



DocAve® 6 Lotus Notes Migrator

User Guide

Service Pack 5 Cumulative Update 1

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What's New in this Guide

- Minor edits and cover page update for current release.

About Lotus Notes Migrator

DocAve Lotus Notes Migrator lets SharePoint administrators easily automate the process of consolidating legacy Lotus Notes implementations into Microsoft SharePoint 2013, SharePoint 2010, and SharePoint Online with minimal impact on end-users.

Lotus Notes Migrator allows organizations to:

- **Streamline the data transfer easily** from Lotus Notes to SharePoint
- **Preserve and map all associated metadata and security settings** of Lotus Notes content during the migration
- **Plan migration jobs according to business needs** with granular or bulk content migration and customizable job scheduling

To ensure a complete and successful migration, DocAve's Pre-Migration Scanner provides a detailed analysis of the migration before it is performed. The DocAve Pre-Migration Scanner will detect and notify you of any illegal characters, user permissions, user names, user domains, and other legacy elements that must be mapped in order to migrate successfully into SharePoint.

Organizations can further minimize business disruption and time-to-value by leveraging AvePoint Partner Services (APPS) to perform detailed data analysis, content and application migrations, and post-migration verifications.

As with all AvePoint software, our SharePoint Migration tools leverage only fully supported Microsoft methodologies and APIs.

Complementary Products

Many products and product suites on the DocAve 6 platform work in conjunction with one another. The following products are recommended for use with DocAve Lotus Notes Migrator:

- DocAve Content Manager for SharePoint for restructuring or moving SharePoint content.
- DocAve Report Center for SharePoint to examine pain points in the SharePoint infrastructure and report on SharePoint user behavior and changes.
- DocAve Data Protection for setting backup and recovery points prior to adjusting SharePoint governance policies in this product.
- DocAve Replicator to perform live or event-driven, as well as scheduled or offline replication. Synchronization and management of all content, configurations, and securities is performed with full fidelity.

Submitting Documentation Feedback to AvePoint

AvePoint encourages customers to provide feedback regarding our product documentation. You can [Submit Your Feedback](#) on our website.

Before You Begin

Refer to the sections for system and farm requirements that must be in place prior to installing and using DocAve Lotus Notes Migrator.

AvePoint's Testing Policy and Environment Support

Supported Hardware

AvePoint is committed to maintaining a hardware agnostic platform to ensure that DocAve operates on common Windows file sharing and virtualization platforms. To ensure that DocAve is hardware agnostic, AvePoint tests hardware that is intended to support SharePoint and DocAve infrastructure, storage targets, and hardware-based backup and recovery solutions, as supported by AvePoint's partnerships. AvePoint directly integrates with the following platforms: any Net Share, IBM Storwize Family, FTP, Amazon S3, AT&T Synaptic, Caringo Storage, Del DX Storage, EMC Centra, HDS Hitachi Content Platform, Rackspace Cloud Files, TSM, and Windows Azure Storage.

All other hardware platforms that support UNC addressable storage devices are supported.

***Note:** Most of the hardware partnerships referenced in this guide are intended to make use of advanced functionality (such as snapshot mirroring, BLOB snapshots, indexing, long-term storage, WORM storage, etc.), and are not indications that any changes to the product are required for basic support. In most cases, hardware can be supported with no change to the product.

Supported Backup and Recovery

DocAve supports BLOB backup storage according to the list of hardware platforms above. BLOB snapshot functionality, however, is currently only supported on OEM versions and NetApp hardware.

DocAve supports SQL content and Application database backups via the SharePoint Volume Shadow Copy Service (VSS) on all Windows and SQL server platforms listed above. DocAve also supports snapshot-based SharePoint VSS on all hardware listed above where the hardware partner has certified support with Microsoft.

DocAve supports application and configuration server backups for all the supported software environments listed above. DocAve 6 supports VM backup via Hyper-V/VMWare for the following operating systems: Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2, and Microsoft Hyper-V Server 2012 R2.

Configurations

In order to use DocAve Lotus Notes Migrator, the DocAve 6 platform must be installed and configured properly on your farm. DocAve Lotus Notes Migrator will not function without DocAve 6 present on the farm.

To review a list of migration source versions and systems supported by DocAve Migrator, refer to Appendix C – Migration Source Environment in the [DocAve 6 Installation Guide](#).

Agents

DocAve Agents are responsible for running DocAve jobs and interacting with the SharePoint object model. DocAve Agents enable DocAve Manager to communicate with the respective servers, allowing for DocAve Lotus Notes Migrator commands to function properly.

***Note:** The use of system resources on a server increases when the installed agent is performing actions. This may affect server performance. However, if the agent installed on a server is not being used, the use of system resources is very low and, therefore, the effect on server performance is negligible.

For instructions on installing the DocAve Platform, DocAve Manager, and DocAve Agents, see the [DocAve 6 Installation Guide](#).

Required Permissions

To install and use DocAve Lotus Notes Migrator properly, ensure that the following permissions are met.

Lotus Notes Migrator for SharePoint On-Premises

Before using Lotus Notes Migrator for SharePoint on-premises, ensure that the Agent account has the following permissions:

1. Local System Permissions: The permissions are automatically configured by DocAve during installation. Refer to [Local System Permissions](#) for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.
2. SharePoint Permissions: These permissions must be manually configured prior to using DocAve 6 Lotus Notes Migrator; they are not automatically configured.
 - Member of the Farm Administrators group:
 - Full Control to all zones of all Web applications via User Policy for Web applications
 - Managed Metadata Service – Term Store Administrator

- Other permissions required
 - Managed Metadata Service – Full Control
 - Managed Metadata Service – Administrator
 - 3. SQL Permissions: These permissions must be manually configured prior to using DocAve 6 Lotus Notes Migrator; they are not automatically configured.
 - Member has a Database Role of **db_owner** for all of the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, and Central Admin Database.
 - Member has a Database Role of **db_owner** for Migration Database.
 - Member has a Server Role of dbcreator to SQL Server.
- *Note:** If forms based authentication (FBA) is selected as a Web application's claims authentication type, refer to [Forms Based Authentication Permissions](#) to configure additional settings for the Web application.

Lotus Notes Migrator for SharePoint Online

Before using Lotus Notes Migrator for SharePoint Online, ensure that the following permissions are met:

Local System Permissions for Agent Account

For the registered SharePoint Online site collections, the Agent account is on the Agent machine that will run migration jobs. This machine must have network connection or have configured Agent Proxy Settings. For more information about Agent Proxy Settings, refer to the [Control Panel Reference Guide](#).

For the registered SharePoint on-premises site collections, the Agent account is on the Agent machine that will run migration jobs. This machine must be the Central Administration server or one of the Web front-end servers of the farm where the registered site collections reside, or the machine that can communicate with the Central Administration server or one of the Web front-end servers.

The Agent account must have proper Local System permissions. These permissions are automatically configured by DocAve during installation. Refer to [Local System Permissions](#) for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.

Required Permissions for the User Used to Register SharePoint Online Site Collections

The user that is used to register SharePoint Online site collections in **Control Panel > Registered SharePoint Sites > Manual Input Mode** must have the following permissions to each site collection:

- Full Control permission to the site collection
- Managed Metadata Service – Term Store Administrator
- Other permissions required

- Managed Metadata Service – Full Control
- Managed Metadata Service – Administrator

***Note:** If the site collections are registered in **Scan Mode**, make sure the user has the Global Administrator role in Office 365.

Required Permissions for the User Used to Register SharePoint On-Premises Site Collections

The user that is used to register SharePoint on-premises site collections in **Control Panel > Registered SharePoint Sites > Manual Input Mode** must have the following permissions to each site collection:

- User is a member of the **Site Collection Administrator** group.
 - Managed Metadata Service – Term Store Administrator
- Other permissions required
 - Managed Metadata Service – Full Control
 - Managed Metadata Service – Administrator

***Note:** If the site collections are registered in **Scan Mode**, make sure the user has the Full Control permission to all zones of all Web applications via User Policy for Web Applications.

Local System Permissions

The following Local System Permissions are automatically configured during DocAve 6 installation:

- User is a member of the following local groups:
 - IIS WPG (for IIS 6.0) or IIS IUSRS (for IIS 7.0)
 - Performance Monitor Users
 - DocAve Users (the group is created by DocAve automatically; it has the following permissions):
 - Full Control to the Registry of
HKEY_LOCAL_MACHINE\SOFTWARE\AvePoint\DocAve6
 - Full Control to the Registry of
HKEY_LOCAL_MACHINE\System\CurrentControlSet\Services\eventlog
 - Full Control to the Communication Certificate
 - Permission of Log on as a batch job (it can be found within Control Panel > Administrative Tools > Local Security Policy > Security Settings > Local Policies > User Rights Assignment)
 - Full Control to DocAve Agent installation directory

Forms Based Authentication Permissions

If forms based authentication (FBA) is selected as a Web application's claims authentication type, ensure at least one of the following conditions is in place:

- The Agent account must be a member who has a Database Role of **db_owner** for the FBA database.
- Add the Agent account in the **connectionStrings** node in this Web application's **web.config** file to make the Agent account have the permission to the FBA database. For details, refer to the instructions below:
 - i. Navigate to **Start > Administrative Tools > Server Manager > Roles > Web Server (IIS) > Internet Information Services (IIS) Manager**, find the desired Web application in the **Sites** list.
 - ii. Right-click the Web application and select **Explore**.
 - iii. A window pops up and you can find the **web.config** file in it.
 - iv. Open the **web.config** file with Notepad.
 - v. Find the **connectionStrings** node and specify a user that has access to the database that stores FBA security information.

Migration Speed Considerations

Speed is a very important factor when migrating content. To estimate how long your migration plans will take, in order to better inform stakeholders, the following are some key factors that should be taken into consideration prior to running your migration plans.

- Network bandwidth between the two SharePoint environments
- SQL I/O and memory
- Memory on Web front-end servers
- Memory on the server hosting the DocAve Media service
- Number of CPUs on Web front-end servers
- Source environment deployment
 - Number of objects in source
 - Divide database and folder structures into small data sets before running the migration. Consider a granular migration approach.
 - Size of objects in source
 - A single 1 GB file will migrate far quicker than a million files that have a sum of 1 GB.

- Complexity of folders and sites
 - Prioritize content to be migrated into SharePoint, and utilize tools to establish co-existence throughout the course of the migration project to slowly roll-out SharePoint to users as their content becomes available.
- Whether DocAve has to create site collections during migration
 - Use folders to break up large document libraries or data subsets to manage library size, consider utilizing filtering to migrate a sub-set of the data at a time.
- Whether securities are included in the plan (including mappings)
 - Permissions can be configured to be migrated in the migration plans.
- Whether metadata is included in the plan

Health Analyzer

AvePoint recommends using Health Analyzer to check the prerequisites you need to correctly use DocAve Lotus Notes Migration.

***Note:** Only the users in the DocAve **Administrators** group can use Health Analyzer.

***Note:** AvePoint recommends that you create two different Health Analyzer profiles to scan the source Agent and the destination Agent separately.

After selecting Lotus Notes Migration as the module, all of the scan rules are selected by default, including the rules for the source environment and the rules for the destination environment. When the Health Analyzer job is finished, you can view the Health Analyzer results. If the scan rule is for the destination environment, but it is applied on the source environment, ignore the error or warning, and vice versa.

For more information about Health Analyzer, refer to the [Installation Guide](#).

Getting Started

Refer to the sections below for important information on getting started with DocAve Lotus Notes Migration.

Launching DocAve Lotus Notes Migration

To launch Lotus Notes Migration and access its functionality, follow the instructions below:

1. Log into DocAve. If you are already in the software, click the **DocAve** tab. The **DocAve** tab displays all product suites on the left side of the window.
2. Click **Migration** to view all of the Migration modules.
3. Click **Lotus Notes Migration** to launch the module.

***Note:** If desired, access the **License Details** information for Migrator products from the **Migration** landing page.

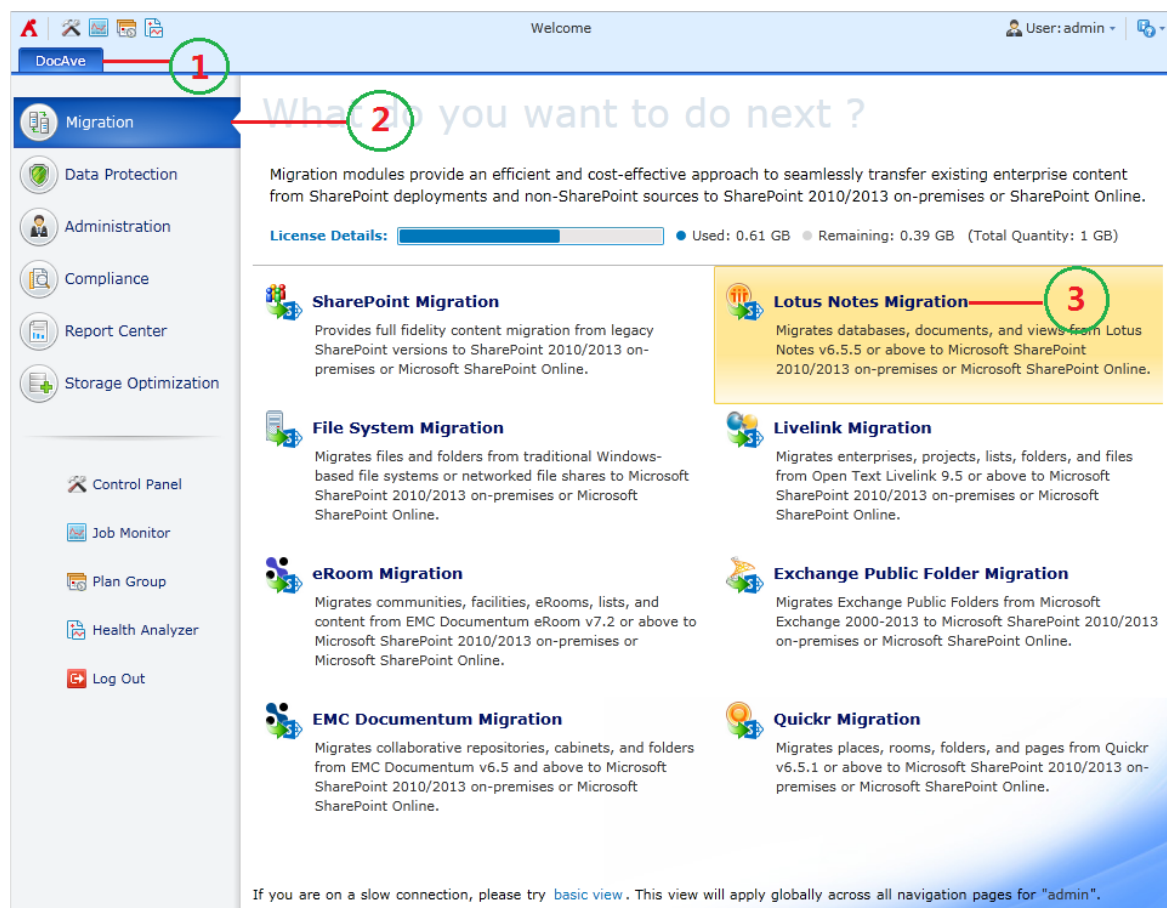


Figure 1: DocAve Lotus Notes Migration launch window.

Navigating DocAve

DocAve mimics the look and feel of many Windows products, making for an intuitive and familiar working environment. While there are many windows, pop-up displays, and messages within DocAve products, they share similar features and are navigated in the same ways.

Below is a sample window in DocAve. It features a familiar, dynamic ribbon, and a searchable, content list view.

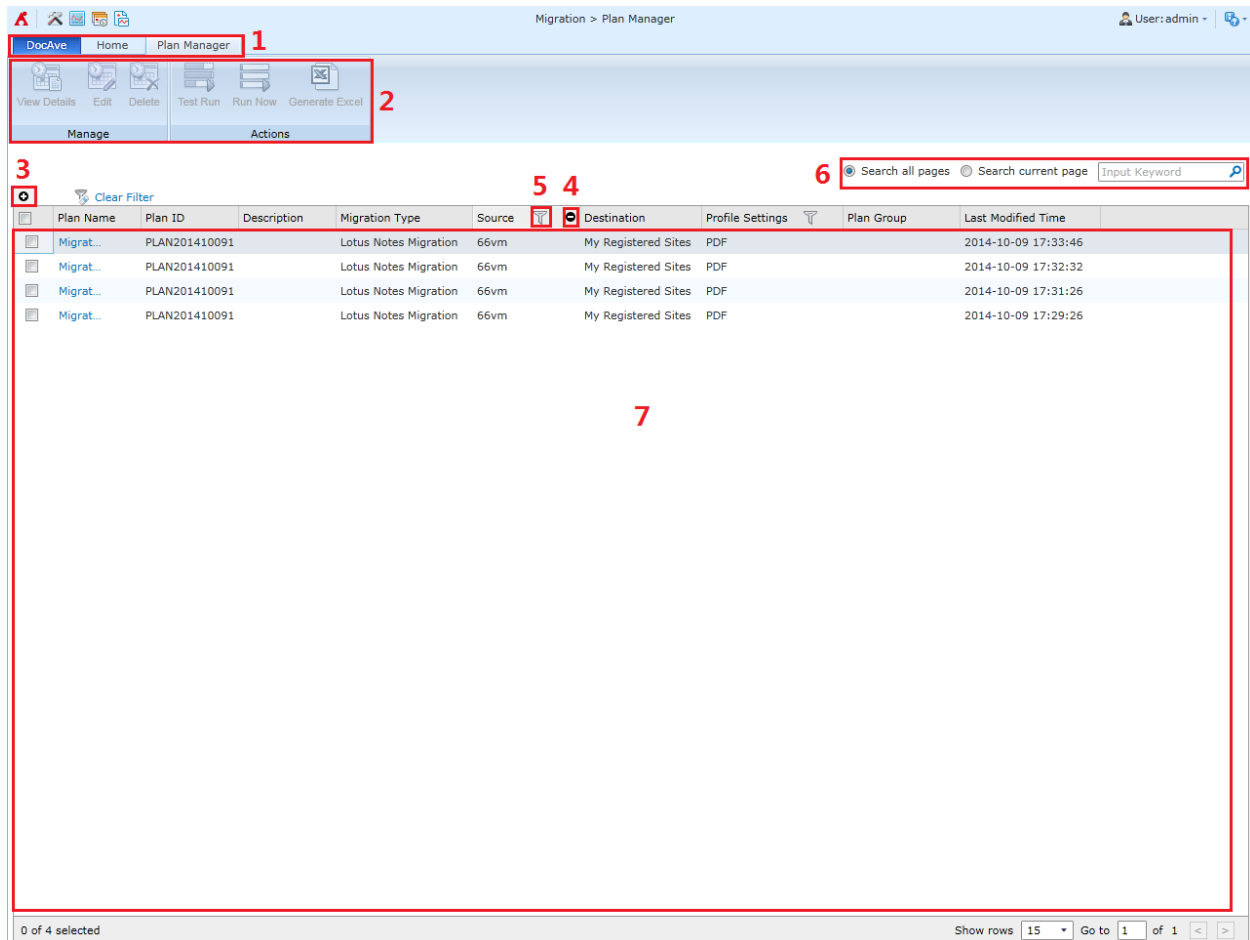




Figure 2: Navigating DocAve.

