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**Metalogix**  
Connect for SharePoint Migration

# **Connect For SharePoint Migration User Guide**

## **Version 1.0**

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## Premigration Tasks

Before you begin migrating content to your new SharePoint installation, you must complete the tasks described in this section.

The migration steps described here apply to any of the following combinations:

Source	Target
SharePoint 2007 and Replicator 4.1 or 5.x	SharePoint 2007 and Replicator 4.1 or 5.x
SharePoint 2007 and Replicator 4.1 or 5.x	SharePoint 2010 and Replicator 4.1 or 5.x
SharePoint 2010 and Replicator 4.1 or 5.x	SharePoint 2010 and Replicator 4.1 or 5.x

### Install Metalogix Replicator for SharePoint

Install Metalogix Replicator for SharePoint into each of your SharePoint farms. For more information on completing this task, see the *Metalogix Replicator Quick Start Deployment Guide*.

### Configure Metalogix Replicator

In SharePoint Central Administration, you must do the following:

1. Enable your source web application for replication.
2. Enable your target web application for replication.
3. Connect your source web application to the target.
4. Connect your target web application to the source.
5. Create an empty map family as follows. This creates the required Replicator content databases in the source and target farms and also validates your Replicator configuration. This map family will not be configured to capture events, so the specific settings are not important.
  - a. On the Configure Map Family page, specify the general settings and replication group for this map family.



- b. On the Configure Replication Map Settings page, clear all of the replication events checkboxes and click OK.

6. On the Monitor Replication page, verify that the map family is replicated to the target web application.

Outbound	Empty Map Family - / - Web Application	Worldwide Connections	Normal	Completed	4/9/2012 2:30:44 PM	Active	Captured	4/9/2012 2:30:37 PM
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Detailed instructions for completing these steps are provided in the *Metalogix Replicator Quick Start Deployment Guide*.

You do not need to create additional map families for the content you are migrating. Connect will automatically create the map families and maps it requires to migrate the content you specify.

## Install and Configure Metalogix Connect for SharePoint

Install and configure Metalogix Connect for SharePoint. You can install Connect on any computer that can connect to both farms. It does not need to be installed on a computer in either SharePoint farm. For more information on completing this task, see the *Metalogix Connect Installation Guide*.

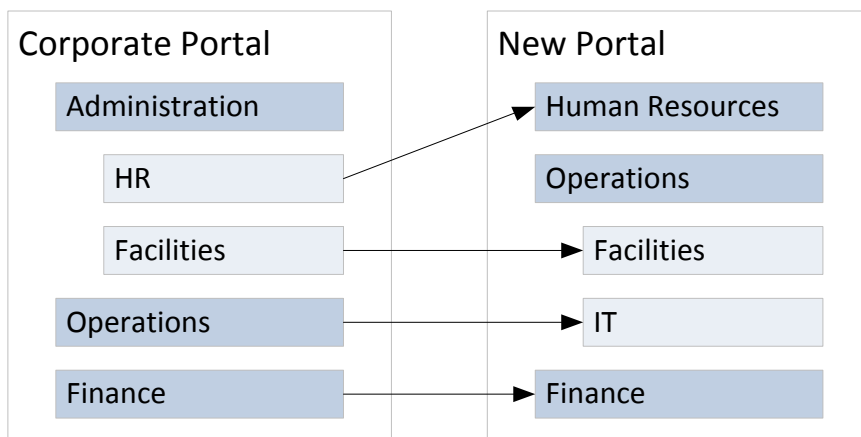
The key steps to perform here are:



1. Install Metalogix Connect.
2. Install the Connect for SharePoint solution to each of your SharePoint farms.
3. Configure Metalogix Connect.
4. Activate Connect for SharePoint Migration.
5. Add connections to each of your SharePoint farms.

## Migrating SharePoint Structure and Content

The following sections describe the process you will follow to migrate structure and content from your current SharePoint web application to the new one. To illustrate the process, consider a corporate portal with five web sites, including subsites, that we want to migrate to a new portal, using a new web site structure.

