

# Migration from MS Outlook PST files to contentACCESS Email archive



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# 1 Introduction

This guide will explain how contentGATE migrates data from *Outlook PST files* to *contentACCESS Email archive*, and the required settings before starting the migration process.

## 2 Migration environment

### Required

- Windows server with **contentACCESS Email Archive**
- **Outlook PST files** to be migrated

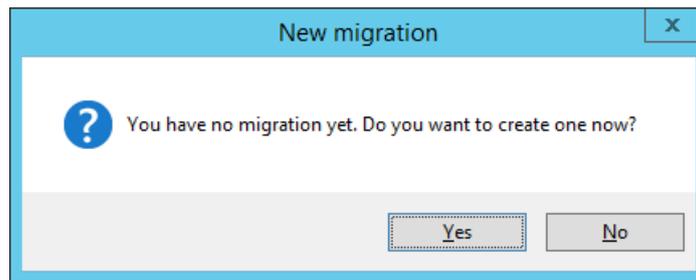
**Note:** The contentGATE application can be hosted by the same server as well.

## 3 contentGATE installation

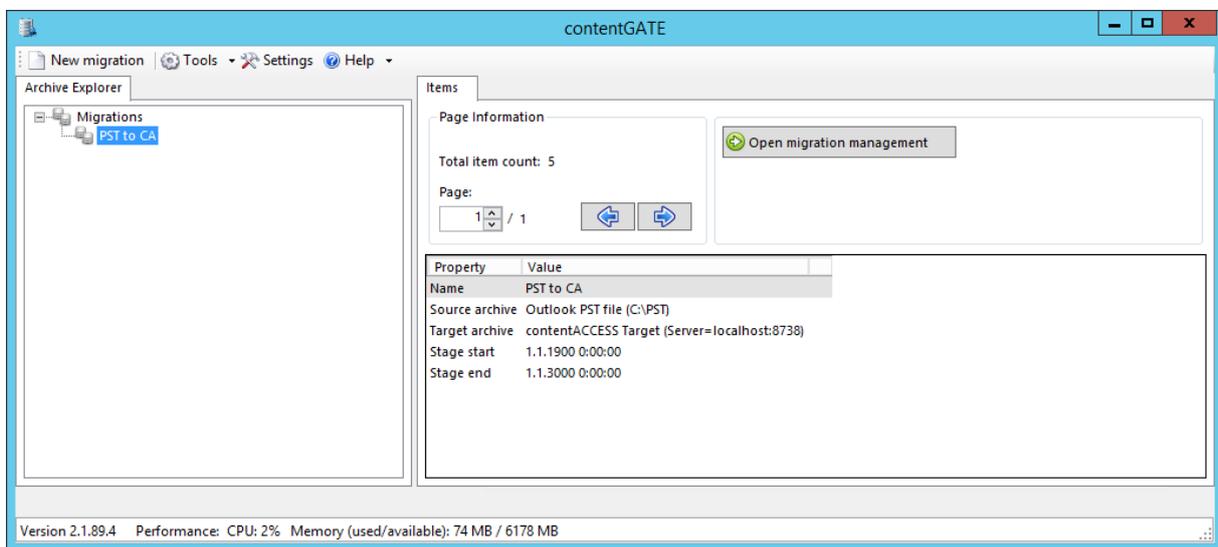
Installation of contentGATE is common for all migration types and is described on [this](#) page.

## 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**. The 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 a 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:** These settings can be disregarded for this migration.

- **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.

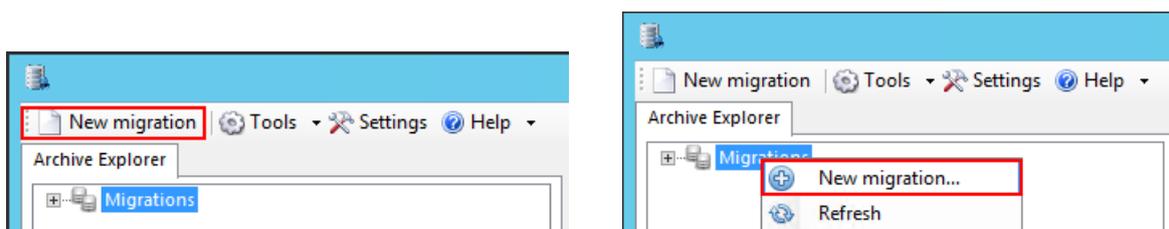
## 5 Migration “How to”

This chapter will describe how to create and configure a new migration project managing the migration of archived emails from **PST files** 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;
- 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.

### 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 (in this case **Outlook PST file**) and Target archive (in this case **contentACCESS target**) connection settings (further details in section [Specifying Source and Target archive connection settings](#)).

**New migration**

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

Version: **Advanced**

Name: **PST to CA** Load ... Configure stage

Source archive: **Outlook PST file** Configure...

Target archive: **contentACCESS Target** Configure...

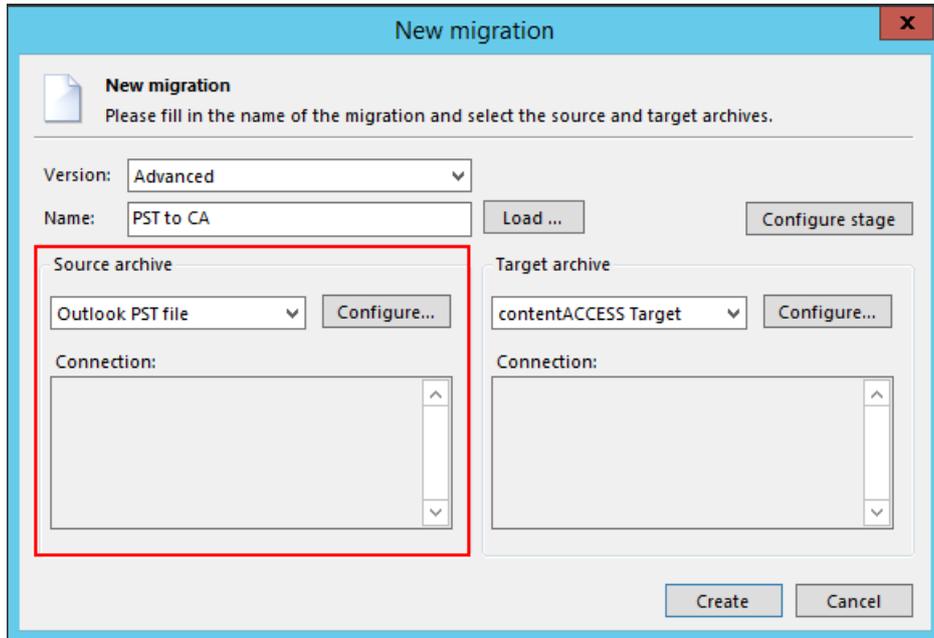
Connection:

Create Cancel

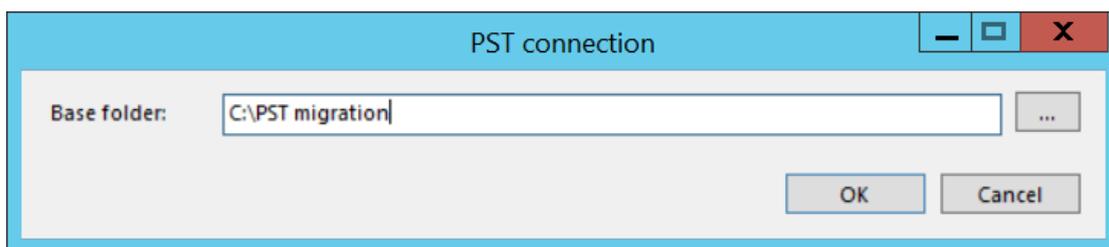
### 5.1.1 Specifying Source and Target archive connection settings

#### The Source archive (Outlook PST file)

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

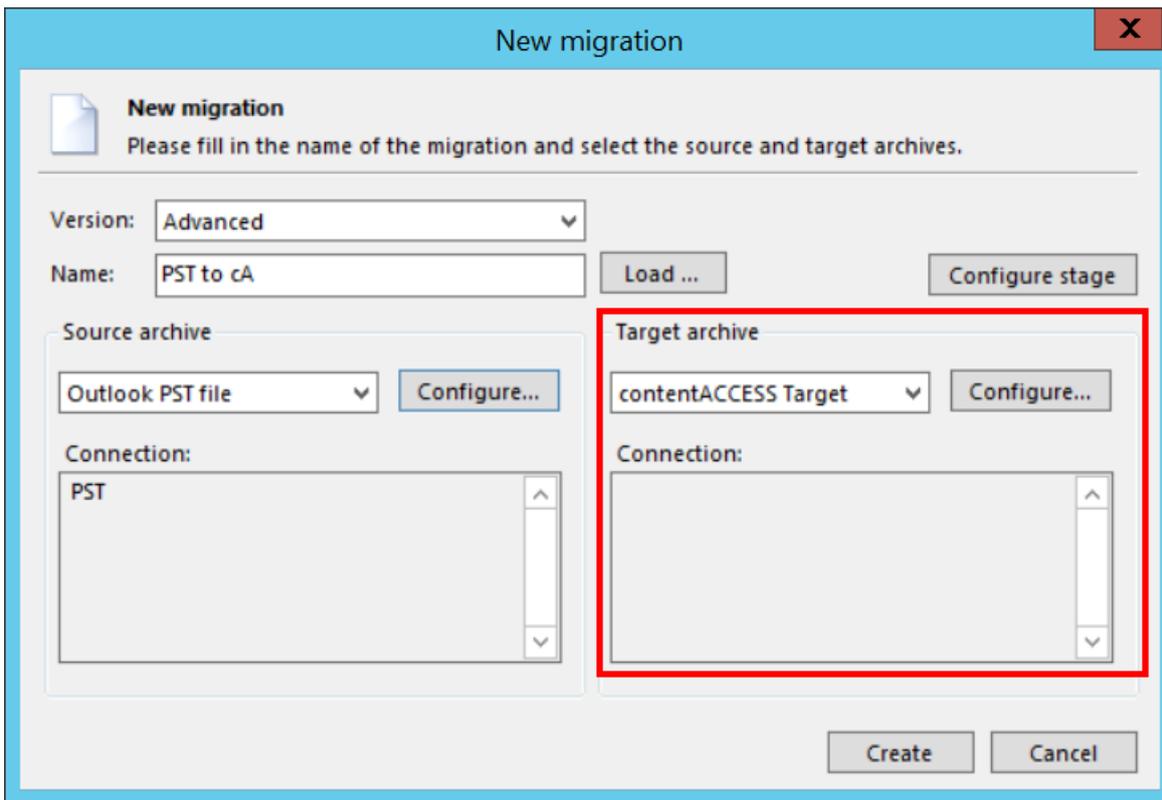


The **PST connection** dialog opens. Enter the folder path where the PST files to be migrated are located and click on "OK".

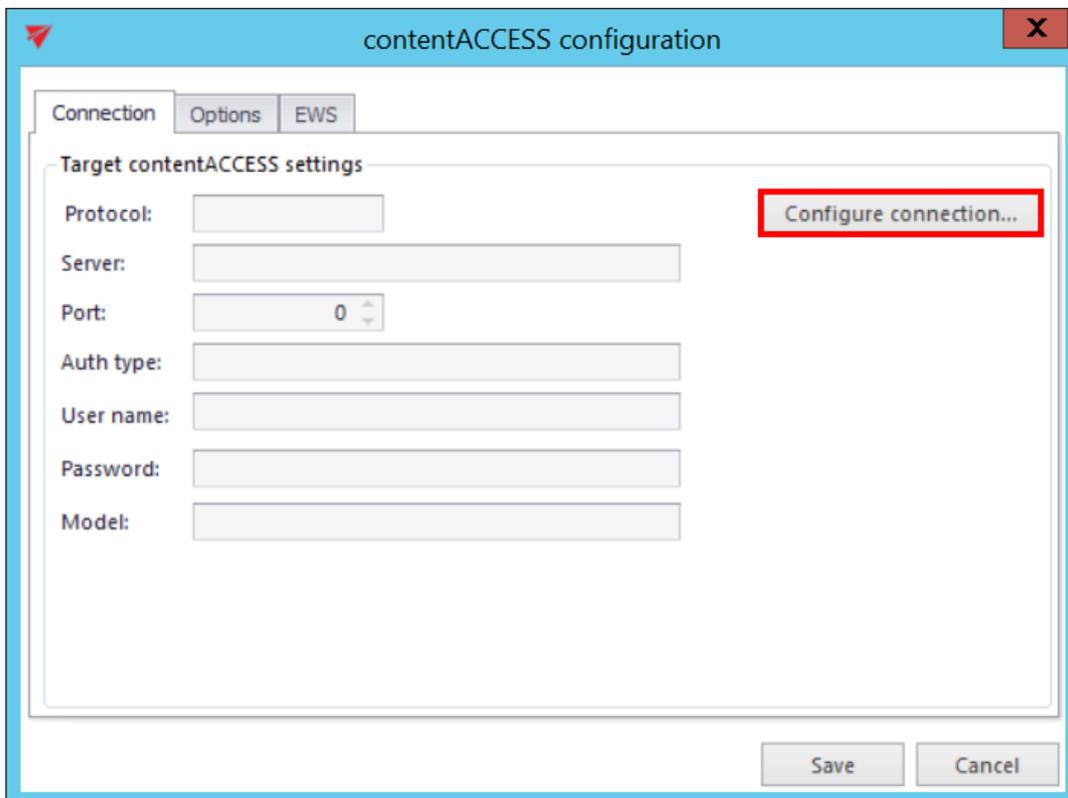


#### The Target archive (contentACCESS Email archive)

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

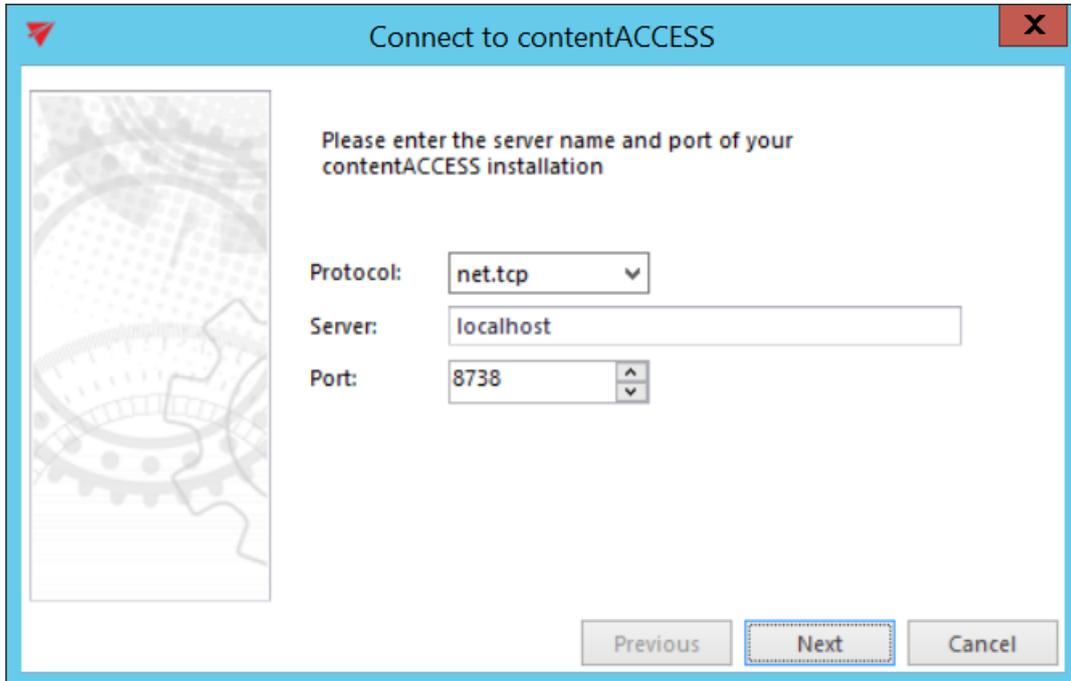


Click "Configure connection ..." in the next dialog.