1. Ribbon Tabs – Allows users to navigate to the DocAve Welcome page and within the active modules.
2. Ribbon Panes – Allows users to access the functionality of the active DocAve module.
3. Manage columns (⊕) – Allows users to manage which columns are displayed in the list. Click the manage columns (⊕) button, and then select the checkboxes next to the column names in the drop-down list.
4. Hide the column (⊖) – Allows users to hide the selected column.

5. Filter the column () – Allows users to filter the information in the List View. Click the filter the column () button next to the column and then select the checkbox next to the column name.
6. Search – Allows users to search the List View pane for a keyword or phrase. You can select **Search all pages** or **Search current page** to define the search scope.
***Note:** The search function is not case sensitive.
7. Management Pane – Displays the actionable content of the DocAve module.

Pre-migration Configurations

Configure the following settings before performing Lotus Notes migration. Click the link to jump to the corresponding section.

- [Configuring Migration Databases](#)
- [Configuring Lotus Notes Connections](#)
- [Configuring Filter Policies](#) (Optional)
- [Configuring Mapping Settings](#) (Optional)
- [Configuring Dynamic Rules](#) (Optional)
- [Configuring Staging Locations \(Offline Jobs Only\)](#)

Configuring Migration Databases

In order to use Lotus Notes Migration, you must configure a dedicated migration database to store links and detailed job information in SQL for every farm and My Registered Sites that will be using Lotus Notes Migration. For detailed information on the Migration database schema, refer to [Appendix A: Lotus Notes Migration Database Information](#).

***Note:** The version of SQL Server required to create a migration database must be SQL Server 2005 SP1 or higher.

1. On the **Home** tab, in the **Settings** group, click **Migration Database**. The **Migration Database** page appears.
2. Select the farm or **My Registered Sites** that will be using Lotus Notes Migration.
3. Click **Configure** in the **Manage** group. The **Configure** page appears.
4. Configure the following settings for the database that will store migration job data:
 - a. **Configure Migration Database** –Specify a migration database. Enter a new **Database Server** and a **Database Name** in the corresponding fields.
 - b. **Authentication** – Select the authentication mode for the migration database.
 - **Windows Authentication** (recommended) – Select this mode to verify the user's identity by Windows.
 - By default, the **Specify a Window account** checkbox is deselected and DocAve will create a new migration database or access the existing migration database using the destination DocAve Agent account.
 - To access the database server with a specified Windows account, select the **Specify a Windows account** checkbox and select a managed account profile from the **Managed Account Profile** drop-down list, or click **New Managed Account Profile** to create a new managed account

profile in Control Panel. Then, click **Validation Test** to validate the account. For more information, refer to the [Control Panel Reference Guide](#).

- **SQL authentication** –Select this mode to verify the user’s identity by SQL Server. Enter the user’s account and password in the **Account** and **Password** fields. You can also validate the SQL database account by clicking **Validation Test**.

***Note:** The account for creating or accessing the migration database must have a server role of **db_creator** for the SQL server where you want to create the migration database and have a database role of **db_owner** for the newly created/existing migration database.

- c. **Failover Database Server** (optional) – Choose a failover database server. In the event that the migration database collapses, the data stored in the Migration database can be transferred to this standby database.

Alternatively, you can specify a Migration Database in the **Advanced** settings by entering a connection string instead of configuring the settings in Step 3.

- a. Click **Advanced**; the **Connection String** section appears.
 - b. Select the **Edit Connection String directly** checkbox to activate this feature, and then enter the connection string according to the example listed in the left pane.
 - c. Click **Validation Test** to validate the connection string. For more information about how to configure the connection string, refer to the **ConnectionString** property in **SQL Server Books Online** or **SQL Server Tutorials** by navigating to **Start > Microsoft SQL Server** (with the version you are using) > **Documentation and Tutorials**.
5. Click **Save** to finish and save the configuration, or click **Cancel** to return to the Migration Database page without saving any configurations.

To view the configuration details of a migration database, select the migration database and click **View Details** on the ribbon in the **Migration Database** page. The detailed configurations are displayed in the **View Details** interface.

Configuring Lotus Notes Connections

To use Lotus Notes Migration, you must first configure the Lotus Notes connection so that the DocAve Agents can connect to the Lotus Domino Servers. In the **Home** tab, click **Configure Connection** on the ribbon. The **Lotus Notes Connection** interface appears.

Managing Lotus Notes Connections

The **Lotus Notes Connection** interface displays all of the Lotus Notes connections that you have previously created.

In this interface, you can change the number of Lotus Notes connections displayed per page and the order in which they are displayed. To change the number of Lotus Notes connections displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the Lotus Notes connections, click on a column heading such as **Name, Agent, Notes .INI File Path, and Last Modified Time**.

Perform the following actions in the **Lotus Notes Connection** interface:

- **Create** – Click **Create** on the ribbon to create a new Lotus Notes connection. For details on creating a new Lotus Notes connection, see [Creating and Editing Lotus Notes Connections](#).
- **View Details** – Click **View Details** on the ribbon and you will see the previously configured settings for this Lotus Notes connection. Here you can also click **Edit** on the ribbon to make changes to the Lotus Notes connection's settings. You will be brought to the **Edit Lotus Notes Connection** interface where you can change this Lotus Notes connection.
- **Edit** – Click **Edit** on the ribbon to change the configurations for this Lotus Notes connection. For details on editing configurations for a Lotus Notes connection, see [Creating and Editing Lotus Notes Connections](#).
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected Lotus Notes connections, or click **Cancel** to return to the **Lotus Notes Connection** interface without deleting the selected Lotus Notes connections.

Creating and Editing Lotus Notes Connections

To create a new Lotus Notes connection, click **Create** on the ribbon. To modify a Lotus Notes connection, select the Lotus Notes connection, and then click **Edit** on the ribbon.

In the **Create Lotus Notes Connection** or **Edit Lotus Notes Connection** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for the Lotus Notes connection. Then enter an optional **Description** for this Lotus Notes connection for future references.
2. **Connection** – Configure the following settings to connect the Lotus Notes Domino Server to the source DocAve Agent.
 - **Agent** – Select your desired DocAve Agent installed in Lotus Notes environment from the drop-down list.
 - **NOTES .INI file path** – Notes .INI files can be found in the Lotus Notes server. A default path is entered automatically. You can also enter the path by yourself, but make sure that the path you enter is the absolute path where Notes .INI file locates.
 - **User ID file** – Click **here** to load the user ID file, then select one from the drop-down list.

- **Password** – Enter the password of the user that you have selected in User ID file. Click the **Validation Test** button to check the password.
3. Click **Save** to save the configurations and return to the **Lotus Notes Connection** interface, or click **Cancel** to return to the **Lotus Notes Connection** interface without saving any changes.

Configuring Filter Policies

Filter Policy allows you to set up filter rules so that you can control which documents within the Lotus Notes databases appear so you can target content more precisely. By setting up and saving filter policies, you can apply the same filter policies to different Lotus Notes migration plans without having to recreate them each time.

To access Filter Policy, click **Profile Settings** on the ribbon in the **Home** tab. On the **Profile Settings** page, click **Filter Policy** on the ribbon.

The **Filter Policy** interface displays any Filter policies that you have previously configured.

In this interface, you can change the number of filter policies displayed per page and the order in which they are displayed. To change the number of filter policies displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the filter policies, click on a column heading such as **Filter Policy Name**, and **Description**.

Perform the following actions in the **Filter Policy** interface:


- **Create** – Click **Create** on the ribbon to create a new filter policy. For details on creating a new filter policy, see [Creating and Editing Filter Policies](#).
- **Edit** – Click **Edit** on the ribbon to change the configurations for this filter policy. For details on editing configurations for a filter policy, see [Creating and Editing Filter Policies](#).
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected filter policies, or click **Cancel** to return to the **Filter Policy** interface without deleting the selected filter policies.

Creating and Editing Filter Policies

To create a new filter policy, click **Create** on the ribbon. To modify a filter policy, select the filter policy, and then click **Edit** on the ribbon.

In the **Create Filter Policy** or **Edit Filter Policy** interface, configure the following settings:

1. **Name** – Enter a **Name** for this filter policy.
2. **Description** – Enter an optional **Description**.
3. **Filter Rule** – Filters content that you want to migrate by setting up a set of filter criteria. Follow the steps below to set up your own filter rules.
 - a. Select **Time Range** or **Attachment** as the filter criteria.
 - If you choose **Time Range**, Lotus Notes documents are filtered according to the created time or modified time.

- If you choose **Attachment**, the attachments within Lotus Notes documents are filtered according to the size or type of attachments.
- b. Click **Add a Filter Level Group** to add a filter rule. The filter rule configuration field appears.
 - For **Time Range** – Select **Created Time** or **Modified Time** from the drop-down menu. In the **Condition** column, select **Before**, **After**, **Within**, or **Older Than**. Set up Time Zone and the exact time in the **Value** column.
 - For **Attachment** – In the **Rule** column, select **Size** or **Type** from the drop-down menu.
 - **Size** – In the **Condition** column, select **> =** or **< =**, and then enter your desired value in the **Value** column. Then choose **KB**, **MB**, or **GB**.
 - **Type** – In the **Condition** column, select **Contains**, **Does Not Contain**, **Equals**, or **Does Not Equal**, and then select or enter a file type in the **Value** column.
- c. Click the delete () button to delete the specified criterion or filter level. You can change the logical relationship between the criterions.
- d. Repeat step a and b to add more filter rules.

The logic options **And** and **Or** are selectable. By default, the logic is set to **And**. Change the logic to **Or** by selecting it from the drop-down list.

- **And** – The content that meets all the criterions will be filtered to be included.
- **Or** – The content that meets any one of the criterions will be filtered to be included.

Basic Filter Conditions – View the logical relationship of the filter rules in this area.

For example, if the logical relationship is ((1 And 2) Or 3) in the **Basic Filter Condition** area, the content that meets both filter rule 1 and filter rule 2, or that meets the filter rule 3, will be included.

4. Click **Save** to save the configurations and return to the **Filter Policy** interface, or click **Cancel** to return to the **Filter Policy** interface without saving any changes.

Configuring Mapping Settings

Before performing a Lotus Notes migration job, you can define optional User Mapping, Group Mapping, and Permission Mapping. Refer to the following sections to learn how to configure the mapping settings.

User Mapping

User mapping maps an existing source node username to SharePoint user in the destination. During migration, Migrator will replace the source username with your specified username in the destination.

To access User Mapping, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **User Mapping** on the ribbon. The **Control Panel** appears.

For specific instructions on setting up user mapping, refer to the [Control Panel Reference Guide](#). Make sure that the source username that you input in the column of **Source Username** is one of the following formats:

- username/orgname
- username/orgname/orgname
- username/orgname/orgname/orgname

The organization in Lotus Notes can be multilevel and here the orgname you enter can also be multilevel.

Group Mapping

Use group mapping to map an existing source group name to a SharePoint group. During the migration, Migrator will replace the source group name with your specified group name in the destination node.

To access Group Mapping, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **Group Mapping** on the ribbon. The **Control Panel** appears.

For specific instruction on setting up user mapping, refer to the [DocAve 6 Control Panel Reference Guide](#).

Permission Mapping

Permission mapping allows you to map permissions in the source to SharePoint permissions in the destination. During the migration, Migrator will replace the source permission with SharePoint permission levels of Default Permission Mapping or your specified permission levels in the destination node.

***Note:** If a user mapping and a permission mapping are combined, the permission of the destination user is the merged result of the mapped user's permission and the mapped permission.

For example, there is **User A** who has the permission of **Read** in the source Lotus Notes and **User B** who has the permission of **Design** in the destination SharePoint. In User Mapping, you map User A to User B. In Permission Mapping, you map Read to Contribute. After the migration job is finished, the permission of User B is **Design + Contribute**.

To access Permission Mapping, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **Permission Mapping** on the ribbon. In the **Permission Mapping** interface, any permission mappings that you have previously created are displayed in the main display pane.

Managing Permission Mappings

In this interface, you can change the number of permission mappings displayed per page and the order in which they are displayed. To change the number of permission mappings displayed per page, select the desired number from the Show rows drop-down list in the lower right-hand corner. To sort the permission mappings, click on a column heading such as **Name** and **Description**.

Perform one of the following actions on a selected permission mapping:

- **Create** – Click **Create** on the ribbon to create a new Permission Mapping. For details on creating a new Permission Mapping, see [Creating and Editing Permission Mappings](#).
- **View Details** – Click **View Details** on the ribbon and you will see the previously configured settings for this permission mapping. Here you can also click **Edit** on the ribbon to make changes to the permission mapping's settings. You will be brought to the Edit Permission Mapping page where you can change this permission mapping.
- **Edit** – Click **Edit** on the ribbon to change the configuration of this permission mapping. For details on editing permission mapping, see [Creating and Editing Permission Mappings](#).
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected permission mappings, or click **Cancel** to return to the Permission Mapping without deleting the selected permission mappings.

Creating and Editing Permission Mappings

To create a new permission mapping, click **Create** on the ribbon. To edit a previously configured permission mapping, select the permission mapping and then click **Edit** on the ribbon.

In the **Create** or **Edit Permission Mapping** interface, configure the following settings:

1. **Name and Description** – Enter a name for the permission mapping that you are about to create or edit. Then enter an optional **Description**.
2. **Permission Mapping** – Set up the mapping of Lotus Notes permissions to SharePoint permissions. Choose one previously configured SharePoint permission level from the **SharePoint Permission Level** drop-down list. We do not recommend changing the default permission mapping. If there is no SharePoint permission level that meets your requirements, you can click **New SharePoint Permission Level** from the drop-down list to create a new one. For details on creating a new SharePoint permission level, refer to [Creating and Editing SharePoint Permission Levels](#).

SharePoint Permission Levels

You can manage SharePoint Permission Levels by creating a new level, viewing the details of a level, editing a level, or deleting a level.

To access Manage SharePoint Permission Level, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **Permission Mapping** on the ribbon. In the **Permission Mapping** interface, click **Manage SharePoint Permission Level** on the ribbon.

The **Manage SharePoint Permission Level** interface displays any permission levels that you have previously created.

In this interface, you can change the number of SharePoint Permission Levels displayed per page and the order in which they are displayed. To change the number of SharePoint Permission Levels displayed per page, select the desired number from the **Show rows** drop-down list in the lower right-hand corner. To sort the SharePoint Permission Levels, click on a column heading such as **Name** and **Description**.

Perform the following actions in the **Manage SharePoint Permission Level** page.

- **Create**— Click **Create** on the ribbon to create a new SharePoint Permission Level, for details on creating a new SharePoint Permission Level, see [Creating and Editing SharePoint Permission Levels](#).
- **View Details** — Click **View Details** on the ribbon and you will see the previously configured settings of a customized permission level or the default setting of a default SharePoint Permission Level.
- **Edit** — Click **Edit** on the ribbon to change the configurations for this SharePoint Permission Level. For details on editing configurations for a SharePoint Permission Level, refer to [Creating and Editing SharePoint Permission Levels](#).

***Note:** Default SharePoint Permission Levels are displayed as default, including Contribute, Design, Edit, Full Control, Read, and View Only. They are not editable.
- **Delete** — Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected SharePoint Permission Levels, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without deleting the selected SharePoint permission levels.

Creating and Editing SharePoint Permission Levels

To create a new SharePoint Permission Level, click **Create** on the ribbon. To modify a SharePoint Permission Level, select the level, and then click **Edit** on the ribbon.

In the **Manage SharePoint Permission Level** interface, configure the following settings:

1. **Name and Description** — Enter a **Name** for this permission level that you are about to create or edit. Then enter an optional **Description**.
2. **Permissions** — Choose which permissions to include in this permission level. You can select permissions from the List, Site, and Personal Permissions levels by selecting the checkbox before a specified permission. Select the **Select All** checkbox to select or clear all permissions.
3. Click **Save** to save the configuration and return to the **Manage SharePoint Permission Level** interface, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without saving any change.

Configuring Dynamic Rules

Dynamic rules map the Lotus Notes field names and the corresponding values to SharePoint column names and column values using the DLL files, which are customized in C#.

Managing Dynamic Rules

To access Dynamic Rule, click **Profile Settings** on the ribbon of **Home** tab. In the **Profile Settings** tab, click **Dynamic Rule** on the ribbon.

In the **Dynamic Rule** interface, you will see a list of previously configured dynamic rules.

In this interface, you can change the number of dynamic rules displayed per page and the order in which they are displayed. To change the number of dynamic rules displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the dynamic rules, click on a column heading such as **Name**, **Description**, **DLL File Name**, and **Last Modified Time**.

