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Installation Guide

 **Davinci**  
**for SharePoint**

v. 2.4





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# System Requirements

## SharePoint 2010 Farm Requirements (for Davinci Installation)

SharePoint Server 2010 (SP2010) or SharePoint Foundation (SPF2010)

### Supported Servers

- Windows Server 2008 64-bit, running .NET Framework 3.5 or higher
- SQL Server 2008, configured to use Windows or SQL Authentication

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#### NOTES:

- You may use named SQL instances or SQL aliases. If you are using a SQL alias, a 32-bit alias must also be defined. See *Adding 32 Bit SQL Aliases for Use by Davinci* (see "Adding 32-bit SQL Aliases for Use by Davinci" on page 41).
  - Content databases may be on multiple SQL servers and/or SQL instances.
- 

### Supported Authentication Methods

- Windows Authentication
- Claims-based Authentication
- Kerberos

NOTE: Permissions granted to Forms-based Authentication accounts can be mapped to Active Directory accounts.

## SharePoint 2007 Legacy Farm Requirements (for Remote Connector Installation)

- Microsoft Office SharePoint Server (MOSS) 2007 32 or 64 bit, SP1 or higher

OR

- Windows SharePoint Services v. 3 (WSS) 32 or 64 bit, SP1 or higher

### Supported Servers

- The following Windows Server versions, running .NET Framework v. 3.5 or higher:
  - Windows Server 2003, 32 or 64 bit
  - Windows Server 2008, 64 bit
- SQL Server 2000, 2005, or 2008, configured to use Windows or SQL Authentication

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NOTES:

- You may use named SQL instances or SQL aliases. If you are using a SQL alias, a 32-bit alias must also be defined. See *Adding 32 Bit SQL Aliases for Use by Davinci* (see "Adding 32-bit SQL Aliases for Use by Davinci" on page 41).
  - Content databases may be on multiple SQL servers and/or SQL instances.
- 

**Supported Authentication Methods:**

- Windows Authentication
- Kerberos

NOTE: Permissions granted to Forms-based Authentication accounts can be mapped to Active Directory accounts.

## SharePoint 2003 Legacy Farm (for Remote Connector Installation)

- SharePoint Portal Server (SPS) 2003, 32 bit SP3

OR

- Windows SharePoint Services 2.0 (WSS 2), 32 bit, SP3 or higher

**Supported Servers**

- Windows Server 2003, 32 bit, .NET Framework v. 3.5 or higher
- SQL Server 2000, 2005, or 2008

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NOTE: Content databases may be on multiple SQL servers and/or SQL instances.

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**Supported Authentication Methods**

- Windows Authentication
- Kerberos

## Davinci Security Account Requirements

Installing, configuring, and using Davinci requires the following accounts:

- Davinci Setup User Account
- Davinci 2010 Migrator Service Account
- Davinci 2003/2007 Remote Service Account

### *Davinci Setup User Account*

The account used to install Davinci Migrator for SharePoint must:

- be a member of the local 2010 Server Administrators Group
- be a member of the SharePoint Farm Administrators Group.

- ideally, be added to the security server role sysadmin for the SQL server.

If, for security reasons, the install account cannot be added to the sysadmin role, it will need to have the following privileges:

- db\_creator role for the SQL server
- db\_owner for the SharePoint\_Config database.

If you are *upgrading* or *uninstalling* Davinci, in addition to the requirements above, the account must also have db\_owner permissions for each content database in the farm.

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NOTE: If you are using the SharePoint 2010 Farm Account (that is, the account running the SharePoint Central Administration application pool), in most cases it will have the appropriate db\_owner privileges by default.

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### *Davinci 2010 Migrator Service Account*

The account that runs the Davinci Migrator Service must:

- be a member of the local 2010 Server Administrators Group
- be a member of the SharePoint Farm Administrators Group.
- ideally, be added to the security server role sysadmin for the SQL server.

If, for security reasons, the install account cannot be added to the sysadmin role, it will need to have the following privileges:

- db\_owner for:
  - the SharePoint\_Config database, and
  - each content database on the destination farm into which content will be migrated.

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NOTE: If you are using the SharePoint 2010 Farm Account (that is, the account running the SharePoint Central Administration application pool), in most cases it will have the appropriate db\_owner privileges by default.

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### *Granting Account Privileges*

See Preparing Your Environment for Installation for detailed instructions on granting all of the required account privileges.

### **Davinci 2003 or 2007 Remote Service Account**

The account that runs the Davinci 2003 or 2007 Remote Service must:

- be local administrator on the SharePoint legacy farm server
- be a member of the SharePoint Farm Administrator's group.
- ideally, be added to the security server role sysadmin for the SQL server.

If, for security reasons, the install account cannot be added to the sysadmin role, it will need to have the following privileges:

- db\_creator role for the SQL server
- db\_owner for:
  - the SharePoint\_Config database, and
  - each content database on the source farm from which content will be migrated.

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NOTE: If you are using the SharePoint 2003 or 2007 Farm Account, in most cases it will have the appropriate db\_owner privileges by default.

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## Client Requirements

### Supported Operating Systems (for installing the Davinci Migrator client application)

The Davinci Migrator is a locally executed application that is downloaded from the Davinci Central website to the machine from which the browser is run. The following versions of Windows are supported:

- Windows Server 2003 or 2008
- Windows XP SP2, Vista, or 7

### Supported Browsers (for accessing the Davinci Central Website)

Internet Explorer (IE) 6, 7, 8, or 9



# Davinci Components

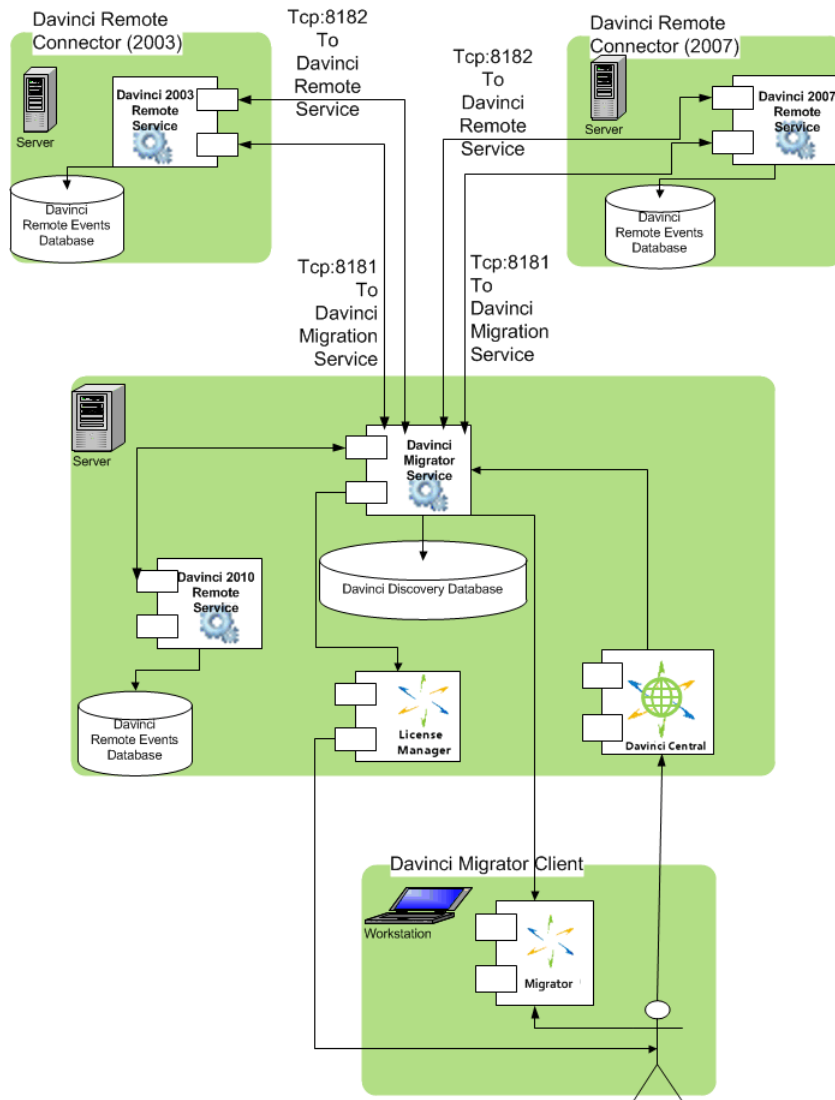
Below are descriptions of Davinci installed components, followed by a diagram that depicts how these components interact.

## Davinci Migrator for SharePoint 2010 Components

SharePoint 2010 Farm Component	Description
Davinci Central Website	<p>A Web application created during the installation process and is the starting point for using the Davinci application. Through the Davinci Central website you:</p> <ul style="list-style-type: none"> <li>▪ configure Davinci</li> <li>▪ collect configuration data from your SharePoint 2010 and legacy farms</li> <li>▪ check log files and server connections</li> <li>▪ install and run the Davinci Migrator application.</li> </ul>
Davinci Migrator Service	The service that runs on the SharePoint 2010 farm and is the primary service responsible for communicating between all SharePoint farms and the Davinci Central Website.
Davinci Discovery Database	A database installed on the SharePoint 2010 farm that centrally stores the data for the Farm Discovery (data collection) that is performed from the Davinci Central Website.
Davinci Migrator.exe	<p>A click-once application that is installed locally from the Davinci Central Website and is used to discover, plan, and migrate SharePoint farms to SharePoint 2010.</p> <p>NOTE: Every time you execute the Davinci Migrator from the Davinci Central Website, it ensures that you are running the latest version installed on your server.</p>
Davinci License Manager.exe	The interface used to update, register, and activate Davinci Migrator.
Davinci 2010 Remote Service	The service that collects remote configuration data for Davinci on the SharePoint 2010 farm.
Davinci 2003 Connector.exe Davinci 2007 Connector.exe	A set of components launched from the Davinci Central Web site and installed on legacy SharePoint sites.
Davinci Remote Events Database	The database that temporarily stores data for the Davinci Discovery configuration data collection.

### Davinci Remote Connector for SharePoint 2003/2007

SharePoint 2003/2007 Legacy Farm Component	Description
Davinci 2007 Remote Service	The service that collects remote configuration data for Davinci on a legacy SharePoint 2007 farm.
Davinci 2003 Remote Service	The service that collects remote configuration data for Davinci on a legacy SharePoint 2003 farm
Davinci Remote Database	The database that temporarily stores data for the Davinci Discovery configuration data collection.



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## First Time Installation

Installation of Davinci for SharePoint consists of the following tasks:

- a** Install Davinci for SharePoint 2010 on your SharePoint 2010 farm.
- b** Activate your Davinci license.
- c** Install the Remote Connector on the SharePoint 2003/2007 legacy farm(s) you wish to migrate.