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

**Note:** Server “localhost” may be used if contentACCESS is installed on the machine that hosts contentGATE.



Connect to contentACCESS

Please enter the server name and port of your contentACCESS installation

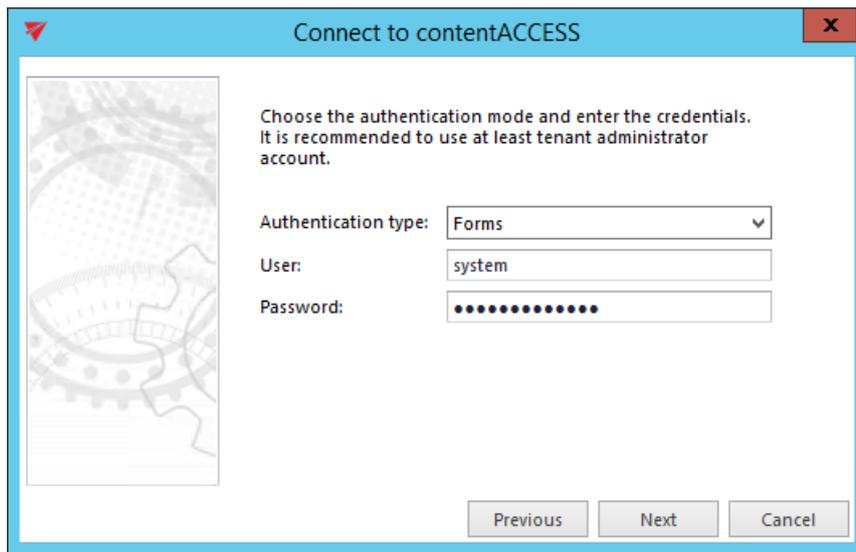
Protocol: net.tcp

Server: localhost

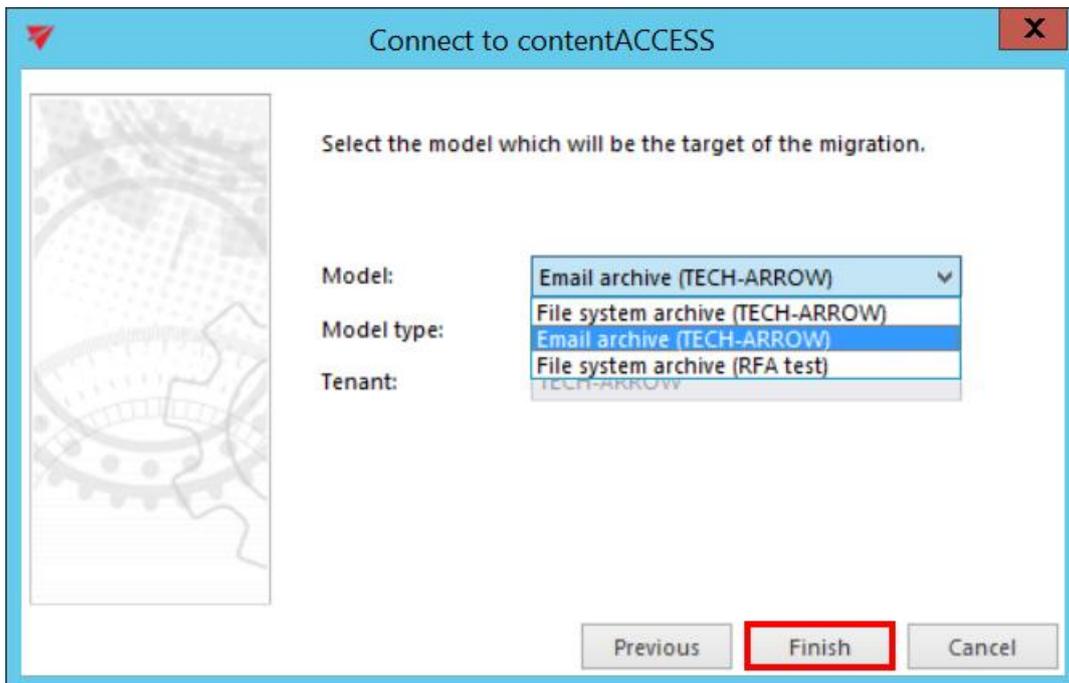
Port: 8738

Previous Next 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 next dialog will list all available models based on your contentACCESS license. The text in brackets refers to the contentACCESS tenant(s). Choose the **Email archive** model that 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

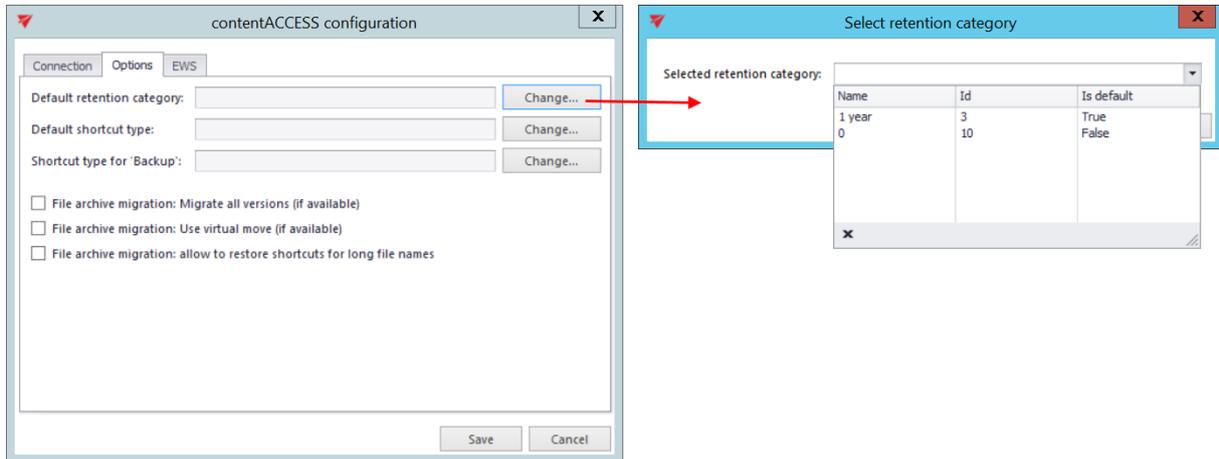
- default retention category,
- default shortcut type and



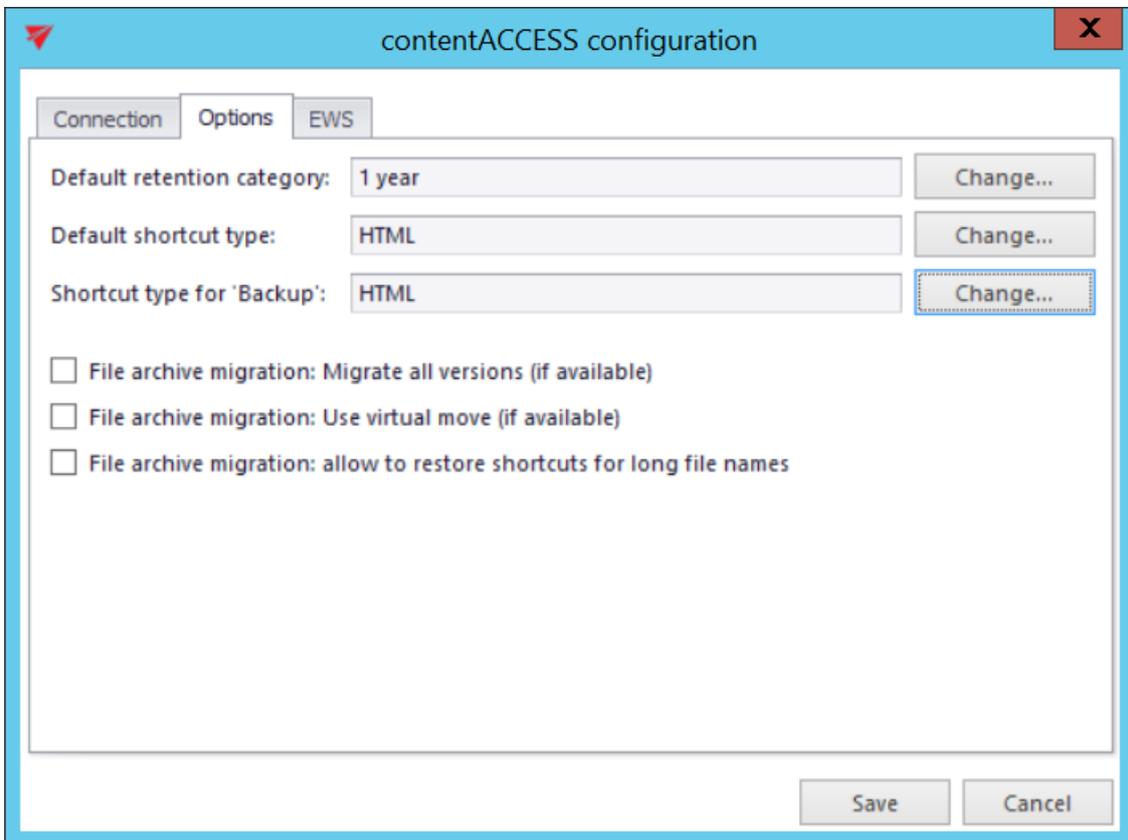
- shortcut type for “Backup”

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

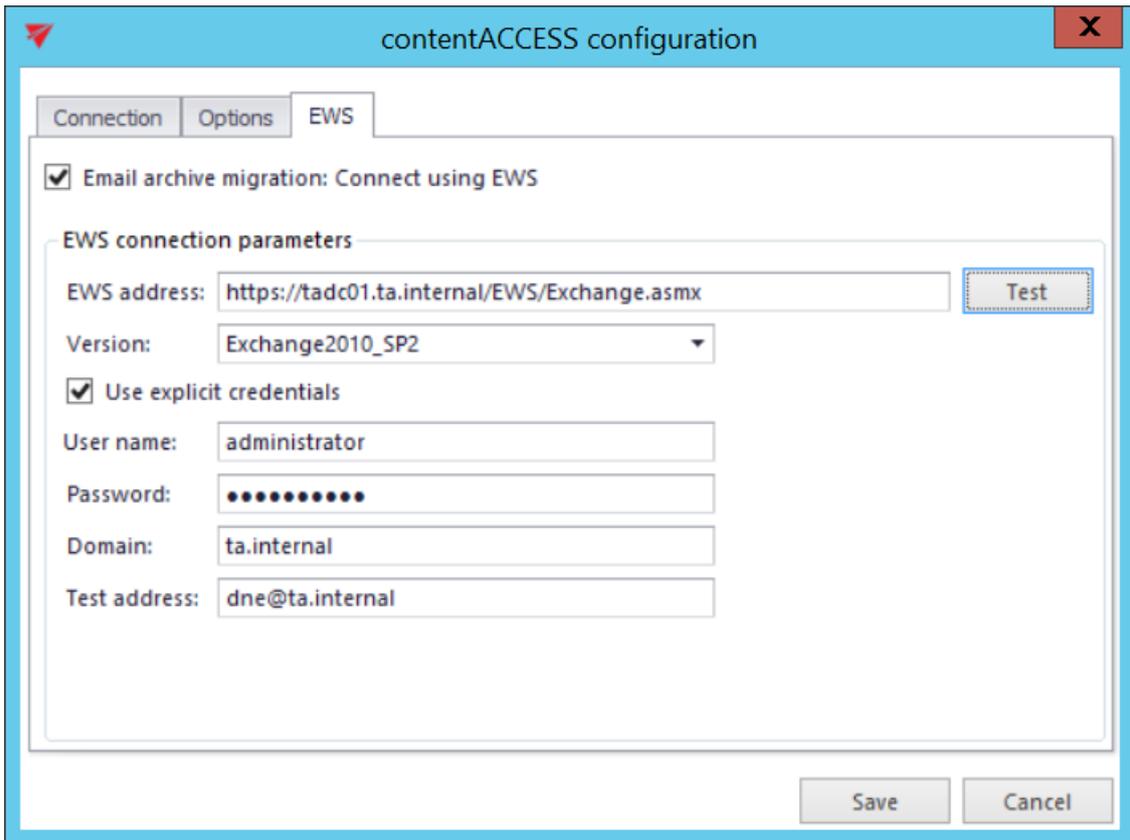
The available retention categories/shortcut types to be used in the target archive are listed based on the contentACCESS settings.



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



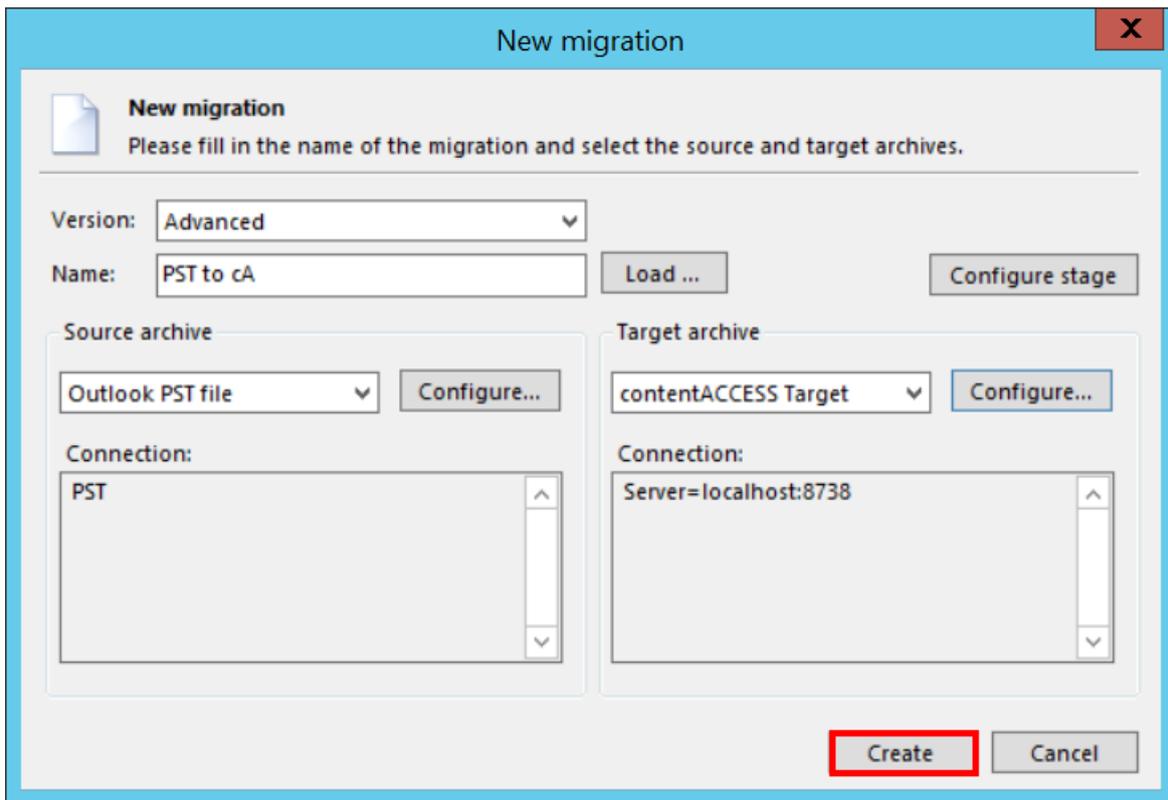
It is also possible to connect to contentACCESS via Exchange Web Services. To do this, click on the **EWS** tab and check the **Email archive migration: Connect using EWS** checkbox. Fill in the EWS address and select the EWS version of the server, where your email provider is running. Check the **Use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



The screenshot shows the 'contentACCESS configuration' dialog box with the 'EWS' tab selected. The 'Email archive migration: Connect using EWS' checkbox is checked. Under 'EWS connection parameters', the 'EWS address' is 'https://tadc01.ta.internal/EWS/Exchange.asmx', the 'Version' is 'Exchange2010\_SP2', and the 'Use explicit credentials' checkbox is checked. The 'User name' is 'administrator', the 'Password' is masked with dots, the 'Domain' is 'ta.internal', and the 'Test address' is 'dne@ta.internal'. There are 'Save' and 'Cancel' buttons at the bottom right, and a 'Test' button next to the EWS address field.

Click "Save".

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

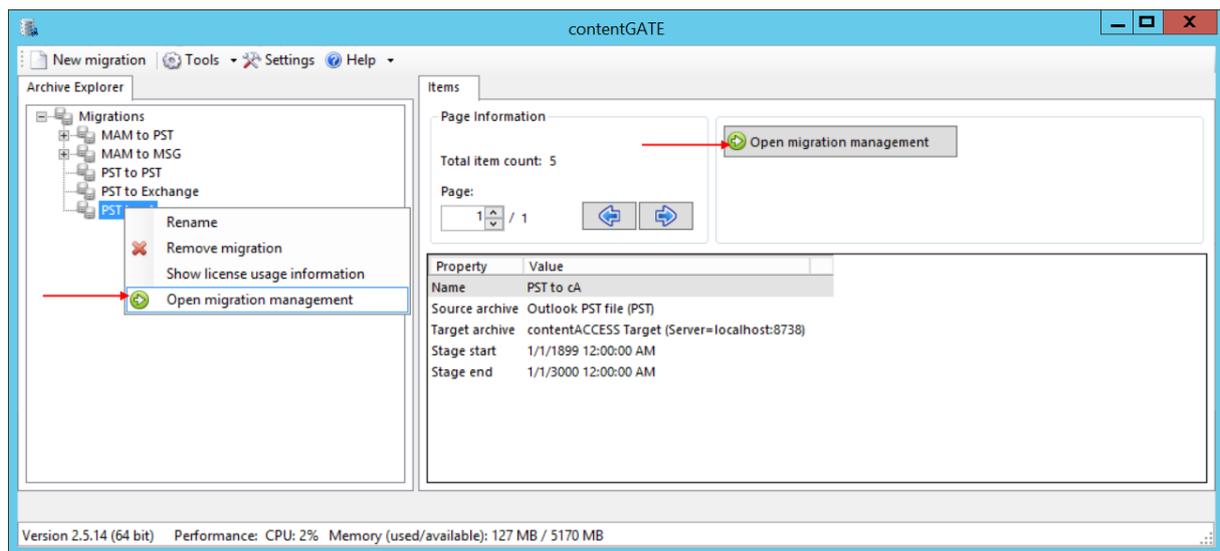


The migration project is now added to the Archive Explorer pane of contentGATE.

Now it can be configured on its management interface.