You may perform the following actions to a Dynamic Rule:

- **Create** – Click **Create** on the ribbon to create a dynamic rule. For detailed on creating a new dynamic rule, refer to [Creating and Editing Dynamic Rules](#).
- **View Details** – Click **View Details** on the ribbon and you will see the previously configured settings for this dynamic rule. Here you can also click **Edit** on the ribbon to make changes to the dynamic rule's settings. You will be brought to the Edit dynamic rule page where you can change this dynamic rule.
- **Edit** – Click **Edit** on the ribbon to change the configuration of this dynamic rule. For details on editing dynamic rule, refer to [Creating and Editing Dynamic Rules](#).
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected dynamic rule, or click **Cancel** to return to the dynamic rule without deleting the selected dynamic rules.

Creating and Editing Dynamic Rules

To create a new dynamic rule, click **Create** on the ribbon. To edit a dynamic rule, select the rule, and then click **Edit** on the ribbon.

In the **Create Dynamic Rule** interface or **Edit Dynamic Rule** interface, configure the following settings:

1. **Name and Description** – Enter a name for the dynamic rule that you are about to create or edit. Then enter an optional description.
2. **Upload a DLL File** – Click **Browse**, and then navigate to the DLL file you want to use. Select the DLL file and then click **Open**.

***Note:** AvePoint provides a sample code for the DLL file. Click the **Download the Sample Code** link in the left description to download the sample code.

3. Click **Save** to save the configuration and return to the Dynamic Rule interface. Click **Cancel** to return to the Dynamic Rule interface without saving any configuration or changes.

Configuring Staging Locations (Offline Jobs Only)

The Staging Location feature is a mandatory requirement of an offline Lotus Notes Migration. There are two staging location modes: Export Mode and Import Mode. Export Mode is used to set up an export location where you will store offline migration data. Import Mode migrates exported data to the destination farm.

To access Staging Location settings, complete the following steps:

1. Click **Export** or **Import** in the **Plan** group on the ribbon to enter Export mode or Import mode.
2. Click **Staging Location** in the **Settings** group on the ribbon; the **Staging Location** interface appears.

Managing Staging Location

In both Export Mode and Import Mode in the **Staging Location** interface, all previously created staging locations are displayed in the main display pane.

In this interface, you can change the number of stage locations displayed per page and the order in which they are displayed. To change the number of staging locations displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort export locations, click on a column heading such as **Export Location Name**, **Agent**, and **Last Modified Time**. To sort import locations, click on a column heading such as **Import Location Name**, **Farm**, and **Last Modified Time**.

Perform the following actions in the **Staging Location** interface:

- **Create** – Click **Create** on the ribbon to create a new staging location. For details on creating a new staging location, see [Creating and Editing Staging Locations](#).
- **View Details** – Click **View Details** on the ribbon and you will see the previously configured settings for this staging location. Here you can also click **Edit** on the ribbon to make changes to the staging location's settings. You will be brought to the **Edit Export Location** page where you can change the settings of this staging location.
- **Edit** – Click **Edit** on the ribbon to change the configurations for this staging location. For details on editing configurations for a staging location, refer to [Creating and Editing Staging Locations](#).
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected staging locations, or click **Cancel** to return to the **Staging Location** interface without deleting the selected staging locations.

Creating and Editing Staging Locations

To create a new staging location, click **Create** on the ribbon. To modify a staging location, select the staging location, and then click **Edit** on the ribbon.

Export Mode

In the **Create Staging Location for Export Mode** or **Edit Staging Location for Export Mode** interface, configure the following settings:

1. **Name and Description** – Enter a name for the export location that you are about to create. Then enter an optional description.
2. **Agent and Path** – Configure the following settings to specify an export location to store the offline migration data.
 - **Agent** – Select the DocAve Agent installed in the source environment for the export location that you are about to create from the drop-down list.
 - **UNC path** – Enter a Universal Naming Convention (UNC) path as the location where the exported data will be stored in the **UNC path** text box. For example, \\admin-PC\c\$\data or \\admin-PC\shared folder
 - **Managed Account Profile** – Select a managed account profile from the drop-down list to set up access to the UNC path, or click **New Managed Account Profile** to create a new one. For details, refer to the [Control Panel Reference Guide](#), and then click **Validation Test** to validate the account.
3. Click **Save** to complete the configuration of the export location for Export Mode.

Import Mode

In the **Create Staging Location for Import Mode** or **Edit Staging Location for Import Mode** interface, configure the following settings:

1. **Name and Description** – Enter a name for the import location that you are about to create. Then enter an optional description.
2. **Farm and Path** – Configure the following settings to designate the import location where to retrieve the exported data and specify a farm where you wish the exported data to be migrated to.
 - **Farm** – Select your desired destination farm that the exported data will be imported to from the **Farm** drop-down list.
 - **UNC path** – Enter the UNC path which has been configured in **Staging Location for Export Mode** and has stored the exported data to get the data.
 - **Managed Account Profile** – Select a managed account profile from the drop-down list to set up access to the UNC path, or click **New Managed Account Profile** to create a new one. For details, refer to the [DocAve 6 Control Panel Reference Guide](#). Then, click **Validation Test** to validate the account.
3. Click **Save** to complete the configuration of the import location.

About Online Migrations

An Online Migration job migrates content, configurations, securities, and metadata from a source Lotus Notes environment to a destination SharePoint environment when a network connection between the source and destination is available.

Online Migration Overview

To perform Online Migration jobs, the following steps must be performed in this order. Click the link to jump to the corresponding section.

1. [Pre-migration Configurations](#)
 - [Configuring Migration Databases](#)
 - [Configuring Lotus Notes Connections](#)
 - [Configuring Filter Policies](#) (Optional)
 - [Configuring Mapping Settings](#) (Optional)
 - [Configuring Dynamic Rules](#) (Optional)
2. [Setting Up a Lotus Notes Online Migration Profile](#)
 - a. [Migration Options](#)
 - b. [Mapping Options](#)
 - c. [Advanced Options](#)
3. [Performing a Lotus Notes Online Migration](#)
 - a. [Select the Source and Destination Nodes](#)
 - [Creating Containers](#)
 - b. Select one of the following methods to perform an online migration
 - [Configuring the Run Now Interface](#)
 - [Configuring the Save As New Plan Interface](#)

Setting Up a Lotus Notes Online Migration Profile

While it is theoretically possible to run an Online Migration job without configuring the settings described in the sections below, it is **strongly** recommended that you configure these settings in order to ensure appropriate content management during migration.

The Online Migration Profile allows you to define numerous settings for the migration jobs, including: Migration Options, Filter Options, Mapping Options, and Advanced Options. Follow the instructions below to create an Online Migration Profile.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. On the **Profile Settings** tab, in the **Plan Mode** group, select **Online Mode**.
3. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.
5. Select the **Migration Options** from the left-hand pane. Select a **Migration Options Sub-Profile** from the drop-down list. For details about this section, refer to [Migration Options](#).
6. Select the **Filter Options** from the left-hand pane and select a Filter Policy from the drop-down list. Or click **New Filter Policy** from the drop-down list to create a new filter policy. For details on creating a filter policy, refer to [Creating and Editing Filter Policies](#).
7. Select the **Mapping Options** from the left-hand pane. Select a **Mapping Options Sub-Profile** from the drop-down list. For details about this section, refer to [Mapping Options](#).
8. Select the **Advanced Options** from the left-hand pane and configure the **Dynamic Rule**, the **Character Length Settings** and the **Illegal Character Replacement Settings**. For details about this section, refer to [Advanced Options](#).
9. Click **Save** to save the profile or click **Save As** and enter a profile name to save it as new profile. Select **Save and replace existing profile** to replace the original profile.

Migration Options

Migration options allow you to configure which content settings and security settings can be migrated. Set up a Migration Options Sub-Profile by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. From the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.
3. Click **Migration Options** on the left-hand pane.
4. In the **Sub-profile** group, click **Edit Sub-profile** to make the **Migration Options** field active.
5. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
6. Enter a sub-profile name in the pop-up window and click **OK**.
7. Click the **Content** tab to configure common settings for this Migration Options. You can configure the following settings:
 - **Document Format Option** – This is used to specify the document type that the Lotus Notes document will be converted to after the migration. Select the **Convert Lotus Notes documents to** checkbox and select one kind of document format from the drop-down list. There are six types that you can choose to convert the Lotus Notes document

to: .docx, .doc, InfoPath, pdf, .aspx, and html. If you choose a library as the destination node, the converted document will be generated in the library as a file. If you choose a list as the destination node, the converted document will be added as an attachment of the item that is generated from the Lotus Notes document.

If do not select the **Convert Lotus Notes documents to** checkbox, the Lotus Notes document will generate an item only after the migration.

***Note:** DocAve supports converting Lotus Notes documents to Microsoft Office InfoPath. You need configure **Generate InfoPath Mapping and Publish InfoPath Template** by Migrator Tool. If you select InfoPath, make sure that you have generated the InfoPath mapping and published the InfoPath template by Migrator Tool.

- **Create Folders by Field Values** – This is used to classify the items generated from Lotus Notes documents in a list by putting these items into folders named by specific field values. Select the **Migrate Lotus Notes documents into folders named by field values** checkbox and then enter a field name in the text box. If the source field values contains separator, enter the separator in the text box and choose the folder structure, **Nested** or **Parallel**. By default, the separator \ is provided. For example, the field values is “A\B” and you entered \ as the separator. If you choose to create nested folders, a folder B is created under folder A. If you choose to create parallel folders, a folder A and folder B are created in the same level.
- **Item Number Limitation** – Limit the number of items in a list or library in SharePoint by selecting the **Create multiple lists/libraries during migration when the number of list/library items exceeds** checkbox. The default number is 5000. You can change the number to decide how many items a list or library can contain. If you select this option, additional lists or libraries are created when the number of items in a list or library exceeds the limit. A numerical suffix (1, 2, 3...) will be added to additional lists' or libraries' name.
- **Image Option** – Normally if you select a list as the destination, embedded images in Lotus Notes documents are added as attachments to the items that are generated from Notes documents. If you select a document library as the destination, embedded images in Lotus Notes documents are migrated to the document library, along with the items that are generated from Notes documents. To extract the embedded images from the list or document library and collect them in a picture library in SharePoint, select the **Extract embedded images into Picture Library** checkbox. **Lotus Notes Picture Library** is provided as the default name of the picture library. You can customize this name.
- **Link Tracking Option** – Select this option to prevent broken links. Links are broken when the source DocLinks are migrated to the destination, but the objects that the DocLink points to are not migrated to the destination. When you select the **Redirect to the Lotus Notes Link Tracking Page for the DocLinks pointing to a migrated object** checkbox, the DocLinks that point to the migrated objects are directed to the Link Tracking Page, which will redirect to the objects in SharePoint. If this option is unselected, the DocLinks that point to a successfully migrated object are directed to the destination object URLs in SharePoint. When the DocLinks point to objects that are not migrated to the

destination, regardless of which option is selected, the viewer is directed to the Link Tracking Page.

***Note:** To select this option, make sure that you have deployed the **SP2010LotusNotesLinkTracking Solution** or the **SP2013LotusNotesLinkTracking Solution** in **Control Panel > Solution Manager**.

- **Lotus Notes Attachment Migration Option** – Places Lotus Notes document attachments in a separated document library in SharePoint. Select the **Migrate attachment to a separated Document Library** checkbox. **Lotus Notes Attachment Library** is provided as the default name of the destination document library. You can also customize the name by entering a document library name in the text box.

***Note:** This option only takes effect when the destination node is a Custom List, Discussion Board, Contacts, Calendar, or Wiki Page Library.

- **Folder Creation Option** (Only for migrating to a document library or a folder within a document library) – Classifies items generated from Lotus Notes documents in a document library by putting items into folders generated by DocAve. Folders are named by the source subject. Select the **Create folder for the migrated documents in destination** checkbox and the document, response, and response to response with the same subject will be migrated into the folder. With this option checked, you can also select the **Migrate reply documents into sub-folder of main topic** checkbox to migrate responses and response to responses into the sub-folders.
- **Document Set Option** (Only for migrating to document library or folder) – Migrates Lotus Notes documents to SharePoint document sets. Select the **Migrate Lotus Notes documents to SharePoint Document Set** checkbox and the property and security of the source data are kept during the migration. The attachments within the Lotus Notes documents are migrated to the document set within the document library, and you can manage the property and security in destination.
- **Default List Template** – Allows users to choose a default list template that will be used as the destination list template when you choose a site collection or a site as the destination node. Select a list template from the **Default list template** drop-down list.

***Note:** The list that you saved as template in SharePoint can be used as the default list template.

8. Click the **Security** tab to configure list permission inheritance and item permission inheritance.

- **User and Group** – Choose whether to migrate the source Lotus Notes users and groups to SharePoint.
- **Security** – When the **Migrate user and group** checkbox selected in the section above, you can also choose to migrate the security of the source users and groups.
- **List Permission Inheritance** (this section is only available when the **Migrate security** checkbox is selected in the section above) – Choose whether a list that is migrated from Lotus Notes database will inherit its parent site's permissions in the destination. Choose **Do not inherit parent site permission** for a list to not inherit permissions of its parent

site or choose **Inherit parent site permission** for a list to inherit permissions of its parent site.

- **Item Permission Inheritance** (this section is only available when the **Migrate security** checkbox is selected in the section above) – Choose whether an item which is migrated from Lotus Notes document will inherit its parent list permission in the destination. Choose **Inherit parent list permission** for an item to inherit permissions of its parent list or choose **Keep source inheritance relationship** for an item to keep the permission inheritance relationship in Lotus Notes.
9. Click **Save** to save the sub-profile. Alternatively, click **Save As** and enter a sub-profile name to save it as another profile. Select **Save and replace existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Mapping Options

Mapping options allow you to configure list mapping, content type mapping, security mapping, and dynamic mapping. Set up a Mapping Options Sub-Profile by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** interface appears.
2. From the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.
3. Click **Mapping Options** on the left-hand panel, and from the **Profile Settings** tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the **Mapping Options** field active.
4. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
5. Enter a sub-profile name in the pop-up window and click **OK**.
6. Click the **List Mapping** tab and configure the following settings to map the Lotus Notes database to the specified list.
 - a. Click **Add a List Mapping** and then a mapping entry appears for you to configure relevant rules.
 - b. Double-click the text box under the **Lotus Notes Database Name** column and enter the name of the Lotus Notes database that you wish to map in the text box.
 - c. Double-click the text box under the **SharePoint List Name** column and enter the name of the SharePoint list which you wish the Lotus Notes database to be mapped to in the text box. If the specified list does not exist in the destination, a new list with the specified name will be created automatically during the migration. If you enter an existing list, make sure the list template you select in **step d** is the same as that of the existing one; otherwise a new list with the selected list template will be created in the destination during the migration. A suffix (**_1**) is added at the end of the list name.
 - d. Select a template for your specified SharePoint list from the **SharePoint List Template** drop-down list. Custom List, Document Library, Discussion Board, Contacts, Calendar,


and Wiki Page Library are provided, or enter a specified SharePoint list template name or list template ID.

***Note:** The list that you saved as template in SharePoint is supported to be used as the list template.

- e. Repeat the steps above to add more mappings.
 - f. To delete one or more previously configured list mappings, select them and then click **Delete the Selected List Mapping(s)**. You can also click the delete (✖) button to remove a previously configured list mapping.
7. Configure the Content Type Mapping. You can choose to configure content type mapping, specify an item title, and configure column mapping. Click **Content Type Mapping** on the tab to use the content type mapping that is created by the Migrator Tool or to configure the content type mapping manually.
- Choose **Use the content type mapping generated by the Migrator Tool** to automatically apply the content type mapping that you previously created with the Migrator Tool during the migration.

***Note:** If you choose to use the content type mapping generated by the Migrator Tool but have never configured the mapping using the tool, the default content type mapping will be automatically generated for use during the migration.
 - To configure the content type mapping in this page by yourself, select the **Manually configure the content type mapping** option and the **Rule** appears. Configure the following settings to set up a rule:
 - **Content Type Mapping** – This is used to map the Lotus Notes form to the specified SharePoint content type. Enter the name of a Lotus Notes form in the column of **Lotus Notes Form** and the name of a specified SharePoint content type on the column of **SharePoint Content Type**. If the SharePoint content type does not exist in the destination, a new content type with the specified name will be created automatically during the migration. If you enter an existing content type in SharePoint, you need to enable Update Content Type in configuration file. On the destination DocAve Agent server, navigate to ... \AvePoint\DocAve6\Agent\data\Migrator\LotusNotesSettings\ConfigurationFile to open **LotusNotesMigrationWorker.xml** with Notepad and change the value of <ContentTypeConfig UpdateContentType="False"> to **True**.
 - **Specified Title** –Specify a source field whose value will be used as the title of an item in SharePoint. Select the **Please specify a title** checkbox and enter the field name in the text box.
 - **Column Mapping** – Specify the SharePoint column name and SharePoint column type for the mapped Lotus Notes field. Click **Add a Column Mapping** to create a column mapping. Enter the name of a Lotus Notes field in the column of **Lotus Notes Field Name** and the name of a specified SharePoint column name in the


column of **SharePoint Column Name**. Then select a SharePoint column type for this column from the **SharePoint Column Type** drop-down list.

Repeat the steps by clicking **Add a column mapping** to add more column mappings. To delete one or more previously configured column mappings, select the mappings and then click **Delete the Selected Column Mapping(s)**. You can also click the delete () button to remove a previously configured column mapping.

***Note:** If you select **Managed Metadata**, it requires you to specify the term set path, and choose whether to allow multiple values in this column. For example, in the Term Set Path text box, System is the group name; “;” is the separator; Keywords stands for the term set. Select the **Allow multiple values** checkbox to define multiple values for the column. You can customize which separator will be used to separate multiple values in the text box. “;” is provided as default.

***Note:** If you select **Lookup**, you must configure the **Column Settings** in the pop-up window. Enter the name of the list/library you want to search, and then enter a name for this Lookup column that you are creating. Thus, you will be able to get the information from the list/library through this Lookup column. You can choose whether to allow multiple values, and designate the separator.

Click the plus (+) button beside the **Rule 1** tab to add more rules.