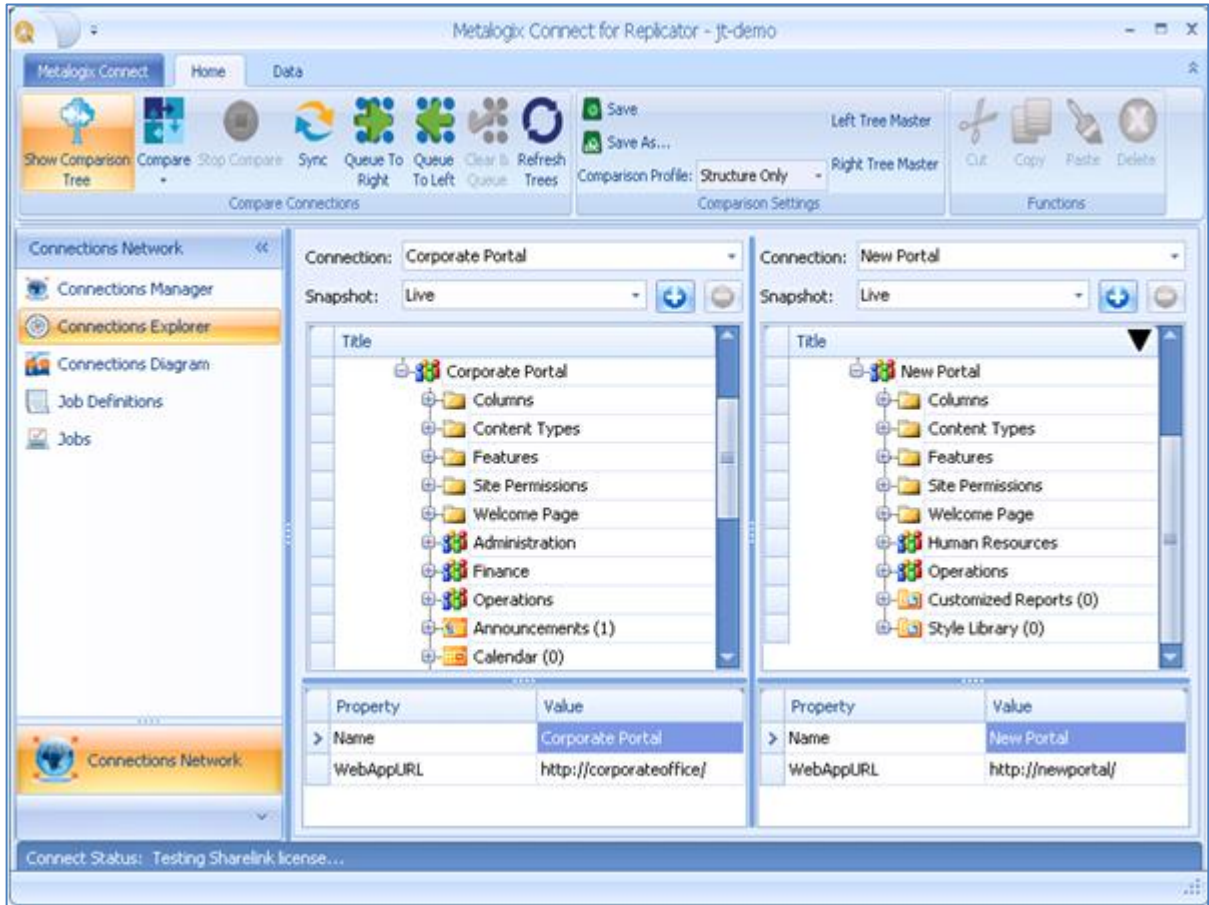


### Opening both SharePoint Web Applications

Start the migration process by opening both SharePoint sites in Connect. To do this:

1. In Connect, select the **Home** tab.
2. Select the **Connections Network** view in the navigation pane.
3. Select **Connections Explorer** in the navigation pane.
4. Select **Show Comparison Tree** from the ribbon. This splits the main window area into two tree views.
5. On the left side, in the **Connection** list, select the source web application. This displays a tree showing the structure of that web application.
6. On the right side, in the **Connection** list, select the target web application.

