

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 <u>Creating a new migration project</u>). First, the interface and general settings are detailed.



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

8	contentGATE	_ 🗆 X
🗄 📄 New migration 🛛 🍥 Tools 🔹 📯 Settings 🔞 Help 🔹		
Archive Explorer	Items Page Information Total item count: 5 Page: 1 / 1 Property Value	
	Name PST to CA Source archive Outlook PST file (C\PST) Target archive contentACCESS Target (Server=localhost:8738) Stage start 1.1.1900 0:00:00 Stage end 1.1.3000 0:00:00	
version 2.1.89.4 Performance: CPU: 2% Memory (used/avai	IIADIE); /4 IVID / 01/6 IVID	.::

- 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.

	3
	🕴 🗋 New migration 🛛 🎯 Tools 🔹 🔆 Settings 🔞 Help 👻
📄 New migration 🔯 Tools 🔹 🔆 Settings 🕜 Help 🔹	Archive Explorer
Archive Explorer	B- Migration
	🐼 Refresh

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 <u>Specifying</u> <u>Source and Target archive connection settings</u>).

New m	igration 🔀
New migration Please fill in the name of the migration and s	elect the source and target archives.
Version: Advanced 🗸	
Name: PST to CA	Load Configure stage
Source archive	Target archive
Outlook PST file	contentACCESS Target
Connection:	Connection:
^	<u>^</u>
	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.

New m	igration X
New migration Please fill in the name of the migration and s	select the source and target archives.
Version: Advanced 🗸	
Name: PST to CA	Load Configure stage
Source archive	Target archive
Outlook PST file	contentACCESS Target ✓ Configure
Connection:	Connection:
	Create Cancel

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

	PST connection	
Base folder:	C:\PST migration	OK Cancel

The Target archive (contentACCESS Email archive)

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



	New m	igration X
PI	ew migration lease fill in the name of the migration and s	elect the source and target archives.
Version:	Advanced 🗸	
Name:	PST to cA	Load Configure stage
- Source a	archive	Target archive
Outlool	k PST file	contentACCESS Target ✓ Configure
Connec	tion:	Connection:
PST	~	
		Create Cancel

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

7	contentACCESS configuration	X
Connection Options EWS		
- Target contentACCESS settin	gs]
Protocol:		Configure connection
Server:		
Port: (*	
Auth type:		
User name:		
Password:		
Model:		
		Save Cancel



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: Server: Port:	net.tcp v localhost 8738 ×			
2		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".



*	Connect to co	ntentACCESS	x
	Choose the authentic It is recommended to account.	ation mode and enter the credentials. use at least tenant administrator	
	Authentication type:	Forms 🗸	
	User:	system	
Chine D	Password:	•••••	
6			
		Previous Next Can	cel

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".

*	Connect to	Connect to contentACCESS				
	Select the model v	which will be the target of the migration.				
	Model: Model type: Tenant:	Email archive (TECH-ARROW) File system archive (TECH-ARROW) Email archive (TECH-ARROW) File system archive (RFA test) TECH-ARROW Previous Finish Carrow C	icel			

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.

contentACCESS configuration		x	₹	Select retention	category		X
Connection Options EWS			Selected retention category:				Ŧ
Default retention category:	Change	_		Name	Id	Is default	
Default shortcut type:	Change			1 year 0	3 10	True False	
Shortcut type for 'Backup':	Change						
File archive migration: Migrate all versions (if available) File archive migration: Lise virtual move (if available)							
File archive migration: allow to restore shortcuts for long file names				x			11.
	Save Canc	el					

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

v contentACCESS configuration						
Connection Options EWS	5					
Default retention category:	1 year	Change				
Default shortcut type:	HTML	Change				
Shortcut type for 'Backup':	HTML	Change				
File archive migration: Mi	grate all versions (if available)					
File archive migration: Us	e virtual move (if available)					
File archive migration: all	ow to restore shortcuts for long file names					
	Sa	ve Cancel				



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.