8. Configure the Security Mapping. Click **Security Mapping** on the tab to choose user mapping, group mapping, permission mapping, and configure AD group mapping.
 - **User Mapping** – Select a user mapping from the drop-down list or click **New User Mapping** in the drop-down list to create a new one. For details on creating a user mapping, refer to the [Control Panel Reference Guide](#).
 - **Group Mapping** – Select a group mapping from the drop-down list or click **New Group Mapping** in the drop-down list to map a source group to a SharePoint group. For details on creating a group mapping, refer to the [DocAve 6 Control Panel Reference Guide](#).
 - **AD Group Mapping** – Maps the Lotus Notes group to a specified AD group which exists in the domain of the SharePoint environment. Click **Add an AD Group Mapping**, then enter the name of the Lotus Notes group in the column of **Lotus Notes Group Name** and the name of the AD group in the column of **AD Group Name**. Repeat the steps by clicking **AD Group Mapping** to add more AD Group Mappings. To delete a one or more previously configured AD group mappings, select the mappings and then click **Delete the Selected AD Group Mapping**. You can also click the delete () button to remove a previously configured AD group mapping.
 - **Permission Mapping** – Select a permission mapping from the drop-down list or click **New Permission Mapping** to create a new one. For details on creating a permission mapping, refer to [Creating and Editing Permission Mappings](#). Note that if you do not configure or select any permission mapping, the default permission mapping will be applied during the migration.


9. Click **Save** to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Advanced Options

Advanced options allow you to configure the Dynamic Rule, the Character Length Settings and the Illegal Character Replacement Settings. Set up Advanced Options by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** interface appears.
2. From the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.
3. Click **Advanced Options** on the left-hand pane, and then the **Advanced Options** page appears. You can configure the following settings:
 - **Dynamic Rule** – Maps the source Lotus Notes field names and corresponding values to SharePoint column names and column values. Select a previously created dynamic rule or click **New Dynamic Rule** to create a new one.
 - **Character Length Settings** – Used to set character length limitations for folder name, file name, and SharePoint URL.
 - **Maximum Length of the folder name** – The default value is 60 and you can define the value between 1 and 128. If the folder name exceeds the limitation, the extra characters will be pruned from the end. For example, a folder migrated from a database is named **abcdef** in the source and the value that you set here is 5. The folder will be named **abcde** after the migration.
 - **Maximum Length of the file name** – The default value is 80 and you can define the value between 1 and 128. If the file name, including the file extension, exceeds the limitation, the extra characters will be pruned from the end. For example, a file is named **abcdef.txt** in the source and the value that you set here is 5. The file will be named **a.txt** after the migration.
 - **Maximum Length of the SharePoint URL** – The default value is 255 and you can define the value between 1 and 260. The length of the SharePoint URL is calculated from the first character of the managed path after **/**. When the folder or file's URL exceeds the limitation, the migration results are as follows:
 - If the folder URL exceeds the limitation, the folder and its content will be migrated to its previous level folder until the folder URL does not exceed the limitation. If there is a file whose URL exceeds the limitation within a folder, it will be migrated to its previous level folder until the file URL does not exceed the limitation.
 - If the file URL exceeds the limitation, the file will be migrated to its previous level folder until the file URL does not exceed the limitation.
 - **Illegal Character Replacement Settings** – This is used to replace illegal SharePoint characters with valid characters. You can modify and add the illegal character mappings

for group level, folder level, and file level to the specified characters in SharePoint. By default, all illegal characters are replaced with an underscore (_). Click **Group Level**, **Folder Level**, or **File Level** on the tab to enter into each page.

- To modify an illegal character mapping, double-click the underscore in the column of **Replace with** behind an illegal character and change _ with your specified character.
- To add an illegal character mapping, click **Add an Illegal Character** and then enter your specified illegal character in the column of **Illegal character in SharePoint** and the corresponding valid character in the column of **Replace with**. Click **Add an Illegal Character** again and another illegal character mapping can be created.
- To delete one or more illegal character mappings, select the mappings and click **Delete the Selected Illegal Character(s)**. You can also remove a previously configured illegal character mapping by clicking the delete () button.

Performing a Lotus Notes Online Migration

An online Lotus Notes Migration migrates contents, securities, and configurations from Lotus Notes to the SharePoint environment.

To start a Lotus Notes online migration job, click **Online Migration** on the ribbon.

To perform a Lotus Notes online migration job, follow the instructions below.

Select the Source and Destination Nodes

1. Click **Select Source** in the **Source** pane or in the **Actions** group on the ribbon to select the source. The **Select Source** interface appears. Configure the following settings.
 - a. **Agent** – Select a DocAve Agent installed in Lotus Notes environment from the drop-down list.
 - b. **Connection** – Select a Lotus Notes connection.
 - c. **Domino Server** – Select the Domino server of Lotus Notes. If you select **Local**, **Local Configuration** section appears.
 - d. **Local Configuration** – Enter the server name and address book name of the Domino Server to get user information.
 - e. **System Database** – Select the **Show system database** checkbox to make all databases displayed in the source tree, including the system database.
 - f. **Filter Option** – Choose what you want to display under the database node on the source tree. By default, **View** is selected and views of a database in Lotus Notes will be available for selection in the source tree. If you want to filter a document, response or response to response as the source node, select **Document by Notes Formula** and enter a formula in the text box below **Define a formula to filter the documents**. Make sure that the formula you enter is in the format as the example below shows:

For example, Categories="", readers="" |From="" & Categories=""! Form="".

***Note:** “|”, “&”, and “!” are supported in the criteria rule. “|” stands for “or”. “&” stands for “and”. “!” stands for “not”.
 - g. Click **OK** to complete configuration of selecting source. On the source tree, you can also filter the objects that can be displayed under a database node. Right-click a database and click **Filter**. In the **Filter** window, select the **Enable filter for the current database** checkbox. Then, choose one of the following options:
 - **View** – Views of the current database will be displayed under the database node.

- **Documents by Lotus Notes formula** – Define a Lotus Notes formula to filter the documents. The documents filtered by the formula will be displayed under the database node. Enter a formula in the text box. Make sure that the formula is in the format as the example below shows:

For example, Categories="", readers="" |From="" & Categories=""! Form="".

***Note:** “|”, “&”, and “!” are supported in the criteria rule. “|” stands for “or”. “&” stands for “and”. “!” stands for “not”.

Click **OK** to complete the configurations and close the **Filter** window.

To change the source, click **Change Source** in the source pane or in the **Actions** group on the ribbon. Then repeat the steps described above.

- Select the node whose data you wish to migrate. If working with a large environment, enter the name of the node (for example, database, view and item) into the **Input Keyword** text box to search for the desired node. You can only search out the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search out. When entering the keyword, the search result will be displayed with a little time.
- Select the source node by selecting the corresponding checkbox.

***Note:** For detailed information about what kinds of source contents are supported and unsupported in the migration, refer to [Supported and Unsupported Elements in Lotus Notes Migrator](#), [Supported and Unsupported Lotus Notes Document Elements](#), and [Supported and Unsupported Lotus Notes Views and Fields](#).

- In the **Destination** pane, click the farm name or **My Registered Sites** to expand the data tree. To select the destination node:

***Note:** Make sure that you have configured the migration database; otherwise the destination farm or the SharePoint Online site will be unavailable. For details on configuring a migration database, refer to [Configuring Migration Databases](#).

- Find the node which you wish to migrate the source data to. If working with a large environment, enter the keyword of the node (for example, site URL, site title, or site/list/folder name) into the **Input Keyword** text box to search for the desired node. You can only search out the nodes whose name is displayed in the currently expanded tree. The nodes that are not displayed in the expanded tree cannot be searched.
- To narrow down the search criteria and display fewer nodes on the tree, right-click the specified node and select **Advanced Search**. In the **Advanced Search** interface, click **Add a Criterion** and configure the following settings:
 - Rule** – Select the rule for this search. The table below lists the supported rules for each node that is supported for Advanced Search.

| Environment | Node | Rule |
|---|-----------------------|-----------------------|
| SharePoint On-Premises | Farm Level | Web Application: URL |
| | Web Application Level | Site Collection: Name |
| | | Site Collection: URL |
| | Sites | Site: Name |
| | | Site: URL |
| | Lists | List/Library: Name |
| | | List/Library: URL |
| | Folders | Folder: Name |
| | | Folder: URL |
| SharePoint Online (My Registered Sites) | Sites | Site: Name |
| | | Site: URL |
| | Lists | List/Library: Name |
| | | List/Library: URL |
| | Folders | Folder: Name |
| | | Folder: URL |

- ii. **Condition** – Select the condition for the rule from the drop-down list.
- iii. **Value** – Enter the value for the rule in the text box.

To add more criteria, click **Add a Criterion**, and repeat the steps above. You can change the logical relationships between the criteria by clicking the **And** or **Or**. By default, the logical relationship is set to **And**. **And** means that the child nodes that meet all of the criteria will be included in the result. **Or** means that the child nodes that meet any criterion will be included in the result. The **Basic Filter Condition** area displays the logic relationships of filter criteria.

Click **Search** to start searching the child nodes.

- c. Select the destination node by clicking corresponding radio button. You can also create a new site collection, site, list or folder by entering the specified name and click **Create Container**. For details on creating containers, refer to [Creating Containers](#).

***Note:** When creating a library or list, the list that you saved as template in SharePoint can be loaded in the **Category** drop-down list. You can select it as the template to create a library or list. Only the list template with the type of Custom List, Document Library, Discussion Board, Contacts, Calendar, and Wiki Page Library can be loaded.

3. There are two methods to saving and/or running this job:

- Click **Run Now** to perform a migration job immediately, and then the **Run Now** interface appears. For more information on how to configure the **Run Now** interface, refer to [Configuring the Run Now Interface](#).

- Click **Save As New Plan**, and then you are brought to the **Save As New Plan** interface. For more information on how to configure the **Save As New Plan** interface, refer to [Configuring the Save As New Plan Interface](#).

Creating Containers

Containers are created in the destination prior to a migration in order to store the migrated content. The destination container in Lotus Notes Migration can be a site collection, site, list, library, or folder.



DocAve allows you to create containers in SharePoint without leaving the DocAve interface, allowing you to perform migration tasks without having to use SharePoint to create all of the necessary containers in the destination.

To create a container, in the Destination pane, enter the name of a new container in the available field, and then click **Create Container**. The **Create Container** interface will pop up. Depending on the container type you are creating, configure the settings for each type of container as such:

***Note:** When creating a folder, no settings need to be configured, and clicking **Create Container** at folder level will create a folder immediately.

Creating a Site Collection

Configure these settings in the Create Site Collection page:

- **Title and Description** – Enter the **Title** of the new site collection and a **Description** for future references.
- **Template Selection** – Select the desired language from the **Select a language** drop-down list. Then select a site template for this new site collection. Click on a tab to access the templates listed in that category, or click on the **Custom** tab and select **Select Template Later...** to not choose a template upon creation.
- **Primary Site Collection Administrator** – Enter the **Username** of the primary administrator for this site collection. Then click the check () button to check whether the user is valid, or click the browse () button to select people and groups in a new page.
- **Secondary Site Collection Administrator** – Enter the **Username** of the secondary administrator for this site collection.
- **Quota Template** – Select the storage quota template to apply to this site collection.
- **Content Database** – Select the Content Database for this site collection

Click **OK** to create the new site collection, or click **Cancel** to close the Create Container interface.

***Note:** Lotus Notes Migrator only supports creating on-premises SharePoint site collections.

Creating a Site

Configure these settings in the Create Site page:

- **Title and Description** – Enter the **Title** of the new site and a **Description** for future references.
- **Template Selection** – Select the desired language from the **Select a language** drop-down list. Then select a site template for this new site. Click on a tab to access the templates listed in that category.
- **Permissions** – Select **Use unique permissions** to allow a unique set of users access to this new site. Select **Use same permissions as parent site** to allow the same users who can access the parent site access to this new site.
- **Navigation** – Select the **Yes** radio button if you want a link to this site to appear in the Quick Launch and top link bar of the parent site.
- **Navigation Inheritance** – Select **Yes** to use the top link bar from the parent site.

Click **OK** to create the new site, or click **Cancel** to close the **Create Container** interface.

Creating a List/Library

Configure these settings in the Create List page:

- **Object Type** – Choose whether you wish to create a **List** or **Library** by selecting the corresponding radio button.
- **Category** – Select the category for the new list or library.
- **Navigation** – Select **Yes** if you want to display the library/list on the Quick Launch.

If you select **Library** as the object type and select **Document Library** as the category, configure the following settings:

- **Document Template** (for Library only) – For a new library, select a document template from the drop-down list to determine the default for all new files created in this document library.
- **Document Version History** (for Document Library, Form Library) – Select **Yes** to create a version each time you edit a file in this library.

Click **OK** to create the new list or library, or click **Cancel** to close the **Create Container** interface.

Configuring the Run Now Interface

In the **Run Now** interface, configure the following settings to perform a migration job immediately:

1. **Conflict Resolution** – Specify the conflict resolution when the item name in the Lotus Notes conflicts with an existing item in the SharePoint. For the **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge required you to check the lower objects, and configure the **Content Level** conflict resolution. Skip provides the configuration of the content level conflict resolution optional. For details about conflict resolution, refer to [Appendix D: Conflict Resolution](#).

2. **Profile Selection** – Configure the related migration options, mapping options and advanced options for the migration job. Select a previously configured profile from the drop-down list. Lotus Notes Migration provides you a default main profile named **Default Profile**.
3. **Destination Agent Group** – Select a destination agent group to execute the migration job. An agent group can contain multiple agents for load balancing and better performance.
***Note:** This section only appears when the destination node is in SharePoint on-premises.
4. **Migration Database** – Check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, click **Details**. The Agent Name and Status are displayed. Ensure that the database is available; otherwise the migration job will fail.
5. **Notification** – Select the e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the [Control Panel Reference Guide](#).
6. **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to be migrated and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.
7. Click **OK** to run the job immediately or click **Cancel** to return to the **Home** page of Online Migration.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings to create a new migration plan.

1. **Plan Name** – Enter a name for the plan that you are about to create. Then enter an optional **Description** for future references.
2. **Profile Selection** – Configure the related migration options, mapping options and advanced options for the migration job. Select a previously configured profile from the drop-down list to apply the migration settings to the migration job. Lotus Notes Migration provides you a default main profile named **Default Profile**.
3. **Destination Agent Group** – Select a destination agent group to execute the migration job. An agent group can contain multiple agents for load balancing and better performance.
***Note:** This section only appears when the destination node is in SharePoint on-premises.
4. **Schedule Selection** – Select one type of schedule to run the plan.
 - **No schedule** – Select this option to run the plan manually.
 - **Configure the schedule myself** – Select this option and the **Schedule Settings** section appears under Schedule Selection.
***Note:** If the Domino Admin, Lotus Notes, Domino Designer, or Migrator Tool is being used while the job is running, the job may fail. Ensure that none are being used while the job is running.

5. **Schedule Settings** – Click **Add Schedule** to create a new schedule. For details about configuring a schedule, refer to [Configuring the Add Schedule Interface](#). To preview a configured schedule, select the schedule and click **Calendar View** to view it in a calendar. You can delete a previously configured schedule by clicking the delete (X) button behind a corresponding schedule.

***Note:** This section only appears when you choose **Configure the schedule myself**.

6. **Notification** – Select the e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the [Control Panel Reference Guide](#) when a certain triggering event occurs.
7. **Associated Plan Group** – Select an associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the [DocAve 6 Control Panel Reference Guide](#).
8. **Migration Database** – Check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, click **Details**. The Agent Name and Status are displayed. Ensure that the database is available; otherwise the migration job will fail.
9. When finished configuring the plan, select one of the following options:
 - Click **Save** to save the plan you have configured. The **Plan Manager** interface appears. For more information, refer to [Managing Plans](#).
 - Click the triangle next to **Save**, then select **Save and Run Now** to save the plan and execute it right now. The **Run Now** interface appears. Configure the following settings:
 - **Options** – Select a type of migration for this migration job.
 - **Full migration** – Choose this option to migrate all contents from the source node to the destination node according to the profile.
 - **Incremental migration** – Choose this option to only migrate the source node content that has been modified since the last migration job and the content that failed to be migrated in the last migration job.
 - **Conflict Resolution** – Specify the conflict resolution when the item name in Lotus Notes conflicts with an existing item in SharePoint. For **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge requires you to check lower objects, and configure the **Content Level** conflict resolution. Skip provides the configuration of content level resolution optional. If you select **Incremental migration** in **Options** and do not select **Skip** as **Content Level** conflict resolution, you can also choose whether to **remigrate the objects whose metadata/securities failed to be migrated in the last migration job**. For details about conflict resolution, refer to [Appendix D: Conflict Resolution](#).
 - **Job Status Option**– Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to be migrated and you have selected the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

10. Click **OK** to run the online migration job.

Configuring the Add Schedule Interface

In the **Add Schedule** interface, configure the following settings to add a schedule:

1. **Options** – Select a type of migration for the customized schedule. Choose **Full migration** to migrate all contents from the source node to the destination node according to the profile. Choose **Incremental migration** to only migrate the source node content that has been modified (**Add** and **Modify**) since the last migration job and the content that failed to be migrated in the last migration job.
2. **Conflict Resolution** – Specify the conflict resolution when the item name in Lotus Notes conflicts with an existing item in SharePoint. For the **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge requires you to check lower objects, and configure content level conflict resolution. Skip provides the configuration of the **Content Level** resolution optional. If you select **Incremental migration** in **Options** and do not select **Skip** as **Content Level** conflict resolution, you can also choose whether to **remigrate the objects whose metadata/securities failed to be migrated in the last migration job**. For details about conflict resolution, refer to [Appendix D: Conflict Resolution](#).
3. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.
4. **Range of Recurrence** – Specify when to start and end the running recurring schedule.
 - **Start time** – Set up the time to start the plan and Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.
 - **No end date** – Select this option to repeat running the plan until being stopped manually.
 - **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.
 - **End by** – Set up the time to end the recurrence of plans.
5. **Job Status Option**– Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to be migrated and you have selected the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.
6. Click **Save** to save the configuration of schedule, or click **Cancel** to return to the **Save As New Plan** interface without saving any change.