You can now browse both web applications and see their structure.

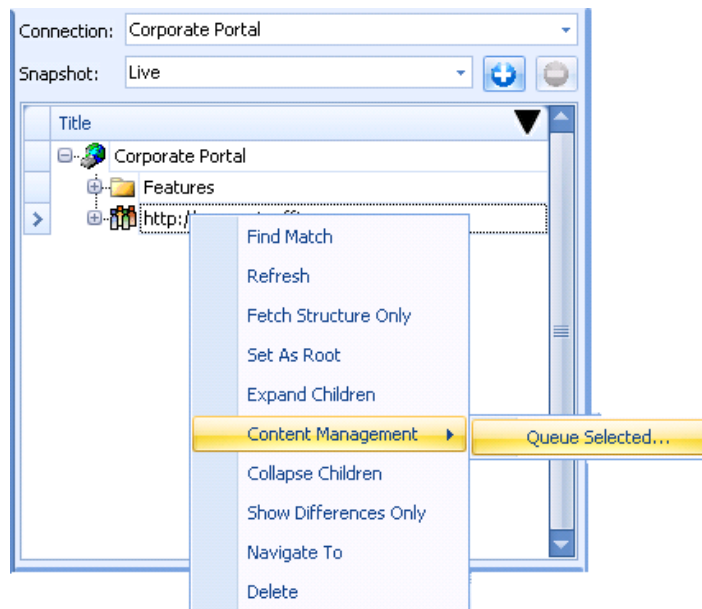




## Replicating Site Collection Structure and Permissions

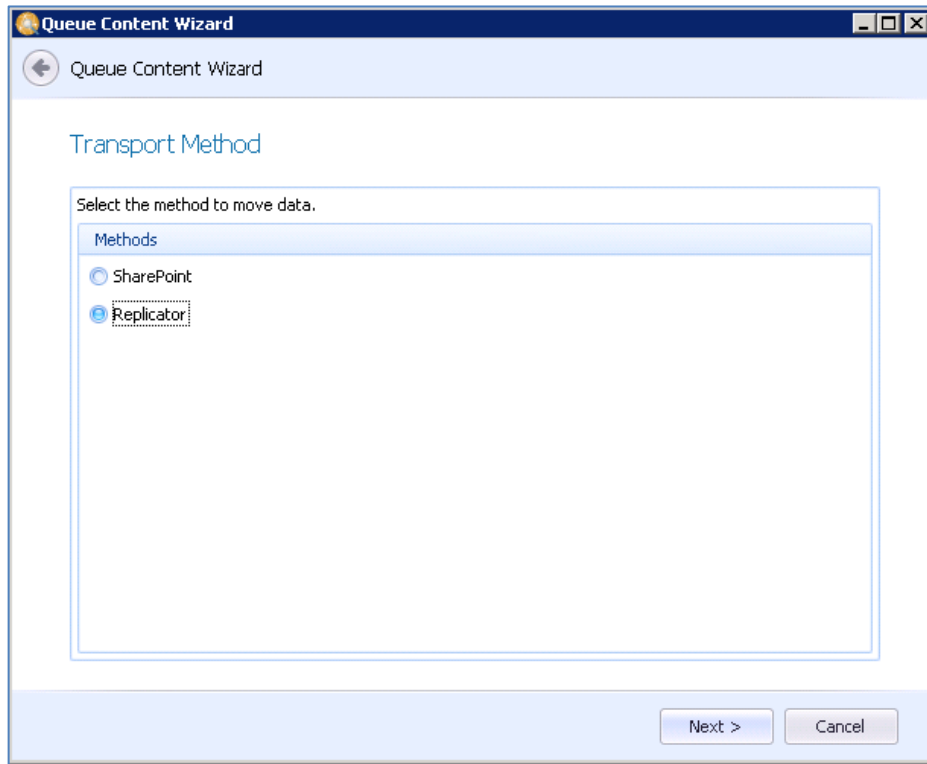
Perform the following steps to replicate the site collection structure and permissions.

