45  
Failure: 0

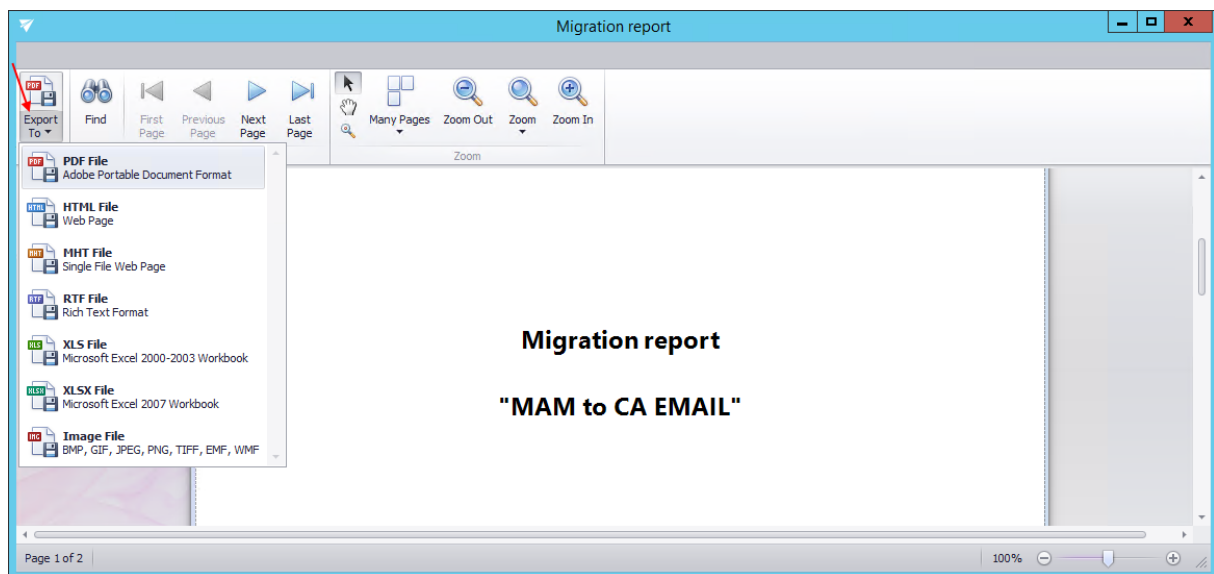
Migration details

Folder path	Migrated items	Excluded items	Total size	Failed items	Migrated shortcuts	Failed shortcuts
Inbox	45	0	2.772 MB	0	45	0

TECH-ARROW, a.s. | Kazanská 5B, 821 06 Bratislava, Slovakia, EU | IČO (Company ID): 45 914 290 | IČ DPH (VAT): SK2023151284  
Contact: Phone: +421 220 741 794, +421 220 741 796 | E-mail: sales@tech-arrow.com | www.tech-arrow.com

Screenshot B: Migration report for “jlopez@ta.internal”

Migration reports can be saved in one of the following formats: PDF, HTML, MHT, RTF, XLS, XLSX and as an image file.