After installing Davinci, you must perform an *initial Farm Discovery* (see "Performing a Farm Discovery" on page 21).

### Pre-Installation Checklist

#### *For installation of Davinci Migrator on your SharePoint 2010 Server:*

- Log into the server on which you will be installing Davinci Migrator as the Davinci Setup Account:
- Domain/Account: \_\_\_\_\_
- Password: \_\_\_\_\_

- Have the following information ready:
- The name of the SQL server where the Davinci Discovery Database will be installed.  
SQL Server Name: \_\_\_\_\_
  - The Davinci Migrator Service Account—that is, the account that will run the Davinci Migrator Service:  
Domain: \_\_\_\_\_  
Account: \_\_\_\_\_  
Password: \_\_\_\_\_

#### *For licensing of Davinci Migrator on your SharePoint 2010 Server:*

- Make sure you are logged in as the Davinci Setup Account and have the following information ready:
- The Davinci Migrator License Activation Code: \_\_\_\_\_

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NOTE: If you do not already have a license activation code, contact Axceler to obtain one.

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#### *For installation of the Remote Connector on your SharePoint 2003/2007 legacy farm server:*

- Log into the server on which you will be installing the Remote Connector as the 2003 or 2007 Remote Service Account:

Domain: \_\_\_\_\_

Account: \_\_\_\_\_

Password: \_\_\_\_\_

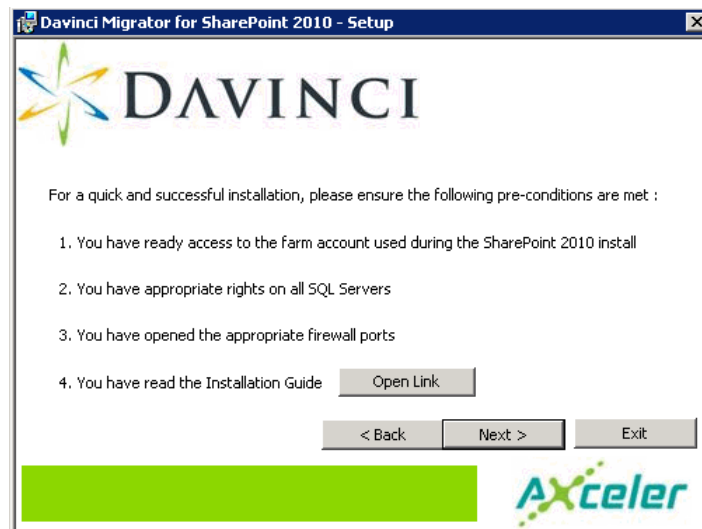
Have the following information ready:

- Credentials for the 2010 SharePoint server where Davinci Migrator was installed:
  - 2010 Server Name: \_\_\_\_\_
  - Port No. (8181 by default): \_\_\_\_\_
  - Davinci Migrator Service Account (see above)
- Davinci 2003 or 2007 Remote Service Account credentials (see above)

## Installing Davinci on Your SharePoint 2010 Farm Server

To install Davinci for SharePoint 2010:

- 1 Log into the server as the *Davinci Setup User Account* (on page 4).
- 2 Download or copy Davinci for SharePoint 2010.zip to your SharePoint 2010 server.
- 3 Double-click the zip file to extract the Davinci Migrator For SharePoint 2010.exe.
- 4 Double-click the file Davinci Migrator for SharePoint 2010.exe to begin the installation process.
- 5 From the Welcome screen, click [**Next**] to display the Pre-Conditions dialog.



- 6 Review the pre-conditions and verify that your environment is prepared for installation.
- 7 Click [**Next**] to display the Axceler License Agreement.
- 8 Read the license agreement. Check the I have read and agreed to the Axceler license agreement box.
- 9 Click [**Next**] to display the Setup Type dialog.

- 10 To ensure that all necessary components are installed, accept the default option (Complete).

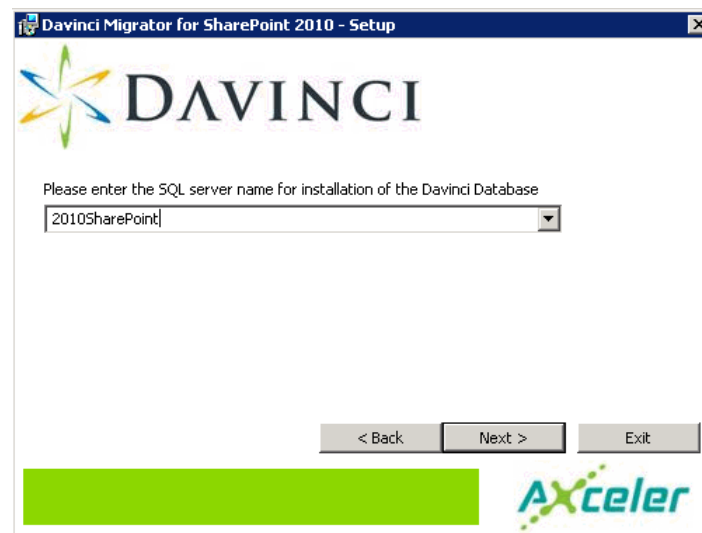


- 11 Click [Next] to display the SQL Database Server dialog.
- 12 Enter the name of the database server on which you want to install the Davinci Discovery Database.

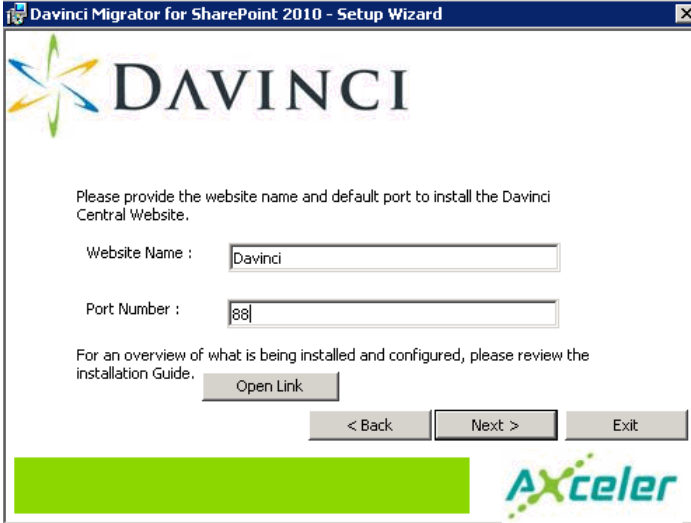
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REMINDER: While it is recommended that the Discovery database be installed on the same SQL server as your SharePoint farm, you can install it on any SQL server in your domain as long as the Setup account and SharePoint 2010 farm account have permissions to that SQL Server. If you are using a SQL alias, make sure it has been added to SharePoint 2010. See *Adding 32 Bit SQL Aliases for Use by Davinci* (see "Adding 32-bit SQL Aliases for Use by Davinci" on page 41).

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- 13 Click [Next] to display the Davinci Central Website Location dialog. Accept the default Website Name and Port Number.



Davinci Migrator for SharePoint 2010 - Setup Wizard

**DAVINCI**

Please provide the website name and default port to install the Davinci Central Website.

Website Name :

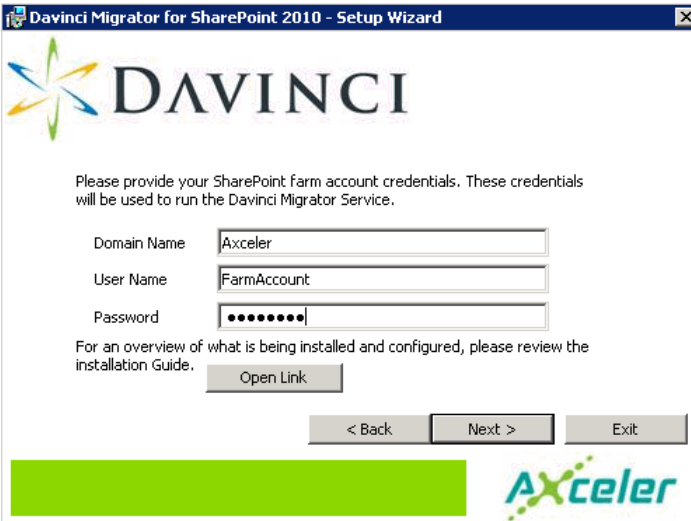
Port Number :

For an overview of what is being installed and configured, please review the installation Guide.

**Axceler**

- 14 Click [Next] to display the SharePoint Farm Account Credentials dialog.

- 15 Enter the Domain Name, User Account, and Password of your SharePoint 2010 farm account.



Davinci Migrator for SharePoint 2010 - Setup Wizard

**DAVINCI**

Please provide your SharePoint farm account credentials. These credentials will be used to run the Davinci Migrator Service.

Domain Name

User Name

Password

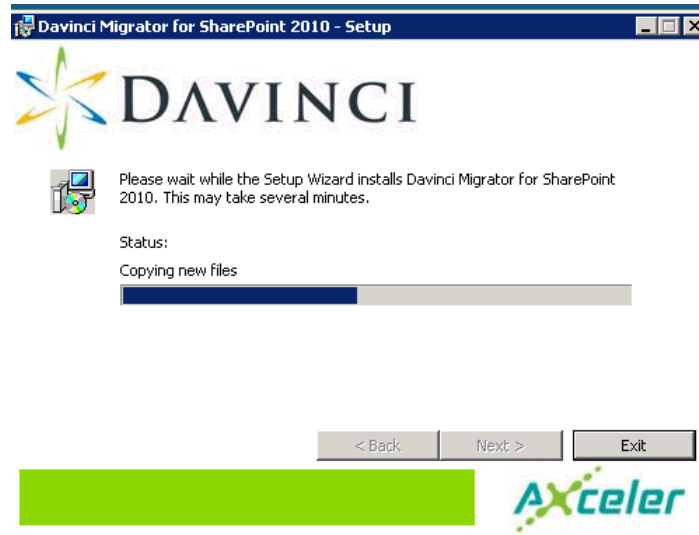
For an overview of what is being installed and configured, please review the installation Guide.

**Axceler**

- 16 Click [Next] to display the Ready to Install dialog.

- 17 Click [Install].

A status message is displayed as each component is installed.