## 5.2 Migration project configuration

Open the **PST to CA** 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

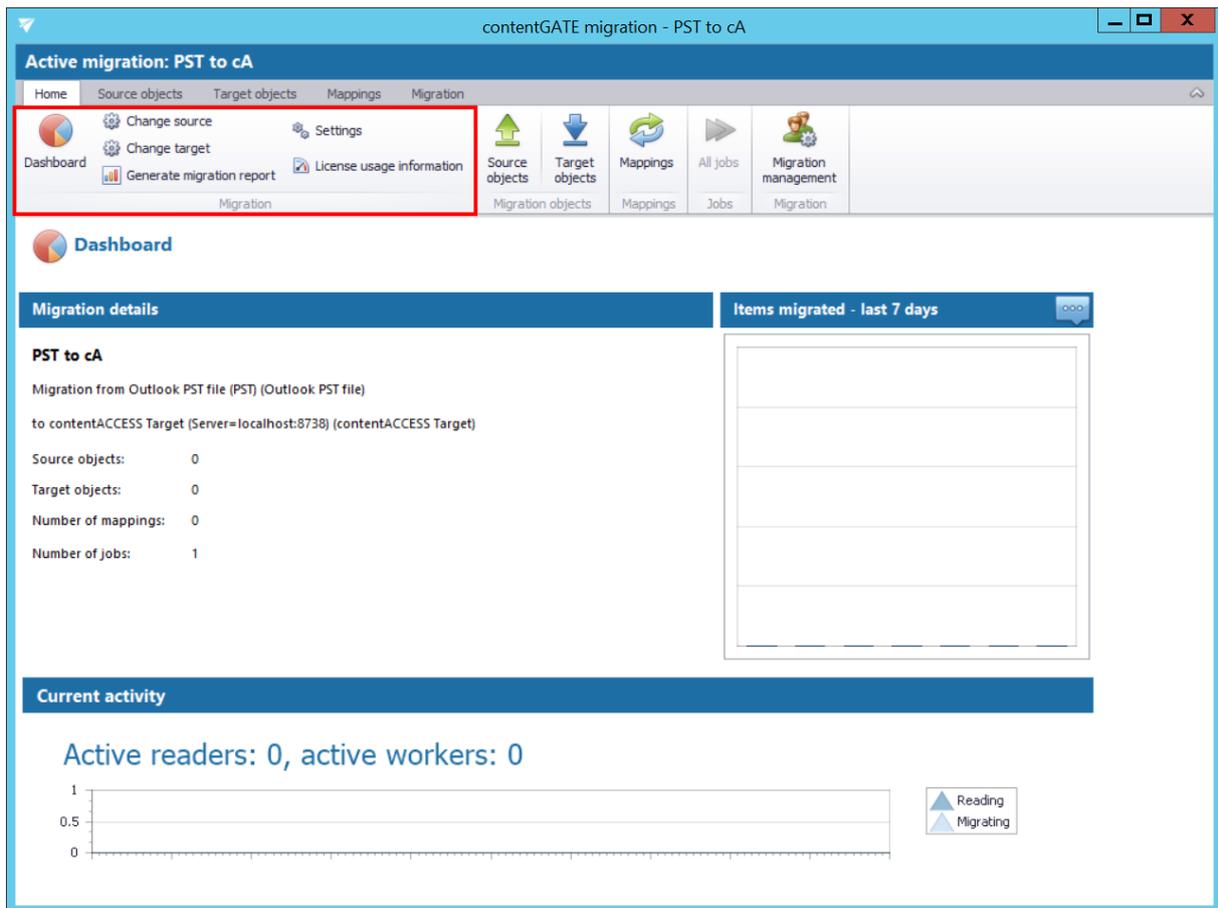
- the exact mailboxes to be migrated/excluded from the migration process
- the exact migration workflow
- migration performance etc.

### 5.2.1 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
- **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.

 Dashboard

## Migration details

## PST to cA

Migration from Outlook PST file (PST) (Outlook PST file)

to contentACCESS Target (Server=localhost:8738) (contentACCESS Target)

Source objects: 0  
 Target objects: 0  
 Number of mappings: 0  
 Number of jobs: 1

## Items migrated - last 7 days

 Refresh  
 Show last 7 days  
 Show last 30 days  
 Show last 365 days

## Current activity

Active readers: 0, active workers: 0



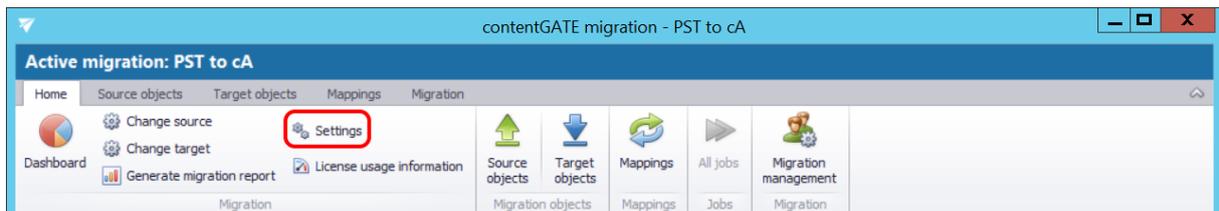
- **Source objects** – This section represents the list of the source objects (in this case Outlook PST files) that are available on the source connector. Initially the grid is empty. Source objects can be loaded either manually or automatically. (For more details click [here](#).)
- **Target objects** - 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.

## 5.2.2 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:

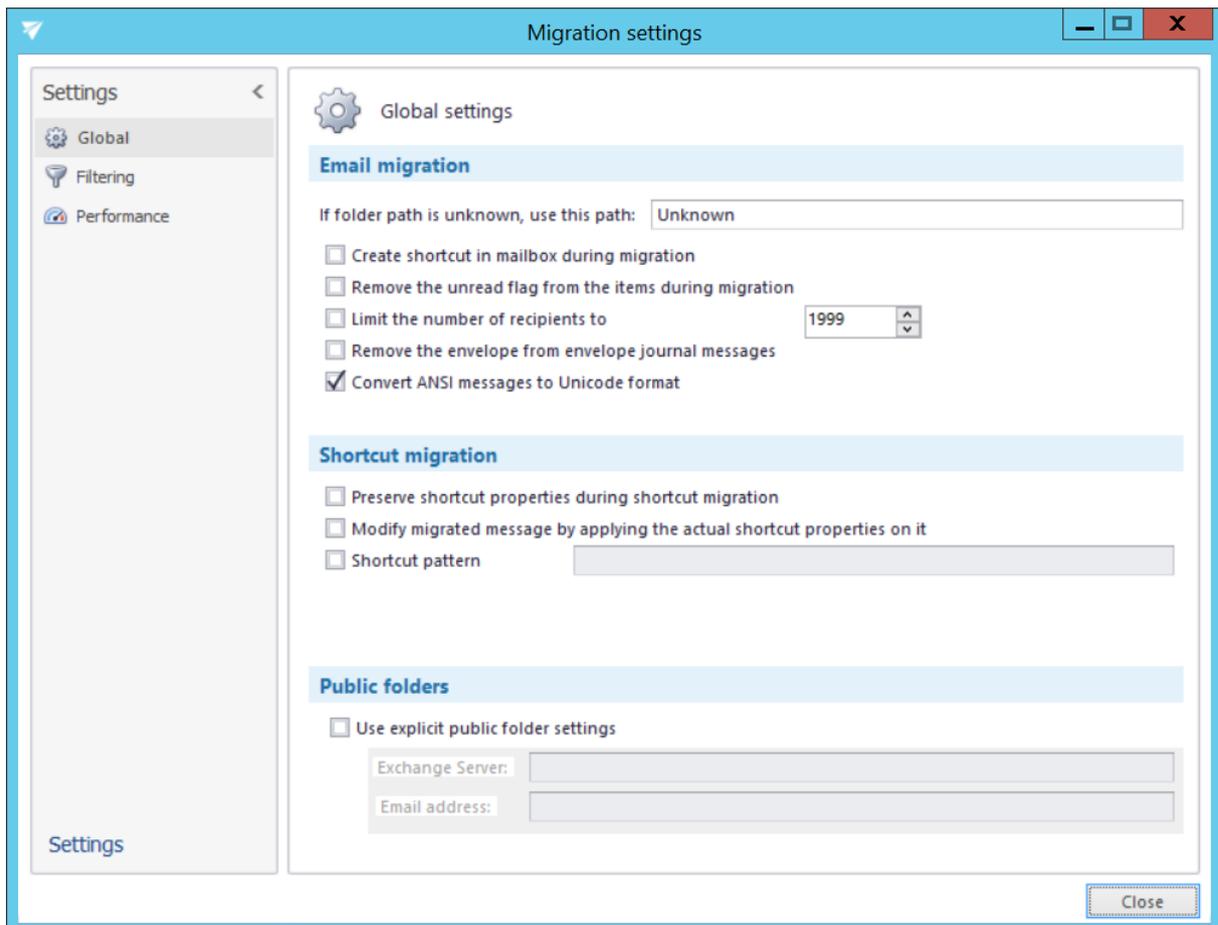
- **Global settings**
- **Filtering settings**
- **Performance settings**

### 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. Other limitations can also be set in this section.

When migrating shortcuts, it is possible to select here if the migrated shortcuts should be preserved or modified by applying the actual shortcut properties.

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



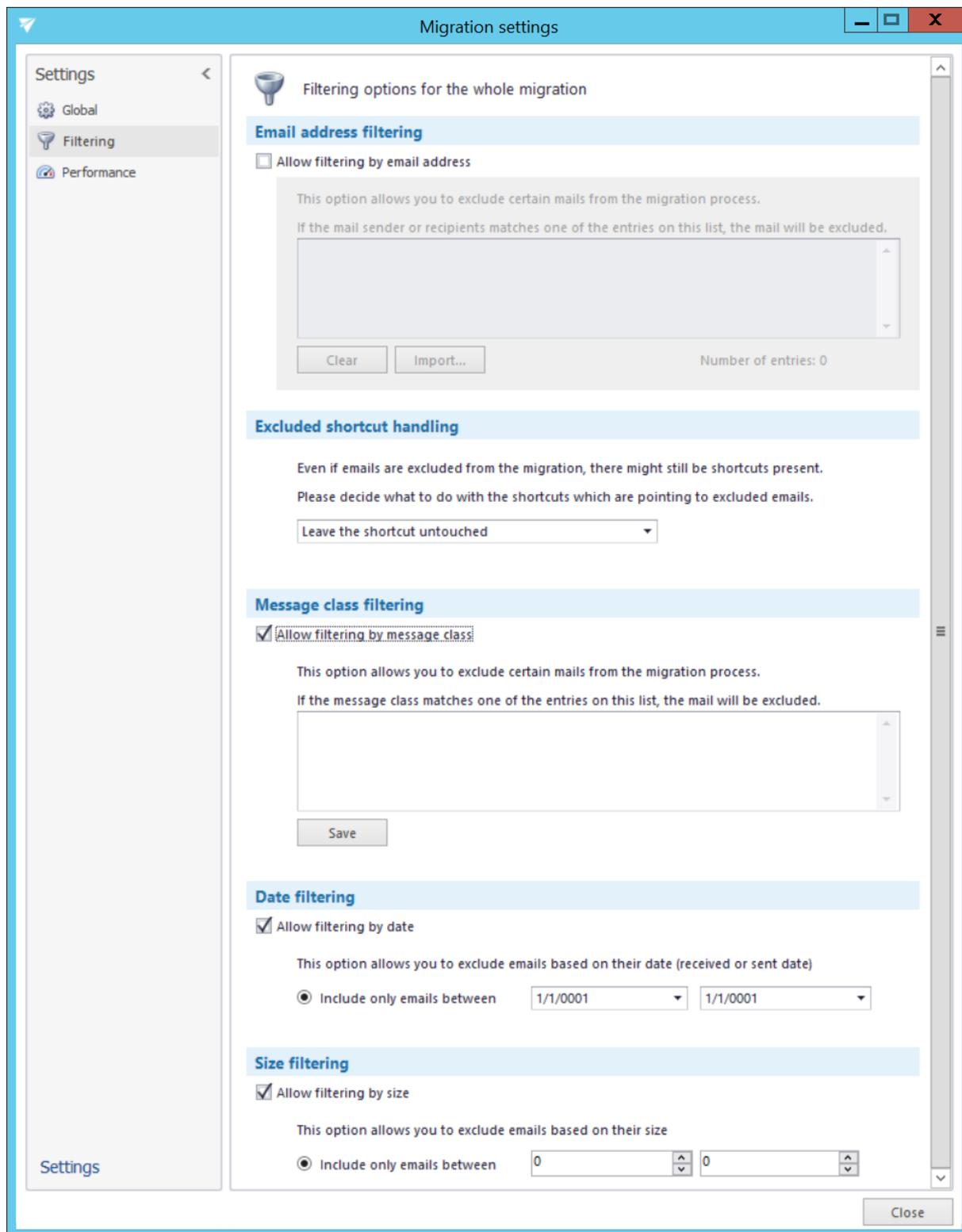
## Filtering settings

Filtering settings enable to exclude certain mailboxes and message classes from the migration process. The list of mailboxes to be excluded can be imported from a CSV file, SQL database or from Oracle. It is possible to import multiple lists 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.

**Note:** Section “Excluded shortcut handling” can be ignored, it cannot be applied in this migration.

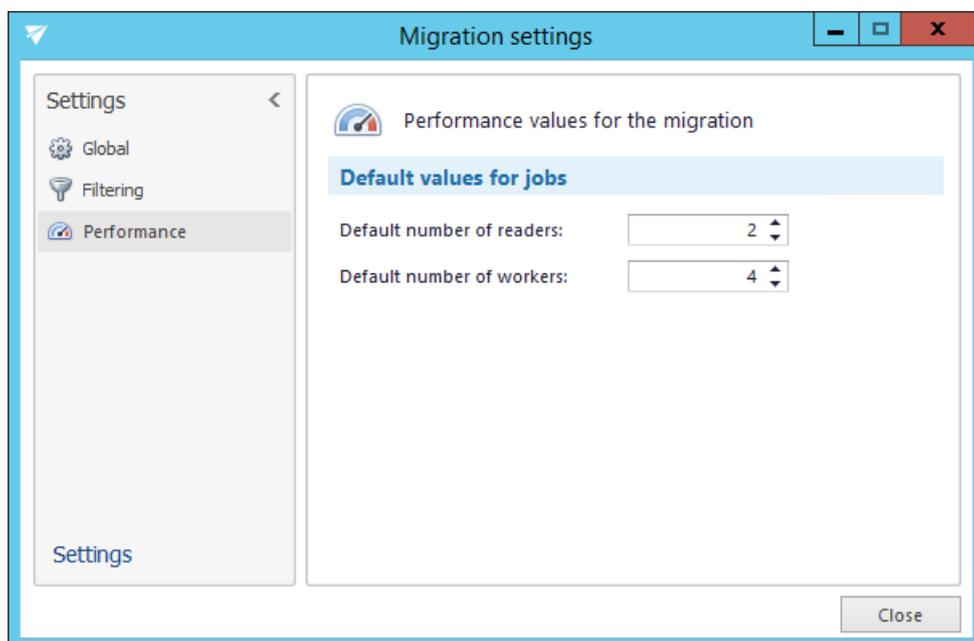
Emails may be excluded from the migration based on their message class, age and size, too.



## 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 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.

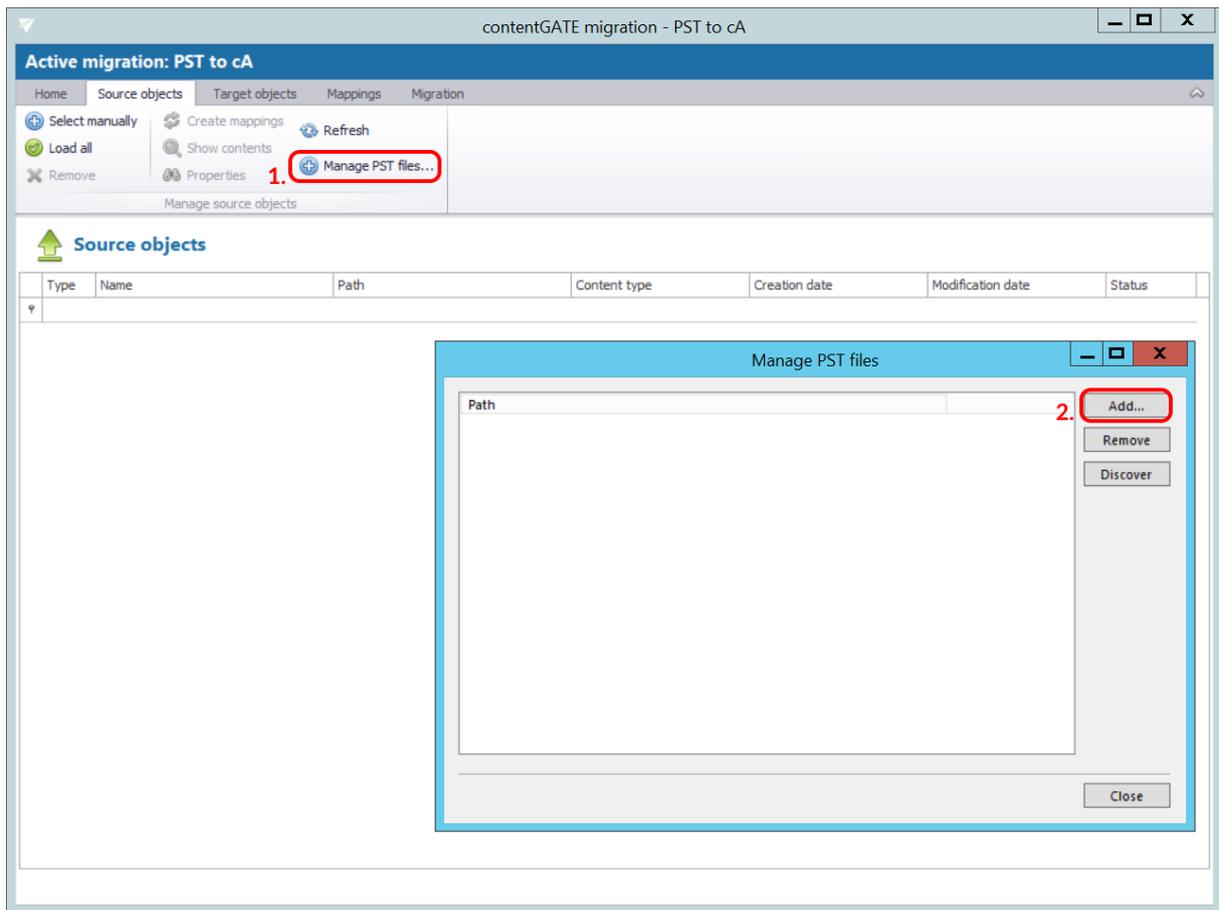


### 5.2.3 Loading source objects

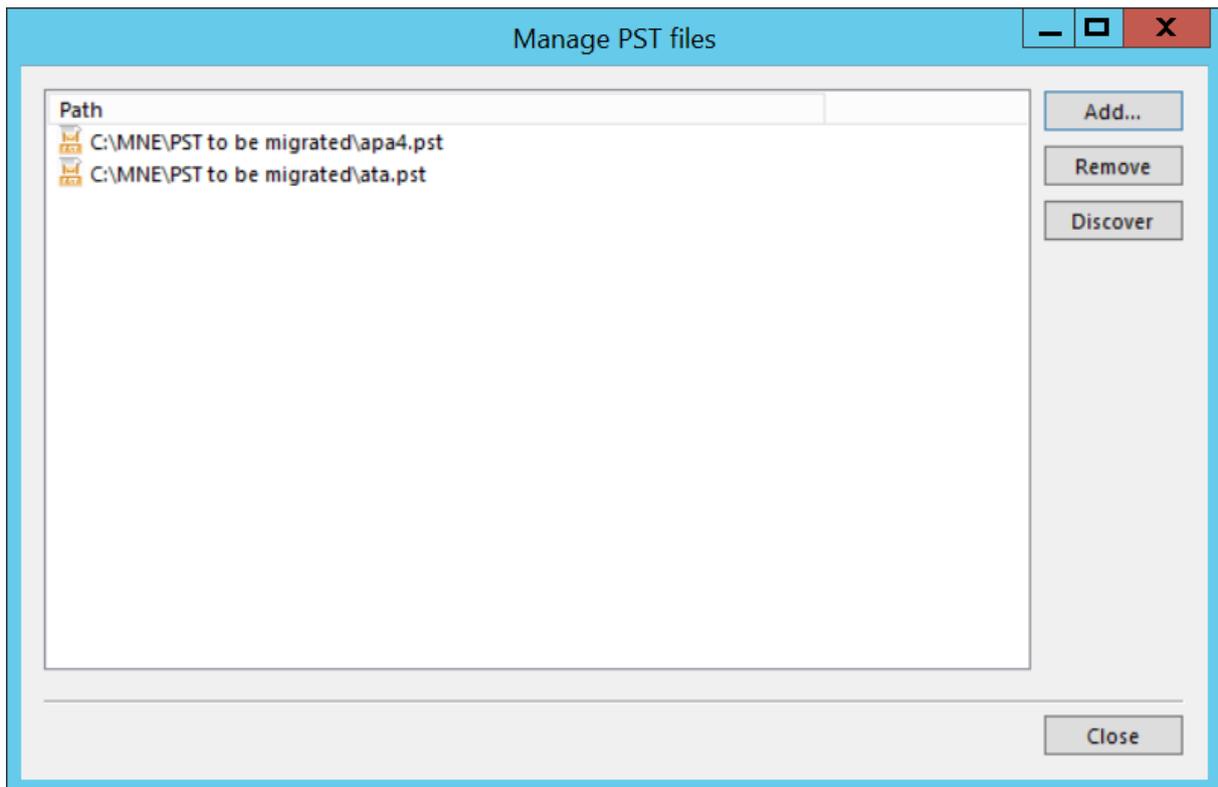
**Definition of terms:** source objects = source Outlook PST files