1. Expand the root level of the left tree. This displays the web application's site collections.
2. On the left tree, right-click on the site collection you are migrating from. In the menu, select **Content Management** and then **Queue Selected**. This opens the Queue Content Wizard.

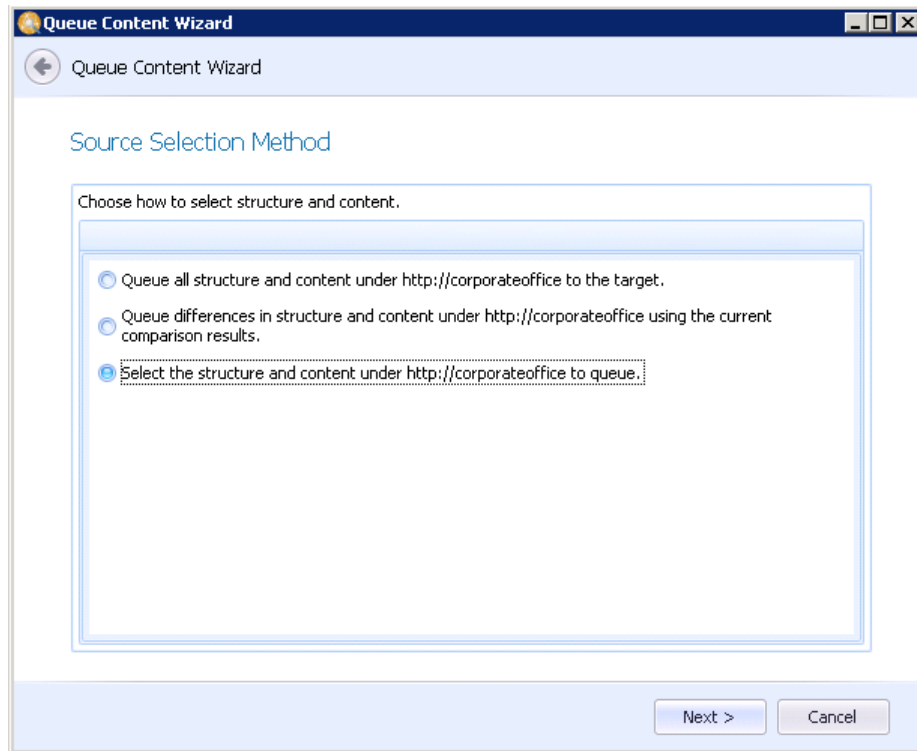


3. On the welcome page, click **Next**.

4. On the Transport Method page, select Replicator method to move data and click **Next**.



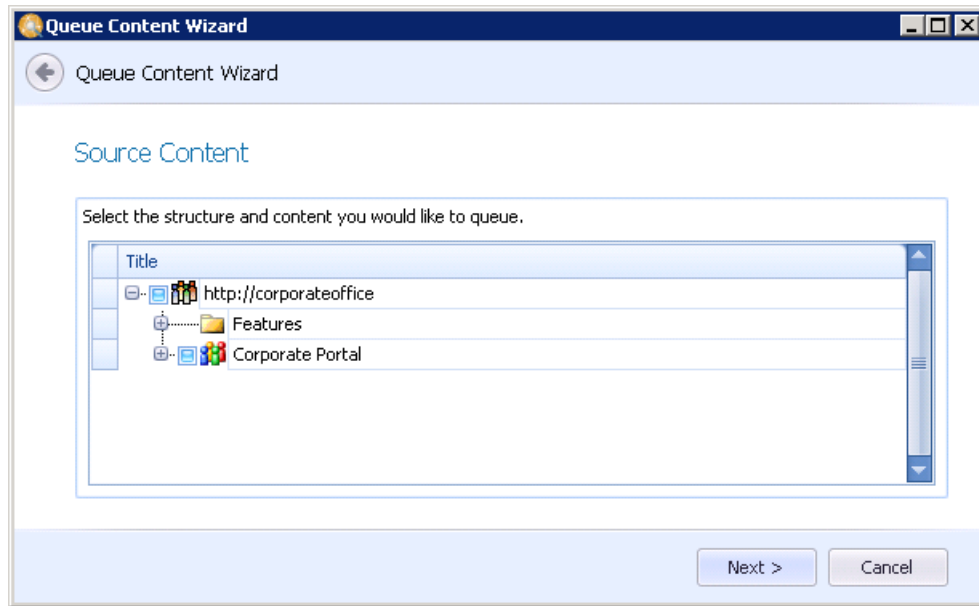
5. On the Source Selection Method page, select **Select the structure and content under...** and click **Next**.