**18** When the installation has been successfully completed you can:

- connect to the Davinci Central Website (by clicking [**Open Link**])

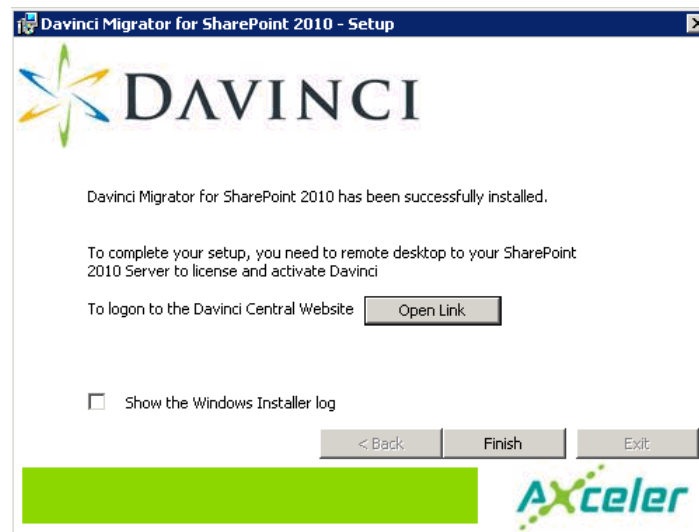
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NOTE: You can connect to the Davinci Central Website only if your Davinci license has already been activated.

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AND/OR

- close the Setup Wizard (by clicking [**Finish**]).



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NOTE: Remember to re-enable UAC security if you disabled it specifically for the installation.

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## Activating your Davinci License

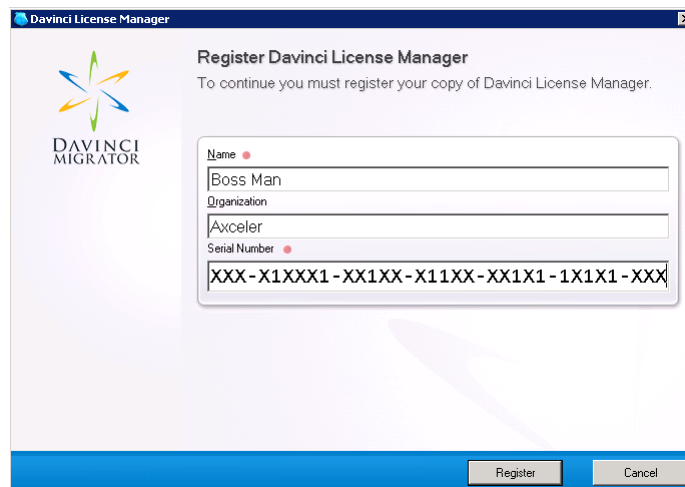
After installing Davinci for SharePoint 2010 on your 2010 farm server—and before installing the Davinci Remote Connector(s) on your 2003/2007 farm server(s)—you must activate your Davinci license.

To activate your Davinci license:

- 1 Do one of the following:
  - Double-click the Davinci License Manager shortcut (if it appears on your desktop).

OR

  - From the Start menu of the SharePoint 2010 server where Davinci has been installed, choose ALL PROGRAMS > DAVINCI FOR SHAREPOINT 2010 > DAVINCI LICENSE MANAGER.
- 2 Enter your Name and Organization and the Serial Number provided by Axceler.

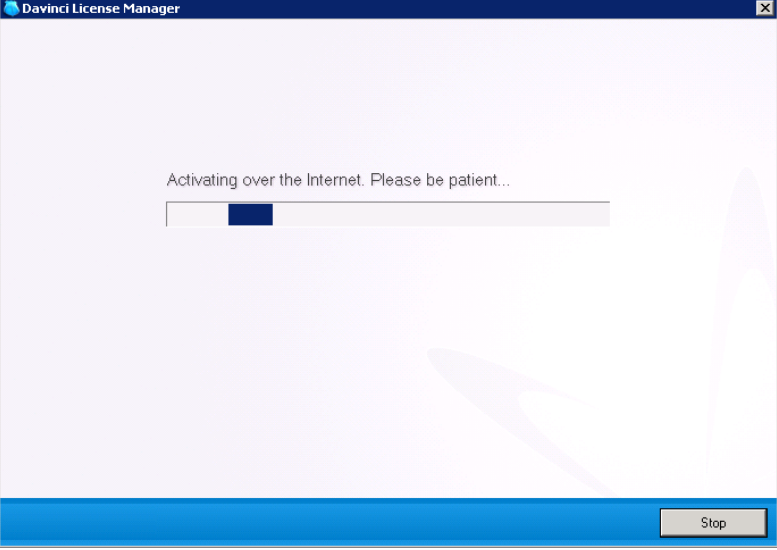


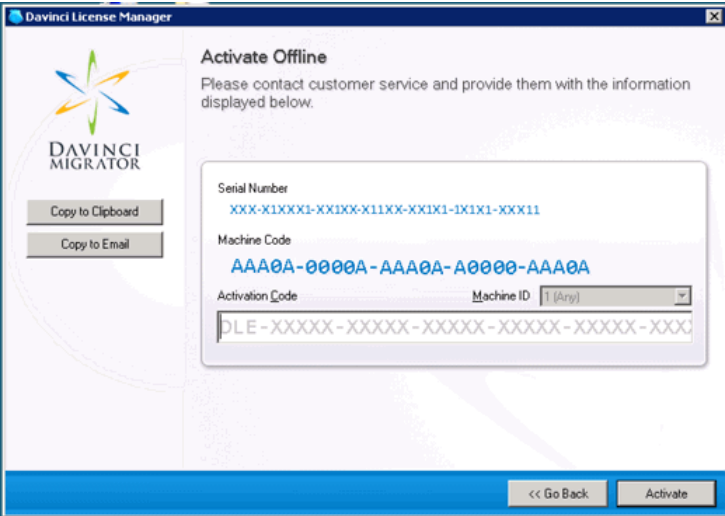
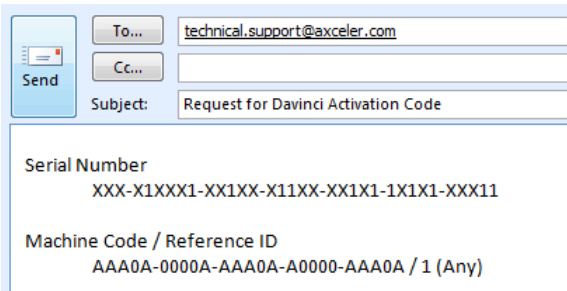
The screenshot shows a Windows dialog box titled "Davinci License Manager". On the left is the "DAVINCI MIGRATOR" logo. The main area is titled "Register Davinci License Manager" and contains the text: "To continue you must register your copy of Davinci License Manager." Below this is a form with three input fields: "Name" (containing "Boss Man"), "Organization" (containing "Axceler"), and "Serial Number" (containing a masked serial number: "XXX-X1XXX1-XX1XX-X11XX-XX1X1-1X1X1-XXX"). At the bottom right are "Register" and "Cancel" buttons.

- 3 Click [**Register**] to display the Activate Davinci License Manager Dialog.



4 Use the information in the following table to determine the appropriate action to take.

If you ...	Then ...
have access to the internet	<p>Click [<b>Activate Over the Internet</b>].</p>  <p>The screenshot shows a window titled "Davinci License Manager" with a blue header bar. The main area is light gray and contains the text "Activating over the Internet. Please be patient..." above a progress bar. The progress bar is partially filled with a dark blue segment. A "Stop" button is visible in the bottom right corner of the window.</p> <p>When the activation is completed, click [<b>OK</b>] then close the License Manager.</p>

If you ...	Then ...
<p>do not have access to the internet</p>	<p>Click [<b>Activate by Entering a Code</b>].</p>  <p>Click [<b>Copy to Clipboard</b>].</p> <p>Compose an email to <i>Axceler Technical Support</i> (see "Technical Support" on page 49):</p> <ul style="list-style-type: none"> <li>▪ For the Subject, enter "Request for Davinci Activation Code."</li> <li>▪ Paste the contents of the clipboard (that is, the Serial Number and Machine Code) into the body of the email</li> </ul>  <p>You will receive a return email from Axceler with your activation code. Paste it into the <b>Activation Code</b> field of the Activate Offline dialog, then click [<b>Activate</b>].</p>
<p>want to activate your license at a later time</p>	<p>Click [<b>Activate Later</b>].</p>

**IMPORTANT:** If you have an evaluation license, you must activate it within three days of registering.

Once your Davinci Migrator license is activated, you can *install the Remote Connector(s) for the 2003/2007 farm(s) you want to migrate* (see "Installing the Remote Connector on Your SharePoint 2003/2007 Legacy Farm Server" on page 17).

## Installing the Remote Connector on Your SharePoint 2003/2007 Legacy Farm Server

To install a Remote Connector:

- 1 Log into the server as the **Remote Service Account** (see "Davinci 2003 or 2007 Remote Service Account" on page 5).

- 2 Launch a browser session and enter the url for the Davinci Central Website:

`http://<ServerName>:<PortNumber>/Davinci`

where:

- ServerName is the name of the 2010 SharePoint farm server where Davinci Migrator is installed
- PortNumber is the port number for Davinci Central (88 by default).



- 3 From the Davinci Central Login screen, provide the following credentials:

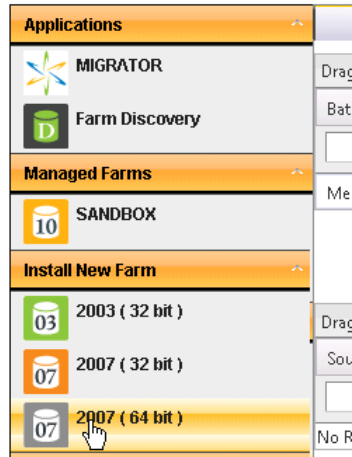
- the Server Name where Davinci Migrator is installed
- the Port Number of the Davinci Migrator Service (8181 by default)
- the Domain, User Name, and Password of the Davinci Migrator Service Account.

 A screenshot of the Davinci Central Login screen. The screen features the Davinci logo at the top, which consists of a stylized starburst icon followed by the word "DAVINCI" in a serif font. Below the logo are several input fields: "Server Name" with the value "2010SharePoint", "Port Number\*" with the value "8181", "Domain" with the value "Axceler", "User Name" with the value "FarmAccount", and "Password" with masked characters "••••". Underneath these fields is a section titled "Login options" containing three checkboxes: "Remember me (Forget me)" which is checked, "Remember my password" which is checked, and "Sign me in automatically" which is unchecked. At the bottom of the form are two buttons: "Login" and "Cancel". A small footnote at the very bottom reads "\*Port Number of Davinci Migrator Service".

- 4 Click [**Login**].

- 5 From the Install New Farm panel, click on the connector that is appropriate for the farm: SharePoint 2003 Connector 32 bit, SharePoint 2007 Connector 32 bit, or SharePoint 2007 Connector 64 bit.