*	contentACCESS configuration
Connection O	ptions EWS
Email archive	migration: Connect using EWS
-EWS connectio	on parameters
EWS address:	https://tadc01.ta.internal/EWS/Exchange.asmx Test
Version:	Exchange2010_SP2
Use explicit	t credentials
User name:	administrator
Password:	•••••
Domain:	ta.internal
Test address:	dne@ta.internal
	Save Cancel

Click "Save".

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



	New m	igration X
PI	ew migration ease fill in the name of the migration and :	select the source and target archives.
Version:	Advanced 🗸	
Name:	PST to cA	Load Configure stage
- Source a	archive	Target archive
Outlool	k PST file V Configure	contentACCESS Target ✓ Configure
Connect	tion:	Connection:
PST	× ×	Server=localhost:8738
		Create Cancel

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).



15	contentGATE				
Archive Explorer MAM to PST MAM to MSG PST to PST PST to Exchange Rename Remove migration Show license usage information Open migration management	Items Page Information Total item count: 5 Page: 1 → / 1 I → / 1/1/899 12:00:00 AM Stage end I /1/3000 12:00:00 AM				
Version 2.5.14 (64 bit) Performance: CPU: 2% Memory (used/available): 127 MB / 5170 MB:					

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.



7	content	GATE mig	gration - PS	ST to cA		_	. 🗆 X
Active migration: PST to cA							
Home Source objects Target objects Mappings Migration							$\hat{\sim}$
Image: Dashboard Image: Settings Image: Dashboard Image: Settings Image: Dashboard Image: Settings Image: Dashboard Image: Settings Image: Dashboard Image: Settings	Source objects	Target objects	Mappings	All jobs	Migration management		
Migration	Migration	n objects	Mappings	Jobs	Migration		
Cashboard				Ite	ms migrated - last 7 days		
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							
Current activity							
Active readers: 0, active worker	s: 0						
1 0.5 0		1				Reading Migrating	

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.



7	contentGATE r	nigration - P	ST to cA			_ □	X
Active migration: PST to cA							
Home Source objects Target objects Mappings Migration	_						\sim
🕼 Change source 🗞 Settings	🔶 🚽	$ \sim $		24			
Dashboard Generate migration report	Source Targe	Mappings	All jobs	Migration			
Migration	Migration objects	Mappings	Jobs	Migration			
🕜 Dashboard							
• •						_	
Migration details			Ite	ems migrated - last 7	days 🧧	201	
PST to cA						1	
Migration from Outlook PST file (PST) (Outlook PST file)							
to contentACCESS Target (Server=localhost:8738) (contentACCESS Targe	t)						
Source objects: 0						_	
Target objects: 0							
Number of mappings: 0							
Number of jobs: 1							
Current activity							
Active readers: 0, active worke	rs: 0						
1							
0.5					Migrating		
0 -							

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 <u>here</u>)
- Settings item filtering settings, global and performance settings can be configured here (more details <u>here</u>)
- 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.

Migration details		Items migrated - last 7 days
PST to cA Migration from Outlook to contentACCESS Targe Source objects: Target objects: Number of mappings: Number of jobs:	PST file (PST) (Outlook PST file) t (Server≃localhost:8738) (contentACCESS Target) 0 0 1	 Refresh Show last 7 days Show last 30 days Show last 365 days
Current activity		
	aders: 0, active workers: 0	Reading

- **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 <u>here</u>.)
- 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 <u>here</u>.)
- 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 <u>here</u>.)



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 <u>here</u> (jobs) and <u>here</u>
(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.

	ContentGATE migration - PST to cA						_ 🗆 X		
Active	Active migration: PST to cA								
Home	Home Source objects Target objects Mappings Migration					~			
	錄 Change source 와 Change target	ा Settings			ø		2		
Dashboard	Generate migration report	License usage information	Source objects	Target objects	Mappings	All jobs	Migration management		
	Migration			n objects	Mappings	Jobs	Migration		

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.