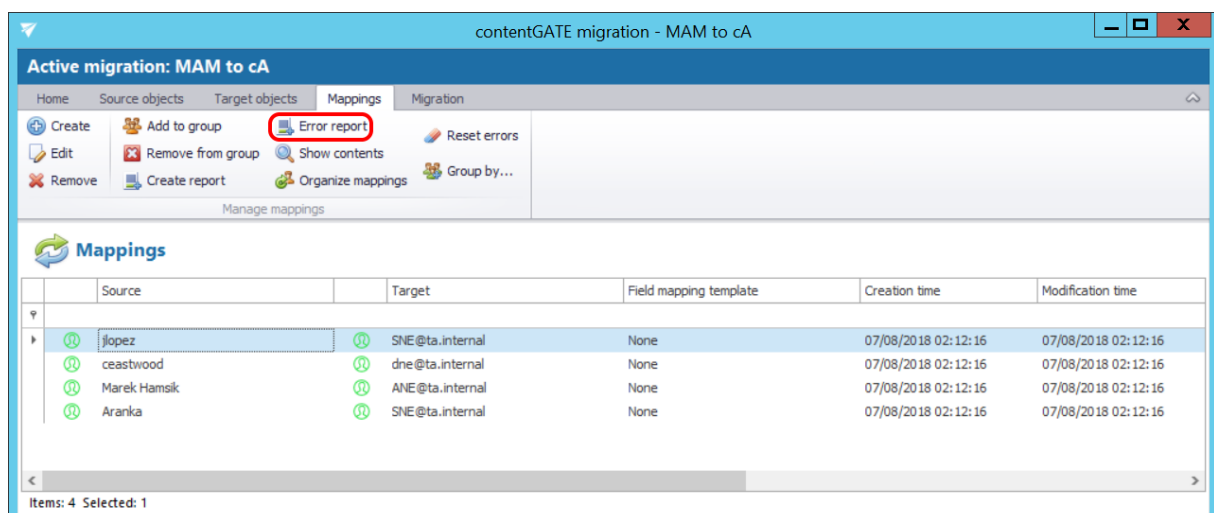


## Error handling

To handle errors better and have a better overview of them, there are two buttons on the [Mappings](#) tab:

### Error report

This button allows you to save the migration failures/errors of a selected mapping to a CSV file.



Advanced failure report options

Configure failure report

☒ Generate one report file

☐ Generate one file per user

File name template: MigrationReport\_%NAME%

Target folder:

File type: CSV

Generate Close

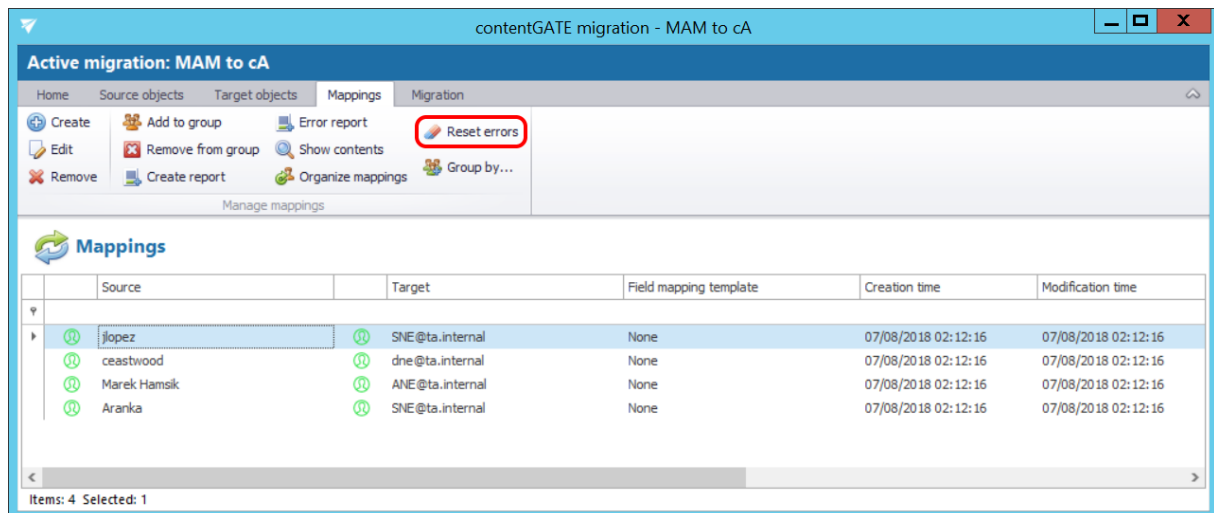
[illegible]

Screenshot: CSV error report

## Reset errors

This button allows you to reset the shortcut migration errors. This is very useful in case you want to get rid of the errors in shortcuts that are no longer in the mailbox but are still figuring in the migration report.





A pop-up window will open. If you are sure you want to reset the errors, confirm the process by clicking on the **Reset** button.