## DAVINCI CENTRAL



- 6 Click [**Run**] to start the setup process.
- 7 From the Welcome screen, click [**Next**] to display the Pre-Conditions dialog.
- 8 Review the pre-conditions and verify that your environment is prepared for installation.



- 9 Click [**Next**].

- 10 Enter the credentials for the SharePoint 2010 server to enable the Remote Connector to communicate with the Davinci Migrator Service. Note that this is the same information you entered to log onto Davinci Central in Step 3.



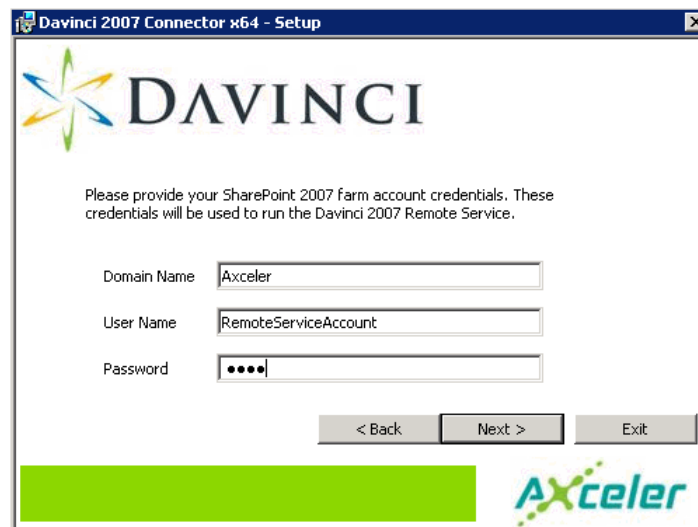
The screenshot shows the 'Davinci 2007 Connector x64 - Setup' window. At the top is the Davinci logo. Below it, the text reads: 'Please enter the SharePoint 2010 farm account details and port numbers you set up on the Davinci 2010 server.' The form contains the following fields:

SharePoint 2010 server name	2010SharePoint
Port Number	8181
Domain Name	Axceler
User Name	FarmAccount
Password	.....

At the bottom of the form are three buttons: '< Back', 'Next >', and 'Exit'. The Axceler logo is visible in the bottom right corner.

- 11 Click [Next].

- 12 Enter the credentials for the *Davinci 2003 or 2007 Remote Service Account* (on page 5).



The screenshot shows the 'Davinci 2007 Connector x64 - Setup' window. At the top is the Davinci logo. Below it, the text reads: 'Please provide your SharePoint 2007 farm account credentials. These credentials will be used to run the Davinci 2007 Remote Service.' The form contains the following fields:

Domain Name	Axceler
User Name	RemoteServiceAccount
Password	....

At the bottom of the form are three buttons: '< Back', 'Next >', and 'Exit'. The Axceler logo is visible in the bottom right corner.

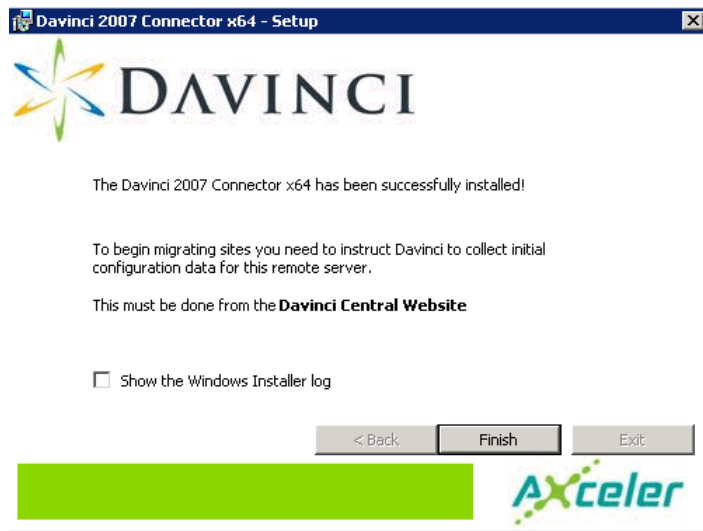
- 13 Click [Next].

14 To begin the installation, click **[Install]**.



A status message displays, showing the progress of the installation.

15 When the installation is complete, click **[Finish]** to close the installer.



## Performing a Farm Discovery

After installing Davinci, you must run an initial Farm Discovery, which will collect the content within your SharePoint farms that Davinci needs to perform a migration.

**NOTE:** Any sites that are added to a discovered farm *after* an initial Farm Discovery has been performed will be discovered automatically by Davinci.

If you have upgraded from an earlier version of Davinci, you may have to rediscover site collections that contain objects that Davinci was not able to migrate previously. See "If you have upgraded from an older version of Davinci" later in this topic.

### Loading Site Collections to be Discovered from a Batch File

Typically, you select site collections to be discovered from a tree view. If you have an exceptionally large farm, however, you may find it more efficient to load the site collections you want to discover directly from an Excel batch file. To create the batch file:

- 1 From Davinci Central left panel, under Managed Farms, click **Farm Discovery**.
- 2 Click [**Download**] to open or save the batch file template (in Excel).
- 3 For each site collection, supply the farm name and site collection URL.

	A	B	C	D	E	F	G
1	FarmName	SiteCollectionUrl					
2	2008sharepoint	<a href="http://2008sharepoint/sites/beta">http://2008sharepoint/sites/beta</a>					
3	2008sharepoint	<a href="http://2008sharepoint/sites/chi">http://2008sharepoint/sites/chi</a>					
4							
5							
6							

### Before You Begin

Before running a Farm Discovery, **stop the SharePoint Timer Jobs and SharePoint Index Services on each farm that you are going to discover** (see "Stopping the SharePoint Index and Timer Jobs Before Performing a Farm Discovery" on page 26).

Depending on the size of your content databases, the initial data collection could take several hours. While initial data collection runs in the background and does not restrict access to your SharePoint environment, it is recommended that you run it when system usage is low. You may also choose to discover a few site collections at a time, particularly if you have a large farm.

**NOTE:** Make sure that none of the site collections included in the Discovery job are read- and/or write-locked; otherwise, the sites within them will not be discovered.

To perform the initial Farm Discovery:

- 1 Log into Davinci Central.
- 2 In the left panel, under Managed Farms, click Farm Discovery.

## DAVINCI CENTRAL

The screenshot displays the Davinci Central interface for Farm Discovery. The left sidebar contains the following sections:

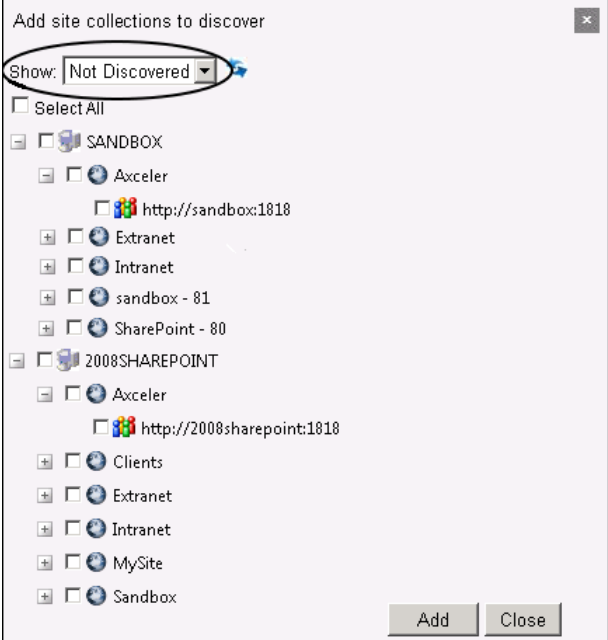
- Applications:** MIGRATOR, Farm Discovery (selected).
- Managed Farms:** SANDBOX (10), 2008SHAREPOINT (07).
- Install New Farm:** 2003 (32 bit) (03), 2007 (32 bit) (07), 2007 (64 bit) (07).
- Logs:** Migration History (H), Trace Log (T).

The main content area shows the 'Farm Discovery' tab with the following components:

- Job:** New, Start, Stop, Clear Queue buttons. Job Status: Waiting to Start.
- Discovery Job Queue:** Add, Delete, Stop, Refresh, Download, Import buttons.
- Site Collections:** A table with columns: Farm, Site Collection, Start Time, Finish Time, Elapsed Time, Status. Below the table, it states 'No Record Found'.
- Current Site Collection:** A table with columns: Item, Processing, Start Time, Finish Time, Elapsed Time, Status. Below the table, it states 'No Record Found'.

- 3 Use the information in the following table to determine the appropriate next step.



If you want to ...	Then ...
select site collections from the tree view	<ul style="list-style-type: none"> <li>▪ Click <b>[Add]</b>. Note that the <b>Show</b> drop-down defaults to <b>Not Discovered</b>.</li> </ul>  <ul style="list-style-type: none"> <li>▪ Check the box to the left of each object containing the sites you want to discover. You can Select All objects within managed farms, or select individual farms, web application, or site collections.</li> <li>▪ Click <b>[Add]</b>, then <b>[Close]</b>.</li> </ul>
load site collections from a batch file	<ul style="list-style-type: none"> <li>▪ Click <b>[Import]</b>.</li> <li>▪ Navigate to and open the Excel file containing the site collections you want to discover.</li> </ul>

All of the site collections within the scope of your selection populate the Discovery Job Queue grid, with a Status of "Waiting."

Discovery Job Queue

Site Collections

<input type="checkbox"/>	Farm	Site Collection	Start Time	Finish Time	Elapsed Time	Status	Progress
<input type="checkbox"/>	SANDBOX	http://sandbox:1818				Waiting	
<input type="checkbox"/>	SANDBOX	http://sandbox:1818/sites/s				Waiting	
<input type="checkbox"/>	SANDBOX	http://sandbox:7624				Waiting	
<input type="checkbox"/>	SANDBOX	http://sandbox:7624/comm				Waiting	
<input type="checkbox"/>	SANDBOX	http://sandbox:7624/sites/A				Waiting	

**NOTE:** If you want to delete one or more site collections from the list before starting the Farm Discovery, check the box the left of the site collection(s), then click **[Delete]**.

**4** To initiate the discovery job, click **[Start]**.

As a site collection is discovered:

- the status in the Site Collection grid changes to "In Progress"
- counts of objects within the site collection being discovered (sites, lists, web parts, features, and so on) populate the Current Site Collection grid.
- when finished, the status changes to "Complete."