Lotus Notes Migration for SharePoint Online

You can use Lotus Notes Migration to migrate Lotus Notes objects to SharePoint Online. To perform this function properly, you must configure your SharePoint sites in Control Panel. For more detailed

information about this configuration, refer to the **Registered SharePoint Sites** section in the [DocAve 6 Control Panel Reference Guide](#).

Before using Lotus Notes Migration for SharePoint Online, make sure you have purchased the corresponding Lotus Notes to SharePoint Online Migration licenses. You can navigate to **DocAve 6 Manager > Control Panel > License Manager**, then click **Migration** tab to view whether or not the corresponding Lotus Notes to SharePoint Online Migration licenses are available.

For details on how to manage migration profiles, or perform a Lotus Notes Online Migration job, refer to [About Online Migrations](#).

***Note:** Lotus Notes Migration to SharePoint Online does not support the Create Container function at the site collection level in a SharePoint Online destination node.

***Note:** In **User Mapping**, the **Add a placeholder account to keep metadata even if the user no longer exists** option is not supported for use with Lotus Notes Migration to SharePoint Online. This option replaces non-existent destination users with a placeholder account in the destination Active Directory.

***Note:** You can use the DocAve Agent that cannot connect to the internet to run a Lotus Notes Migration job using SharePoint Online nodes. To do so, you must configure the **Agent Proxy Settings** in **Control Panel**. For more information, refer to the [Control Panel Reference Guide](#).

About Offline Migrations

Lotus Notes offline migration exports the source data to an export location first, and then imports the exported data to the SharePoint destination. The corresponding Lotus Notes export profile and import profile must be in place prior to running an offline migration.

Offline Migration Overview

1. [Pre-migration Configurations](#)
 - [Configuring Migration Databases](#)
 - [Configuring Lotus Notes Connections](#)
 - [Configuring Staging Locations \(Offline Jobs Only\)](#)
 - [Configuring Filter Policies](#) (Optional)
 - [Configuring Mapping Settings](#) (Optional)
 - [Configuring Dynamic Rules](#) (Optional)
2. [Configuring Lotus Note Offline Migration Profiles](#)
 - a. [Setting Up an Export Profile](#)
 - b. [Setting Up an Import Profile](#)
3. [Performing a Lotus Notes Offline Migration](#)
 - a. [Exporting Data](#)
 - i. [Selecting the Source and Destination Nodes](#)
 - ii. [Configuring the Save As New Plan Interface](#)
 - b. [Importing Data](#)
 - i. [Selecting the Source and Destination Nodes](#)
 - [Creating Containers](#)
 - ii. [Configuring the Save As New Plan Interface](#)

Configuring Lotus Note Offline Migration Profiles

The Offline Migration Profiles allows you configure numerous settings for the offline migration jobs. Offline Migration Profiles consist of Export Profile and Import Profile. Follow the instructions below to create an export profile and import profile.

Setting Up an Export Profile

Create an Export Profile to configure Lotus Notes Migrator filter options and mapping options.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. In **Plan Mode** group, click **Export Mode**.
3. In the **Profile/Sub-profile** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.
5. Click **Filter Options** on the left-hand pane. Select a previously configured filter policy from the drop-down list or click **New Filter Policy** to create a filter policy. For details on creating a filter policy, refer to [Creating and Editing Filter Policies](#).
6. Select the **Mapping Options**. For details about this section, refer to [Mapping Options](#). It may differ in the type of mappings.
7. Click **Save** beside Main Profile name to save the configuration of the main profile, or click **Cancel** to go back to the default **Profile Settings** page without saving any change.

Setting Up an Import Profile

Create an Import Profile to configure Lotus Notes Migrator migration options, mapping options, and other customized settings.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. In **Plan Mode** group, click **Import Mode**.
3. In the **Profile/Sub-profile** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.
5. Click **Migration Options** on the left-hand pane. For details on configuring a sub-profile of Migration Options, refer to [Migration Options](#).
6. Select **Mapping Options**. For details about this section, refer to [Mapping Options](#).
7. Click **Advanced Options** on the left-hand pane, and then the Advanced Options page appears. For details on configuring Advanced Options, refer to [Advanced Options](#).
8. Click **Save** beside Main Profile name to save the configuration of the main profile, or click **Cancel** to go back to the default **Profile Settings** page without saving any change.

Performing a Lotus Notes Offline Migration

An offline Lotus Notes Migration migrate content from an offline source to an offline destination. The process includes setting up an export location, exporting the data to the export location, setting up an import location, and then importing the data to the destination location.

Exporting Data

The following instructions describe how to export data to the export location in order to perform an offline migration job.

Selecting the Source and Destination Nodes

1. From the **Home** tab, in the **Plan** group, click **Export**.
2. Click **Select Source** in the **Source** pane or in the **Actions** group on the ribbon to select the source data. The **Select Source** interface pops up. Configure the following settings.
 - a. **Agent** – Select your desired DocAve Agent installed in Lotus Notes environment from the drop-down list.
 - b. **Connection** – Select the Lotus Notes connection that is previously configured.
 - c. **Domino Server** – Select the Domino server of Lotus Notes. If you select **Local**, **Local Configuration** section appears.
 - d. **Local Configuration** – Enter the server name and address book name of the Domino server to get user information.
 - e. **System Database** – Select the **Show system database** checkbox to make all database displayed in the source tree, including the system database.
 - f. **Filter Option** – Choose what you want to display in the source tree. By default, **Database or view** is selected and databases or views of a database in Lotus Notes will be available for selection in the source tree. If you want to filter a document as the source node, select **Document by Notes Formula** and enter a formula in the text box below **Define a formula to filter the documents**. Make sure that the formula you enter is in the format as the example below shows:

For example, Categories="", readers="" | From="" & Categories="" ! Form="" .

***Note:** “|”, “&”, and “!” are supported in the criteria rule. “|” stands for “or”. “&” stands for “and”. “!” stands for “not”.
 - g. Click **OK** to complete configuration of selecting source. To change the source, click **Change Source** in the source pane or in the **Actions** group on the ribbon. Then repeat the steps described above.

- h. Select the node whose data you wish to migrate. If working with a large environment, enter the name of the node (for example, database, view or item) into the **Input Keyword** text box to search for the desired node. You can only search out the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search out. When entering the keyword, the search result will be displayed with a little time.
- i. Select the source node by selecting the corresponding checkbox.


***Note:** For detailed information about what kinds of source contents are supported and unsupported in the migration, refer to [Supported and Unsupported Elements in Lotus Notes Migrator](#), [Supported and Unsupported Lotus Notes Document Elements](#), and [Supported and Unsupported Lotus Notes Views and Fields](#).

3. In the **Destination** pane, select a previously configured export location from the drop-down list or click **New Export Location** to create a new one. For details on creating an export location for export mode, refer to [Configuring Staging Locations \(Offline Jobs Only\)](#).
4. Click **Save As New Plan** to save the settings as a new plan. To configure the **Save As New Plan** interface, refer to [Configuring the Save As New Plan Interface](#).

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings to build a migration plan:

1. **Plan Name** – Enter a name for the plan that you are about to create. Then enter an optional Description for future references.
2. **Profile Selection** – Configure the related migration options, mapping options and advanced options for the migration job. Select a previously configured profile from the drop-down list to apply the migration settings to the migration job. Lotus Notes Migration provides you a default main profile named **Default Profile**.
3. **Schedule Selection** – Select one type of schedule to run the plan.
 - **No schedule** – Select this option to run the plan manually.
 - **Configure the schedule myself** – Select this option and the Schedule Settings section appears under Schedule Selection.

***Note:** If any of the Domino Admin, Lotus Notes, Domino Designer, and AvePoint Migrator Tool is being used while the job is running, the job may fail. Make sure none of them is being used while the job is running.
4. **Schedule Settings** – Click **Add Schedule** to create a new schedule. For details about configuring a schedule, refer to [Configuring the Add Schedule Interface](#). To preview a configured schedule, select the schedule and click **Calendar View** to view it in a calendar. You can delete a previously configured schedule by clicking the delete () button behind a corresponding schedule.

***Note:** This section only appears when you choose **Configure the schedule myself**.

5. **Notification** – Select the e-mail **Notification** profile for sending the notification report. For more information on working with notification policies, refer to the [DocAve 6 Control Panel Reference Guide](#).
6. **Associated Plan Group** – Select an associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the [Control Panel Reference Guide](#).
7. When finished configuring the plan, select one of the following options:
 - Click **Save** to save the plan you have configured. The **Plan Manager** interface appears. For more information, refer to [Managing Plans](#).
 - Click the triangle next to **Save**, then select **Save and Run Now** to save the plan and execute it right now. The **Run Now** interface appears. Configure the following settings.
 - **Options** – Select a type of migration for this migration job.
 - **Full migration** – Choose this option to export all contents from the source node to the export location according to the profile.
 - **Incremental migration** – Choose this option to only export the source node content that has been modified (**Add** and **Modify**) of since the last migration job and the content that failed to be migrated in the last migration job.
 - **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.
8. Click **OK** to run the export job.

Configuring the Add Schedule Interface

In the **Add Schedule** interface, configure the following settings to add a schedule:

1. **Options** – Select a type of migration for the customized schedule. Choose **Full migration** to migrate all contents from the source node to the export location according to the profile. Choose **Incremental migration** to only export the source node content that has been modified (**Add** and **Modify**) since the last migration job and the content that failed to be migrated in the last migration job.
2. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.
3. **Range of Recurrence** – Specify when to start and end the running recurring schedule.
 - **Start time** – Set up the time to start the plan and Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.

- **No end date** – Select this option to repeat running the plan until being stopped manually.
 - **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.
 - **End by** – Set up the time to end the recurrence of plans.
4. **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.
 5. Click **OK** to save the configuration of schedule, or click **Cancel** to return to the **Save As New Plan** interface without saving any change.

Importing Data

The following instructions describe how to import data from the import location to SharePoint in order to perform an offline migration job:

Selecting the Source and Destination Nodes

1. From the **Home** tab, in the **Plan** group, click **Import**.
2. In the **Source** pane, on the **Browse** tab, click the farm that you have configured in Staging Location for Import Mode and the import location is loaded. Click the import location to load the **Lotus Notes Exported Data** folder in the UNC path. Then select the exported data which is named by the plan name. To see details of the exported data in the source tree, click the **Details** tab.

***Note:** If you cannot find the data you wish to import in the source, click **Import Location** to specify the location where you have stored the data.
3. In the **Destination** pane, click the farm name to expand the data tree. Select the destination node:
 - a. Locate the node that exported data will be imported to. If working with a large environment, enter the keyword of the node into the Input Keyword text box to search for the desired node. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.
 - b. To narrow down the search criteria and display fewer nodes on the tree, right-click the specified node and select **Advanced Search**. In the **Advanced Search** interface, click **Add a Criterion** and configure the following settings:
 - i. **Rule** – Select the rule for this search. The table below lists the supported rules for each node that is supported for Advanced Search.

| Node | Rule |
|-----------------------|-----------------------|
| Web Application Level | Site Collection: Name |
| | Site Collection: URL |
| Sites | Site: Name |
| | Site: URL |
| Lists | List/Library: Name |
| | List/Library: URL |
| Folders | Folder: Name |
| | Folder: URL |
| Sites | Site: Name |
| | Site: URL |
| Lists | List/Library: Name |
| | List/Library: URL |
| Folders | Folder: Name |
| | Folder: URL |

- ii. **Condition** – Select the condition for the rule from the drop-down list.
- iii. **Value** – Enter the value for the rule in the text box.

To add more criteria, click **Add a Criterion**, and repeat the steps above. You can change the logical relationships between the criteria by clicking **And** or **Or**. By default, the logical relationship is set to **And**. **And** means that the child nodes that meet all of the criteria will be included in the result. **Or** means that the child nodes that meet any criterion will be included in the result. The **Basic Filter Condition** area displays the logic relationships of filter criteria.

Click **Search** to start searching the child nodes.

- c. Select the destination node by clicking the corresponding radio button. You can also create a new site collection, site, list or folder by entering the specified name and click **Create Container**. For details on creating containers, refer to [Creating Containers](#).
4. Click **Save As New Plan** to save your settings as a new plan. To configure the settings of the **Save As New Plan** interface, refer to [Configuring the Save As New Plan Interface](#).

Creating Containers

Containers are created in the destination prior to a migration in order to store the migrated content. The destination container in Lotus Notes Migration can be a site collection, site, list, library, or folder.



DocAve allows you to create containers in SharePoint without leaving the DocAve interface, allowing you to perform migration tasks without having to use SharePoint to create all of the necessary containers in the destination.

To create a container, in the Destination pane, enter the name of a new container in the available field, and then click **Create Container**. The **Create Container** interface will pop up. Depending on the container type you are creating, configure the settings for each type of container as such:

***Note:** When creating a folder, no settings need to be configured, and clicking **Create Container** at folder level will create a folder immediately.

Creating a Site Collection

Configure these settings in the Create Site Collection page:

- **Title and Description** – Enter the **Title** of the new site collection and a **Description** for future references.
- **Template Selection** – Select the desired language from the **Select a language** drop-down list. Then select a site template for this new site collection. Click on a tab to access the templates listed in that category, or click on the **Custom** tab and select **Select Template Later...** to not choose a template upon creation.
- **Primary Site Collection Administrator** – Enter the **Username** of the primary administrator for this site collection. Then click the check () button to check whether the user is valid, or click the browse () button to select people and groups in a new page.
- **Secondary Site Collection Administrator** – Enter the **Username** of the secondary administrator for this site collection.
- **Quota Template** – Select the storage quota template to apply to this site collection.
- **Content Database** – Select the Content Database for this site collection

Click **OK** to create the new site collection, or click **Cancel** to close the Create Container interface.

***Note:** Lotus Notes Migrator only supports creating on-premises SharePoint site collections.

Creating a Site

Configure these settings in the Create Site page:

- **Title and Description** – Enter the **Title** of the new site and a **Description** for future references.
- **Template Selection** – Select the desired language from the **Select a language** drop-down list. Then select a site template for this new site. Click on a tab to access the templates listed in that category.
- **Permissions** – Select **Use unique permissions** to allow a unique set of users access to this new site. Select **Use same permissions as parent site** to allow the same users who can access the parent site access to this new site.
- **Navigation** – Select the **Yes** radio button if you want a link to this site to appear in the Quick Launch and top link bar of the parent site.

- **Navigation Inheritance** – Select **Yes** to use the top link bar from the parent site.

Click **OK** to create the new site, or click **Cancel** to close the **Create Container** interface.

Creating a List/Library

Configure these settings in the Create List page:

- **Object Type** – Choose whether you wish to create a **List** or **Library** by selecting the corresponding radio button.
- **Category** – Select the category for the new list or library.
- **Navigation** – Select **Yes** if you want to display the library/list on the Quick Launch.

If you select **Library** as the object type and select **Document Library** as the category, configure the following settings:

- **Document Template** (for Library only) – For a new library, select a document template from the drop-down list to determine the default for all new files created in this document library.
- **Document Version History** (for Document Library, Form Library) – Select **Yes** to create a version each time you edit a file in this library.

Click **OK** to create the new list or library, or click **Cancel** to close the **Create Container** interface.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings to build up a migration plan:

1. **Plan Name** – Enter a name for the plan that you are about to create. Then enter an optional **Description** for future reference.
2. **Profile Selection** – Configure the related migration options, mapping options and advanced options for the migration job. Select a previously configured profile from the drop-down list to apply the migration settings to the migration job. Lotus Notes Migration provides you a default main profile named **Default Profile**.
3. **Destination Agent Group** – Select a destination agent group to execute the migration job. An agent group can contain multiple agents for load balancing and better performance.

***Note:** This section only appears when the destination node is in SharePoint on-premises.

4. **Schedule Selection** – Select one type of schedule to run the plan.
 - **No schedule** – Select this option to run the plan manually.
 - **Configure the schedule myself** – Select this option to configure the schedule. The **Schedule Settings** section appears under Schedule Selection.
5. **Schedule Settings** – Click **Add Schedule** to create a new schedule. For details about configuring a schedule, refer to [Configuring the Add Schedule Interface](#). To preview a configured schedule, select the schedule and click **Calendar View** to view it in a calendar. You can delete a previously configured schedule by clicking the delete (✖) button behind a corresponding schedule.

***Note:** This section only appears when you choose **Configure the schedule myself**.

6. **Notification** – Select the e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the [DocAve 6 Control Panel Reference Guide](#).
7. **Associated Plan Group** – Select an associated plan group(s) or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the [DocAve 6 Control Panel Reference Guide](#).
8. **Migration Database** – Check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, click **Details**. The Agent Name and Status are displayed. Ensure that the database is available; otherwise the migration job will fail.
9. When finished configuring the plan, select one of the following options:
 - Click **Save** to save the plan you have configured. The **Plan Manager** interface appears. For more information, refer to [Managing Plans](#).
 - Click the triangle next to **Save**, then select **Save and Run Now** to save the plan and execute it right away. The **Run Now** interface appears. Configure the following settings.
 - **Options** –Select a type of migration for the import job.
 - **Full migration** – Choose this option to import all contents from the export location to the destination node according to the profile.
 - **Incremental migration** – Choose this option to only import the export location content that has been modified (**Add** and **Modify**) since the last migration job and the content that failed to migrate in the last migration job.
 - **Conflict Resolution** –Specify the conflict resolution when the item name in Lotus Notes conflicts with an existing item in SharePoint. For **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge requires you to check lower objects, and configure the **Content Level** conflict resolution. Skip provides the configuration of content level resolution optional. For details about conflict resolution, refer to [Appendix D: Conflict Resolution](#).
 - **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.
10. Click **OK** to run the import job.

Configuring the Add Schedule Interface

In the **Add Schedule** interface, configure the following settings to add a schedule:

1. **Options** – Select a type of migration for the customized schedule. Choose **Full migration** to import all contents from the export location to the destination node according to the profile.

Choose **Incremental migration** to only import the modified content (**Add** and **Modify**) from the export location since the last migration job.