7	Migration settings	_ 🗆 X
Settings < Global Filtering Performance	Global settings Email migration If folder path is unknown, use this path: Unknown Create shortcut in mailbox during migration Remove the unread flag from the items during migration Limit the number of recipients to Remove the envelope from envelope journal messages Convert ANSI messages to Unicode format	
	Shortcut migration Preserve shortcut properties during shortcut migration Modify migrated message by applying the actual shortcut properties on it Shortcut pattern	
Settings	Public folders Use explicit public folder settings Exchange Server: Email address:	
		Close

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.

*	Migration settings
Settings <	Filtering options for the whole migration
Siltering	Email address filtering
Performance	Allow filtering by email address
in the second second	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 🔹
	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
	This option allows you to exclude emails based on their size
Settings	Include only emails between
	Close

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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.

*	Migration settings
Settings <	Performance values for the migration
P Filtering	Default values for jobs
Performance	Default number of readers: 2 🗘
	Default number of workers: 4
Settings	
	Close

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:



7	contentGA	E migration - PST to cA				X
Active migration: PST to cA						
Home Source objects Target objects Ma Home Source objects Target objects Ma Image: Select manually Image: Select mappings Image: Select mappings Ref Image: Select manually Image: Select mappings Image: Select mappings Ref Image: Select manually Image: Select mappings <	ppings Migration tresh nage PST files					\diamond
Type Name P	Path	Content type	Creation date	Modification date	Status	
	Path		Manage PST files	2. (Add Remove Discover	

Once the PST files are added, close the dialog:



Manage PST files	_ 🗆 🗙
Path C:\MNE\PST to be migrated\apa4.pst C:\MNE\PST to be migrated\ata.pst	Add Remove Discover
	Close

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.

	contentGATE migration - PST to cA			_ □	X
Active migration: PST to cA					
Home Source objects Target objects Mappings Migration	n				\sim
Select manually Create mappings Load all Show contents Manage source objects Source objects					
Type Name Path	Content type	Creation date	Modification date	Status	



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".

¥			Migrat	ion objects		_ □	x
:	Select	migration objects					
	Туре	Name	Path	Content type			
۴					_		
		C:\MNE\PST to be migrated\apa4.pst	1	PST			
•		C:\MNE\PST to be migrated\ata.pst		PST			
It	ems: 2 Se	lected: 2					
₽	Add	Add folder 谷 Remove					
	Туре	Name	Content type				
٩							
1+	ame: 0						
- 10	inis. U						
					Save	Canc	el

The selected source objects are now added to the grid:

*	contentGAT	E migration - PST to cA			_ □	X
Active migration: PST to cA						
Home Source objects Target objects Mapping	ngs Migration					\diamond
Select manually Select manually Create mappings Select manually Show contents	h					
K Remove 🚳 Properties	e PST files					_
Source objects	1	Content type	Creation date	Modification date	Status	
C: WINE PST to be migrated apa4.pst C: WINE PST to be migrated ata.pst		PST PST	26/03/2018 03:12:15 26/03/2018 03:12:15	26/03/2018 03:12:15 26/03/2018 03:12:15	None None	_



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".

								contentGAT	E migration -	PST to cA			_ □	x
Ac	tive n	nigratio	n: PST	to cA										
Ho	me	Source ob	jects	Target o	objects I	Mappings	Migration							\diamond
Ð	Select	manually	💥 Re	move										
	Lond al		ØØ Pro	operties										
	LOaU a		🕲 Re	fresh										_
	Ma	nage target	objects											
1	Та	arget ob	jects											
	Туре	Name				Path			Content type		Creation date	Modification date	Status	
۴														
•	0	SNE@ta.i	nternal						Mailbox		26/03/2018 03:17:48	26/03/2018 03:17:48	None	
	(0,0)	ANE@ta.i	nternal						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).

¥					contentGATE migra	ation - PST to cA		_ □	X
Active r	nigration: PST t	o cA							
Home	Source objects T	Target objects	Mappings	Migration					\sim
🕀 Create	Add to group	p 🔍 Show	contents						
D Edit	🔝 Remove from	n group							
💥 Remov	e 📃 Create repor	rt @S Orga	nize mappi	ngs					
	Manage r	mappings							
<i>©</i> M	lappings								
	Source			Target		Field mapping template	Creation time	Modification time	
٩									
<									>

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.