Open the “Source objects” tab. The grid of the page is initially empty, the source PST files must be added here.

First, you need to manually select the PST files that will be migrated. Click on “Manage PST files...” in the toolbar and then click on “Add” to browse for the demanded PST files to be migrated:

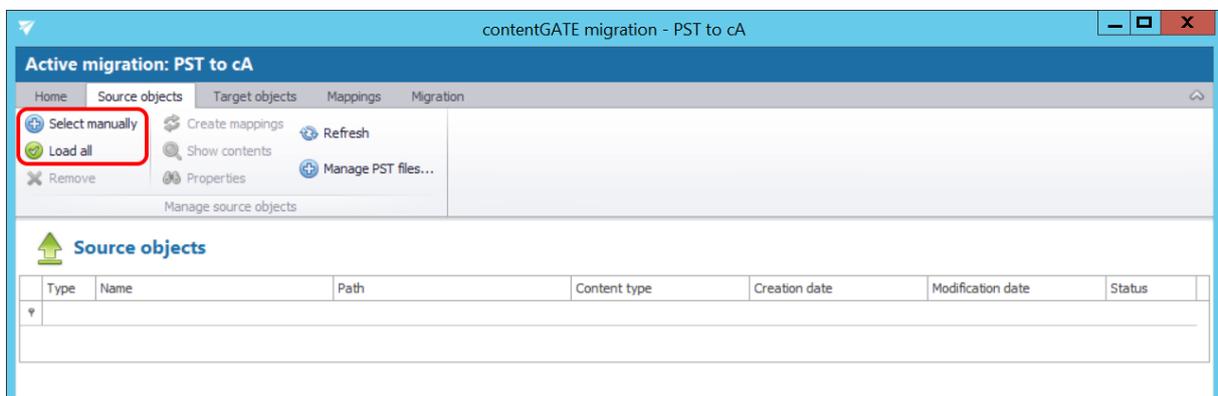


Once the PST files are added, close the dialog:



Now you can load the PST files to the source object's grid. You have multiple options how to load them:

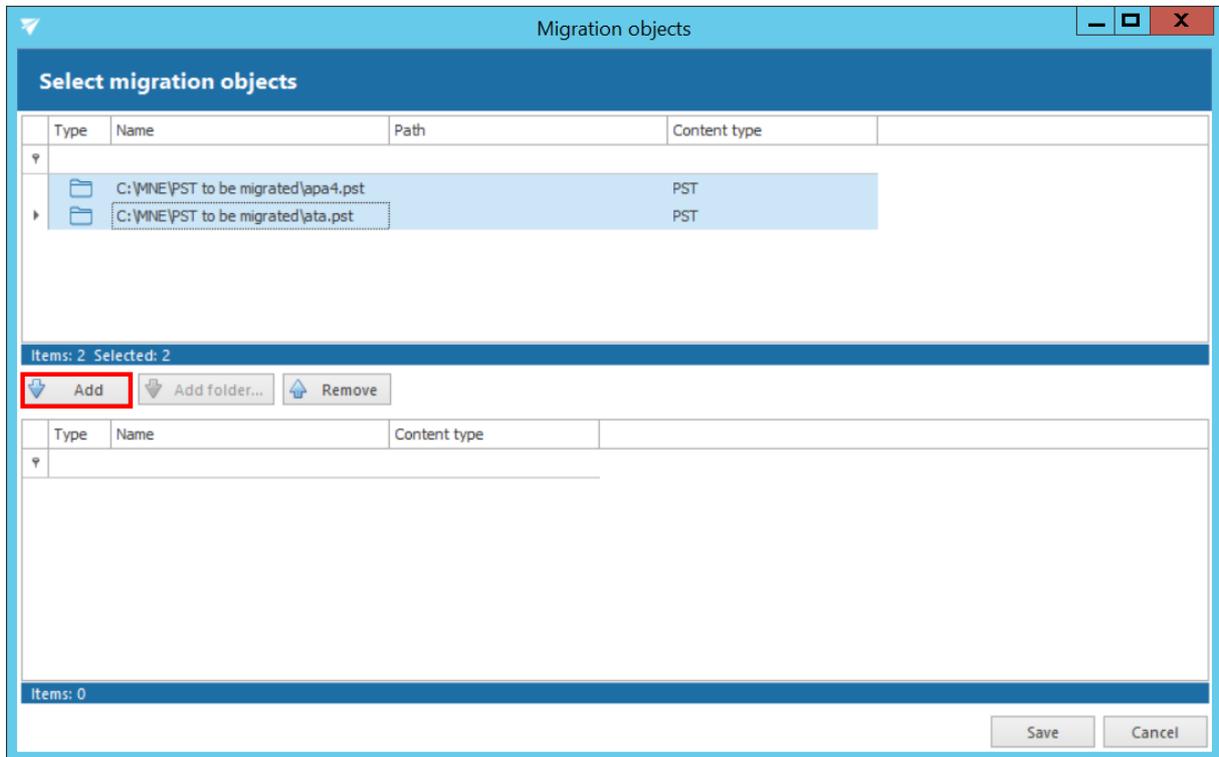
- **Load all** – use this option to load all available objects
- **Select manually** – if you do not want to load all available objects from the source connector (e.g. if you do not want to migrate all), you can use this option to pick the desired objects manually.



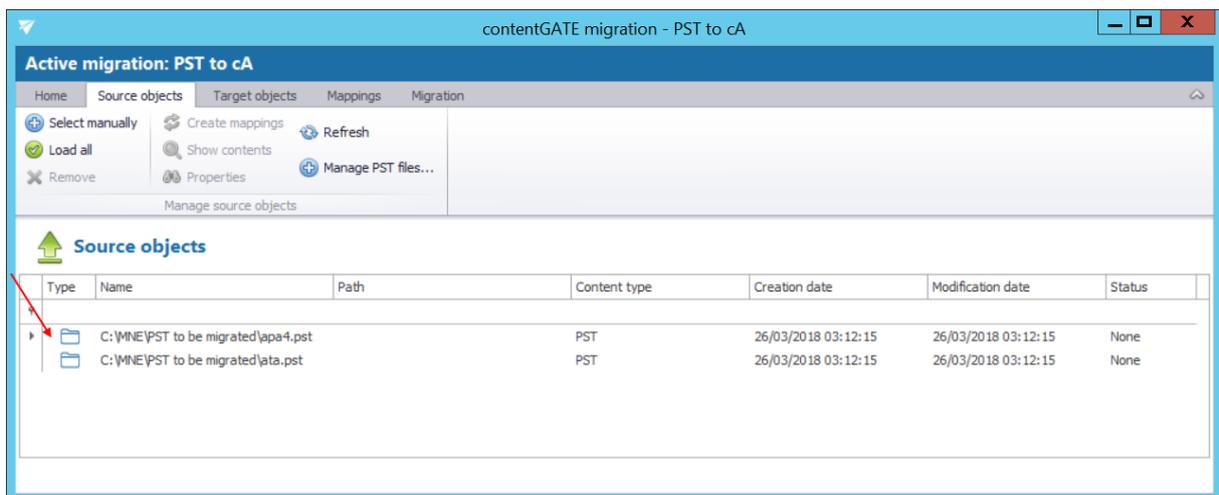


By clicking on **Select manually**, the “Migration objects” dialog opens. Pick up the desired objects from the list and click “Add”. The source objects will be shifted to the lower part of the dialog. The dialog offers to select subfolders of a source object, too (option “Add folder”).

Click “Save”.



The selected source objects are now added to the grid:





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

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

## 5.2.4 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 must be 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:

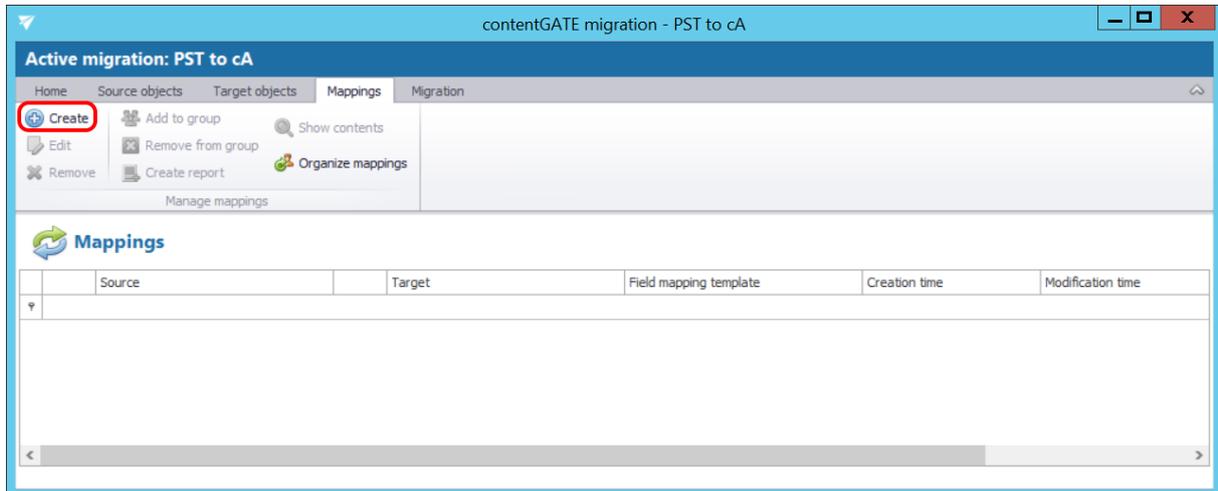
- **Load all** – use this option to load all objects available on the source archive
- **Select manually** – if you do not want to load all available objects from the source connector, you can use this option to pick the desired objects manually.

**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”.

Type	Name	Path	Content type	Creation date	Modification date	Status
Mailbox	SNE@ta.internal		Mailbox	26/03/2018 03:17:48	26/03/2018 03:17:48	None
Mailbox	ANE@ta.internal		Mailbox	26/03/2018 03:17:48	26/03/2018 03:17:48	None

## 5.2.5 Mapping source objects to target objects

contentGATE migration requires to map the objects on the source side (in this case Outlook PST files) to the objects on the target side (contentACCESS Email archive mailboxes). Open the “Mappings” tab and click “Create” in the toolbar to create the desired object mapping(s).



The “Mappings” dialog features the

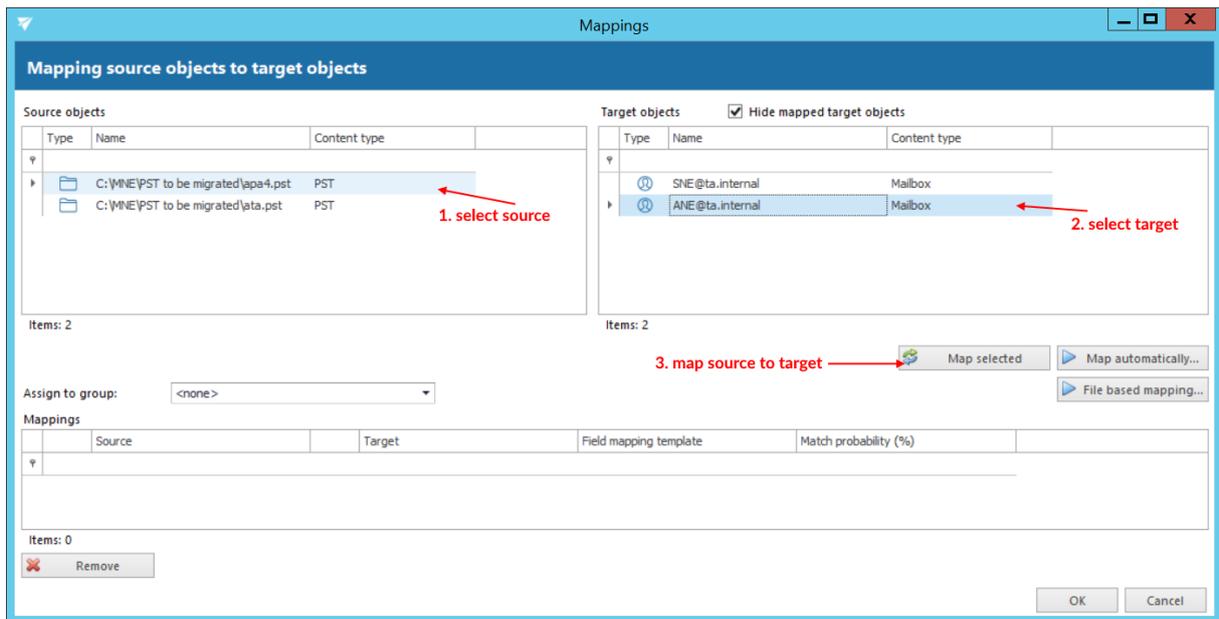
- **source** object(s) TO BE MIGRATED on the source side, and
- **target** object(s) WHERE the source objects can be migrated on the target side.

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

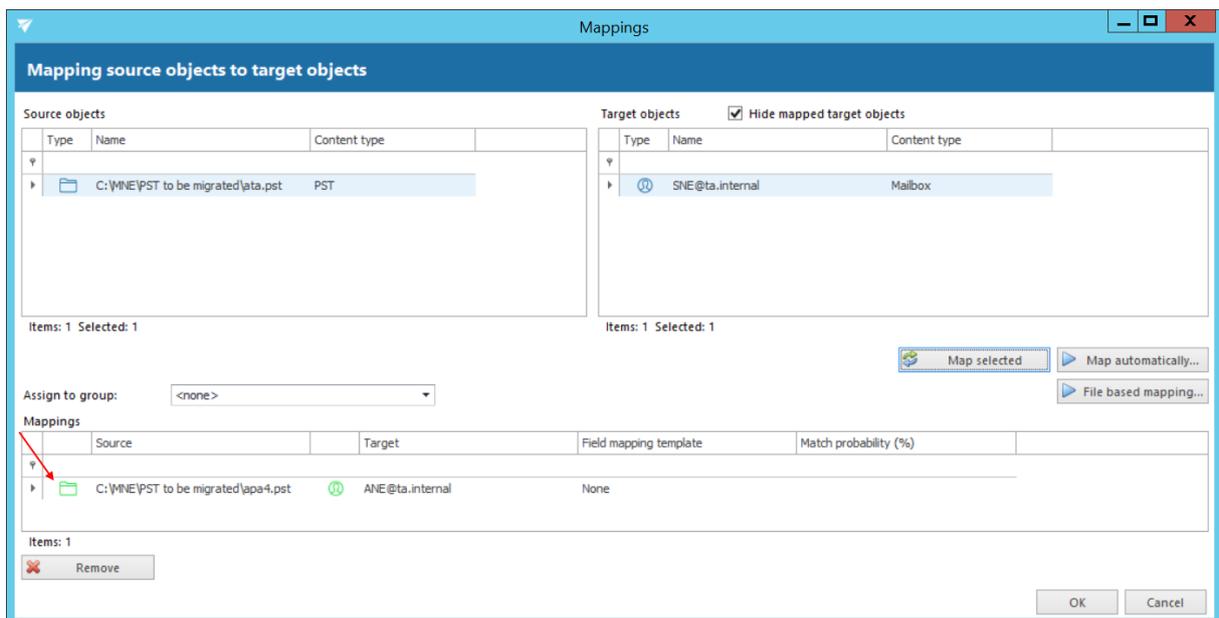
Mappings in contentGATE may be specified either

- **manually**
- **automatically**
- **file based**

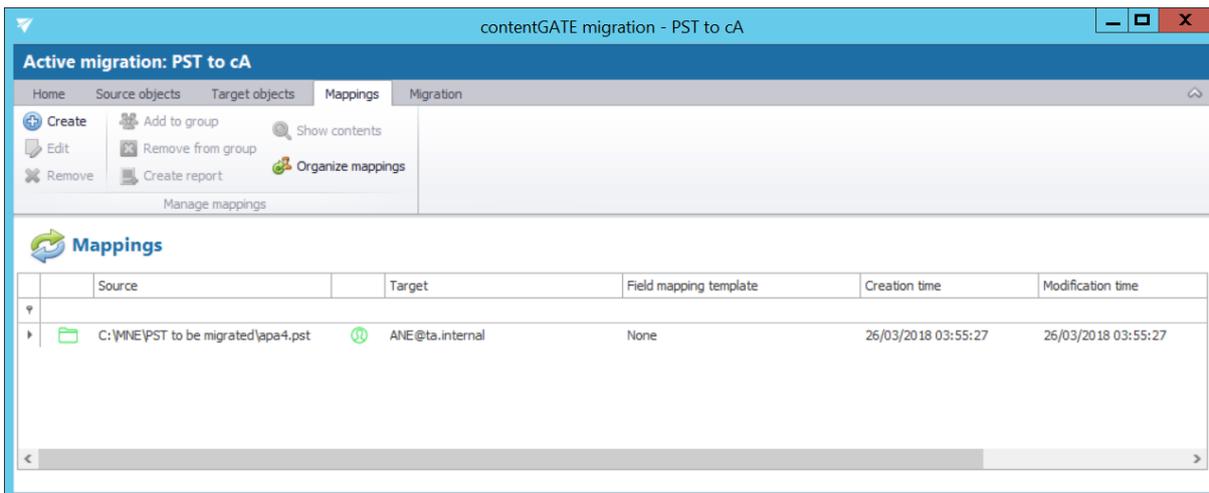
Automap is currently unavailable for **PST files to contentACCESS Email archive** migration type, so the desired mappings must be set manually. By **manual selection** select each source and target one-by-one, and map them together using the “Map selected” option.