2. **Conflict Resolution** –Specify the conflict resolution when the item name in Lotus Notes conflicts with an existing item in SharePoint. For **Container Level**, the conflict resolutions provided are Merge and Skip. Merge requires you to check **Check lower objects for conflicts**, and configure the **Content Level** conflict resolution. Skip provides the configuration of content level resolution optional. For details about conflict resolution, refer to [Appendix D: Conflict Resolution](#).
3. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.
4. **Range of Recurrence** – Specify when to start and end the running recurring schedule.
 - **Start time** – Set up the time to start the plan and Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.
 - **No end date** – Select this option to repeat running the plan until being stopped manually.
 - **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.
 - **End by** – Set up the time to end the recurrence of plans.
5. **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.
6. Click **OK** to save the configuration of schedule, or click **Cancel** to return to the **Save As New Plan** interface without saving any change.

Supported and Unsupported Elements in Lotus Notes Migrator

The following table lists the current supported and unsupported elements for Lotus Notes Migrator.

DocAve Lotus Notes Migrator does not support the elements that are not listed in the table below.

| Database in Lotus Notes | Form in Lotus Notes | Supported Site Template in SharePoint | Supported List in SharePoint |
|----------------------------|----------------------|---------------------------------------|------------------------------|
| Database Library | Database | Unsupported | Unsupported |
| | Librarian | | |
| Design Synopsis | Synopsis | Unsupported | Unsupported |
| Discussion-Notes&Web | Main Topic | Team Site | Custom List |
| | Response | | Document Library |
| | Response to Response | | Discussion Board |
| | | | Contacts |
| Doc Library-Notes&Web | | Team Site | Calendar |
| | | | Wiki Page Library |
| | Document | | Custom List |
| | Response | | Document Library |
| | Response to Response | | Discussion Board |
| | | | Contacts |
| DOLS Restore Template | DOLS Resource | Unsupported | Unsupported |
| | Database | | |
| Domino Web Access Redirect | Server | Unsupported | Unsupported |
| | UI | | |
| | Application | | |
| Domino Web Access | Memo | Team Site | Custom List |
| | | | Document Library |
| | | | Discussion Board |
| | | | Contacts |
| | | | Calendar |
| Extended Mail | Memo | Team Site | Wiki Page Library |
| | | | Custom List |
| | | | Document Library |
| | | | Discussion Board |
| | | | Contacts |
| | | | Calendar |
| iNotes Web Access | Memo | Team Site | Custom List |
| | Rules | | Document Library |
| | Stationery | | Discussion Board |

| Database in Lotus Notes | Form in Lotus Notes | Supported Site Template in SharePoint | Supported List in SharePoint |
|--------------------------|---------------------------|---------------------------------------|------------------------------|
| | | | Contacts |
| | | | Calendar |
| | | | Wiki Page Library |
| Lotus SmartSuite Library | Document | Team Site | Custom List |
| | Lotus SmartSuite Document | | Document Library |
| | | | Discussion Board |
| | | | Contacts |
| | | | Calendar |
| | | | Wiki Page Library |
| Mail | Memo | Team Site | Custom List |
| | Junk mail | | Document Library |
| | Rules | | Discussion Board |
| | Stationery | | Contacts |
| | | | Calendar |
| | Wiki Page Library | | |
| Microsoft Office Library | Document | Team Site | Custom List |
| | MS Office Document | | Document Library |
| | | | Discussion Board |
| | | | Contacts |
| | | | Calendar |
| | | | Wiki Page Library |
| Personal Address Book | Contacts | Team Site | Contacts |
| | Contacts by Category | Unsupported | Unsupported |
| | Groups | | |
| | Birthday & Anniversaries | | |
| | Account | | |
| | Certificates | | |
| | Connections | | |
| | International MIME | | |
| | Locations | | |
| Personal Journal | Journal Entry | Team Site | Custom List |
| | | | Document Library |
| | | | Discussion Board |
| | | | Contacts |
| | | | Calendar |
| | | | Wiki Page Library |
| TeamRoom | Team member | Unsupported | Unsupported |
| | Subteam | | |
| | Event | | |
| | Newsletter profile | | |
| | Document | Team Site | Custom List |

| Database in Lotus Notes | Form in Lotus Notes | Supported Site Template in SharePoint | Supported List in SharePoint |
|----------------------------------|--------------------------|---------------------------------------|------------------------------|
| | Response | | Document Library |
| | Response to Response | | Discussion Board |
| | Individual status report | | Contacts |
| | Announcement | | Calendar |
| | Team status | | Wiki Page Library |
| News Articles | N/A | Unsupported | Unsupported |
| Notebook | Notebook Entry | Team Site | Custom List |
| | | | Document Library |
| | | | Discussion Board |
| | | | Contacts |
| | | | Calendar |
| | | | Wiki Page Library |
| Domino Blog | N/A | Unsupported | Unsupported |
| RSS Feed Generator | RSS Feed Definition | Team Site | Custom List |
| | | | Document Library |
| | | | Discussion Board |
| | | | Contacts |
| | | | Calendar |
| | | | Wiki Page Library |
| Domino Directory | Domino Directory | Team Site | Custom List |
| | | | Document Library |
| | | | Discussion Board |
| | | | Contacts |
| | | | Calendar |
| | | | Wiki Page Library |
| ID Vault | N/A | Unsupported | Unsupported |
| IBM Web Access (iNotes) Redirect | AutoLogin | Team Site | Custom List |
| | | | Document Library |
| | CssDWALogin | | Discussion Board |
| | DWALoginForm | | Contacts |
| | | | Calendar |
| | | | Wiki Page Library |
| Catalog | File System | Team Site | Custom List |
| | | | Document Library |
| | Document Content | | Discussion Board |
| | | | Contacts |
| | Main | | Calendar |
| | | | Wiki Page Library |

Supported and Unsupported Lotus Notes Document Elements

The following table lists the current supported and unsupported Lotus Notes Document elements.

DocAve Lotus Notes Migrator does not support the Lotus Notes Document elements that are not listed in the table below.

| Notes Document Elements | Support Status | Note |
|--|---------------------|--|
| Page Break | Supported | |
| Horizontal Rule | Supported | |
| Section | Supported | |
| Table | Supported | |
| Picture | Supported | |
| Attachment | Supported | |
| Link Hotspot | Supported | |
| Text Pop-up | Partially Supported | Script element and code event are unsupported. |
| Button | Unsupported | |
| Action Hotspot | Unsupported | |
| OLE Object/Active X | Supported | Support Microsoft Office 1995-2013 Word/Excel/PowerPoint |
| Email Object | Unsupported | |
| Formula Pop-up | Unsupported | |
| Java Script/Visual Basic Script | Unsupported | |
| Notes Script | Unsupported | |
| Java Applet | Unsupported | |
| Bookmark | Unsupported | |
| Embedded View/Embedded Outline/Embedded DatePicker/Embedded Navigator/Embedded Folder Pane | Unsupported | |
| Applets | Unsupported | |
| Calendar | Unsupported | |
| Inbox | Unsupported | |
| HTML Control Check Box | Partially Supported | Only keep format and content. The others, such as relationship, script, and event are unsupported. |
| HTML Control Text Box | Partially Supported | Only keep format and content. The others, such as relationship, script, and event are unsupported. |

| Notes Document Elements | Support Status | Note |
|---|---------------------|---|
| HTML Control Radio Box | Partially Supported | Only keep format and content. The others, such as relationship, script, and event are unsupported. |
| HTML Control Combo Box | Partially Supported | Only keep format and content. The others, such as relationship, script, and event are unsupported. |
| HTML Control List Box | Partially Supported | Only keep format and content. The others, such as relationship, script, and event are unsupported. |
| Document Link/View Link/Database Link | Supported | |
| Document Link/View Link/Database Link in pictures | Partially Supported | When adding multiple links for different areas within one picture, but there is overlap area for the selected areas, the picture cannot be migrated to the destination. |
| Anchor Link | Unsupported | |
| Computed Text | Supported | |
| Tabbed Table | Supported | |
| List | Supported | |
| Bullets | Supported | |

Supported and Unsupported Lotus Notes Views and Fields

The following table lists the current supported and unsupported Lotus Notes views and fields.

DocAve Lotus Notes Migrator does not support the Lotus Notes views and fields that are not listed in the table below.

| View/Field Name | Support Status |
|--|-----------------------|
| View-All Documents | Supported |
| View-By Author | Supported |
| View-By Category | Supported |
| View-By Alternate Name | Unsupported |
| View-Review Status | Supported |
| Custom View | Unsupported |
| Field-Text/Rich Text/Rich Text Lite | Supported |
| Field-Date/Time | Supported |
| Field-Number | Supported |
| Field-Dialog list/Field-Checkbox/Field-Radio button/Field-Listbox/Field-Combobox | Supported |
| Field-Author | Supported |
| Field-Names | Supported |
| Field-Readers | Supported |
| Field-Password | Supported |
| Field-Formula | Supported |
| Field-Time zone | Supported |
| Field-Color | Supported |

Managing Sub-profiles

Refer to the information below to manage an existing sub-profile.

Editing an Existing Sub-profile

1. Select an existing sub-profile from the **Sub-Profile** drop-down list.
2. Click **Edit Sub-profile** in the **Sub-profile** group to edit the sub-profile settings.
3. Click **Save** in the **Sub-profile** group to save the sub-profile settings. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace the existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Deleting an Existing Sub-profile

1. Select an existing sub-profile from the **Sub-Profile** drop-down list.
2. Click **Delete** in the **Profile/Sub-profile** group to delete the sub-profile, or directly click **Delete** next to the sub-profile name in the drop-down list. Note that the default sub-profile and the sub-profile used in the main profile cannot be deleted.

Uploading a Previously Configured Sub-profile

1. In the **Profile Settings** interface, click **Migration Options** or **Mapping Options** on the left panel.
2. Click **Edit Sub-profile** to make the **Migration Options** field active.
3. Click **Upload** in the **Sub-profile** group.
4. Select a previously created sub-profile and click **Open** to upload it. If a sub-profile having the same name exists in DocAve, you have two options:
 - **Upload as a new profile** – Upload the sub-profile and name the uploaded sub-profile by adding a suffix, for example, *subprofile_1*.
 - **Overwrite current profile** – Replace the existing sub-profile. The Default Mappings sub-profile and the Default Migration Options profile sub-profile cannot be overwritten.

Downloading an Existing Sub-profile

1. In the **Profile Settings** interface, click **Migration Options** or **Mapping Options** on the left-hand panel.
2. Select an existing sub-profile and click **Edit Sub-profile** in the **Sub-profile** group.
3. Click **Download** in the **Sub-profile** group to save the sub-profile to the local disk.

Managing Plans

The Plan Manager interface allows users to view, edit, delete, test run, and run plans. After launching the migration module, click **Plan Manager** next to the **Home** tab. In the **Plan Manager** interface, any plans that you have previously created are displayed in the main display pane.

In this interface, you can change the number of plans displayed per page. To change the number of plans displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the plans, click the column heading such as **Plan Name**, and **Plan ID**.

Perform the following actions in the **Plan Manager** interface:

- Select a plan and click **View Details**. The source node and the destination node are displayed on the data tree. You can also click **Settings** on the ribbon to view the migration settings of this plan. When you want to change the nodes you selected or want to modify the migration settings, click **Edit** on the ribbon.
- Select a plan and click **Edit** on the ribbon to change the configurations for the selected plan. You can change the nodes you selected and modify the migration settings. Besides, you can click **Profile Settings** or **Create Container** to performing the corresponding actions.
- Select the plans that you want to delete and click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected plans, or click **Cancel** to return to the **Plan Manager** interface without deleting the selected plans.
- Click **Test Run** to perform a test run job that simulates the real migration job. By viewing the job report of the test run, you can find whether the source contents can be migrated to the destination successfully, and then adjust the plans or optimize the settings.

***Note:** Test Run results may differ from the results of an actual migration. Investigate Test Runs that display **Finished with Exceptions** results by reviewing the log file. If no obvious content, metadata, or permission errors are found, it is likely that the actual migration will complete successfully.
- Click **Run Now** to perform the migration job.

Lotus Notes Migrator Tool

Lotus Notes Migrator Tool resides in ... \AvePoint\DocAve6\Agent\bin\MigratorTool.exe. This tool is used to analyze and scan the source objects, generate analysis reports and scan reports, configure user mapping/content type mapping/InfoPath mapping. The analysis and scan results can be used to assist before performing a migration job. Refer to the [DocAve 6 Supplementary Tools User Guide](#) for instructions on using this tool.

Accessing Lotus Notes Migration Hot Key Mode

In order to work faster and improve your productivity, DocAve supports Hot Key mode for you to perform corresponding actions quickly by only using keyboard.

To access Hot Key mode, in DocAve interface, use the key combinations of **Ctrl + Alt + Z** on the keyboard, and then press **1** to direct to the products pane, To access the Migration products, press **M**. Then, press **N** to enter the **Lotus Notes Migration** interface.

To access Hot Key mode, in **Lotus Notes Migration** interface, use the key combinations of **Ctrl + Alt + Z** on the keyboard.

The following is a list of hot keys for the top level, each time you want to go back to the top level after accessing the interface of lower level, press **Ctrl + Alt + Z** on the keyboard.

For example, continue pressing **H**, you are brought to Lotus Notes Migration Home Page.

| Operation Interface | Hot Key |
|---------------------------------|---------|
| Lotus Notes Migration Home Page | H |
| Lotus Notes Plan Manager | P |
| DocAve Home Page | 1 |
| DocAve Online Community | 2 |
| Control Panel | 3 |
| Job Monitor | 4 |
| Plan Group | 5 |
| Health Analyzer | 6 |
| Account Information | 9 |
| Help and About | 0 |

Home Page

To access the Home page by using hot keys, in the **Lotus Notes Migration** interface, use key combination of **Ctrl + Alt + Z** to access the Hot Key mode, and then press **H** on the keyboard to enter the Home page.

The following is a list of hot keys for functionalities on the ribbon of the Home page.

For example, continue pressing **O**, you are brought you the Online Migration.

| Functionality Name and Hot Key | |
|--------------------------------|----|
| Online Migration | O |
| Export | EX |
| Import | I |
| Profile Settings | PS |
| Configure Connection | CF |

| Functionality Name and Hot Key | |
|--------------------------------|----|
| Migration Database | MD |
| Job Monitor | J |

Migration Database

| Functionality Name and Hot Key | | | | | |
|--------------------------------|---|-----------|---|--------|---|
| Configure | C | Save | O | | |
| | | Cancel | C | | |
| View Details | V | Configure | C | Save | O |
| | | | | Cancel | C |
| | | Close | X | | |
| Close | X | | | | |

Configure Connection

| Functionality Name and Hot Key | | | |
|--------------------------------|---|--------|---|
| Create | N | Save | S |
| | | Cancel | C |
| View Details | V | Edit | E |
| | | Close | X |
| Edit | E | Save | S |
| | | Cancel | C |
| Delete | D | | |
| Close | X | | |

Profile Settings

| Functionality Name and Hot Key | | | | | |
|--------------------------------|----|---------------|---|--------|---|
| Online Mode | O | | | | |
| Export Mode | EX | | | | |
| Import Mode | I | | | | |
| Filter Policy | F | Create | N | Save | S |
| | | | | Cancel | C |
| | | View | V | Edit | E |
| | | | | Cancel | C |
| | | Edit | E | Save | S |
| | | | | Cancel | C |
| | | Delete | D | | |
| | | Close | X | | |
| Mappings | M | User Mapping | U | | |
| | | Group Mapping | G | | |

| Functionality Name and Hot Key | | | | | |
|--------------------------------|----|--------------------|---|------------------------------------|---|
| | | Permission Mapping | P | Create | N |
| | | | | View Details | V |
| | | | | Edit | E |
| | | | | Delete | D |
| | | | | Manage SharePoint Permission Level | M |
| | | | | Close | X |
| Dynamic Rule | DY | Create | N | | |
| | | View Details | V | | |
| | | Edit | E | | |
| | | Delete | D | | |
| | | Close | X | | |
| Set as Default | DF | | | | |
| Edit Sub-profile | ES | | | | |
| Upload | U | | | | |
| Download | DL | | | | |
| New | N | | | | |
| Delete | DE | | | | |
| Save | S | Save | S | | |
| | | Save As | A | | |
| Discard Changes | DC | | | | |
| Close | X | | | | |

Online Migration

| Functionality Name and Hot Key | | | | | |
|--------------------------------|----|--------|---|------------------|----|
| New Plan | N | | | | |
| Select Source | SS | OK | O | | |
| | | Cancel | C | | |
| Create Container | CC | OK | O | | |
| | | Cancel | C | | |
| Save As New Plan | A | Save | S | Save | SA |
| | | | | Save and Run Now | SR |
| | | Cancel | C | | |
| Run Now | R | OK | O | | |
| | | Cancel | C | | |
| Change Source | SS | OK | O | | |
| | | Cancel | C | | |

Export

| Functionality Name and Hot Key | | | | | | | |
|--------------------------------|----|-------------|---|------------------|----|--------|---|
| Select Source | SS | | | | | | |
| Staging Location | SL | Export Mode | P | Create | N | Save | S |
| | | | | | | Cancel | C |
| | | | | View Details | V | Edit | E |
| | | | | | | Close | X |
| | | | | Edit | E | Save | S |
| | | | | | | Cancel | C |
| | | | | Delete | D | | |
| Close | X | | | | | | |
| Save As New Plan | A | Save | S | Save | SA | | |
| | | | | Save and Run Now | SR | | |
| New Plan | N | | | | | | |

Import

| Functionality Name and Hot Key | | | | | | | |
|--------------------------------|----|-------------|---|------------------|----|--------|---|
| Staging Location | SL | Import Mode | I | Create | N | Save | S |
| | | | | | | Cancel | C |
| | | | | View Details | V | Edit | E |
| | | | | | | Close | X |
| | | | | Edit | E | Save | S |
| | | | | | | Cancel | C |
| | | | | Delete | D | | |
| Close | X | | | | | | |
| Save As New Plan | A | Save | S | Save | SA | | |
| | | | | Save and Run Now | SR | | |
| New Plan | N | | | | | | |

Plan Manager Page

To access the Plan Manager page by using hot keys, in the **Lotus Notes Migration** interface, use key combinations of **Ctrl + Alt + Z** to access the Hot Key mode, and then press **P** on the keyboard to enter the Plan Manager page.