¥		Mappings	_ D X
Mapping source objects to target	objects		
Source objects		Target objects 🖌 Hide mapped target objects	
Type Name	Content type	Type Name Conte	nt type
C:\WNE\PST to be migrated\apa4.pst C:\WNE\PST to be migrated\apa4.pst C:\WNE\PST to be migrated\ata.pst	PST 1. select source	Y O SNE@ta.internal Mailbo O ANE@ta.internal Mailbo	x 2. select target
Arrian to aroun:		items: 2 3. map source to target	Map selected Map automatically
Mappings			
Source	Target	Field mapping template Match probability (%)	
Y Items: 0 Remove			OK Cancel

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

		Mappings	
Mapping source objects to target	objects		
Source objects		Target objects 🗹 Hide mapped targe	t objects
Type Name	Content type	Type Name	Content type
C:\MNE\PST to be migrated\ata.pst C:\MNE\PST to be migrated\ata.pst	PST		Maibox Map selected Map automatically
Assign to group: <pre> </pre>	•		File based mapping
Mappings Source	Target	Field mapping template Match prot	ability (%)
C:\MNE\PST to be migrated\apa4.pst	① ANE@ta.internal	None	
Items: 1 Remove			OK Cancel

Click "OK" to add them to the grid.



¥			contentGATE migra	ation - PST to cA		_ □ X
Active	migration: PST to cA					
Home	Source objects Target objects	Mappings	Migration			\diamond
🔂 Create	Add to group 🔍 Show	contents				
💥 Remov	re 📕 Create report 🧀 Orga	nize mapp	ngs			
	Manage mappings					
<i>©</i> N	lappings					
	Source		Target	Field mapping template	Creation time	Modification time
9						
• 🖻	C: WNE\PST to be migrated\apa4.pst	0	ANE@ta.internal	None	26/03/2018 03:55:27	26/03/2018 03:55:27
<						>

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.

		Mappings	
Mapping source objects to target	objects		
Source objects		Target objects 🖌 Hide mapped target obj	jects
Type Name	Content type	Type Name	Content type
P C:\/MNE\/PST to be migrated\ata.pst	PST		Mailbox
Items: 1		Items: 1	
			S Map selected Map automatically
Assign to group: <pre></pre>	•		File based mapping
Mappings			
Source	Target	Field mapping template Match probabili	ty (%)
Items: 0			
🔀 Remove			
			OK Cancel



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.

*	File based mapping options
🕀 Select file	C:\Users\administrator.TA\Desktop\Mappings.csv
PST,Mail C:\MNE\PST to be n C:\MNE\PST to be n	nigrated\apa4.pst,ane@ta.internal nigrated\ata.pst,sne@ta.internal
Separator:	,
🗹 Ignore first line	
Source property:	Name 🗸
Target property:	EmailAddress 🗸
	Start mapping Cancel

¥		File based mapping
		100%
	0	1 objects were auto mapped
	8	0 objects failed to map
		Stancel

Note: Only .csv file format is supported.



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

7		Mappings	
Mapping source objects to	o target objects		
Source objects		Target objects 🗌 Hide ma	pped target objects
Type Name	Content type	Type Name	Content type
Ŷ		Y SNE@ta.internal dne@ta.internal ANE@ta.internal	Malbox Malbox Malbox
Items: 0 Selected: 1		Items: 3	Map selected Map automatically
Assign to group: Default Mappings Default	•		File based mapping
Default	1 arget	Field mapping template	Match probability (%)
C:\PST migration\ABAL.pst C:\PST migration\ABAL.pst C:\PST migration\apa4.pst C:\PST migration\ata.pst C:\PST migration\dve.pst	SNE@ta.internal SNE@ta.internal dne@ta.internal ANE@ta.internal	None None None None	
Items: 4 Selected: 1			
🐱 Remove			OK Cancel

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:



₹	contentGATE migration - PST to cA	_ 🗖 X
Active migration: PST to cA Home Source objects Target objects Mappings Migration Image: Source objects Target objects Mappings Migration Image: Source objects Remove from group Show contents Image: Show contents Image: Source Image: Source Image: Source Image: Source Image: Source Image: Source Source Target Image: Source Image: Source Image: Source Image: Source C: WINE VPST to be migrated \apa4.pst Image: ANE @ta.interr Image: Source Image: Source	contentGATE migration - PST to cA Migration task General Emails Mapping properties Source object: C:\MNE\PST to be migrated\apa4.pst Mapping Properties Show details Target object: ANE@ta.internal Show details	Modification time
< Items: 1 Selected: 1	OK Cancel	

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

Thttp://migrintoca/contentW	/EB/Default.aspx?mic ♀ ▾ ♂	₩ contentWEB ×			- □ n ★
ኛ contentWEB	🔎 Connect t			ال	Administrator +
希 contentWEB / Email arch	ive / companyadmin(etech-arrow.com	Q Advar	nced search 👻	English 🗸
	ថេ∟≎	C C	Q		
	4	From © Subject © To © Date There are no active items to show in this view	\$	4 IIII >	
► 7 ¢				(i)	Online help





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).

*	contentGATE migration - PST to cA	_ □	X
Active migration: PST to	o cA		
Home Source objects T	arget objects Mappings Migration		\sim
Create group	t job 🔍 🚯 Add members		
Remove group Remov	Job details 💥 Remove members		
M	anage groups		
🏂 Migration mana	gement		
Groups 4 Job	as of group Members of group		
Default (0)	Default job [Default] - Email migration itopped ▶ Start ■ Stop		

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



¥				Grou	ips			X
	Create gr	oup and add	d members					
G	roup name:	PST to cA group						•
м	embers							
	Source		Target		Status	Summary		
	7							
				হ্যি ১	how group bo	x		
				A	\dd			
				💥 F	lemove			
4	2							>
							Create	Cancel
-								

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

V		Maj	opings		X
5	Select mappings				
Av	ailable mappings				
	Source	Target	Status	Summary	
٩					
	C:\MNE\PST to be migrated	ANE@ta.internal	None		
<					>
				Select	t Cancel



In the next pop up dialog click "Create".

¥			Grou	ıps			X
с	reate gr	oup and add	l members				
Gro	up name:	PST to cA group					-
Me	mbers						
	Source		Target	Status	Summary		
٩			- -				
•	C: MNE PS	Γ to be migrated	ANE@ta.internal	None			
<							>
						Create	Cancel

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

¥		contentGA	E migration	- PST to cA	
Active migration: P	'ST to cA				
Home Source objects	Target objects Mappings	Migration			\$
	Create job Edit job Remove job	ld members move members			
	Manage groups				
Migration m	Jobs of group Members of gr	up			
Default (0)	Source	Target	Status	Summary	Added on
PST to cA group (1)	P C: WINE\PST to be migrated.	. ANE@ta.internal	None		26/03/2018 03:55:27



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:

ContentGATE migration - PST to cA	_ 🗆 X
Active migration: PST to cA	
Home Source objects Target objects Mappings Migration	\sim
Add members	
Image: Second provide a	
Manage groups	
A Migration management	
Groups 4 Jobs of group Members of group	
Default (0)	
PST to cA group (1)	



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 <u>Default project</u> <u>settings</u>. 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.

*	Jobs
Create new jol	5
Job name:	Email migration job
Group:	PST to cA group 👻
Migration workflow:	Email migration 🔹
Reader performance:	2
Worker performance:	4
	Create Cancel

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.