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

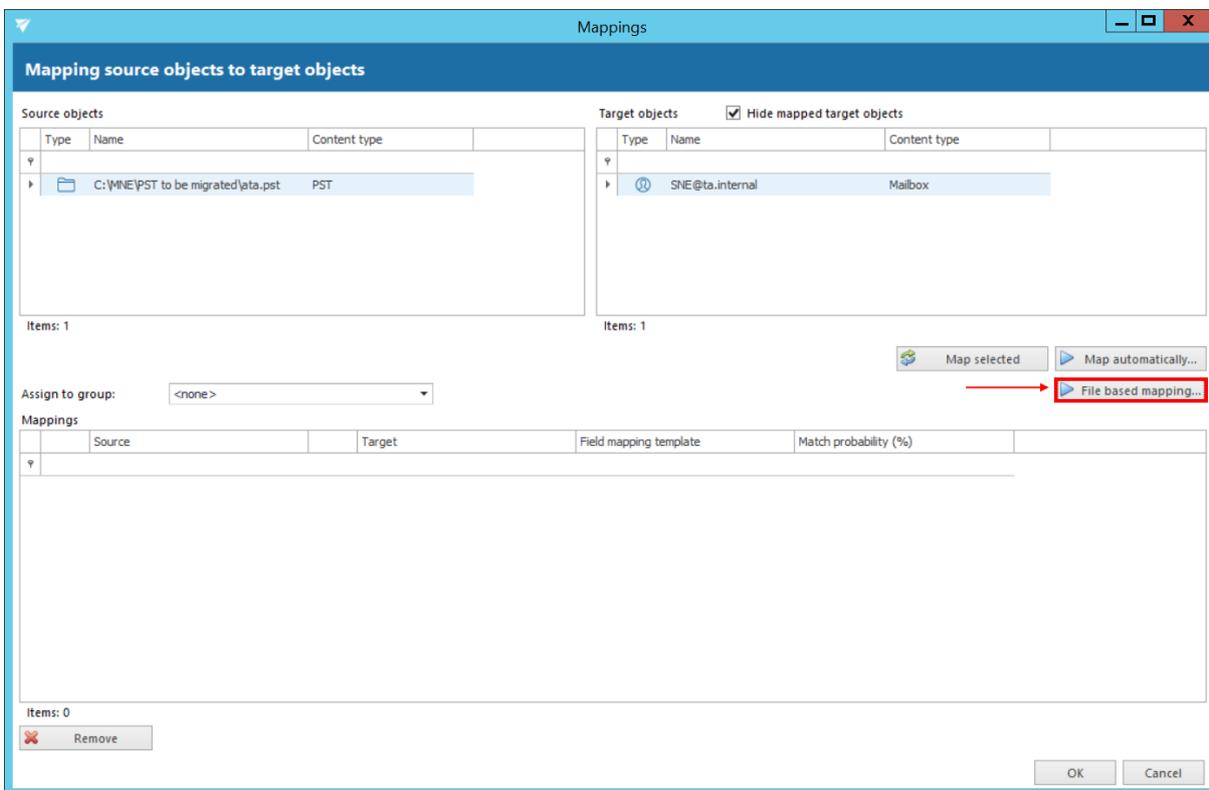


Click "OK" to add them to the grid.

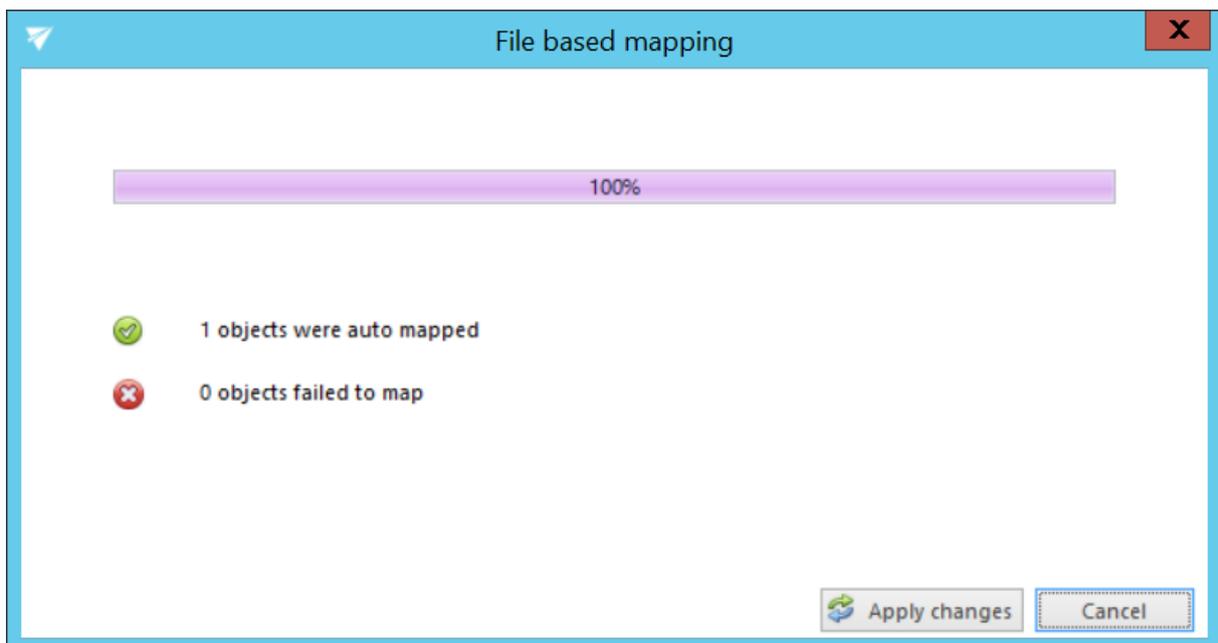
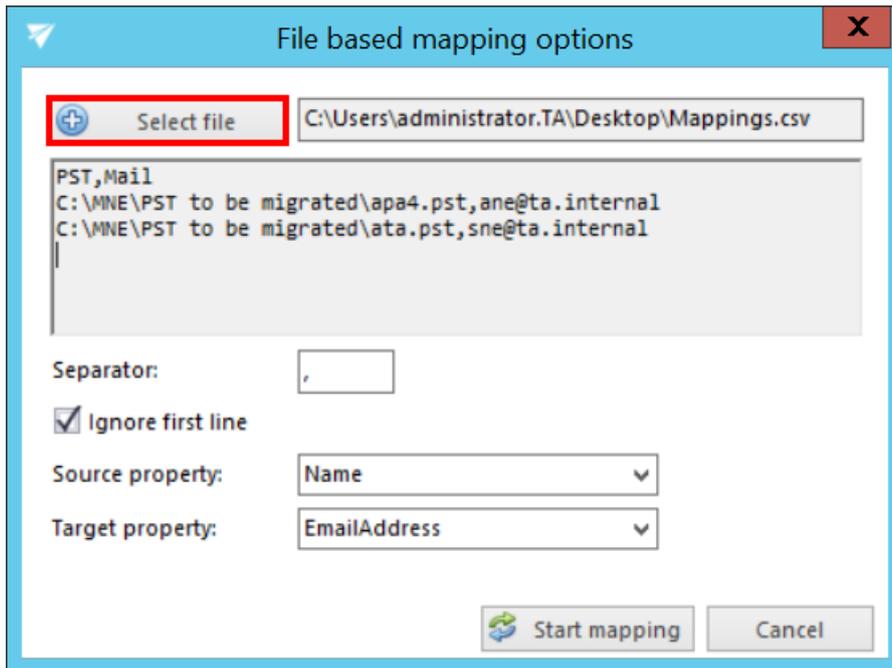


**Note:** Mapped objects are marked with green color in the source and target grids, while unmapped objects are blue.

To map objects based on a file, click on **File based mapping...** in the Mappings dialog.

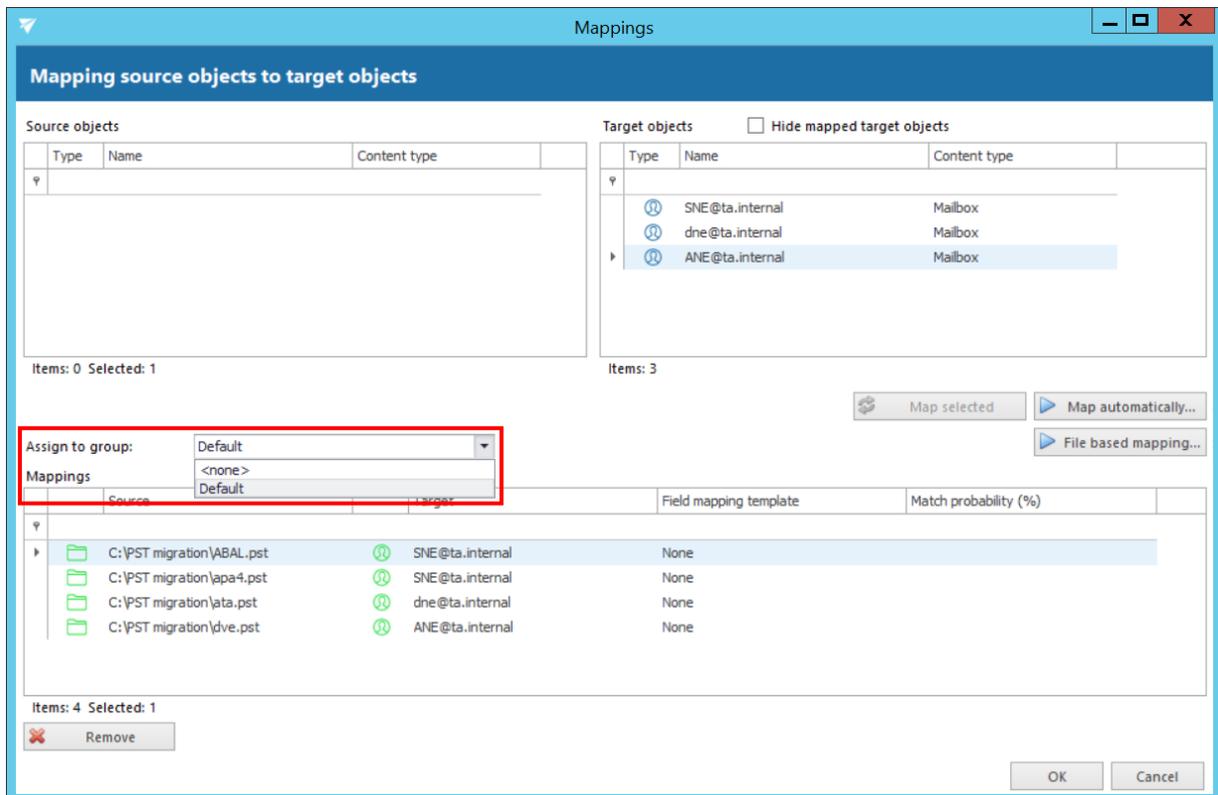


Click on **Select file** and select the file to load the data from. The location of the file will be displayed in the textbox next to the button, the file content will be displayed in the box under it. Specify the **separator** of the properties. If you want to ignore the first line of text in your file (e.g. header, as in our use case), check the **Ignore first line** checkbox. Select the **Source** and **Target** property 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.



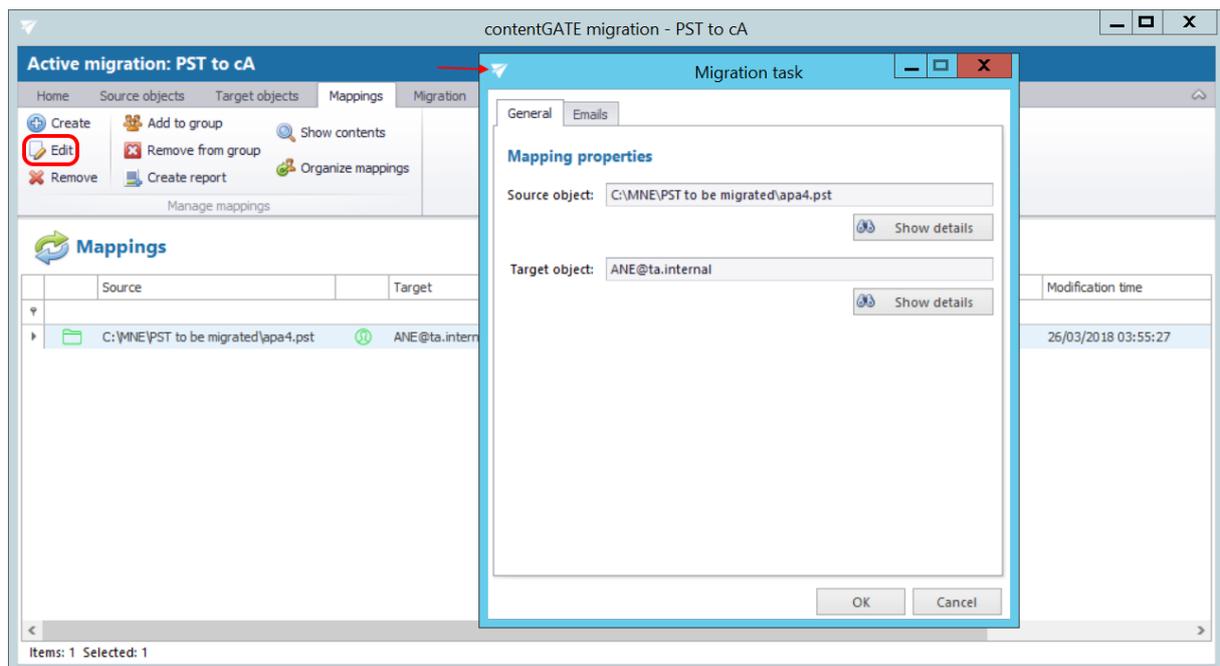
**Note:** Only .csv file format is supported.

The created mappings can be assigned to a previously created group also from the **Mappings** dialog.