The screenshot displays the 'Farm Discovery' interface. At the top, there is a 'Job' section with buttons for 'New', 'Start', 'Stop', and 'Clear Queue', and a 'Job Status: InProgress' indicator. Below this is the 'Discovery Job Queue' section with buttons for 'Add', 'Delete', 'Stop', 'Refresh', 'Download', and 'Import'. The main area contains two tables: 'Site Collections' and 'Current Site Collection - http://sandbox:7624'.

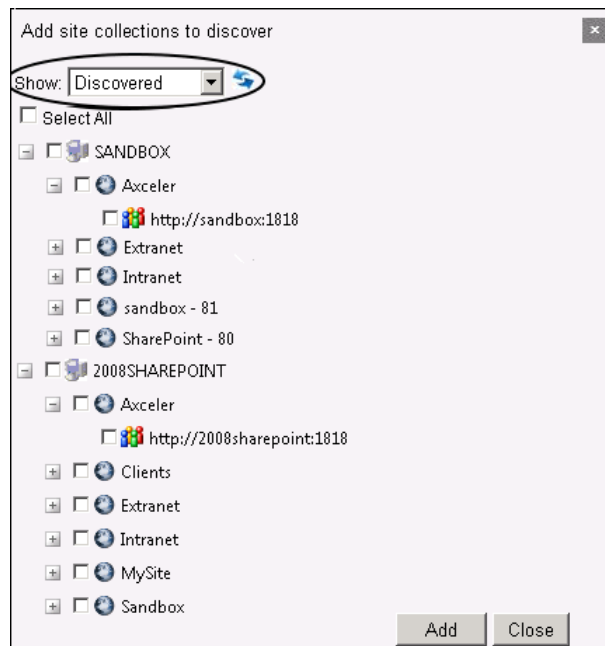
<input type="checkbox"/>	Farm	Site Collection	Start Time	Finish Time	Elapsed Time	Status	Progress
<input type="checkbox"/>	SANDBOX	http://sandbox:1818	4/25/2012 5:12:22 PM	4/25/2012 5:13:08 PM	0:00:46	Complete	<div style="width: 100%; height: 10px; background-color: green;"></div>
<input type="checkbox"/>	SANDBOX	http://sandbox:1818/sites/	4/25/2012 5:13:08 PM	4/25/2012 5:13:36 PM	0:00:28	Complete	<div style="width: 100%; height: 10px; background-color: green;"></div>
<input type="checkbox"/>	SANDBOX	http://sandbox:7624	4/25/2012 5:13:36 PM		0:00:06	InProgress	<div style="width: 10%; height: 10px; background-color: orange;"></div>
<input type="checkbox"/>	SANDBOX	http://sandbox:7624/comm				Waiting	<div style="width: 0%; height: 10px; background-color: gray;"></div>
<input type="checkbox"/>	SANDBOX	http://sandbox:7624/sites/				Waiting	<div style="width: 0%; height: 10px; background-color: gray;"></div>
<input type="checkbox"/>	SANDBOX	http://sandhox:7624/sites/				Waiting	<div style="width: 0%; height: 10px; background-color: gray;"></div>

Item	Processing	Start Time	Finish Time	Elapsed Time	Status	Progress
Preparing Discovery	12 of 12	4/25/2012 5:13:36 PM	4/25/2012 5:13:37 PM	0:00:01	Complete	<div style="width: 100%; height: 10px; background-color: green;"></div>
Site	1 of 1	4/25/2012 5:13:38 PM	4/25/2012 5:13:38 PM	0:00:00	Complete	<div style="width: 100%; height: 10px; background-color: green;"></div>
User	50 of 50	4/25/2012 5:13:38 PM	4/25/2012 5:13:38 PM	0:00:00	Complete	<div style="width: 100%; height: 10px; background-color: green;"></div>
SiteGroup	16 of 16	4/25/2012 5:13:39 PM	4/25/2012 5:13:39 PM	0:00:00	Complete	<div style="width: 100%; height: 10px; background-color: green;"></div>
SiteGroupMembership	12 of 13	4/25/2012 5:13:39 PM		0:00:03	InProgress	<div style="width: 90%; height: 10px; background-color: green;"></div>
Web	0 of 16				Waiting	<div style="width: 0%; height: 10px; background-color: gray;"></div>

- If you want to cancel the entire Discovery job before it has completed, click **Job [Stop]**.
- If you want to cancel the discovery of the site collection currently In Progress , click **Discovery Job Queue [Stop]**.

Site collections on which a Farm Discovery has been successfully performed now display in the tree view as **Discovered**.



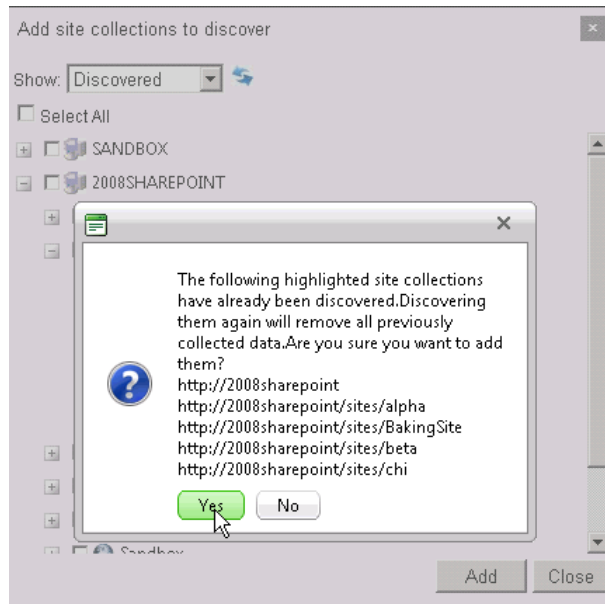
If you have upgraded from an older version of Davinci:

If you have upgraded from version 1.5 and want to migrate workflows, you will need to re-discover any site collections on the source farm(s) that contain workflows that you want to migrate.

If you are upgrading from version 2.0 or earlier and you want to migrate Web Part pages in document libraries and page libraries, you will need to re-discover any site collections on the source farm(s) that contain that Web Part pages you want to migrate. (Prior to version 2.2, only Web Parts on default.aspx could be migrated.)

You can either:

- Select the site collections from the Discovered list.  
A pop-up will display alerting you of site collections that have already been discovered.



- Click [YES] to dismiss the dialog and continue with the discovery.

OR

- Highlight and delete the site collection(s) from the Managed Farm's Discovery History grid.

Name	Server Type	URL	Status	Last Activity
2008SHAREPOINT	MOSS 2007	http://2008SharePoint		

Discovery History	Connectivity	Summary		
Site Collections				
Delete				
Drag a column header and drop it here to group by that column				
Site Collection	Status	Start Time	Finish Time	Elapsed Time
HTTP://2008SHAREPOINT/SITES/CHI	Complete	4/26/2012 11:58:45 AM	4/26/2012 11:58:58 AM	0:00:13
HTTP://2008SHAREPOINT/SITES/BETA	Complete	4/26/2012 11:57:31 AM	4/26/2012 11:58:45 AM	0:01:14
		4/26/2012 11:35:26	4/26/2012 11:35:26	

The site collection(s) will move from the Discovered list to the Not Discovered list, and you can proceed as if you were performing an initial Farm Discovery.

## Stopping the SharePoint Index and Timer Jobs Before Performing a Farm Discovery

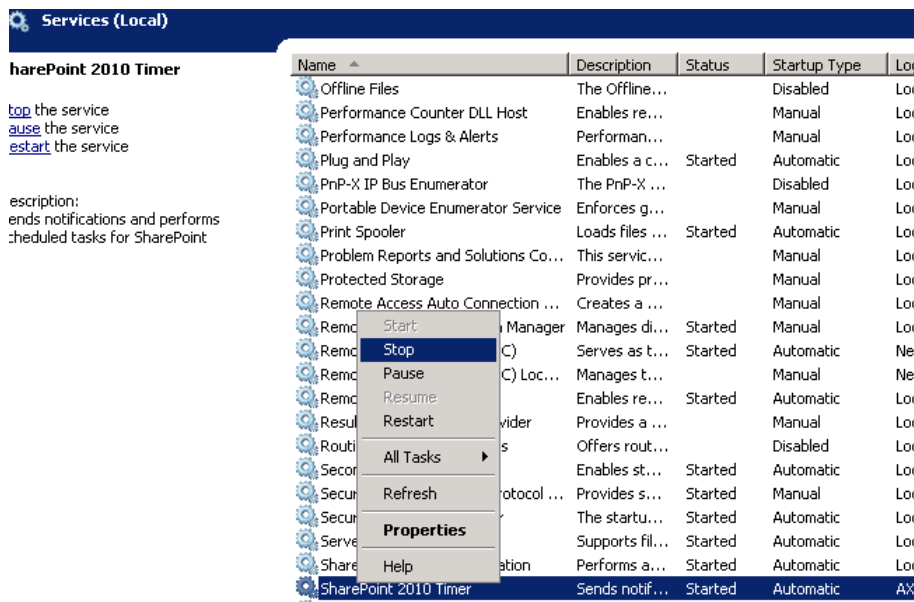
Before starting a Farm Discovery on any SharePoint server, you must stop the Index and Timer jobs on that server.

### To stop the SharePoint Index and Timer Jobs:

- 1 From the server machine Start menu, choose ADMINISTRATIVE TOOLS > SERVICES.
- 2 Select the appropriate service, as described in the following table.

Version	Index Job Name	Timer Job Name
SharePoint 2010	SharePoint Server Search 14	SharePoint 2010 Timer
SharePoint 2007	Office SharePoint Server Search	Windows SharePoint Services Timer
SharePoint 2003	Microsoft SharePointPS Search	Windows SharePoint Services Timer

- 3 Right-click and choose STOP.



- 4 Once Farm Discovery is complete, select the job, right-click and choose START.



---

## Upgrading from an Earlier Version of Davinci

### Upgrading from a version older than v. 1.5

If you are upgrading from a version of Davinci older than v. 1.5, first uninstall the currently-installed version then install of the latest version using the instructions for *First Time Installation* (on page 9).

It will not be necessary to re-activate your Davinci license, but you will need to *re-discover your farms*. (see "Performing a Farm Discovery" on page 21)

### Upgrading from v 1.5 or later

If you are upgrading from Davinci v. 1.5 or later, run the installer for 2010 and the remote connectors to update your current installation. It will not be necessary to re-activate your Davinci license

---

NOTE: At the end of the upgrade you will be prompted to restart your system. A restart is *not* necessary, however. Click **[No]** to dismiss the message.

---

If you are upgrading from 1.5, you will need to *re-discover* (see "Performing a Farm Discovery" on page 21) any site collections that contain workflows that you want to migrate. If you are upgrading from 2.0 or earlier, you will need to *re-discover* (see "Performing a Farm Discovery" on page 21) any site collections that contain Web Part pages in document libraries and page libraries that you want to migrate. (Prior to version 2.2, only Web Parts on default.aspx were migrated.)