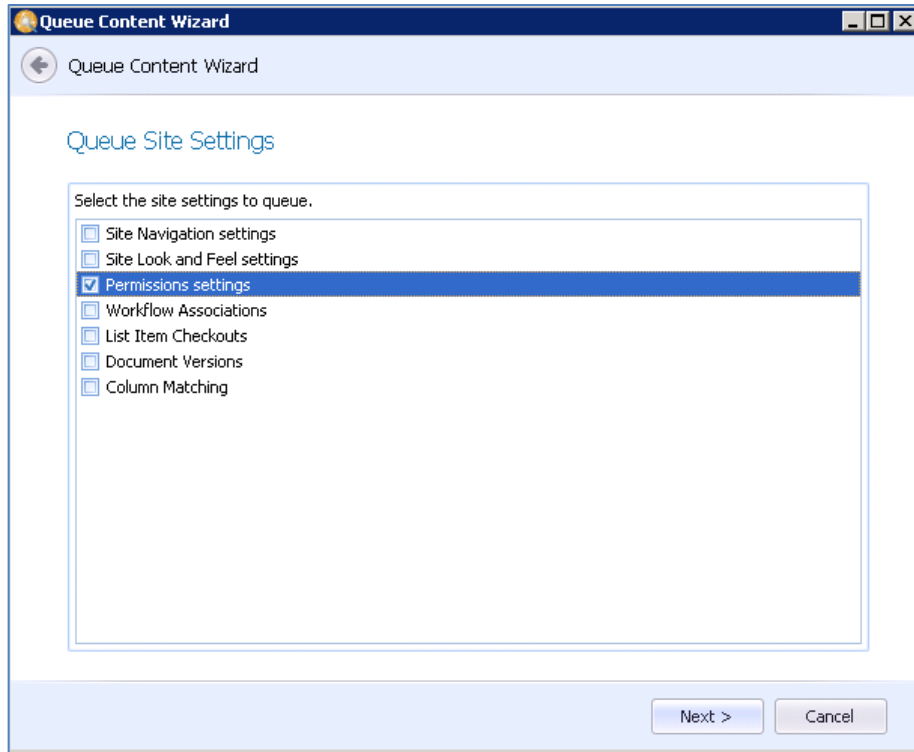
6. On the Source Content page, select only the root web site. The icons for the root web site and site collection will change to blue squares. Click **Next** to continue.

In this migration phase, we only want to migrate the site collection's structure and not its content. Selecting the root web site ensures Connect queues both SharePoint groups and permissions.