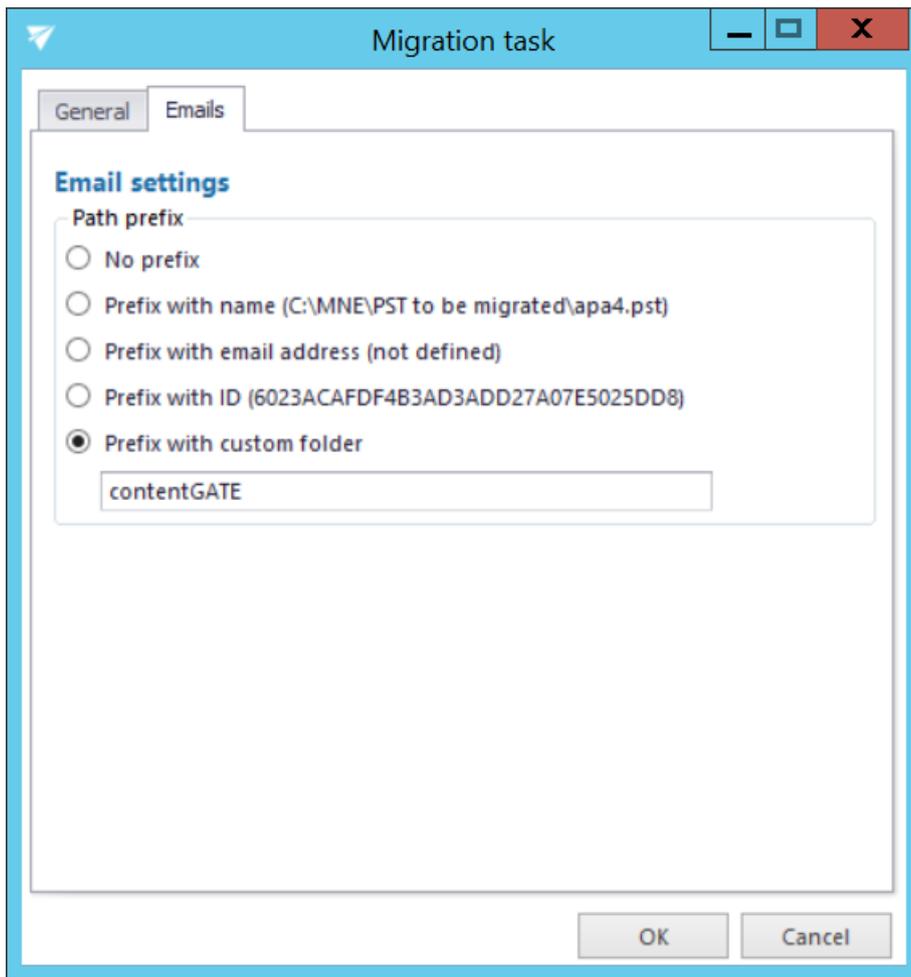


### 5.2.5.1 Editing the object mappings

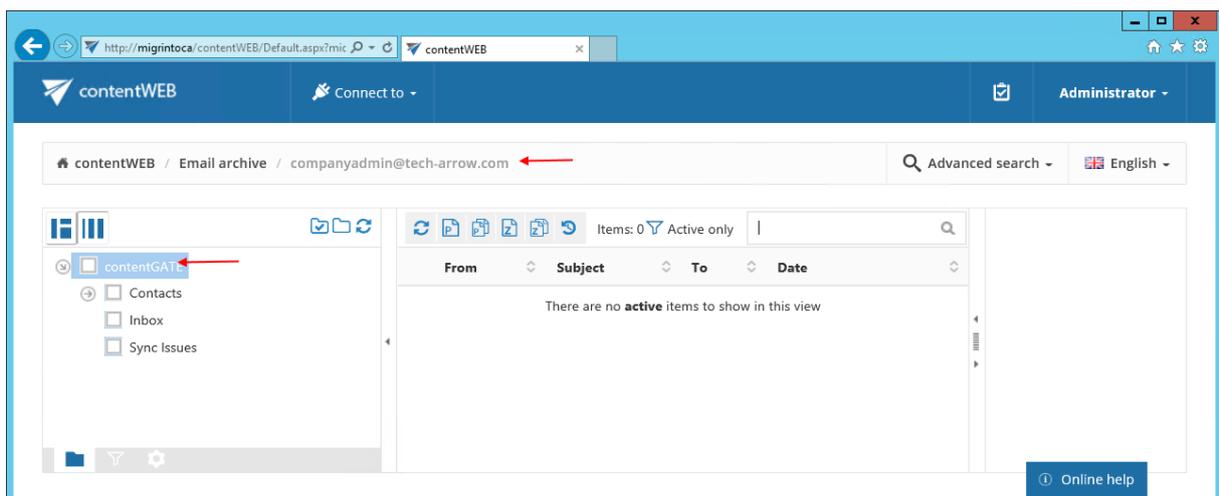
The application allows to edit object mappings using the **"Edit"** option in the **"Mappings"** tab's toolbar. The **"General"** tab of the dialog shows the basic properties of the source and target objects:



In the “**Emails**” settings (“**Emails**” tab) it is possible to prefix the transferred emails in the target archive (contentWEB) with a name, email address, ID or a custom folder. It is recommended to use the “**Prefix with custom folder**” method (in this use case we use folder “**contentGATE**”). The migrated mailbox folders will be prefixed with “**contentGATE**” parent folder in the archive, which enables to easily distinguish them from another folders.



Prefixing the items to migrate with "contentGATE" folder



Prefixed items in the archive - contentWEB

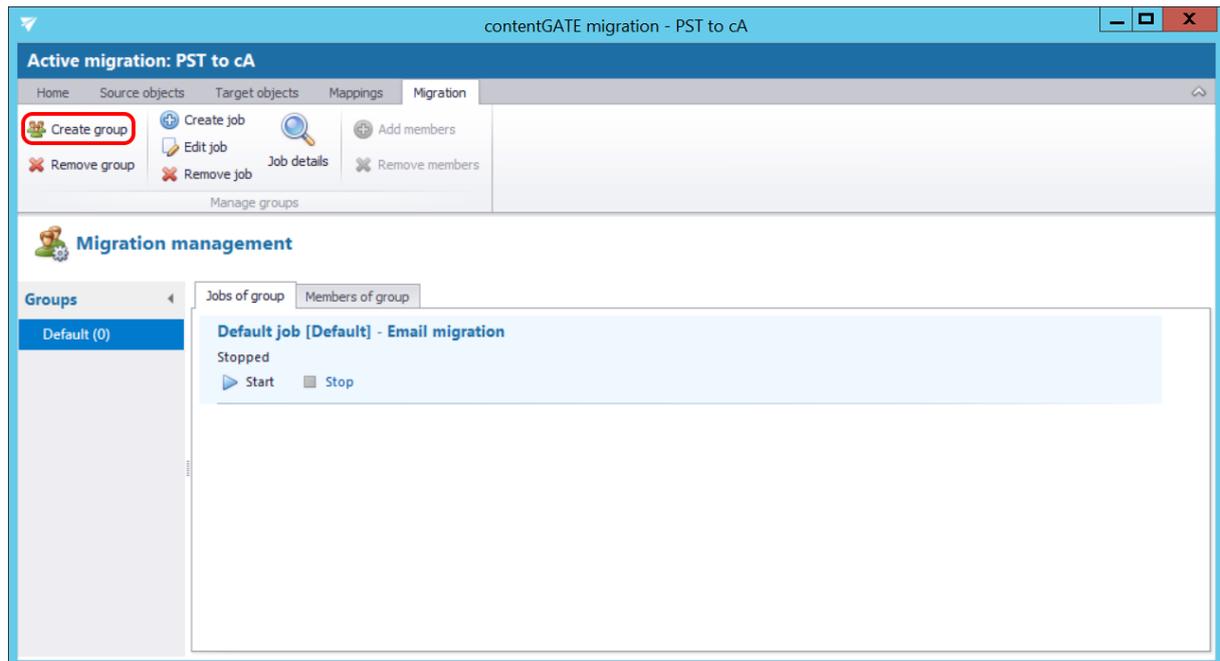
In next steps we will learn how to create a migration group and add our mapped mailboxes to this group.

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

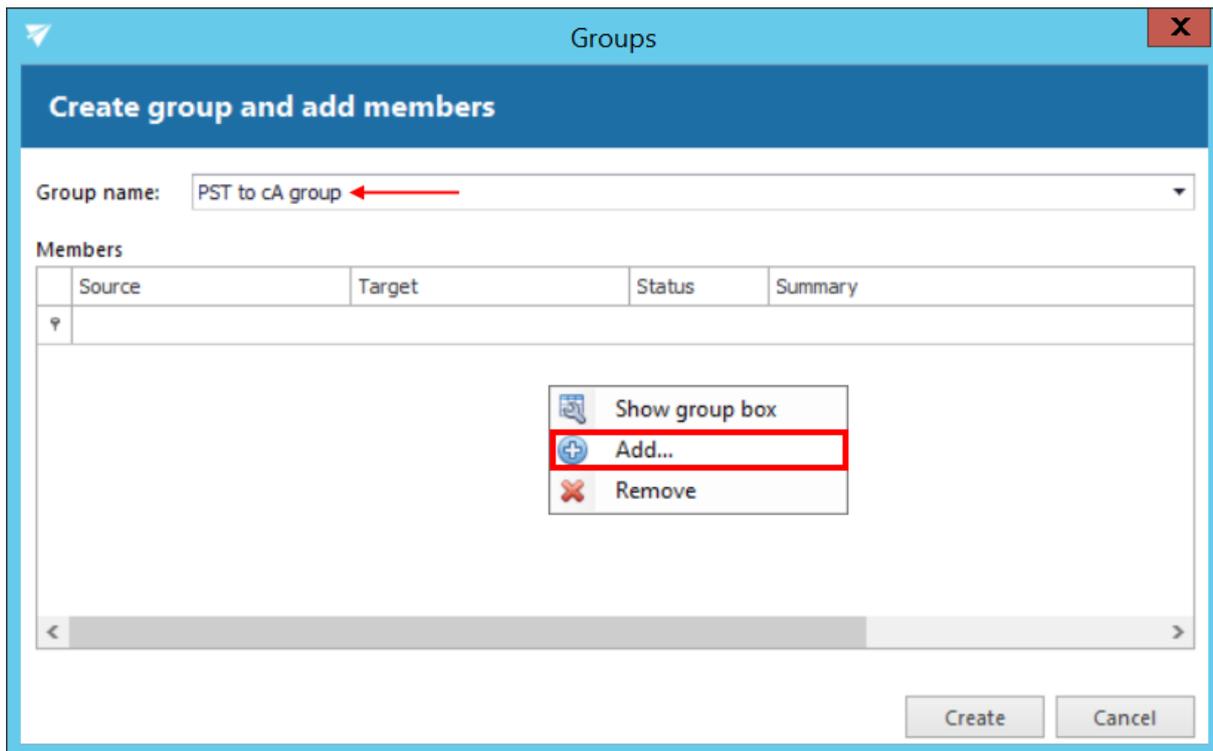
In the next step we need to create a migration group and associate our mapped mailboxes with it. Since a migration can be started on group level only, mailboxes that are not group members cannot be processed.

Group management makes the migration process more transparent and manageable. You may 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.

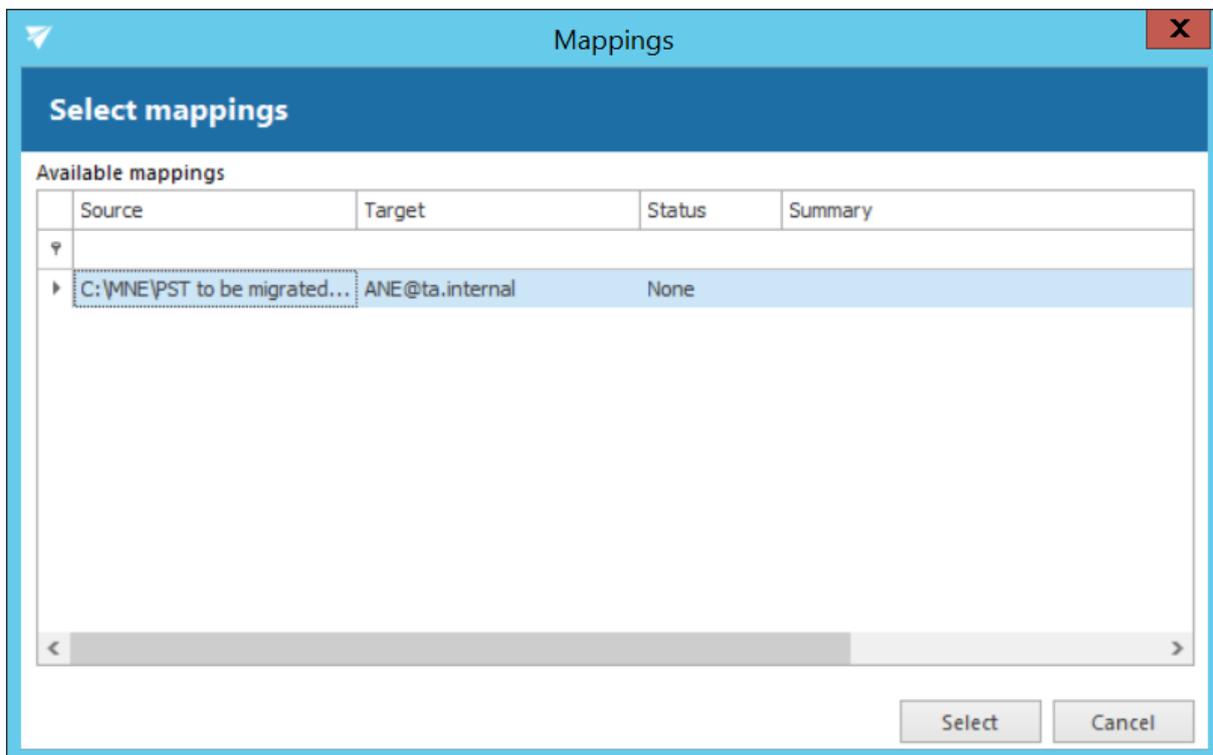
- **Create a migration group and add members to it.** Navigate to “**Migration**” tab. As you can see, there is initially a **Default** group. Click “Create group” in the toolbar to create a new group (if you don’t want to use the default one).



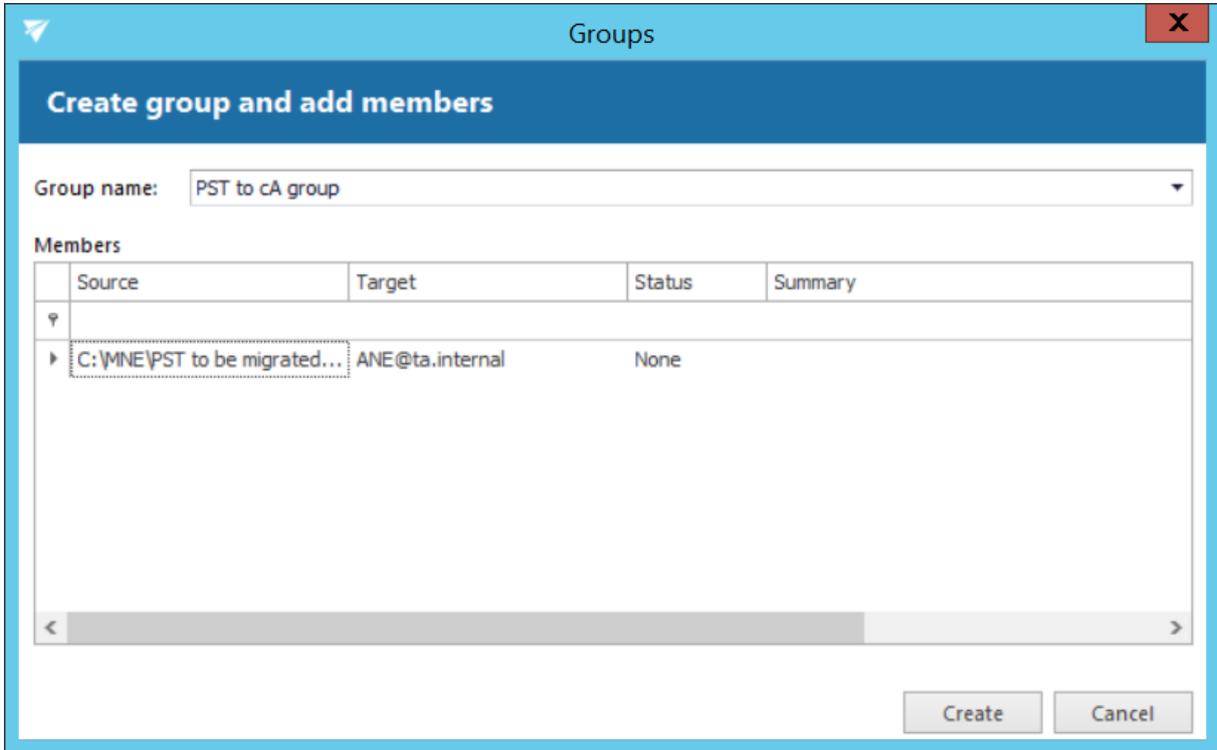
Name the group and add members to it using the context menu:



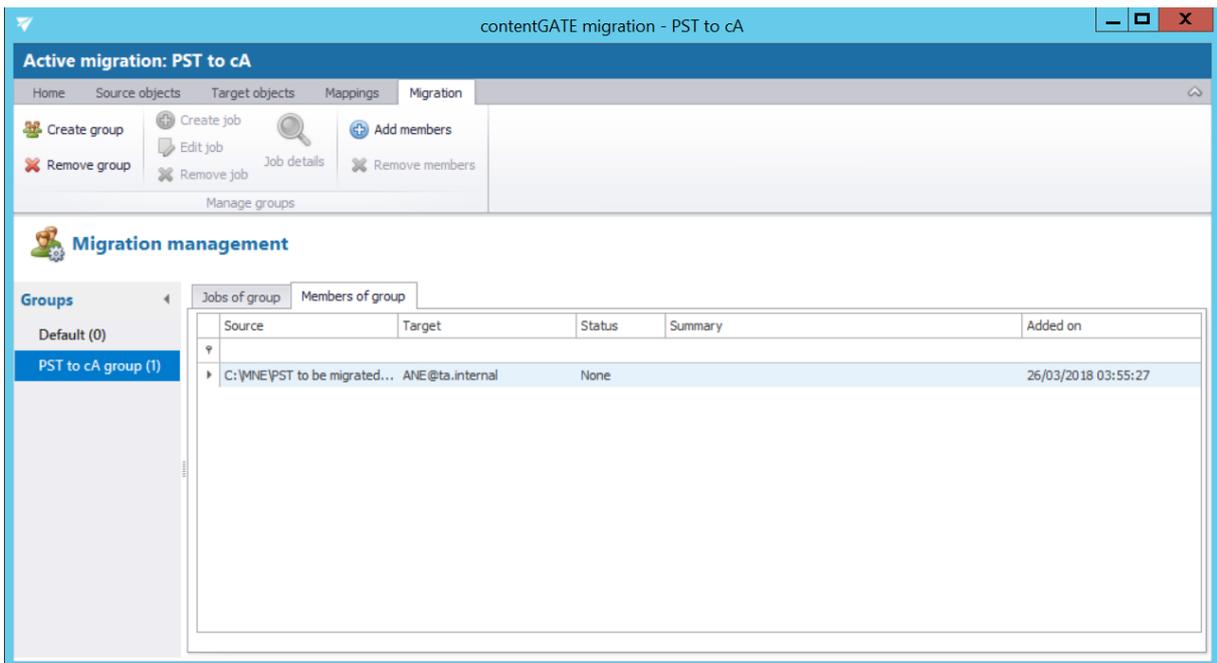
The next pop-up dialog displays all available mappings that can be added to the group. Pick the desired mappings and click “Select”.



In the next pop up dialog click “Create”.