For example, continue pressing **V**, you are brought to the **View Details** interface.

| Functionality Name and Hot Key | | | |
|--------------------------------|---|----------------------|----|
| View Details | V | Source & Destination | SD |

| Functionality Name and Hot Key | | | | | | | |
|--------------------------------|----|----------------------|----|----------------------|----|------------------|----|
| | | Settings | SE | Edit | E | | |
| | | Edit | E | Close | X | | |
| | | | | Source & Destination | SD | | |
| | | | | Settings | SE | | |
| | | | | Save | SA | Save | SA |
| | | | | | | Save As | A |
| | | | | | | Save and Run Now | SR |
| | | Cancel | X | | | | |
| Edit | E | Source & Destination | SD | Create Container | CC | OK | O |
| | | | | | | Cancel | C |
| | | | | Save | SA | Save | SA |
| | | | | | | Save As | A |
| | | | | | | Save and Run Now | SR |
| | | | | | | Cancel | X |
| | | Settings | SE | Save | SA | Save | SA |
| | | | | | | Save As | A |
| | | | | | | Save and Run Now | SR |
| | | | | | | Cancel | X |
| Delete | D | | | | | | |
| Test Run | TR | OK | O | | | | |
| | | Cancel | C | | | | |
| Run Now | R | OK | O | | | | |
| | | Cancel | C | | | | |

Appendix A: Lotus Notes Migration Database Information

Refer to the following tables to view the detailed job information stored in the migration database. In [Job Detail](#), you can view the job details of each migrated source object, the source/destination object ID, the URL of the source/destination object, the size of the source object, the owner of the source/destination object, the migration start time, the end time, and so on. In [Job Notification](#), you can view the status of the migration job and view the comment related to the migration job. In [Job Statistic](#), you can view the statistical information of the migration job, such as, the job ID, the plan ID, the source/destination start time, the source/destination end time, the source/destination Agent name, the number of migrated/failed/skipped items/folders/lists, and so on.

Job Detail

View the information of the job details in the table below.

| Column Name | Description | Value |
|----------------------|---|---|
| JobId | It is the ID of the job. | The prefix of the job ID facilitates the distinction of different migrations. The job ID prefix for Lotus Notes migration is LM. For example, LM20120702184324729287, it indicates a Lotus Notes migration job ID. |
| SequenceId | It is the sequence ID of each migrated source object. | The value represents the sequence of each migrated source object. For example, 1, it indicates that this source object is the first migrated object. |
| SourceObjectId | It is the ID of the source object. | The value is the ID of the source object. |
| SourceObjectParentID | | The value is the ID of the parent of the source object. |
| TargetObjectId | It is the ID of the target object. | The value is the GUID of each target object level from site collection level to item level. For example, 08e90aee-c8d8-474b-8979-c1250a32b94d is the GUID of the target list. For Web application level, the value displayed is 00000000-0000-0000-0000-000000000000. |
| TargetObjectParentID | | The value is blank. |

| Column Name | Description | Value |
|-----------------------|--|--|
| SourceFullUrl | It is the full URL of the source object. | The value is the full URL of the source object. Use the value to find the source object. |
| TargetFullURL | It is the full URL of the target object. | The value is the full URL of the target object. Use the full URL to find the target object. If the source object is not migrated to the target, the column value is blank. |
| SourceObjectTitle | It is the title of the source object. | The value is the title of the source object. |
| TargetObjectTitle | It is the title of the target object. | The value is the title of the target object. |
| SourceObjectType | It is the type of the source object. | The value represents the type of the source object. <ul style="list-style-type: none"> • 901 – Lotus Notes Database • 902 – Lotus Notes Document • 903 – Lotus Notes Attachment • 1001 – Lotus Notes Group • 1002 – Lotus Notes User |
| TargetObjectType | It is the type of the target object. | The value represents the type of the target object. <ul style="list-style-type: none"> • 10002 – Site Collection • 10003 – Site • 10004 – Library • 10005 – List • 10006 – Folder • 10007 – Document • 10008 – Item • 10009 – Attachment |
| SourceObjectSizeBytes | It is the size of the source object. The unit is byte. | The value is the real size of the source object. |
| TargetObjectSizeBytes | It is the size of the target object. The unit is byte. | The value is the size of the target object. |
| SourceObjectOwner | It is the owner of the source object. | The value represents the user who creates the source object. |

| Column Name | Description | Value |
|---------------------|--|--|
| TargetObjectOwner | It is the owner of the target object. | The value represents the user who creates the source object. |
| SourceObjectVersion | It is the version of the source object. | The value represents the version information of the source object. |
| TargetObjectVersion | It is the version of the target object. | The value represents the version information of the target object. |
| Operation | It is the operation performed for each source object during migration. | <p>The value represents the operation performed when migrating the source object to the target.</p> <ul style="list-style-type: none"> • 0 – None • 1 – Skipped • 2 – New Created • 3 – Overwritten • 4 – Appended • 5 – Filtered • 7 – Merge |
| Status | It is the migration status of the source object. | <p>The value represents the status of the job.</p> <ul style="list-style-type: none"> • 0 – Starting • 1 – Successful • 2 – Backup Failed • 3 – Restore Failed • 4 – Filtered Out • 5 – Skipped • 6 – Exceptional |
| StartTime | It is the time when the backup starts. | The value represents the time when the backup starts. |
| EndTime | It is the time when the restore completes. | The value represents the time when the restore completes. |
| FilteredOutPolicy | It is the status of using filter policy. | <p>The value represents the status of using filter policy.</p> <ul style="list-style-type: none"> • 0 – Not Used • 1 – Used |
| TruncatedPolicy | It is the truncated policy that is applied to the source object. | The value represents the truncated policy that is applied to the source object. |

| Column Name | Description | Value |
|----------------------|--|---|
| | | <ul style="list-style-type: none"> • None – No truncated policy. • Truncated – The object name is truncated. • Renamed – The object name is renamed. • MoveUp – The object is moved up to the higher level. |
| TruncatedOrRenamedAs | It is the new name of the object in the target. | The value is the new name of the object in the target after truncating or renaming. |
| CustomMetadata | It is the status of using custom metadata. | The value represents the status of using custom metadata. There is no custom metadata in Lotus Notes. The value here is false. |
| MetadataMapping | It is the statues of using C-Based Object Oriented Language (C# Language) Mapping. | The value represents the status of using C-Based Object Oriented Language (C# Language) Mapping. <ul style="list-style-type: none"> • 0 – Not Used • 1 – Used |
| Message | It displays the migration message of the source object. | The value is the migration message of the source object. |

Job Notification

View the information of the job notifications in the table below.

| Column Name | Description | Value |
|-------------|--|---|
| SequenceId | It is the ID of the sequence for each job. | The value represents the sequence of each job. For example, 1, it indicates that this job is the first migration job. |
| JobId | It is the ID of the job. | The prefix of the job ID facilitates the distinction of different migrations. The job ID prefix for Lotus Notes migration is LM. For example, LM20120702184324729287, it |

| Column Name | Description | Value |
|-------------|------------------------------|--|
| | | indicates a Lotus Notes migration job ID. |
| Status | It is the status of the job. | <p>The value represents the status of the job.</p> <ul style="list-style-type: none"> • 0 – In Progress • 2 – Finished • 3 – Failed • 4 – Stopped • 7 – Finished With Exception • 8 – Paused |
| Message | It displays the job comment. | The value displayed is the same as the comment in Statistics of Job Details. |

Job Statistic

View the information of the job statistics in the table below.

| Column Name | Description | Value |
|---------------|-----------------------------------|---|
| JobId | It is the ID of the job. | The prefix of the job ID facilitates the distinction of different migrations. The job ID for Lotus Notes Migration is LM. For example, LM20120702184324729287, it indicates a Lotus Notes migration job ID. |
| PlanId | It is the ID of the plan. | The value is the plan ID, for example, PLAN20120702184321934938. |
| PlanName | It is the name of the plan. | The value is the plan name. If you run a job without saving it as a plan, the value is Instance Plan. |
| PlanGroupId | It is the ID of the plan group. | The value is the ID of the plan group that you set for the plan. |
| PlanGroupName | It is the name of the plan group. | The value is the name of the plan group that you set for the plan. |

| Column Name | Description | Value |
|------------------|--|---|
| SourceAgentType | It is the source Agent type. | The value represents the source Agent type. The value for Lotus Notes is 8. |
| TargetAgentType | It is the target Agent type. | The value represents the target Agent type. <ul style="list-style-type: none"> • 5 – SharePoint 2010 • 6 – SharePoint 2013 • 11 – SharePoint Online |
| SourceAgentName | It is the source Agent name. | The value is the source Agent name. |
| TargetAgentName | It is the target Agent name. | The value is the target Agent name. |
| Status | It is the status of the job. | The value represents the status of the job. <ul style="list-style-type: none"> • 0 – In Progress • 2 – Finished • 3 – Failed • 4 – Stopped • 7 – Finished With Exception • 8 – Paused |
| Run Type | It is the type of the job. | The value represents the type of the job. <ul style="list-style-type: none"> • 0 – Run/Rerun • 1 – Test Run |
| SourceStartTime | It is the time when the backup starts. | The value represents the time when the backup starts. |
| SourceFinishTime | It is the time when the backup completes. | The value represents the time when the backup completes. |
| TargetStartTime | It is the time when the restore starts. | The value represents the time when the restore starts. |
| TargetFinishTime | It is the time when the restore completes. | The value represents the time when the restore completes. |
| Description | It is the description of the job. | The value is the description of the job. |
| UserName | It is the DocAve user who runs the job. | The value is the username who runs the job. |
| JobOption | It is the option of the job. | The value is 0. |
| JobType | It is the type of the job. | The value represents the type of the job. |

| Column Name | Description | Value |
|-----------------------------|--|--|
| | | <ul style="list-style-type: none"> 0 – Full Migration 1 – Incremental Migration |
| ContainerConflictResolution | It is the container conflict resolution. | The value represents the resolution of container conflict. <ul style="list-style-type: none"> 0 – Skip 5 – Merge |
| ContentConflictResolutuion | It is the content conflict resolution. | The value represents the resolution of content conflict. <ul style="list-style-type: none"> 0 – Skip 2 – Append 3 – Overwrite |
| MigratedBytes | It is the size of the migrated data. The unit is byte. | |
| FailedBytes | It is the size of the data that are failed to be migrated. The unit is byte. | |
| SkippedBytes | It is the size of the skipped data. The unit is byte. | |
| FilteredBytes | It is the size of the data that is filtered out. The unit is byte. | |
| MigratedSiteCollectionCount | It is the number of migrated site collections. | |
| MigratedSiteCount | It is the number of the migrated sites. | |
| MigratedListCount | It is the number of the migrated lists. | |
| MigratedFolderCount | It is the number of migrated folders. | |
| MigratedItemCount | It is the number of migrated items. | |
| FailedSiteCollectionCount | It is the number of site collections that are failed to be migrated. | |
| FailedSiteCount | It is the number of the sites that are failed to be migrated. | |
| FailedListCount | It is the number of the lists that are failed to be migrated. | |
| FailedFolderCount | It is the number of the folders that are failed to be migrated. | |
| FailedItemCount | It is the number of the items that are failed to be migrated. | |

| Column Name | Description | Value |
|--------------------------------|--|-------|
| SkippedSiteCollectionCount | It is the number of the skipped site collections. | |
| SkippedSiteCount | It is the number of the skipped sites. | |
| SkippedListCount | It is the number of the skipped lists. | |
| SkippedFolderCount | It is the number of the skipped folders. | |
| SkippedItemCount | It is the number of the skipped items. | |
| FilteredOutSiteCollectionCount | It is the number of site collections that are filtered and excluded from the result. | |
| FilteredOutSiteCount | It is the number of sites that are filtered and excluded from the result. | |
| FilteredOutListCount | It is the number of lists that are filtered and excluded from the result. | |
| FilteredOutFolderCount | It is the number of folders that are filtered and excluded from the result. | |
| FilteredOutItemCount | It is the number of items that are filtered and excluded from the result. | |
| ExceptionSiteCollectionCount | It is the number of site collections that are migrated with exception. | |
| ExceptionSiteCount | It is the number of sites that are migrated with exception. | |
| ExceptionListCount | It is the number of lists that are migrated with exception. | |
| ExceptionFolderCount | It is the number of folders that are migrated with exception. | |
| ExceptionItemCount | It is the number of items that are migrated with exception. | |

Appendix B: Lotus Notes Customization Support Table

The following table shows what kinds of source node are supported to be migrated to the corresponding destination nodes

✓ means the migration is supported.

| <div>Migrate To</div> <div>What to Migrate</div> | Site Collection | Site | List | Folder | Note | What to select when migrating |
|--|-----------------|------|------|--------|------|---|
| Database | ✓ | ✓ | ✓ | ✓ | | <div>Database to Site Collection</div> <div><div><div>1. Source</div><div><div>Input Keyword</div><div>Actions</div></div><div>Please click Change Source to change the source.</div><div>Change Source</div><div><div>Local</div><div><div><div><input checked="" type="checkbox"/></div>test_1.nsf</div><div><div><input type="checkbox"/></div>test_1_new.nsf</div><div><div><input type="checkbox"/></div>ViewLink.nsf</div></div><div><div>Page 3 of 3</div></div></div></div><div><div>2. Destination</div><div><div>Input Keyword</div><div>Actions</div></div><div><div>Farm(3310VM13\SHAREPOINT:SHAREPOINT_CONFIG_487EE762-F1AB-4...</div><div>Farm(49VM09:SHAREPOINT_CONFIG)<div><div>http://49vm09/</div><div><div>/</div><div>/my</div><div><input checked="" type="radio"/> /sites/Demo</div><div>http://49vm09:10086/</div><div>http://49vm09:12345/</div><div>http://49vm09:14285/</div><div>http://49vm09:48723/</div></div></div><div>Farm(VM27:SHAREPOINT_CONFIG)</div></div></div></div></div> |

| Migrate To What to Migrate | Site Collection | Site | List | Folder | Note | What to select when migrating |
|-------------------------------|--------------------|------|------|--------|------|--|
| | | | | | | <div>Database to site</div> <div><div><div>1. Source</div><div><div>Input Keyword</div><div>Actions</div></div><div>Please click Change Source to change the source.</div><div>Change Source</div><div><div>Local</div><div><div><div><input checked="" type="checkbox"/></div>test_1.nsf</div><div><input type="checkbox"/> test_1_new.nsf</div><div><input type="checkbox"/> ViewLink.nsf</div></div><div>Page 3 of 3</div></div></div><div><div>2. Destination</div><div><div>Input Keyword</div><div>Actions</div></div><div><div>Farm(3310VM13\SHAREPOINT:SHAREPOINT_CONFIG_487EE762-F1AB-42I</div><div>Farm(49VM09:SHAREPOINT_CONFIG)</div><div><div>http://49vm09/</div><div><div>/</div><div>/my</div><div>/sites/Demo</div><div><div>Top-level Site {qzhao}</div><div>Lists</div><div>Sites</div><div><div>URL Name</div><div>Site 1{Site 1}</div></div></div><div>http://49vm09:10086/</div><div>http://49vm09:12345/</div><div>http://49vm09:14285/</div><div>http://49vm09:48723/</div><div>Farm(VM27:SHAREPOINT_CONFIG)</div></div></div></div></div></div> |

| Migrate To What to Migrate | Site Collection | Site | List | Folder | Note | What to select when migrating |
|-------------------------------|--------------------|------|------|--------|------|--|
| | | | | | | <div>Database to List</div> <div><div>1. Source</div><div><div>Input Keyword</div><div>Actions</div></div><div>Please click Change Source to change the source.</div><div>Change Source</div><div>Local<ul style="list-style-type: none"><input checked="" type="checkbox"/> test_1.nsf<input type="checkbox"/> test_1_new.nsf<input type="checkbox"/> ViewLink.nsf<div>Page 3 of 3</div></div></div> <div><div>2. Destination</div><div><div>Input Keyword</div><div>Actions</div></div><div><div>Farm(3310VM13\SHAREPOINT:SHAREPOINT_CONFIG_487EE762-F1AB-42DC-987D-...)</div><div>Farm(49VM09:SHAREPOINT_CONFIG)<ul style="list-style-type: none">http://49vm09/<div>/</div>/my/sites/Demo<ul style="list-style-type: none">Top-level Site {qzhao}<ul style="list-style-type: none">Lists<ul style="list-style-type: none"><input checked="" type="radio"/> attATT_qzCalendarCFCustomized Reports</div></div></div> |

| <div>Migrate To</div> <div>What to Migrate</div> | Site Collection | Site | List | Folder | Note | What to select when migrating |
|--|-----------------|------|------|--------|------|--|
| View | ✓ | ✓ | ✓ | ✓ | | <div>View to Site Collection</div> <div><div><div>1. Source</div><div><input type="text" value="Input Keyword"/> </div><div>Please click Change Source to change the source.</div><div>Change Source</div><div>Local<ul style="list-style-type: none">test_1.nsf<ul style="list-style-type: none">My Favorites(0 object(s) in the node)By Author(10 object(s) in the node)By Category(10 object(s) in the node)Review Status(10 object(s) in the node)All Documents(10 object(s) in the node)(\$Profiles)(0 object(s) in the node)By Alternate Name(0 object(s) in the node)test_1_new.nsfViewLink.nsf</div><div>Page 3 of 3</div></div><div><div>2. Destination</div><div><input type="text" value="Input Keyword"/> </div><div><ul style="list-style-type: none">Farm(3310VM13\SHAREPOINT:SHAREPOINT_CONFIG_487EE762-F1AB-42DC-987D-)Farm(49VM09:SHAREPOINT_CONFIG)<ul style="list-style-type: none">http://49vm09/<ul style="list-style-type: none">//my/sites/Demohttp://49vm09:10086/http://49vm09:12345/http://49vm09:14285/http://49vm09:48723/Farm(VM27:SHAREPOINT_CONFIG)</div></div></div> |