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## Uninstalling (Removing) Davinci

The tasks involved in uninstalling Davinci should be performed in the following order:

- a** Remove the Remote Connector from your SharePoint 2003/2007 legacy farm(s).
- b** Remove Davinci from your SharePoint 2010 farm.

To uninstall Remote Connectors from SharePoint 2003/2007 legacy farm server(s):

- 1** Log into your SharePoint 2003/2007 legacy farm server as the *Remote Service Account* (see "Davinci 2003 or 2007 Remote Service Account" on page 5).
- 2** From the Start menu choose the appropriate option for the version of Windows you are running; either:
  - CONTROL PANEL > ADD OR REMOVE PROGRAMS (Windows Server 2003 and earlier)
  - OR
  - CONTROL PANEL > PROGRAMS AND FEATURES (Windows Server 2008).
- 3** Double-click **Davinci 2003 Connector** or **Davinci 2007 Connector**.
- 4** From the Welcome screen, click **[Next]**.
- 5** To confirm that you want to begin the uninstall process, click **[Remove]**.  
The setup wizard provides a status as each component is removed.
- 6** When the Setup Wizard has successfully uninstalled the Davinci Remote Connector, click **[Finish]**.

To uninstall Davinci Migrator from the SharePoint 2010 farm server:

- 1** Log into your SharePoint 2010 farm server as the *Davinci Setup User Account* (on page 4).
- 2** From the Start menu choose CONTROL PANEL > PROGRAMS AND FEATURES.
- 3** Double-click **Davinci Migrator for SharePoint 2010**.
- 4** From the Setup Wizard Welcome screen, click **[Next]**.
- 5** Select **Remove** then click **[Next]**.
- 6** To confirm that you want to begin the uninstall process, click **[Remove]**.  
The setup wizard provides a status as each component is removed.
- 7** When the Setup Wizard has successfully uninstalled Davinci Migrator, click **[Finish]**.



## APPENDIX

# Preparing Your Environment for Installation

This appendix contains instructions for ensuring that the servers on which Davinci components are installed are in compliance with *System Requirements* (on page 3).

## *In This appendix*

Adding a User Account to a Server's Local Administrators Group .....	34
Adding a User Account to the SharePoint Farm Administrators Group .....	35
Enabling the SQL Server sysadmin (or dbcreator) Role for the Davinci Setup and Remote Service Accounts .....	36
Enabling the db_owner Role for the Davinci Setup and Remote Service Accounts.....	38
Adding 32-bit SQL Aliases for Use by Davinci.....	41
Opening Ports on Your SharePoint Farm Servers .....	42

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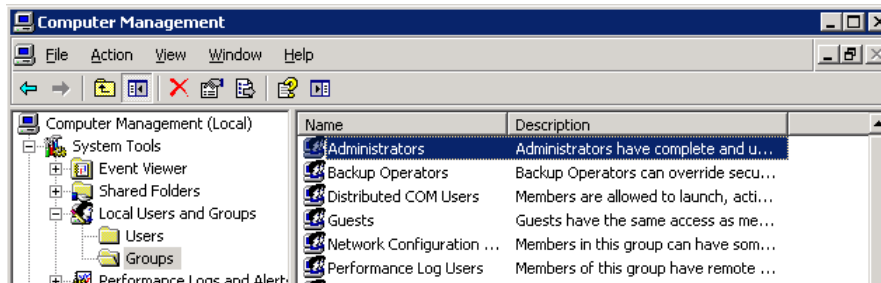
## Adding a User Account to a Server's Local Administrators Group

The following accounts must be a member of the Windows server's Local Administrator's group:

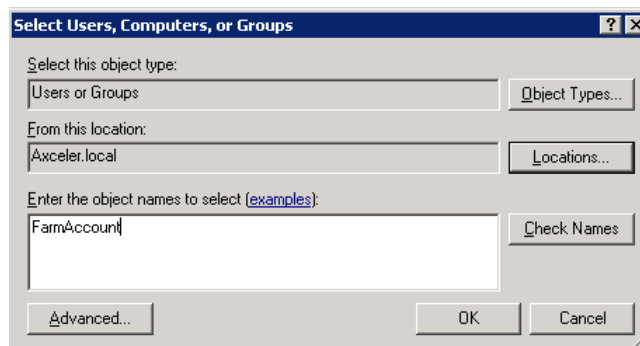
- the Davinci Setup User Account (the account used to install Davinci)
- the Davinci Migrator Service Account, and
- the Davinci Remote Service Account.

To add an account to the server's Local Administrators group:

- 1 From the server machine's Start menu, choose ADMINISTRATIVE TOOLS > COMPUTER MANAGEMENT.
- 2 Expand the Local Users and Groups node, then click Groups.
- 3 In the right pane, double-click Administrators.



- 4 If the account does not appear in the Members list:
  - a) Click **[Add]**.
  - b) In the Enter object names to select field, enter the account name.



- c) Click **[Check Names]** to validate the account.
- d) Click **[OK]** to add the account to the Members list.

---

## Adding a User Account to the SharePoint Farm Administrators Group

To add a user account to the SharePoint Farm Administrators group:

- 1 Open the SharePoint Central Administration website.
- 2 Navigate to the appropriate page. Use the information in the following table for guidance.

SharePoint Version	Location in Central Administration
2010	SECURITY > MANAGE THE FARM ADMINISTRATORS GROUP.
2007	OPERATIONS > SECURITY CONFIGURATION > UPDATE FARM ADMINISTRATORS GROUP
2003	SECURITY CONFIGURATION > SET SHAREPOINT ADMINISTRATION GROUP.

- 3 Add the account to which you want to give Farm Administrator privileges (if it does not already appear in the list).
- 4 Click **[OK]**.

---

## Enabling the SQL Server sysadmin (or dbcreator) Role for the Davinci Setup and Remote Service Accounts

Following are instructions for enabling the sysadmin or dbcreator role\* for:

- the Davinci Setup Account on the SQL server where the Discovery Database will be installed

AND

- the 2003/2007 Remote Service account(s) on the SQL server where the Remote Database(s) will be installed.

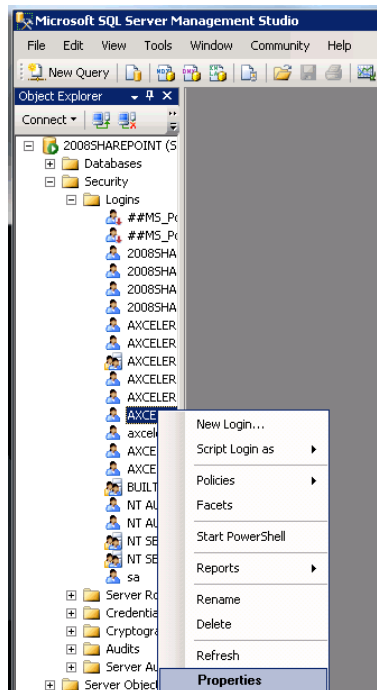
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\*The sysadmin role provides a Davinci account with all of the privileges it needs to install and operate. However, if for security reasons it is not possible to give accounts this level of access, `db_creator` role can be granted in conjunction with `db_owner` privileges for the `SharePoint_Config` database and for all content databases involved in the migration.

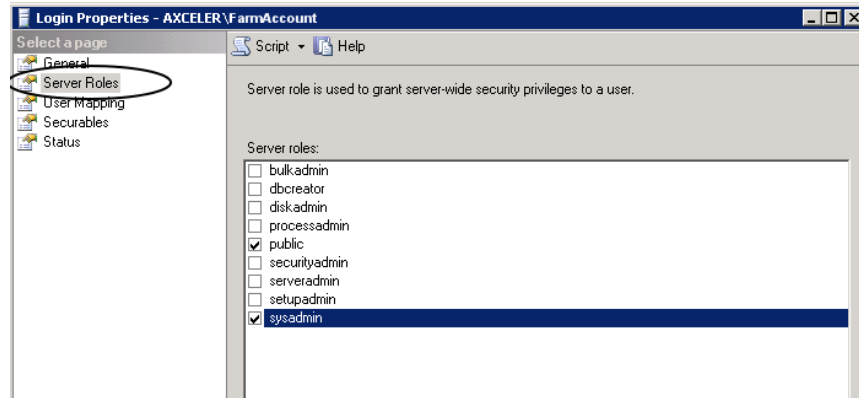
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To enable the sysadmin role in SQL Server:

- 1 Open SQL Server Management Studio on the server where Davinci (or the Remote Connector) will be installed.
- 2 In the left pane, expand the **Security** folder, then the **Logins** folder.
- 3 Locate the account that will be used as the Davinci Setup Account (or the Remote Service Account).
- 4 Right-click and choose **PROPERTIES**.



- 5 On the Login Properties window, select Server Roles and check sysadmin (or dbcreator, if necessary).



- 6 Click [OK].

If you added the account to the dbcreator role, make sure it also has db\_owner privileges for the appropriate databases.

NOTE: By default, the Farm Account is made dbo of all content databases, and therefore has the db\_owner privilege. Therefore, if you are using the Farm Account, no additional action is normally necessary.

---

## Enabling the db\_owner Role for the Davinci Setup and Remote Service Accounts

Following are instructions for enabling the db\_owner role:

- For the Davinci Setup Account:
  - on the SharePoint\_Config database on the destination farm, and
  - each SharePoint content database to which content will be migrated

AND

- For the Davinci 2003/2007 Remote Service account(s):
  - Share\_Point Config database on the source farm, and
  - each SharePoint content database on the source farm(s) that will be migrated.

---

NOTE: This procedure is necessary *only* if the account does not have **sysadmin** privileges for SQL server and is not the dbo (database owner), a privilege granted to the Farm Account by default.