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 an **Email migration job** (Outlook PST migration job) to our migration group.

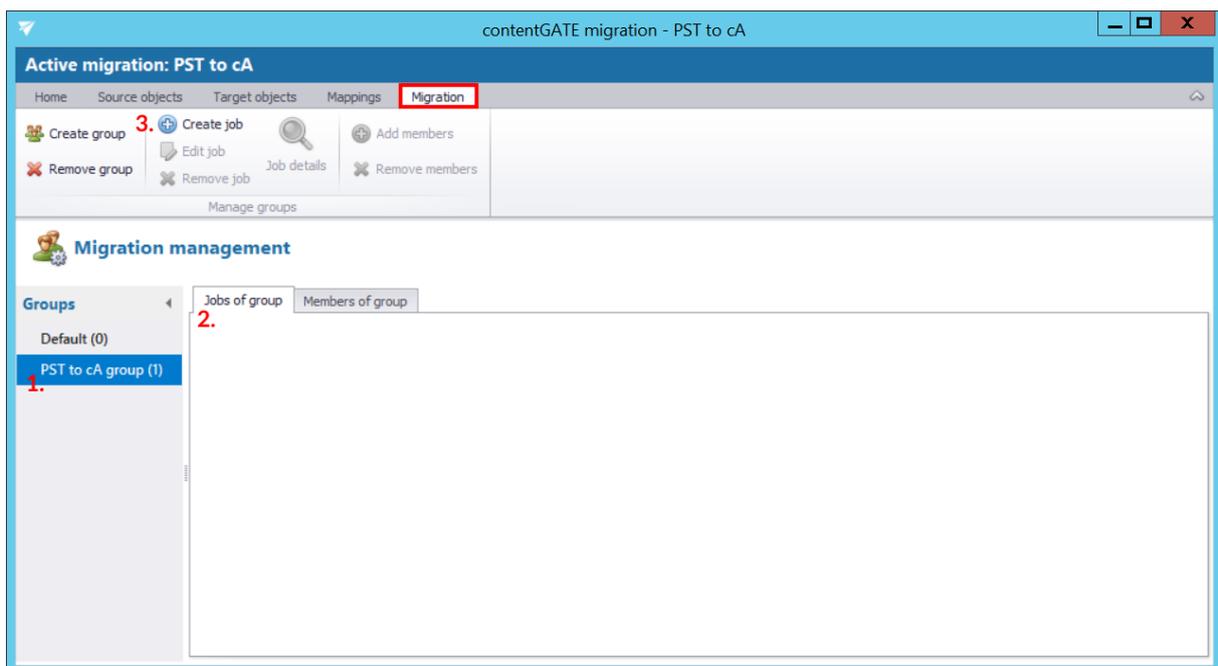
## 5.2.7 Creating migration job(s) to your migration project

A migration job manages the migration process and it defines what exactly will be migrated. For the migration *Outlook PST files to contentACCESS Email archive* only one migration job type is available: the **Email migration job**.

The administrator may create multiple job instances from this job type. E.g. one job will be responsible for migrating the *PST to cA group's* PST files, another job will manage the PST files of the *Accounting group* etc.

**Note:** Please ignore the **Email shortcut migration job** when migrating PST files to contentACCESS Email archive.

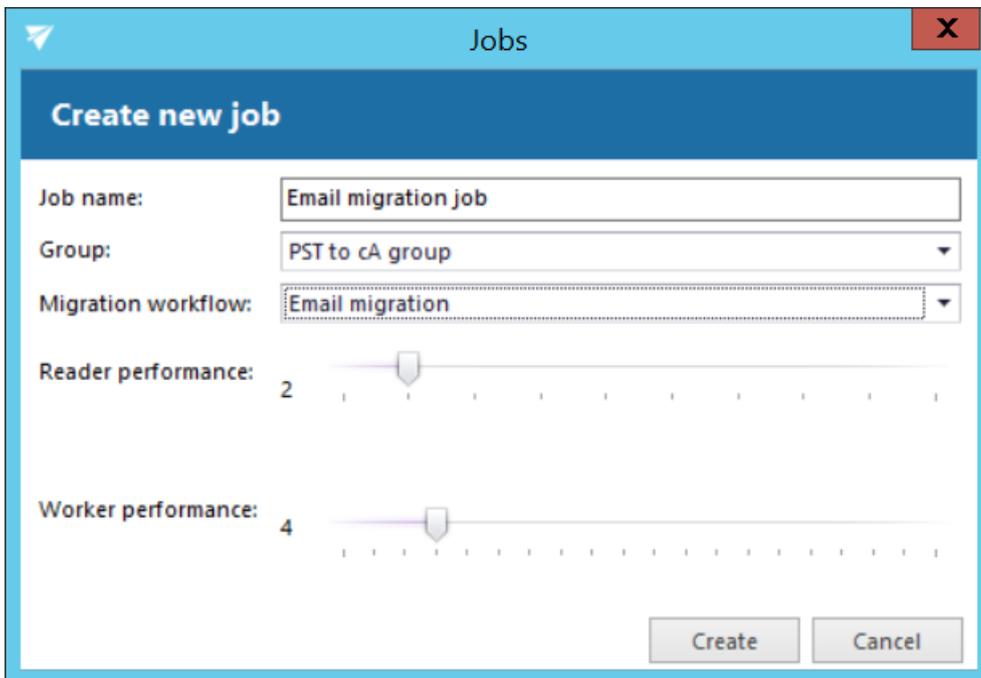
A migration job is always assigned to a migration group. It can be created by 1. selecting the group in the pane, 2. switching to “Jobs of group” tab and 3. clicking option “Create job” in the toolbar:



By clicking the **Create job** button, the “Create new job” dialog opens. It requires to:

- **name** the job
- assign the job to a **group** – The group is already selected if the job is created for a group directly (from the Migration tab). The job will process the members of this migration group.
- specify the migration **workflow** - The workflow defines the migration procedure. The migration of *PST files* to the *contentACCESS Email archive* is managed by the *Email migration job*, the *Email shortcut migration job* can be ignored.
- adjust **thread performance**; this is set to the default values specified in [Default project settings](#). The configurations of the migration job always overwrite the settings specified in the default project settings.

According to the below displayed screenshot we have created an **Email migration job**, which will manage the migration process of the **PST to cA group** group’s PST files.

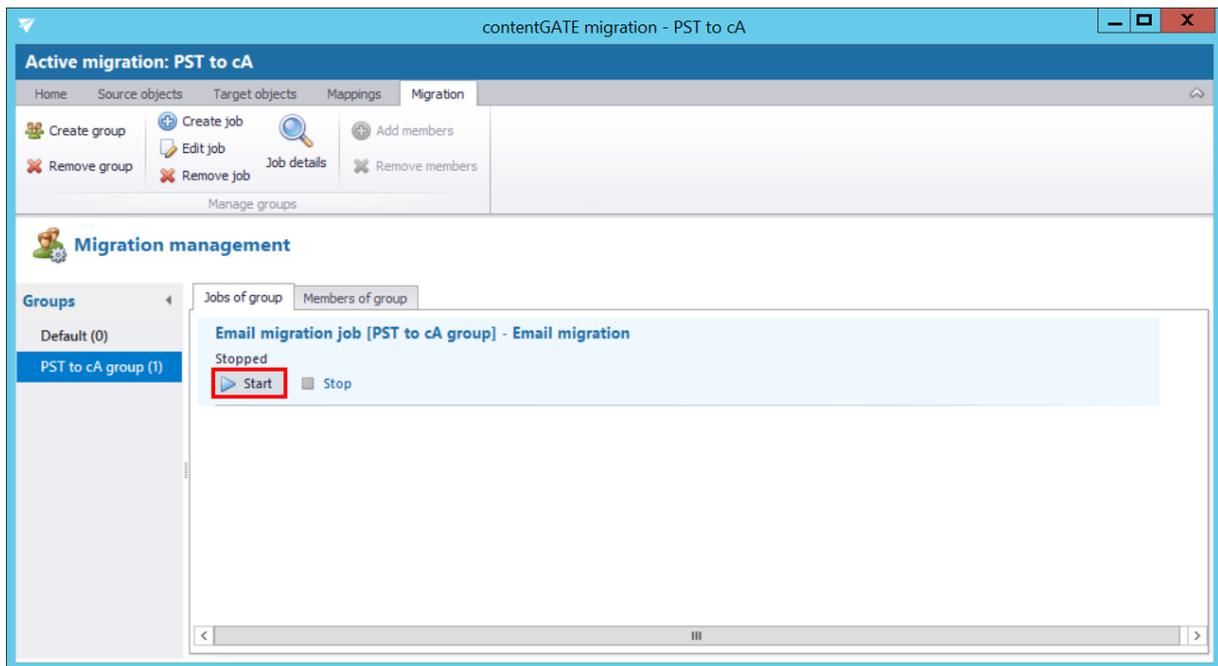


Now every configuration is done and you can proceed with the migration.

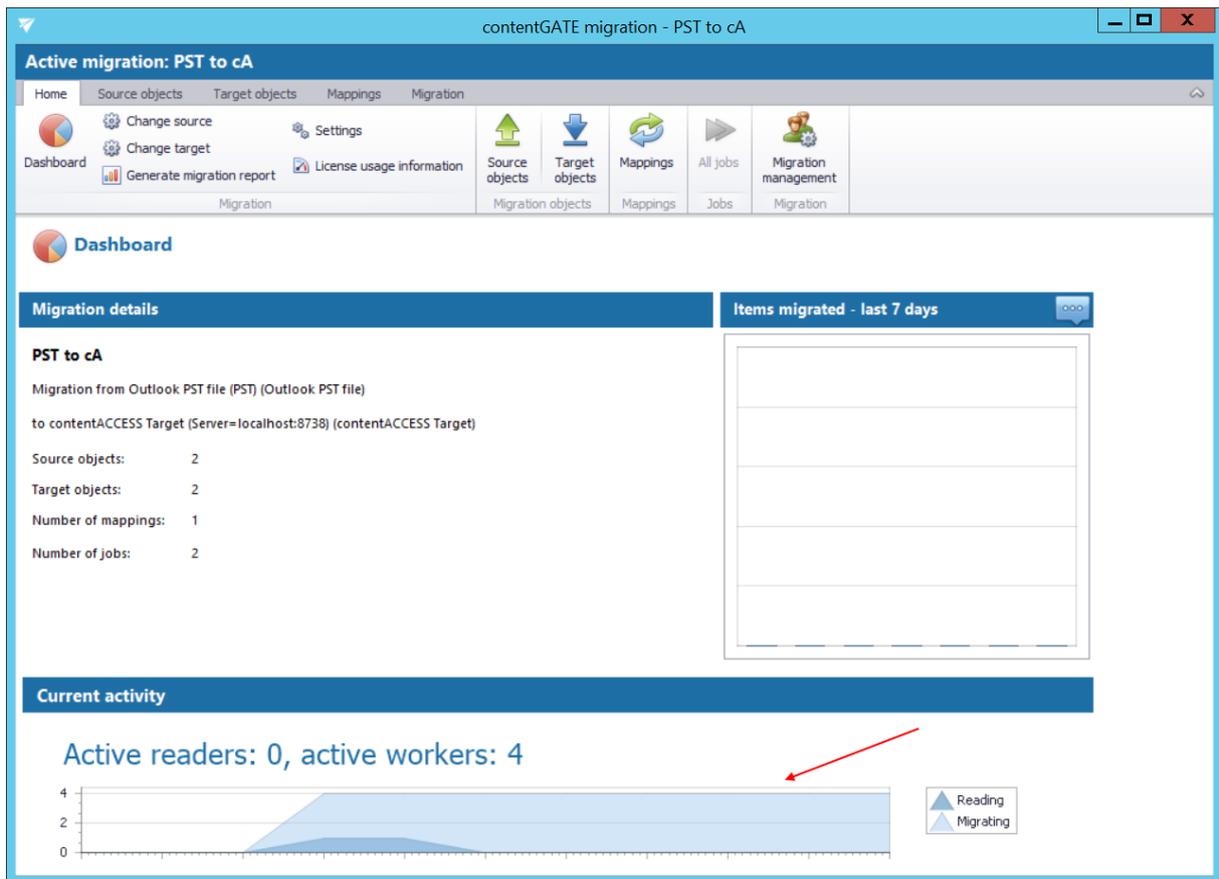
## 6 Starting the migration

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.

Click on **Start** in the grid and wait until the job completes the migration process.

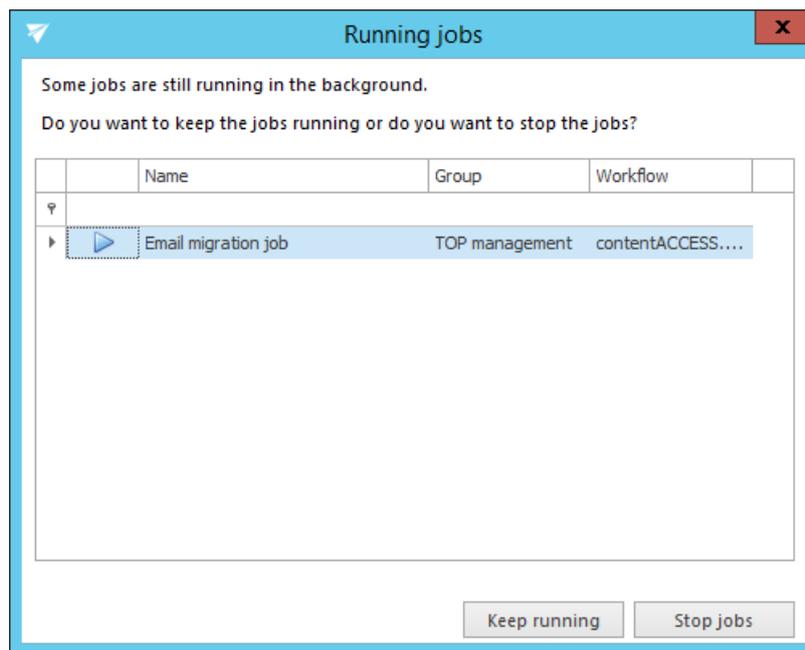


The current thread activity can be checked on the project's dashboard, too:



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):

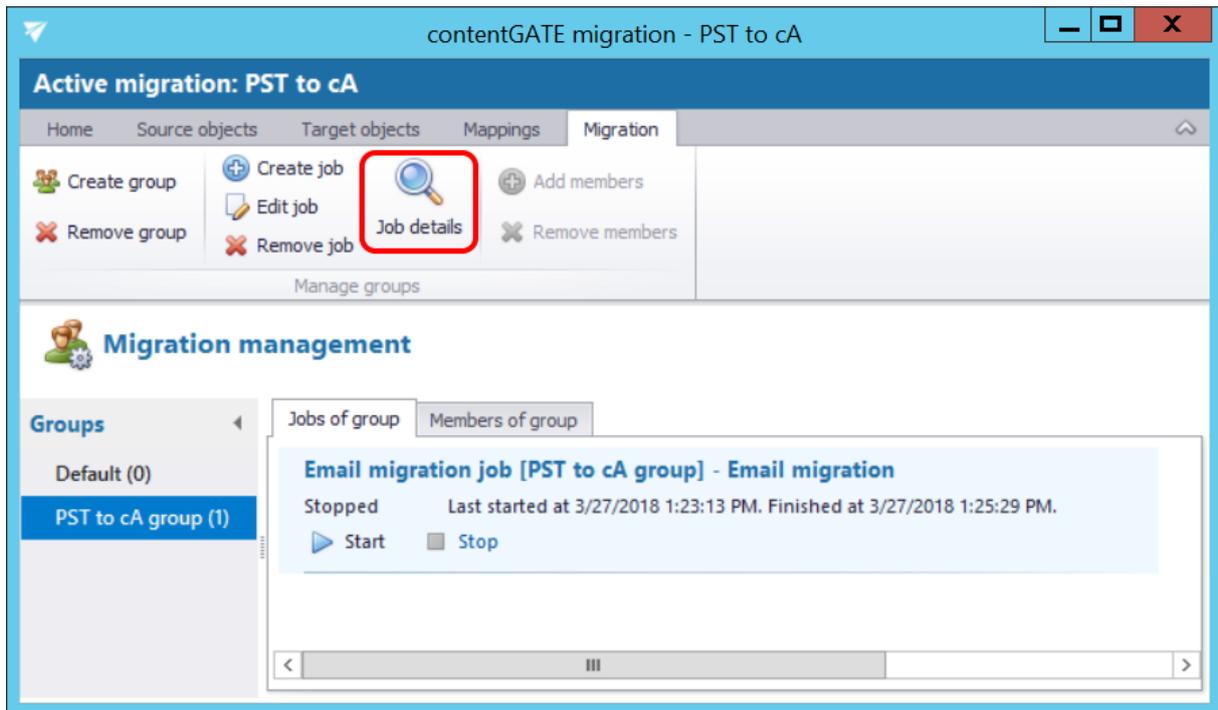
- keep them running – this option allows to complete the tasks in the background
- stop the job(s)



## 7 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.



Job details
[-] [max] [x]

**Job details**

Overview
Report
Messages
Activity

**Email migration job [PST to cA group] - Email migration**  
 Stopped    Last started at 3/27/2018 1:23:13 PM. Finished at 3/27/2018 1:25:29 PM.  
▶ Start    ■ Stop    Summary report of last job run: Number of mappings: 1. Number of documents: 377, eligible: 377, migrated: 377, failed: 0, excluded: 0, already migra

**Job progress**

Overall progress:

100%

Objects:

Finished	Failed	Total	Elapsed time
1	0	1	00:00:02:16

Items:

Migrated	Failed	Skipped	Excluded	Total
377	0	0	0	377

**Object progress**

■ Migrated 1
■ Failed / Unfinished 0
■ Waiting 0

**Item progress**

■ Migrated 377
■ Failed 0
■ Skipped 0
■ Excluded 0
■ Waiting 0

Close

➤ **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
[-] [max] [x]

**Job details**

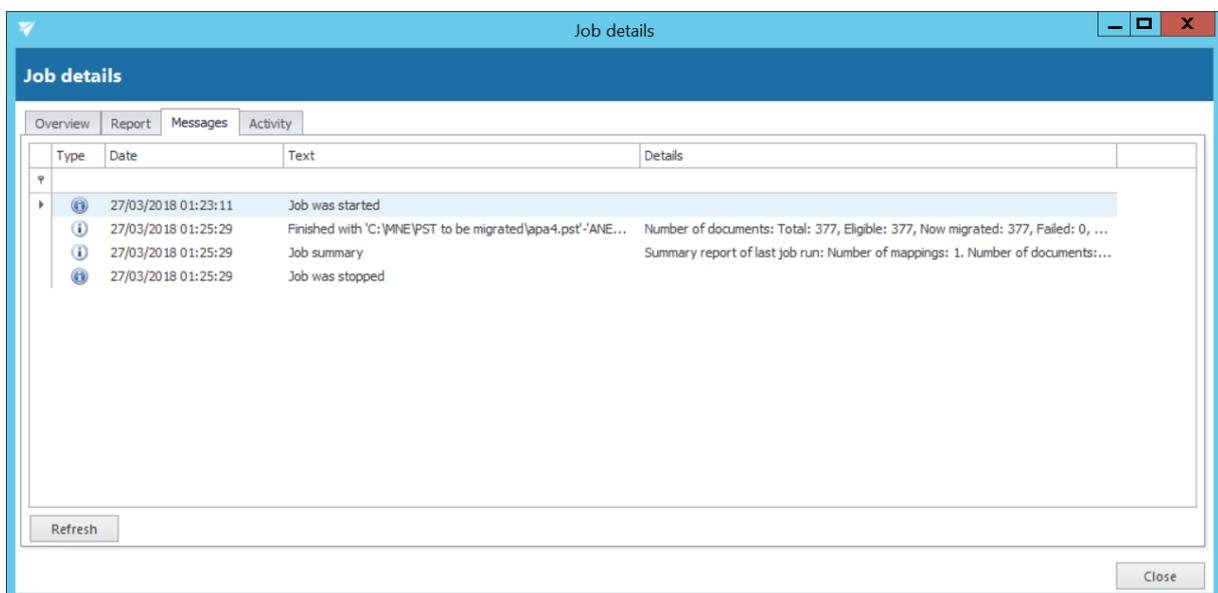
Overview
Report
Messages
Activity

TaskID	Source	Target	Reading completed	Completed	Total	Filtered	Migrated	Failures
6	C:\MNE\PST to be migrated\apa4.pst	ANE@ta.internal	Yes	Yes	377	377	377	0

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.