| What to Migrate | Migrate To | | | | | What to select when migrating |
|-----------------|-----------------|------|------|--------|------|--|
| | Site Collection | Site | List | Folder | Note | |
| | | | | | | <div><div>View to Site</div><div><div><div>1. Source</div><div><input type="text" value="Input Keyword"/> Actions ▾</div><div>Please click Change Source to change the source.</div><div>Change Source</div><div>Local<ul style="list-style-type: none">test_1.nsf<ul style="list-style-type: none">My Favorites(0 object(s) in the node)By Author(10 object(s) in the node)By Category(10 object(s) in the node)Review Status(10 object(s) in the node)All Documents(10 object(s) in the node)(\$Profiles)(0 object(s) in the node)By Alternate Name(0 object(s) in the node)test_1_new.nsf</div><div><div>2. Destination</div><div><input type="text" value="Input Keyword"/> Actions ▾</div><div><ul style="list-style-type: none">Farm(3310\VM13\SHAREPOINT:SHAREPOINT_CONFIG_487EE762-F1AB-42DC-987D-6F)Farm(49\VM09:SHAREPOINT_CONFIG)<ul style="list-style-type: none">http://49vm09/<ul style="list-style-type: none">//my/sites/Demo<ul style="list-style-type: none">Top-level Site {qzhao}<ul style="list-style-type: none">ListsSites<ul style="list-style-type: none">URL NameSite 1{Site 1}http://49vm09:10086/</div></div></div></div></div> |

| Migrate To What to Migrate | Site Collection | Site | List | Folder | Note | What to select when migrating |
|-------------------------------|--------------------|------|------|--------|------|---|
| | | | | | | <div>View to List</div> <div><div><div>1. Source</div><div><div>Input Keyword</div><div>Actions</div></div><div>Please click Change Source to change the source.</div><div>Change Source</div><div>Local<ul style="list-style-type: none">test_1.nsf<ul style="list-style-type: none">My Favorites(0 object(s) in the node)By Author(10 object(s) in the node)By Category(10 object(s) in the node)Review Status(10 object(s) in the node)All Documents(10 object(s) in the node)(\$Profiles)(0 object(s) in the node)By Alternate Name(0 object(s) in the node)test_1_new.nsf</div></div></div> <div><div>2. Destination</div><div><div>Input Keyword</div><div>Actions</div></div><div><div>Farm(3310\VM13\SHAREPOINT:SHAREPOINT_CONFIG_487EE762-F1AB-42DC-987D-</div><div>Farm(49\VM09:SHAREPOINT_CONFIG)</div><div>http://49vm09/<ul style="list-style-type: none">//my/sites/Demo<ul style="list-style-type: none">Top-level Site {qzhao}<ul style="list-style-type: none">Lists<ul style="list-style-type: none">attATT_qzCalendar</div></div></div> |

| Migrate To What to Migrate | Site Collection | Site | List | Folder | Note | What to select when migrating |
|-------------------------------|--------------------|------|------|--------|------|---|
| | | | | | | <div><div>View to Folder</div><div><div><div>1. Source</div><div><div>Input Keyword</div><div>Actions</div></div><div>Please click Change Source to change the source.</div><div>Change Source</div><div><div>Local</div><div><div>test_1.nsf</div><div><div>My Favorites(0 object(s) in the node)</div><div>By Author(10 object(s) in the node)</div><div>By Category(10 object(s) in the node)</div><div>Review Status(10 object(s) in the node)</div><div>All Documents(10 object(s) in the node)</div><div>(\$Profiles)(0 object(s) in the node)</div><div>By Alternate Name(0 object(s) in the node)</div></div><div>test_1_new.nsf</div><div>ViewLink.nsf</div></div><div><div>Page 3 of 3</div></div></div></div><div><div>2. Destination</div><div><div>Input Keyword</div><div>Actions</div></div><div><div>Farm(3310VM13\SHAREPOINT:SHAREPOINT_CONFIG_487EE762-F1AB-42DC-987D-</div><div>Farm(49VM09:SHAREPOINT_CONFIG)</div><div><div>http://49vm09/</div><div><div>/</div><div>/my</div><div>/sites/Demo</div><div><div>Top-level Site {qzhao}</div><div><div>Lists</div><div><div>Name</div><div>att</div><div><div>Root Folder</div><div><div>Folders</div><div><div>Name</div><div>Folder 1</div></div></div><div>ATT_qz</div></div></div></div></div></div></div></div></div></div></div> |

| <div>Migrate To</div> <div>What to Migrate</div> | Site Collection | Site | List | Folder | Note | What to select when migrating |
|--|-----------------|------|------|--------|------|--|
| Notes Document | | | ✓ | ✓ | | <div>Document to List</div> <div><div><div>1. Source</div><div><input type="text" value="Input Keyword"/> </div><div>Please click Change Source to change the source.</div><div>Change Source</div><div>Local<ul style="list-style-type: none">520DB.nsf<ul style="list-style-type: none"><input checked="" type="checkbox"/> mainres1res2res3res1res1res2res2res3res3test11111520DBa.nsf</div></div><div><div>2. Destination</div><div><input type="text" value="Input Keyword"/> </div><div><div>Farm(3310VM13\SHAREPOINT:SHAREPOINT_CONFIG_487EE762-F1AB-42DC-987D-...)</div><div>Farm(49VM09:SHAREPOINT_CONFIG)<ul style="list-style-type: none">http://49vm09/<ul style="list-style-type: none">//my/sites/Demo<ul style="list-style-type: none">Top-level Site {qzhao}<ul style="list-style-type: none">Lists<ul style="list-style-type: none"><input checked="" type="radio"/> attATT_qzCalendarCFCustomized Reports</div></div></div></div> |

| Migrate To What to Migrate | Site Collection | Site | List | Folder | Note | What to select when migrating |
|-------------------------------|--------------------|------|------|--------|------|--|
| | | | | | | <div>Document to Folder</div> <div><div>1. Source</div><div><div>Input Keyword</div><div>Actions</div></div><div>Please click Change Source to change the source.</div><div>Change Source</div><div>Local<ul style="list-style-type: none">520DB.nsf<ul style="list-style-type: none"><input checked="" type="checkbox"/> mainres1res2res3res1res1res2res2res3res3test11111520DBa.nsf520DB_replica.nsf</div></div> <div><div>2. Destination</div><div><div>Input Keyword</div><div>Actions</div></div><div>Farm(3310\VM13\SHAREPOINT:SHAREPOINT_CONFIG_487EE762-F1AB-42DC-987D-...)</div><div>Farm(49\VM09:SHAREPOINT_CONFIG)</div><div>http://49vm09/<ul style="list-style-type: none">//my/sites/Demo<ul style="list-style-type: none">Top-level Site {qzhao}<ul style="list-style-type: none">Lists<ul style="list-style-type: none">Nameatt<ul style="list-style-type: none">Root Folder<ul style="list-style-type: none">Folders<ul style="list-style-type: none"><input checked="" type="radio"/> Folder 1ATT_qz</div></div> |

Appendix C: Lotus Notes Migrator Configuration File

You can manage Lotus Notes Migration functions by configuring the attribute of the corresponding node in the **LotusNotesMigrationWorker.xml** configuration file. Navigate to ...\\AvePoint\\DocAve6\\Agent\\data\\Migrator\\LotusNotesSettings\\ConfigurationFile on the machine where the source DocAve Agent is installed and find the **LotusNotesMigrationWorker.xml** file.

LotusNotesMigrationWorker.xml

Open the **LotusNotesMigrationWorker.xml** file with Notepad. Refer to the information below to configure the attribute in the **LotusNotesMigrationWorker.xml** file.

- **NotesDocumentTitle** – This node allows you to define the field name that will be set as the display name of the Lotus Notes documents when loading the source content in the source tree. By default, the attribute is **Subject** and the Lotus Notes documents are displayed by the field **Subject**. You can add multiple fields in the attribute. Separate them with semicolon.
- **UsingSessionAddressBook** – This node allows you to choose the method to retrieve the Domino Server.
 - **True** – **True** means Lotus Notes Migrator retrieves the Domino Server from Address Book.
 - **False** – **False** means Lotus Notes Migrator retrieves the Domino Server from the attributes of **DominoServer** and **DirectoryDatabasePath**. If no attribute is defined for **DominoServer** or **DirectoryDatabasePath**, Lotus Notes Migrator retrieves the Domino Server from **names.nsf** database of the local Domino Server.
- **DominoServer** – The Domino Server name.
- **DirectoryDatabasePath** – The relative path of the Domino Server's **names.nsf** database. If the names.nsf database resides in ...\\notes\\data, enter **names.nsf**. If the names.nsf database resides in ...\\notes\\data\\test, enter **test\\names.nsf**.
- **ServerItem** – Enter the name of the Domino Server that will be loaded when selecting the source, or the IP address of the server where the Domino Server resides.
- **PerformanceLogDisable** – This node allows you to choose whether to collect the performance log.
 - **False** – **False** means the performance log will be collected when performing Lotus Notes migration jobs. The performance log file will be generated in the folder that is named by Job ID and the folder is within...\\AvePoint\\DocAve6\\Agent\\jobs.
 - **True** – **True** means the performance log will not be collected when performing Lotus Notes migration jobs.

- **NotesFormColumn** – This node allows you to define the name of the field from which the form name is retrieved.
- **KeepDXLFiles** – This node allows you to choose whether the migrated documents will be saved as XML files
in ... \AvePoint\DocAve6\Agent\data\Migrator\LotusNotesDxlCollection.
- **TimeLimitedForExportDocument** – This node allows you to define the maximum limited time for exporting the source attachment. The unit is minute and the default value is 4. If the source attachment is not exported within the limited time, Lotus Notes Migrator does not export the attachment anymore and continues to migrate the other content.
- **GroupCrawlDepth** – This node allows you to define the maximum depth of the source groups that will be migrated to the destination. The default value is 3.
- **OnlyKeepRichText** – This node allows you to choose whether the DOCX or DOC file which is generated from the Lotus Note document only contains the Rich Text content.
 - **False** – **False** means the generated DOCX or DOC file contains all of the fields and the corresponding field values of the Lotus Notes document.
 - **True** – **True** means the generated DOCX or DOC file only contains the Rich Text content.
- **RichTextColumnName** – This node allows you to define the field name of the field with the type of Rich Text. By default, the field name is **Body**.

***Note:** This node takes effect when the attribute of **OnlyKeepRichText** is **True**.

- **EncodingKey** – This node allows you to define the method to encode Microsoft Word content. If there is random code in the generated DOCX file or DOC file, select an encode method in **EncodingsMapping** and set it as the attribute of **EncodingKey**.
- **SleepDuration** – This node allows you to define the time to delay when generating the DOCX or DOC file. The delayed time is to avoid the of Microsoft Word icon out of shape. The unit is millisecond and the default attribute is **200**. If the Microsoft Word icon is out of shape, modify the attribute and make it larger than 200.
- **ConvertDocxByOffice** – This mode allows you to choose whether to use Microsoft Office method to convert the Lotus Notes documents to Microsoft Office Word files. The method determines whether the converted Microsoft Office Word files are available for crawl in the destination.

***Note:** This attribute takes effect when **docx** is selected in **Profile Settings > Migration Options > Document Format Option**.

***Note:** Make sure Microsoft Office 2007 or above is installed on the server where the destination DocAve Agent resides.

- **True** – **True** means the converted .docx files are available for crawl.
- **False** – **False** means the converted .docx files are unavailable for crawl.

- **ViewCanRestore** – This node allows you to choose whether to migrate the source view.
 - **False** – **False** means the source view will not be migrated to the destination in the migration job.
 - **True** – **True** means the source view will be migrated to the destination in the migration job.

***Note:** Only the built-in view is supported to migrate.
- **UpdateContentType** – This node allows you to choose whether to allow SharePoint existing content types to be updated if an existing content type is specified in Content Type Mapping.
 - **False** – **False** means the existing SharePoint content type will not be updated.
 - **True** – **True** means the existing SharePoint content type will be updated and the Lotus Notes form will be mapped to the content type.
- **MigrateFormToSiteContentType** – This node allows you to choose whether to migrate the source form to SharePoint site content type.
 - **False** – **False** means the source form will not be migrated to the site content type but will be migrated to the list content type.
 - **True** – **True** means the source form will be migrated to the site content type.

***Note:** When you choose SharePoint Online as the destination environment, the source form will be migrated to the site content type regardless if the value of **MigrateFormToSiteContentType** is **False** or **True**.
- **CreateNewContentType** – This node allows you to choose whether to create a new site content type for the source form when the site content type name already exists in the destination.

***Note:** This only takes effect when the value of **MigrateFormToSiteContentType** is **True** or the destination environment is SharePoint Online.

 - **False** – **False** means no new site content type will be created for the source form. The existing site content type will be updated and the fields of the source form will be added to the existing site content type.
 - **True** – **True** means a new site content type will be created for the source form. The new site content type is named by adding a suffix (**_1**, **_2**,..., increasing in numerical value), for example, content type**_1**.
- **SpecifiedTitleForAllContentTypes** – This node allows you to define a field whose values for will be migrated as the values of **Title** for all content types that are involved in the current migration job. Enter a field name as the value of this node. You can also define multiple field names by separating the field names with semicolons. If the first field does not exist in the source form, Lotus Notes Migration will check whether the second field exists and others are by this analogy.

***Note:** If the **Specified Title** features is enabled for a specific content type in the applied migration profile or in Migrator Tool, this node will not take effect on that content type.

- **TrueString** – This node allows you to define the source field that will be mapped to the Bool column. By default, the attribute contains **1**, **yes**, and **true**. When the source field value contains one of the attribute, the source field will be mapped to the Bool column. You can add multiple field values in the attribute. Separate them with semicolon.
- **UseSTA** – This node allows you to choose whether to use a single threshold apartment thread to retrieve the source data when performing the migration job.
 - **True** – **True** means single threshold apartment thread is used to retrieve the source data.
 - **False** – **False** means multiple thresholds are used to retrieve the source data.

***Note:** If the Lotus Notes migration job hung, modify the value of this attribute to **True**.

- **UseDelegateExportOle** – This mode allows you to choose whether to use a single threshold apartment thread to retrieve the source OLE objects.
 - **True** – **True** means single threshold apartment thread is used to retrieve the source OLE objects.
 - **False** – **False** means multiple thresholds are used to retrieve the source OLE objects.
- **CreateNewTermIfDoesNotExist** – This node allows you to choose whether to create new terms in the destination when the source field values do not exist in the destination.
 - **True** – **True** means Lotus Notes Migration will create new terms in the destination when the source field values do not exist in the destination.
 - **False** – **False** means Lotus Notes Migration will not create new terms in the destination when the source field values do not exist in the destination.
- **ExcelOLECloseConfig Close** – This node allows you to define whether the source Microsoft Office Excel related processes will be stopped when the source Excel OLE objects are successfully exported.
 - **True** – **True** means the source Microsoft Office Excel related processes will be stopped when the source Excel OLE objects are successfully exported.
 - **False** – **False** means the source Microsoft Office Excel related processes will not be stopped when the source Excel OLE objects are successfully exported.
- **MultiThreadConfig Enabled** – This node allows you to choose whether to use multiple threads to migrate source data to SharePoint Online.
 - **True** – **True** means multiple threads will be used to migrate source data to SharePoint Online.
 - **False** – **False** means a single thread will be used to migrate source data to SharePoint Online.

- **MaxMultiThread** – This node allows you to define the maximum number of threads that will be used to migrate source data to SharePoint Online. The default value is 5.

***Note:** AvePoint does not recommends that you enter a positive integer greater than 10.

- **CurrencyKey** – This node allows you to define the currency unit for the destination currency column. Enter the currency key that exists in the **CurrencyMapping** node as the value of this node. The default value is UnitedStates.
- **EncodingsMapping** – This node allows you to define the encode method for **EncodingKey**, which decides how to encode the content in Microsoft Word.
 - **utf-8** – It is used for English.
 - **gb2312** – It is used for Chinese.
 - **Shift-JIS** – It is used for Japanese.
- **CurrencyMapping** – This node allows you to define the currency key and value for the currency unit. By default, the following mappings are provided:
 - **Currency key="EuropeanUnion1" value="-2"** – The currency column value will be displayed in the format of 100 €.
 - **Currency key="EuropeanUnion2" value="-1"** – The currency column value will be displayed in the format of € 100.
 - **Currency key="UnitedStates" value="1033"** – The currency column value will be displayed in the format of \$ 100.
 - **Currency key="Japan" value="1041"** – The currency column value will be displayed in the format of ¥ 100.

***Note:** You can add more currency mappings by adding the attributes in the format of **Currency key="" value=""** and entering the corresponding keys and values. To get the currency keys and values, refer to the [Microsoft technical article](#).

Appendix D: Conflict Resolution

In this appendix, the detailed information of each resolution is described. View the tables below for your reference.

Container Level Conflict Resolution

| Resolution | Object | Conflict | No Conflict |
|------------|---------------|--|--|
| Skip | Configuration | Ignore the conflicting configuration and do nothing on the destination. | A new SharePoint object will be created. |
| | Security | Ignore the conflicting security and do nothing on the destination. | A new SharePoint object will be created. |
| Merge | Configuration | Merge the settings in the destination node with settings from the source node. | A new SharePoint object will be created. |
| | Security | Permissions – Source permissions that do not already exist in the destination node will be added to the destination node. Permission Levels – the permission levels that do not already exist in the destination node will be added to the destination node. The permission levels that already exist in the destination node will not be replaced. | A new SharePoint object will be created. |

Content Level Conflict Resolution

| Resolution | Object | Conflict | No Conflict |
|------------|---------|--|--|
| Overwrite | Content | Delete the conflicting content on destination first and overwrite it with the source content. | A new SharePoint object will be created. |
| Skip | Content | Ignore the conflicting content and do nothing on destination. | A new SharePoint object will be created. |
| Append | Content | The conflicting content will not be deleted; and the conflicting data will be transferred to the destination by adding a suffix (_1, _2,..., increasing in numerical value). | A new SharePoint object will be created. |

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