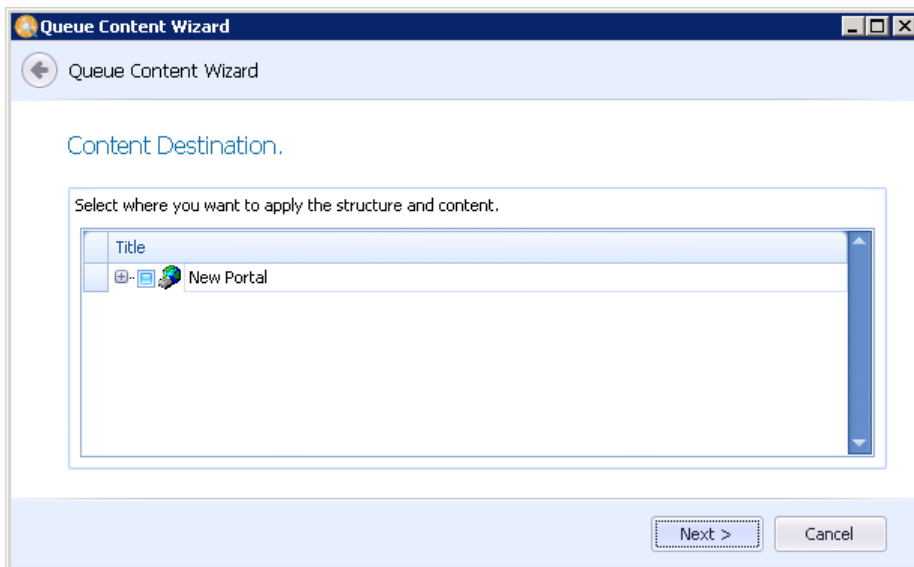
Selecting the root web site again changes the icon to a checkmark, which indicates the web site and its content is selected. If you see the checkmark icon, then select the root web site again until you see the blue square icon.



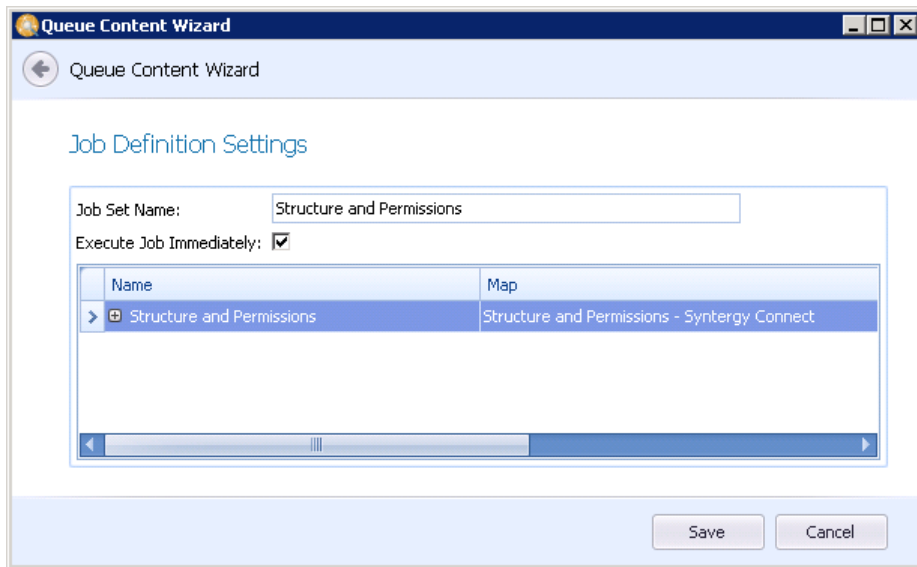
7. On the Queue Site Settings page, select **Permissions settings** and click **Next**. Optionally, you can select the other settings based on your needs.



8. On the Content Destination page, select the target web application you are adding this site collection to and click **Next**.



9. On the Job Definition Settings page, enter a descriptive name for the job set and select **Execute Job Immediately**. You can expand job definition in the table to see more information about what will be queued. Click **Save** to create the replication job.



This creates a replication job and queues it for replication. You can see the job by selecting **Jobs** in the navigation pane and clicking **Refresh Job Sets**.

## Replicating Structure and Content

To replicate content from the left tree to the right tree, perform the following steps:

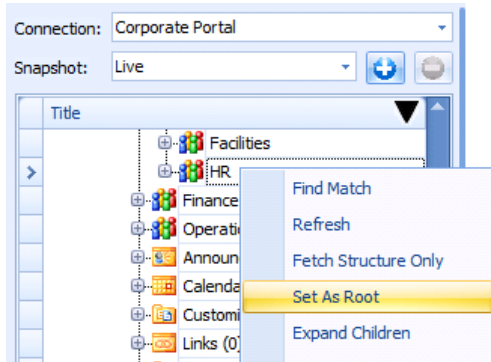
1. On the left tree, right-click on a folder whose contents you want to replicate and select **Content Management** and then **Queue Selected**. For example, if you wanted to replicate subsites under the same parent web site, you would right-click the parent web site. This opens the Queue Content Wizard.
2. On the welcome page, click **Next**.
3. On the Transport Method Page, select Replicator as the method to move data and click **Next**.
4. On the Source Selection Method page, select one of the options and then click **Next**.
5. If you elected to "Select the structure..." on the previous screen, then on the Source Content page, select the content you want to queue from the tree. Click **Next** to continue. If you selected a different option on the previous page, then you will not see this page.
6. On the Queue Site Settings page, select any additional settings you want to queue and click **Next**.
7. On the Content Destination page, select where on the target you want to replicate the source content to and click **Next**. The content you selected to queue will be replicated under the location you specify here.
8. On the Job Definition Settings page, enter a descriptive name for the job set and select **Execute Job Immediately**. You can expand job definition in the table to see more information about what will be queued. Click **Save** to create the replication job.

This creates a replication job and queues it for replication. You can see the job by selecting **Jobs** in the navigation pane and clicking **Refresh Job Sets**.

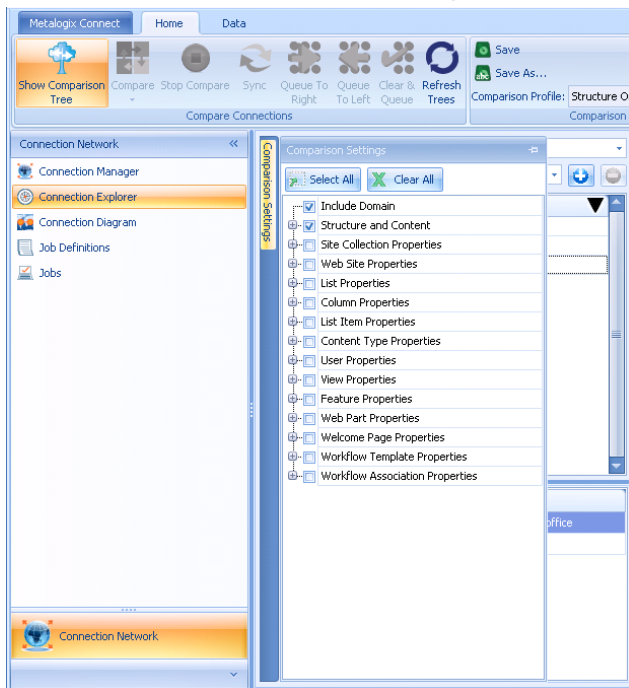
## Comparing SharePoint Structure and Content

If you have pre-existing sites on the target that also exist on the source, then you may want to compare those sites to see any differences before queuing content for replication. To do this:

1. Select the source and target web applications in the comparison tree.
2. On the left tree, right-click on the web site or folder you want to compare and select **Set As Root**.



3. On the right tree, right-click the web site or folder you want to compare and select **Set As Root**.
4. Beside the left tree there is a Comparison Settings tab, click it to open the panel.