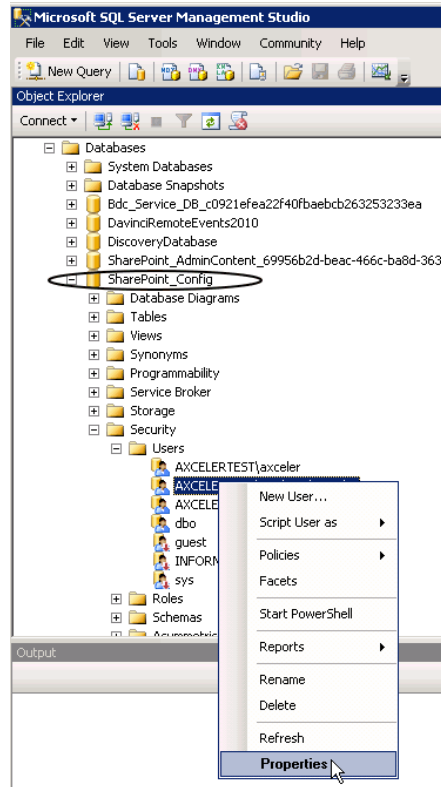
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To enable the db\_owner role on the appropriate databases:

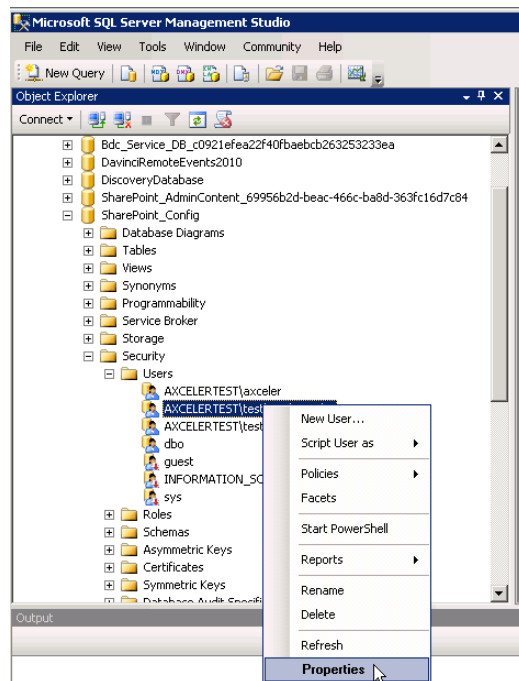
- 1 Open SQL Server Management Studio on the server where Davinci (or the Remote Connector) will be installed.
- 2 In the left pane, expand the Security folder for the database to which you want to grant privileges.
- 3 Locate the account that will be used as the Davinci Setup Account (or the Remote Service Account).



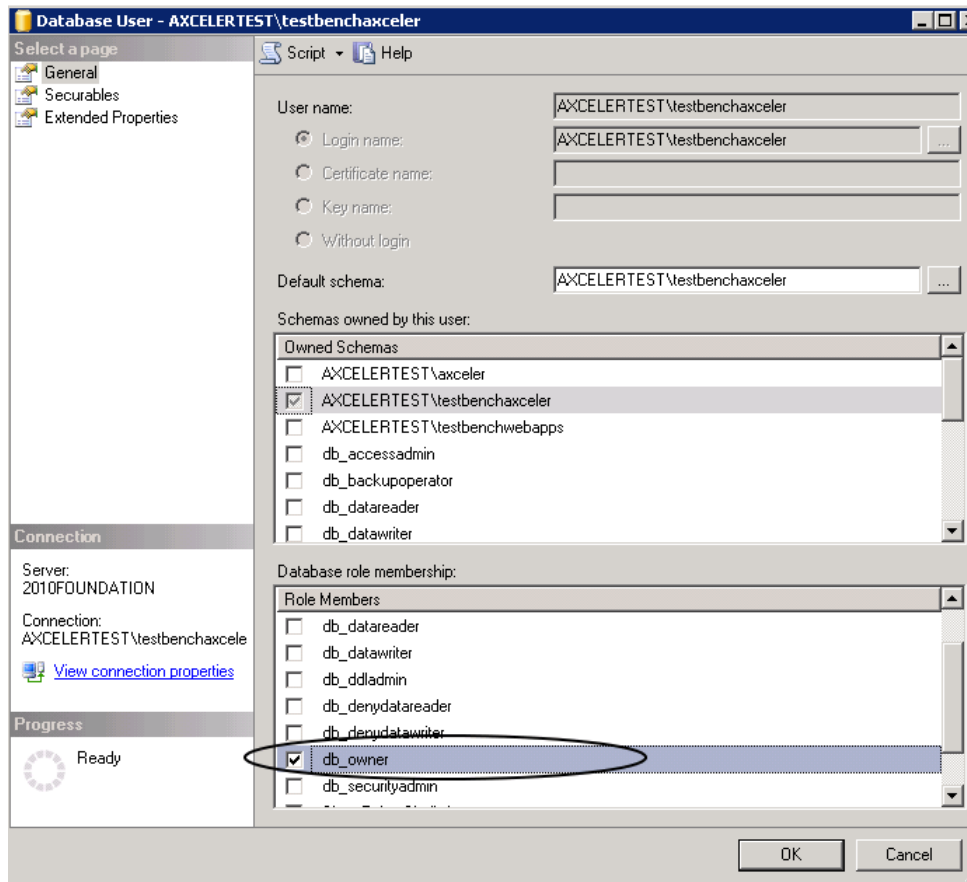
- 4 Right-click and choose PROPERTIES.



- 5 On the Login Properties window, select Server Roles and check sysadmin (or dbcreator, if the sysadmin role cannot be granted).



- 6 In the Database role membership list, make sure the db\_owner box is checked.



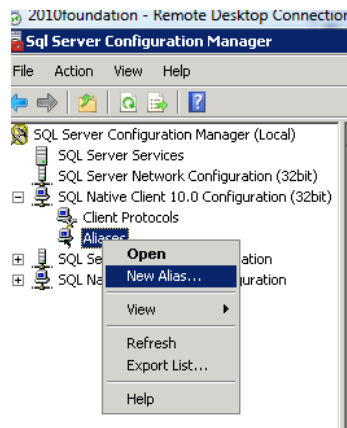
- 7 Click [OK].

## Adding 32-bit SQL Aliases for Use by Davinci

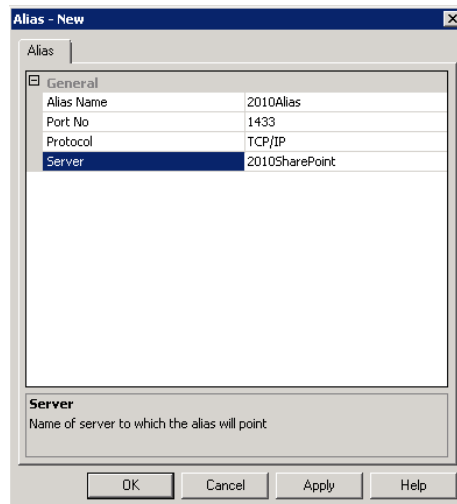
Within the current version of Davinci Migrator, the version of Install Shield does not recognize 64 bit aliases. They are, however, supported in SharePoint. Therefore, if a 64 bit alias is used, you will need to add a 32-bit alias to SQL Server in your SharePoint environment prior to installing Davinci. Otherwise, your installation could become corrupted.

To add a 32-bit SQL Server alias:

- 1 From the server machine's Start menu, choose ALL PROGRAMS > MICROSOFT SQL SERVER 2008 > CONFIGURATION TOOLS > SQL SERVER CONFIGURATION MANAGER.
- 2 Choose SQL NATIVE CLIENT 10.0 CONFIGURATION (32 BIT) > ALIASES.
- 3 Right-click and choose NEW ALIAS.



- 4 Complete the dialog with the Alias Name, Port No, Protocol, and Server name.



- 5 Click [OK].

---

## Opening Ports on Your SharePoint Farm Servers

Before you install Davinci Migrator and Remote Connectors, the following ports must be open (that is, allowed through Windows Firewall) on the applicable SharePoint farm servers:

Port to Open	SharePoint 2010	SharePoint 2003/2007
88 (for the Davinci Central Website)	Inbound	Outbound*
8181 (for the Davinci Migrator Service)	Inbound/Outbound*	Inbound/Outbound*
8182 (for the Davinci Remote Service)	Inbound/Outbound*	Inbound/Outbound*

---

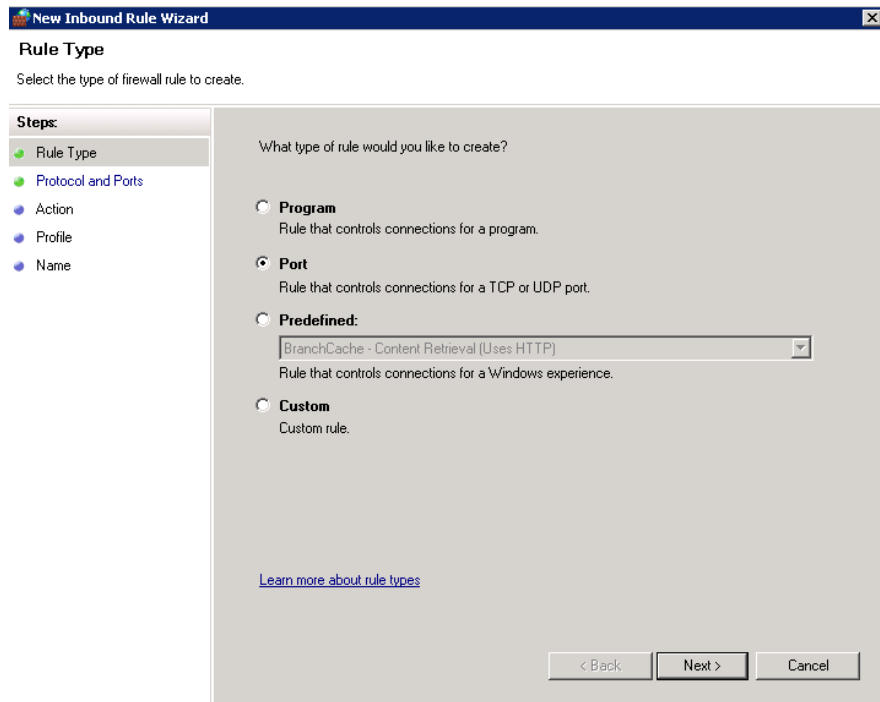
\*Normally, outbound ports are not blocked.

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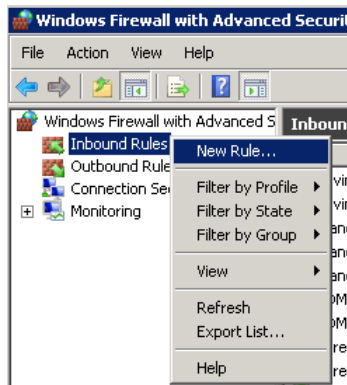
To open ports on a Windows 2008 server when using standard Windows Firewall:

- 1 From the server machine's Start menu, choose CONTROL PANEL > SYSTEMS AND SECURITY > WINDOWS FIREWALL.
- 2 Click **Advanced Settings**.
- 3 For each port you want to open:

- a) Select the type or rule you want to create (typically, Inbound Rules will be created), right-click and choose NEW RULE.



- b) On the Rule Type dialog, select the PORT radio button, then click [Next].