¥	contentGATE migration - PST to cA	_ 🗆 X
Active migration: PST to	to cA	
Home Source objects T	Target objects Mappings Migration	\sim
A Create group	e job 🔍 🛞 Add members	
X Remove group X Remov	Job details 💥 Remove members	
M	Aanage groups	
🏂 Migration mana	agement	
Groups 🔹 Joi	bs of group Members of group	
Default (0)	Email migration job [PST to cA group] - Email migration	
PST to cA group (1)	Stopped Start Stop	
1		
< (III	>

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



¥		contentGATE mig	gration - P	ST to cA			_ 🗆 🗙	2
Active n	nigration: PST to cA							
Home	Source objects Target objects Mappings Migration							\sim
Dashboard	Image source Image source Image target Image source Image target Image source Image target Image source Image target Image source	Source objects	Mappings	All jobs	Migration management			
	Migration	Migration objects	Mappings	Jobs	Migration			
Migratio	ashboard on details			Ite	ems migrated - last	7 days	2000	
PST to c	A							
Migration	n from Outlook PST file (PST) (Outlook PST file)							
to conten	tACCESS Target (Server=localhost:8738) (contentACCESS Target)						
Source of	bjects: 2						_	
Target ob	jects: 2							
Number o	of mappings: 1						_	
Number o	of jobs: 2							
							_	
Current								
Curren								
Ac	ctive readers: 0, active worker	rs: 4						
4						Reading Migrating		

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)



R	7 Running jobs 🛛 🗙							
	Some jobs are still running in the background.							
	Do you want to keep the jobs running or do you want to stop the jobs?							
[Name	Group	Workflow			
	٩		**					
			Email migration job	TOP management	contentACCESS			
l								
						_		
				Keep runnir	ng Stop jobs			

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.



contentGATE migration - PST to cA								
Active migration: PST to cA								
Home Source objects Target objects Mappings Migration	\diamond							
 Add members Add members Add members Bob details Remove group 								
Manage groups								
Migration management	A Migration management							
Groups 1 Jobs of group Members of group								
Default (0) PST to cA group (1) 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. Stop Start Stop								
< III	>							

The window consists of 4 tabs:

> Overview

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



¥				Job details			_ D X		
Job details	Job details								
Overview Report Email migration Stopped La Start S	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:	Job 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			Item progre	s					
Migrated 1	Failed / Unfinished	0 Waiting 0	Migrated Walting 0	377 🕨 Failed 0 🔪 Si	Kipped 0 Excluded 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.

7	Job	details				_	. 🗆 X
Job details							
Overview Report Messages Activity							
TaskID Source	Target	Reading completed	Completed	Total	Filtered	Migrated	Failures
9							
6 C:\MNE\PST to be migrated\apa4.pst	ANE@ta.internal	Yes	Yes	377	377	377	0
						[Close

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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.

Job details							
	lob	o deta	ils				
ļ	Ov	erview	Report Messages	Activity			
		Туре	Date	Text	Details		
	۴						
	×		27/03/2018 01:23:11	Job was started			
		(27/03/2018 01:25:29	Finished with 'C: \MNE\PST to be migrated \apa4.pst'-'ANE	Number of documents: Total: 377, Eligible: 377, Now migrated: 377, Failed: 0, .		
		(27/03/2018 01:25:29	Job summary	Summary report of last job run: Number of mappings: 1. Number of documents:		
			27/03/2018 01:25:29	Job was stopped			
	- 1	Refresh					
						CI	ose

> 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).



Ŵ			Job details	
Job deta	ails			
Overview	Report Messages	Activity		
Activity	of readers and wo	rkers		
	Progress		Info	Details
	1	0	Reading finished.	Folder: 'Sent Items'. Documents so far: 377
	2	0	Reading finished.	
	Batch progre	55	Info	Details
	1	0		
	2	0		
	3	0		
	4	0		
				Close

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.