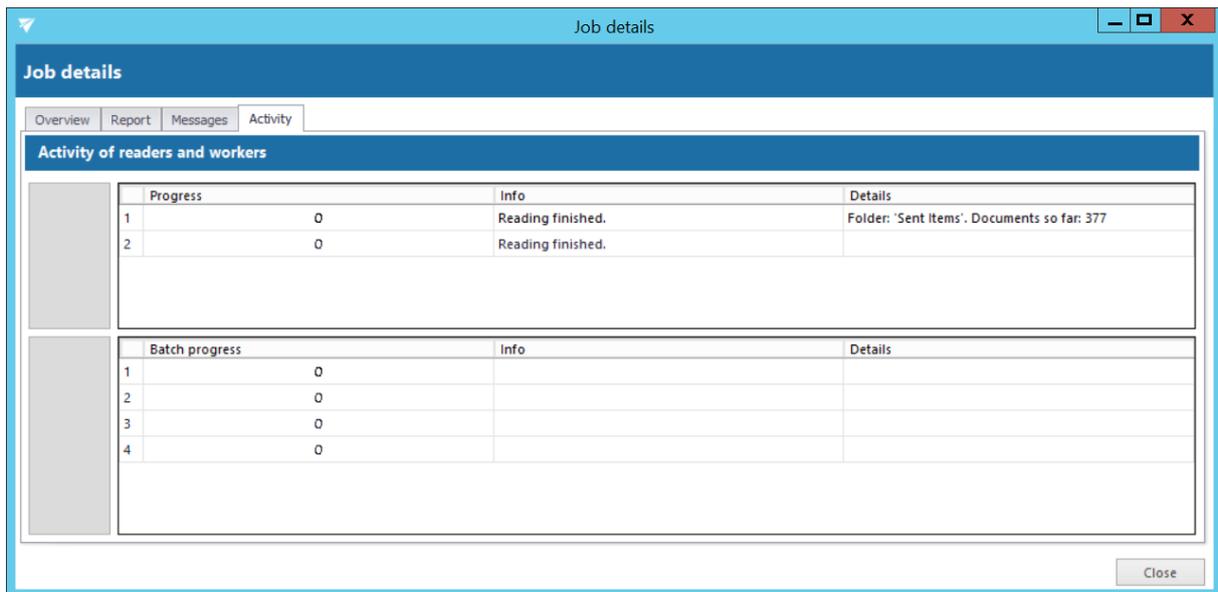
### ➤ Activity

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).



## 8 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 “PST to CA” 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

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



contentGATE migration - PST to cA

**Active migration: PST to cA**

Home | Source objects | Target objects | Mappings | Migration

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

**Generate migration report**

**Dashboard**

**Migration details**

**PST to cA**

Migration from Outlook PST file (PST) (Outlook PST file)  
to contentACCESS Target (Server=localhost:8738) (contentACCESS Target)

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

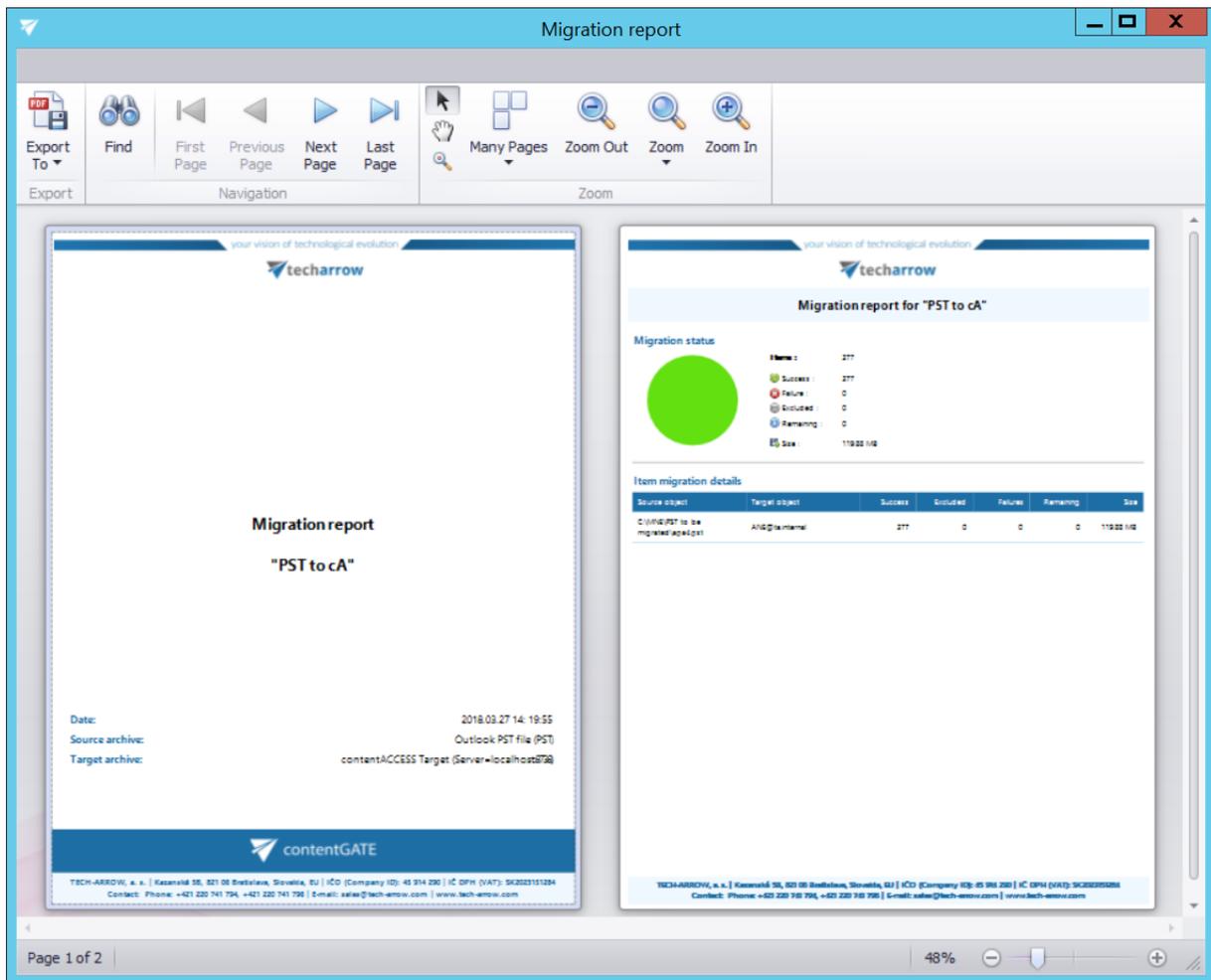
**Items migrated - last 7 days**

Date	Reading	Migrating

**Current activity**

Active readers: 0, active workers: 0

▲ Reading  
▲ Migrating



Migration report

Export To

Find

First Page

Previous Page

Next Page

Last Page

Many Pages

Zoom Out

Zoom

Zoom In

Export

Navigation

Zoom

your vision of technological evolution

techarrow

Migration report

"PST to cA"

Date: 2016.03.27 14: 19:55

Source archive: Outlook PST file (PST)

Target archive: contentACCESS Target (Server=localhost)

contentGATE

TECH-ARROW, a. s. | Kazanská 5B, 821 06 Bratislava, Slovakia, EU | IČO (Company ID): 45 914 290 | IČ DPH (VAT): SK202313284  
Contact: Phone: +421 220 741 734, +421 220 741 736 | E-mail: sales@tech-arrow.com | www.tech-arrow.com

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techarrow

Migration report for "PST to cA"

Migration status

Items: 277

Success: 277

Failure: 0

Excluded: 0

Remaining: 0

Size: 119.02 MB

Item migration details

Source object	Target object	Success	Excluded	Failure	Remaining	Size
C:\Users\psta\OneDrive\psta\Outlook\psta\psta.pst	AV102\Internal	277	0	0	0	119.02 MB

TECH-ARROW, a. s. | Kazanská 5B, 821 06 Bratislava, Slovakia, EU | IČO (Company ID): 45 914 290 | IČ DPH (VAT): SK202313284  
Contact: Phone: +421 220 741 734, +421 220 741 736 | E-mail: sales@tech-arrow.com | www.tech-arrow.com

Page 1 of 2

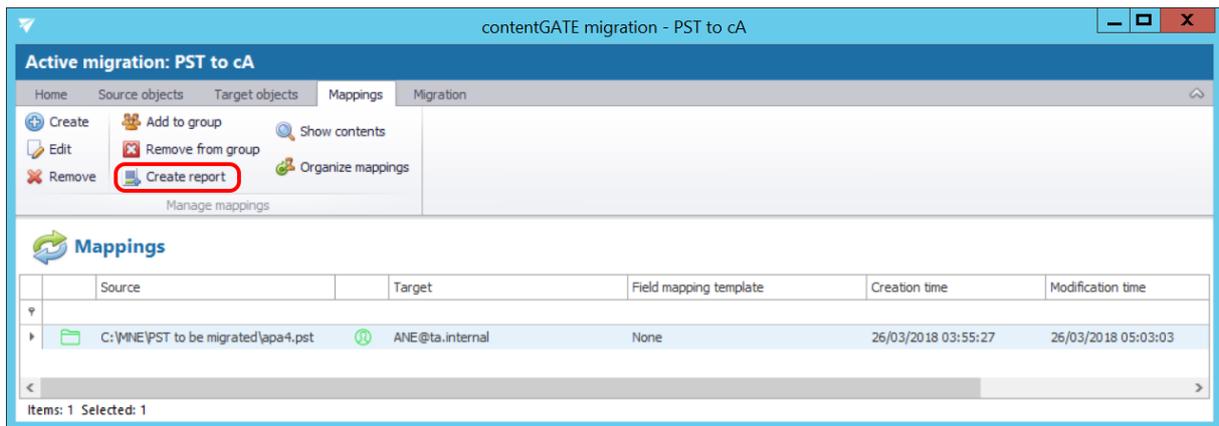
48%

Screenshot A: Migration report for project "PST to cA"

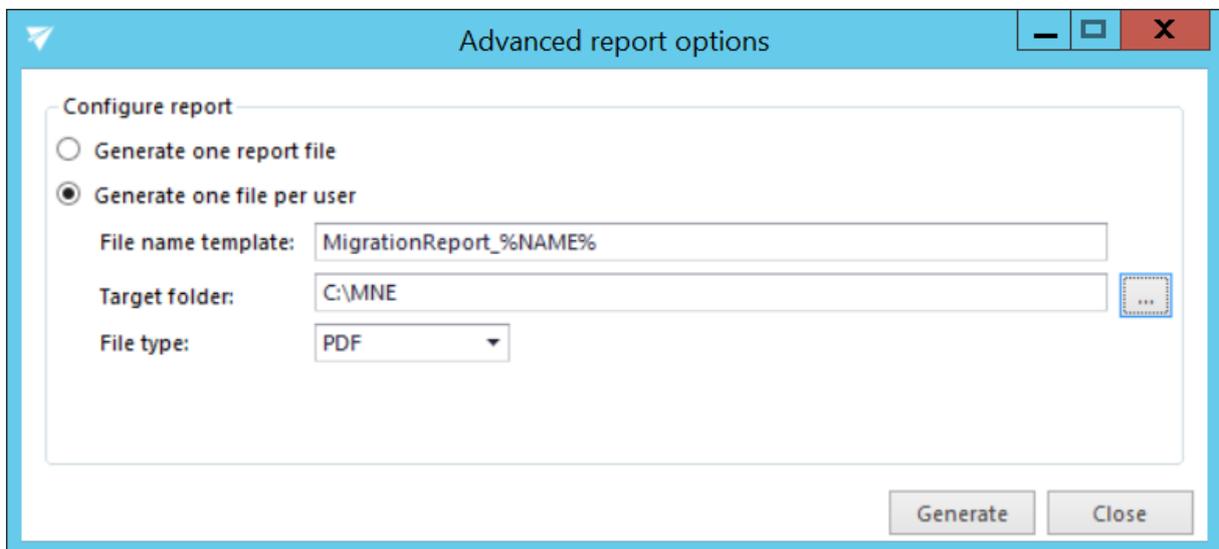
b) **mapped object(s)** – this report type contains the

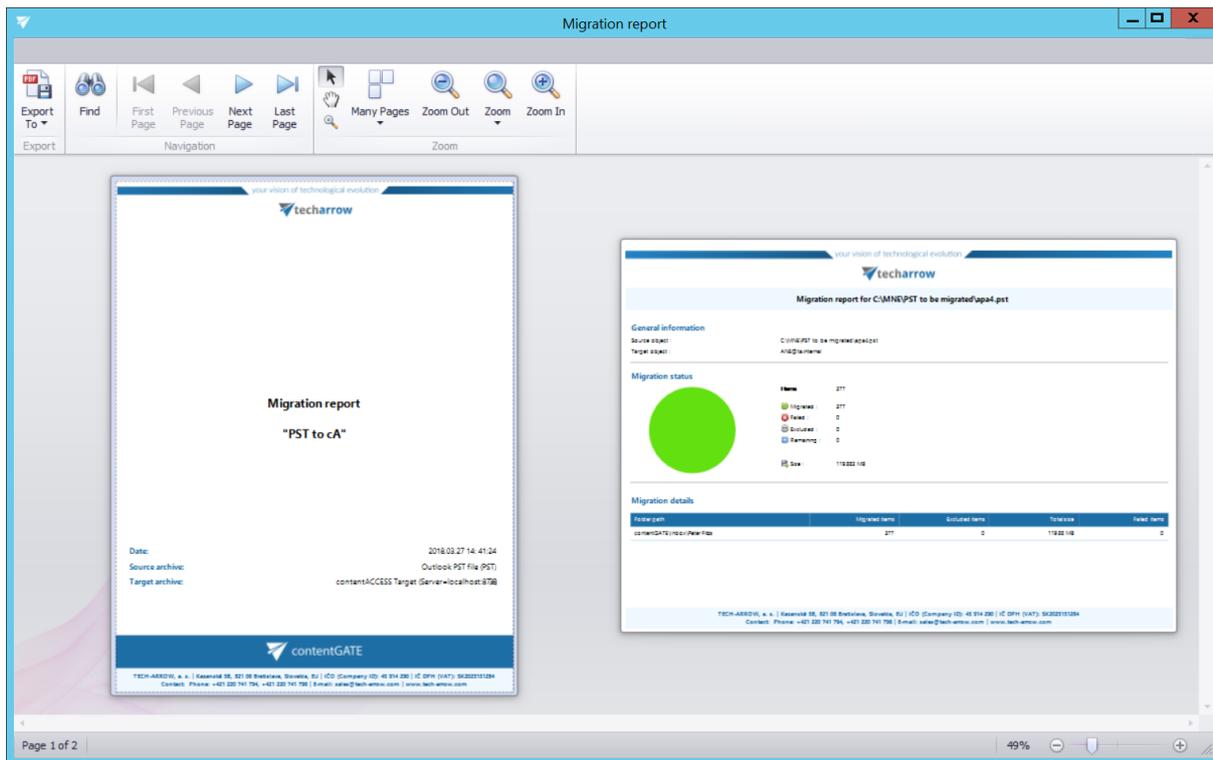
- **general information** about the selected migration object
- **migration status** of the selected migration object
- **migration details** of the selected migration object

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



The user may choose if he wants to create only one file altogether, or one file for every user.





Screenshot B: Migration report for the ane’s PST files

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