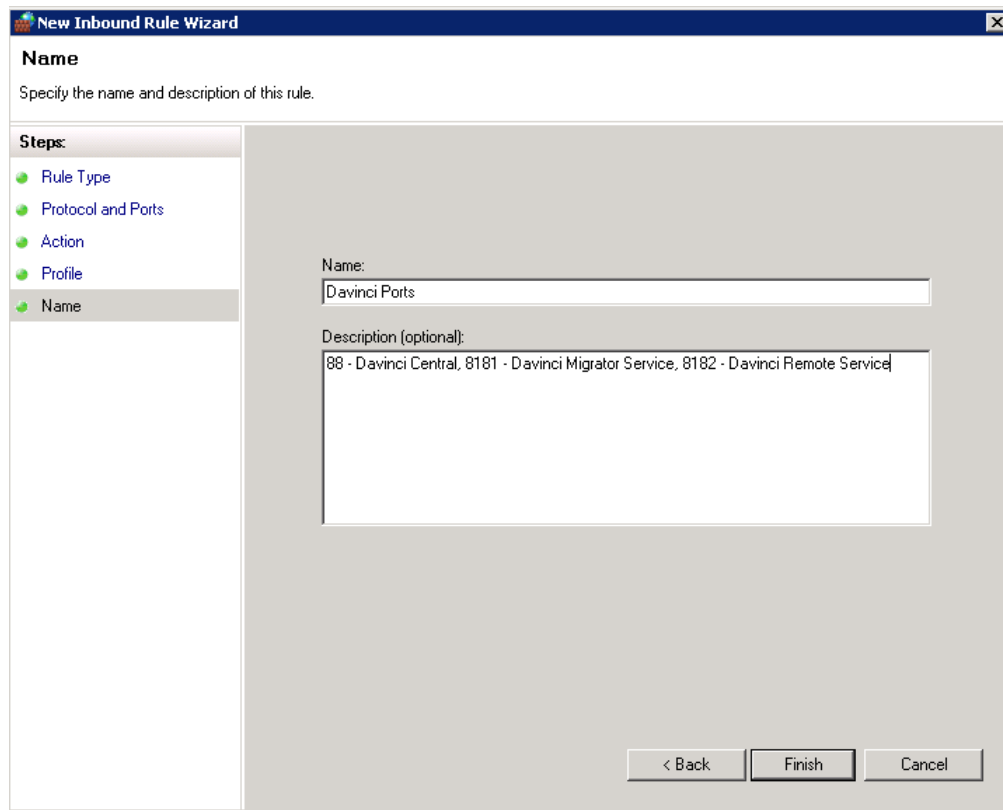
- c) On the Protocol and Ports dialog, accept the default selection (TCP)

- d) Make sure **Specific remote ports** is selected, and enter the number of the port you want to open

The screenshot shows the 'New Inbound Rule Wizard' dialog box, specifically the 'Protocol and Ports' step. The title bar reads 'New Inbound Rule Wizard'. The main heading is 'Protocol and Ports' with the instruction 'Specify the protocols and ports to which this rule applies.' On the left, a 'Steps:' pane lists 'Rule Type', 'Protocol and Ports', 'Action', 'Profile', and 'Name', with 'Protocol and Ports' selected. The main area contains two questions: 'Does this rule apply to TCP or UDP?' with radio buttons for 'TCP' (selected) and 'UDP'; and 'Does this rule apply to all local ports or specific local ports?' with radio buttons for 'All local ports' and 'Specific local ports' (selected). Below the second question is a text input field containing '88, 8181, 8182' and an example 'Example: 80, 443, 5000-5010'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. A link 'Learn more about protocol and ports' is also present.

- e) Click **[Next]**.
- f) On the Action dialog, select the **Allow the connection** radio button, then click **[Next]**.  
On the Profile dialog, make sure the appropriate options are checked, then click **[Next]**.

- g) On the Name dialog, enter a Name (and optionally, a Description) for the rule.



To open ports on a Windows 2003 server:

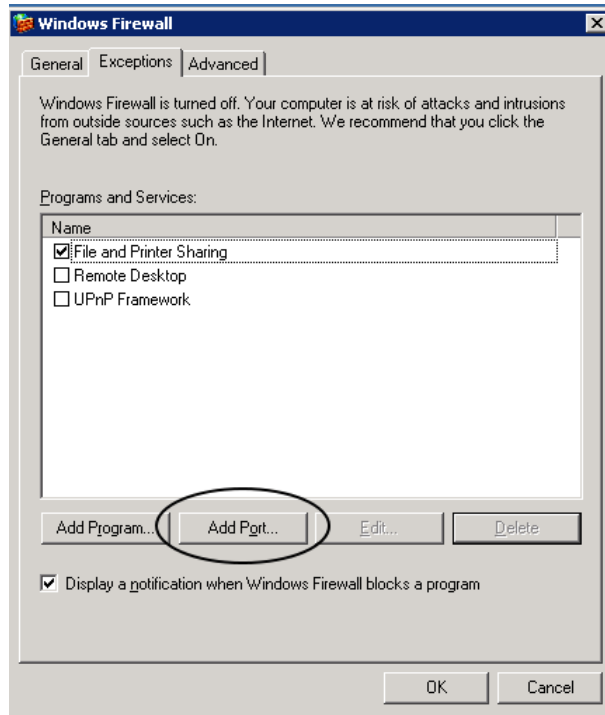
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NOTE: It is only necessary to perform this procedure once for each port. On Server 2003, ports can be opened for inbound connections only. Ports for outbound connections are always open.

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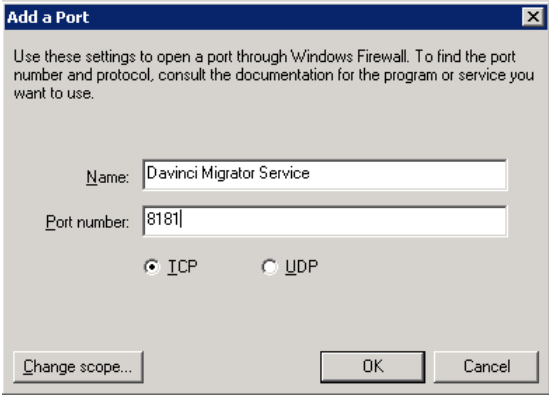
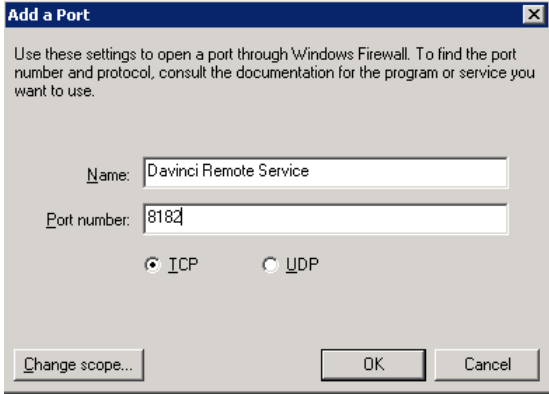
- 1 From the server machine's Start menu, choose CONTROL PANEL > WINDOWS FIREWALL.
- 2 Click Allow a program through Windows Firewall.
- 3 Click [Allow another program...]
- 4 For each port you need to open:

- a) On the Windows Firewall Settings Exceptions tab, click **[Add port...]**.



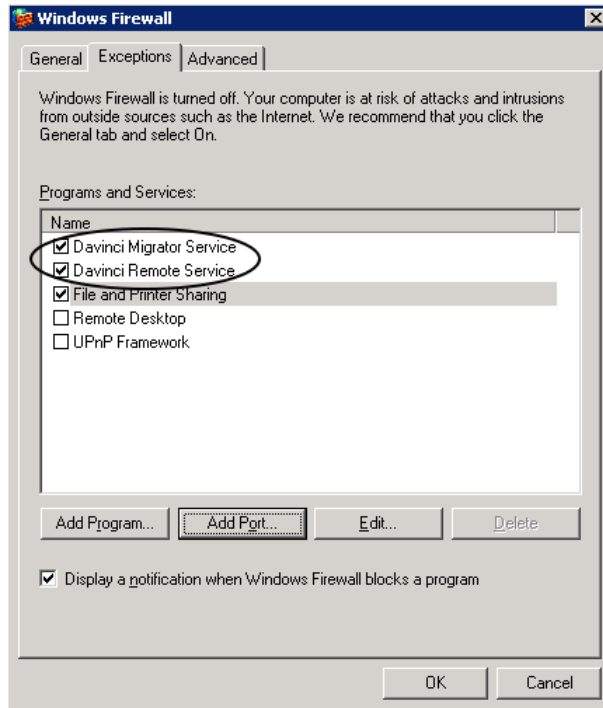


b) Complete the Add Port dialog as described in the following table.

For ...	Complete the Add Port Dialog as follows ...
Davinci Migrator Service	<p>Name: Davinci Migrator Service                      Port: 8181                      Protocol: TCIP</p> 
Davinci Remote Service	<p>Name: Davinci Remote Service                      Port: 8182                      Protocol: TCIP</p> 

c) After completing the dialog, click **[OK]**.

Once the ports have been opened they will appear in the Exceptions list as show below.



# Technical Support

Axceler is committed to providing timely and effective customer support to its customers worldwide. Axceler Technical Support is available to help you solve problems. The standard customer support contract guarantees technical support during contractually specified hours. To obtain technical support for Davinci for SharePoint, have your customer license number ready.

To contact Axceler Technical Support, telephone, fax, or e-mail the nearest office listed below.

Axceler - North America	Axceler - Europe
600 Unicorn Park Drive	7 Swallow Place
Woburn, MA 01801	London W1B 2AG, UK
Phone: 781.995.0063	Phone: +44 (0) 20 7850.0199
Toll Free: 866.712.6530	
Fax: 781.287.0180	Fax: +44 (0) 20 7850.0270
e-mail: Technical.Support@Axceler.com	e-mail: Technical.Support.UK@Axceler.com

## The Axceler Customer Portal

If you have an active support contract with Axceler and your email address is in Axceler's Technical Support database, you can log into the Axceler Customer Portal at <http://www.axceler.com/Support/CustomerPortal.aspx> and access the following product resources:

- announcements of new versions, critical maintenance releases, and other information that may be useful to users of Axceler products
- the product Knowledge Base, which includes training videos, product documentation, and FAQs
- articles, use cases, white papers, and company blogs

You can also connect directly with Axceler's support team and file and manage your own support tickets.

If you are visiting the portal for the first time, enter your email address in the log in screen then click the **[Retrieve Password]** button. You will promptly receive a temporary password for your account via email from Axceler Technical Support.