7	contentGATE mig	gration - PS	ST to cA				_ 🗆	X
Active migration: PST to cA								
Home Source objects Target objects Mappings Migrati	on							\sim
Gange source Settings Gange target	_ ₹	ø		Z,				
Dashboard Generate migration report	on Source Target objects objects	Mappings	All jobs	Migration management				
Migration	Migration objects	Mappings	Jobs	Migration				
Dashboard								
Migration details			lte	ems migrated	- last 7 days			
PST to cA								
Migration from Outlook PST file (PST) (Outlook PST file)								
to contentACCESS Target (Server=localhost:8738) (contentACCESS Tar	rget)							
Source objects: 2								
Target objects: 2								
Number of mappings: 1								
Number of jobs: 2								
Company activity								
Current activity								
Active readers: 0 active work	ers: 0							
	0.0.0							
0					migracing			
• 1								



¥						Ν	ligration	report						L	_ 🗖	x
Export To V	Find	First Page	Previous Page Navigation	Next Page	Last Page	Many Pages	Zoom Out Zoom	Q Zoom	Zoom In							
			your vision of	technologica echarro	l evolution			Migration st	atus	Migr	vision of techn Vision of techn ation repor 117 117	arrow t for "PST t	tion			
			Migra	tion rep	port			Item migrati	on details	Contraction : Contraction : Contra	0 0 11925 MB	277	ded Falur	Remaining	50+ 11925 MS	
			"PS	oT to cA												
D. Se Ta	ate: ource archive: arget archive:			64	ontentACCESS	2018.03.27 14: 19:55 Outlook PST file (PST Target (Sarver-localhostáliá										
	CH-ARROW, s. s. Contact: Ph	Kazanská 55, 521 ona: +421 220 74	00 Enstisions, Siove 1 734, +421 220 741	ontentG Ka, su iĉo (i 796 E-mali: aŭ	ATE Company ID): 45 1 Iss @tech-arrow.c	ni 280 IĈ DPH (VAT): SKZZISISIZ am www.lach-errow.com		NRA+KUIT C	DW, a. s. Kasan Contact: Phone	niai 55, 521 05 Book +521 220 751 774, +	11aa, Soaida, Bi 22 220 741 786 G	i 1CD (Company mail: salas (Plach	y 10): 45 914 200 h-anow.com ww	С орн (vAt): sci v3ech-enow.com		ļ
Page 1 d	of 2											48%	Θ	\mathbf{O} +		+ //

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.



	ContentGATE migration - PST to cA							
Active migration: PST to cA								
Home Source objects Target objects Mappings Migration								
Image mappings Image mappings								
🤣 Mappings								
Source	Target	Field mapping template	Creation time	Modification time				
γ								
C:\/MNE\/PST to be migrated\apa4.pst	ANE@ta.internal	None	26/03/2018 03:55:27	26/03/2018 05:03:03				
< Items: 1 Selected: 1				>				

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

7	Advanced report options	L	_ 🗆	X
Configure report O Generate one report Generate one file per	ile user			
File name template: Target folder: File type:	MigrationReport_%NAME% C:\MNE PDF T			
		Generate	Clos	se



¥		Migration report
Export To To T	First Previous Next Last Page Page Page Page Page Computer State Page Page Page Page Page Computer State P	Reference of the second
	var vision of technological real-back	
		var vator of technological execution
		Migration report for CIMNEPST to be migrated upa4.pst
	Migration report "PST to cA"	General information Non state: C.101479' to 5 m general sector trgs state: T Migration states Migration states Descent: 27 Descent: 2 Descent:
		Migration details Frienzam Upped any Excise any Taxas (and any
	Date: 2018/32/14/4134 Source anthive: Outleak 657 (14/64) Target anthive: contantACCSS Target (Sarver-local/bear 878)	anatolitijnau/werke 27 z 1920-le z
	🜠 contentGATE	1201 AB2010 a.s. (Journal M. KT B Rindow, Souris, to) (20 Journay (S. 419 20) (2010) S0201136 Souris These vidi 2010 (S. 401 20 1010) (Souri see photoestic con (souris biologicus con Souris These vidi 2010 (S. 401 20 1010) (Souri see photoestic con (souris biologicus con
	TECH ARD(M) a. 1. Source M ET IS Service. Source, 50 (50 (Source)) (6 (51 - 20)) (50 (10 - 20)) (Context: France + 41 (25 101 76) + 41 (25 101 76) (Source) (source) (source lash were can	
Page 1 of 2		49% $\ominus = 0 + - + + + + + + + + + + + + + +$

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.