5. In the Comparison Settings list, select the content you want to compare. After making



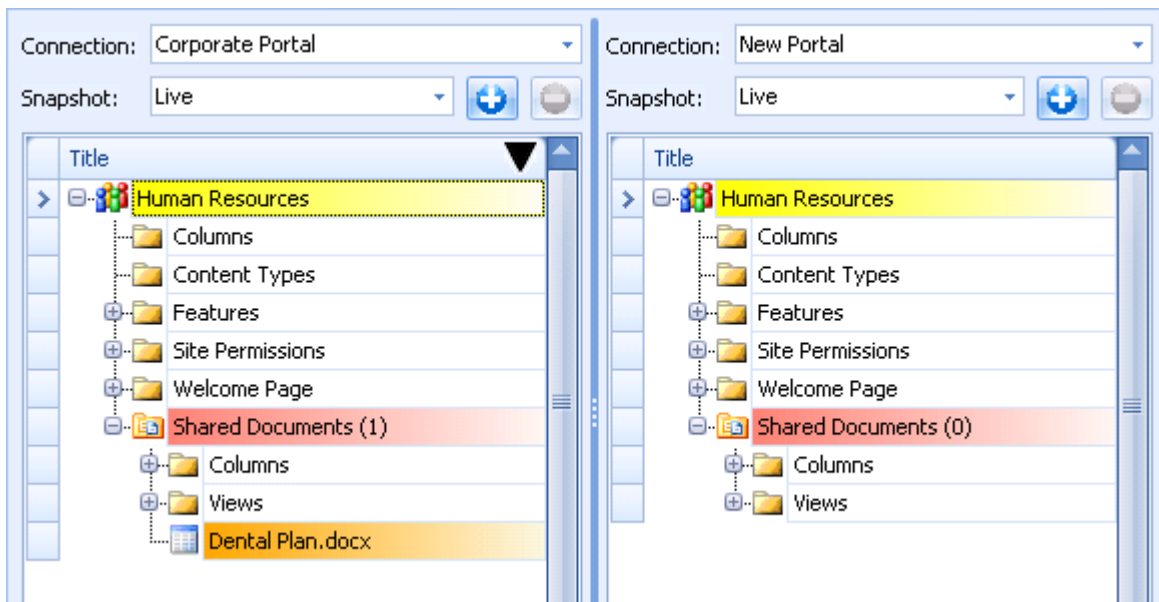


your selections, click on one of the trees to hide the list of settings.

6. In the ribbon, under Comparison Settings, click **Left Tree Master** to indicate that the left tree has the authoritative content in the comparison results.
7. In the ribbon, click **Compare** to start comparing the sites.

Connect will start to compare the contents of both trees. Depending on the amount of content in each tree, this can take a while. As Connect finishes comparing branches in the trees, it displays the comparison results in the trees. The results are shaded as follows:

- Yellow: Content under this folder is different.
- Orange: This content does not exist on the other tree.
- Red: Properties for this item are different. Select the item to see its properties.
- Gray: This content does not exist on the master tree.



Use the instructions provided under "Replicating Structure and Content" on page 15 or "Replicating Differences" on page 18 to replicate content from the left tree to the right tree to correct any differences found in the comparison results.

## Replicating Differences

After performing a comparison, you can quickly queue structure and content that is highlighted as different in Connect. From the ribbon, you can use any of the following tools.



If the same content exists, but is different in both trees, then Replication Connection conflict handling settings specified in Central Administration will be used to resolve the conflict.

### Sync

The Sync tool synchronizes structure and content between the left and right trees by queuing all different items on the left tree to the right and then queuing all different items on the right tree to the left.

To use the Sync tool:

1. Right-click the level in the left tree you want to synchronize and select **Set as Root**.
2. Right-click the level in the right tree you want to synchronize and select **Set as Root**. A > marker will appear to the left of the folder you selected.
3. Click **Sync** in the ribbon.
4. Review the confirmation message and then click **Yes** to synchronize the structure and content marked as different.

### Queue to Right and Queue to Left

The directional queue tools queue structure and content that is marked as different on one tree to the other tree.

To queue differences from the left to the right tree:

1. Right-click the level in the left tree you want to queue from and select **Set as Root**.
2. Right-click the level in the right tree you want to queue to and select **Set as Root**. A > marker will appear to the left of the folder you selected.
3. Click **Queue to Right** in the ribbon.

4. Review the confirmation message and then click **Yes** to queue the highlighted structure and content from the left tree to the right.

To queue differences from the right tree to the left tree, follow the same steps reversing the directions. Press **Queue to Left** to queue the differences.

## Clear and Queue

The clear and queue tool ensures two lists are identical by first clearing the list on the target and then queuing all list settings and content from the source list into the target.

To clear and queue a list:

1. Right-click the list you want to queue from and select **Set as Root**.
2. Right-click the list you want to queue to and select **Set as Root**. A > marker will appear to the left of the folder you selected.
3. Click **Clear & Queue** in the ribbon.
4. Review the confirmation message and then click **Yes** to clear and queue the highlighted structure and content from the left tree to the right.