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dSHIFT Migrator for SharePoint (On-Premises)

Getting Started Guide v1.0

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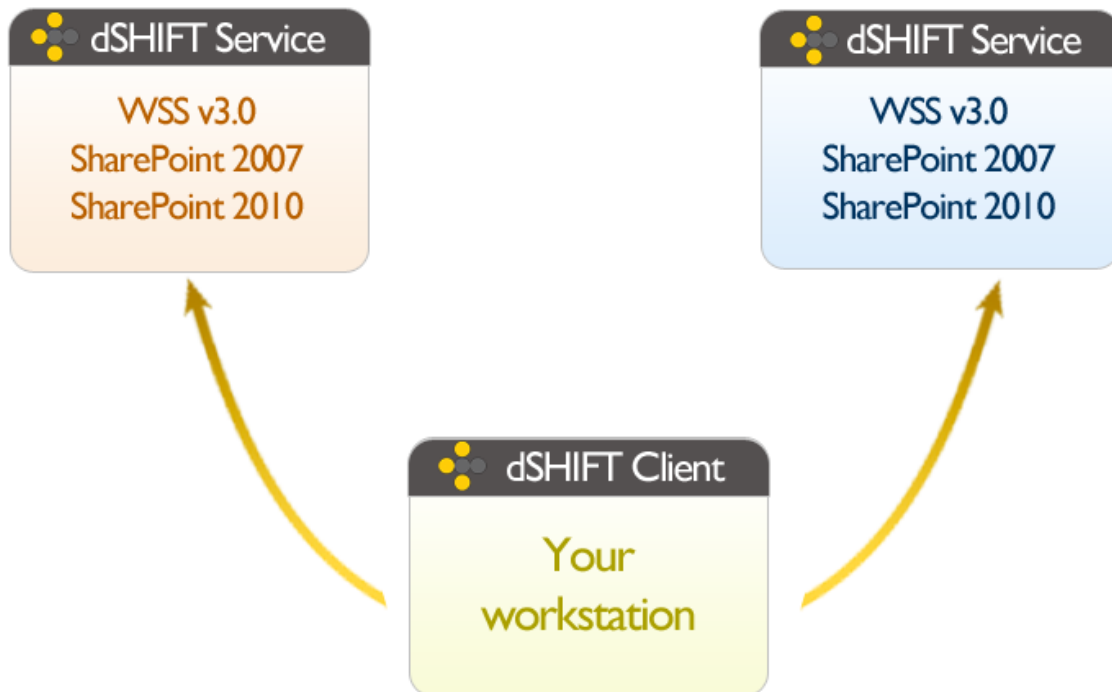
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# Introduction

The dSHIFT Migrator is a one-stop solution to migrate data from WSS 3.0 or MOSS 2007 to SharePoint 2010. The dSHIFT Migrator is also capable of restructuring and reorganizing SharePoint data during migrations by simply dragging and dropping contents from source to destination, and even lets you perform import or export operations, send site-wide notifications and a lot more – all with just a few clicks.

The dSHIFT Migration Tool is built on top of SharePoint’s migration APIs, and uses the latest Microsoft technologies in an extensible architecture, providing an easy-to-use migration solution that delivers definite results. Acting as a “black box” Windows service, dSHIFT migrates all data, including sites, lists, templates and security to the target SharePoint 2010 environment. The figure below details how this service interacts with a client application (the “dSHIFT client”) to perform migrations.



As shown above, the dSHIFT client (front-end GUI) is installed on any workstation in the same network. Since it has been designed to work remotely, the dSHIFT client does not have to be installed on the source server. However, if it is more convenient to do so, running the client from the source server is still possible.

On the other hand, the dSHIFT Windows service must be installed on the source and destination servers with appropriate credentials and access rights. Please use an account that has SharePoint Administrator, Database Administrator, and Local Administrator rights, such as the account used for the SharePoint Timer service.

# Supported Migration Scenarios

The dSHIFT Migrator is capable of migrating data to and from the following platforms:

- Windows SharePoint Services (WSS) v3.0
- Microsoft Office SharePoint Server (MOSS) 2007
- Microsoft SharePoint Foundation 2010
- Microsoft SharePoint Server 2010

## Installation Steps

### I. Installing the dSHIFT Client

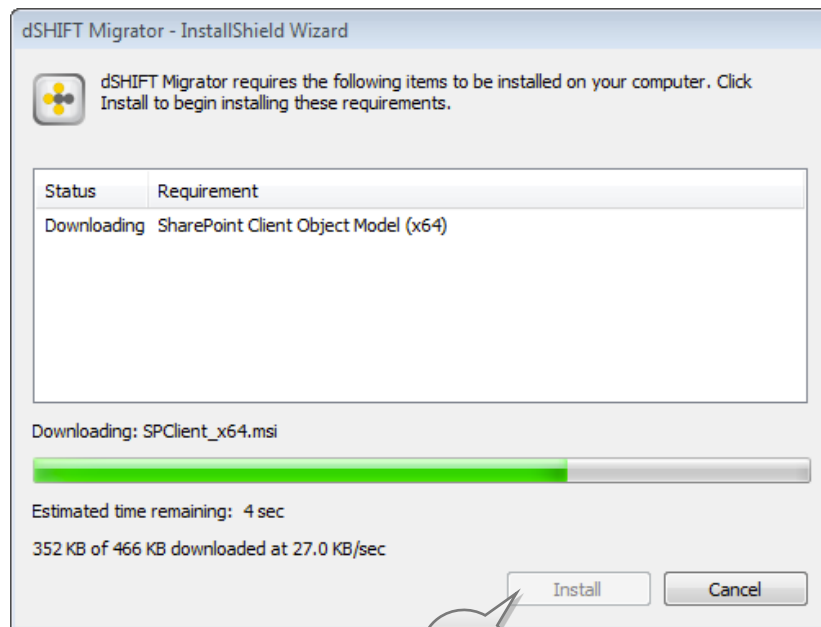
Before you begin installation of the dSHIFT Client, please ensure the following pre-requisites are in place:

1. An account with appropriate local administrator level access rights.
2. Dot Net Framework version 3.5 SPI or higher installed.
3. Access to internet

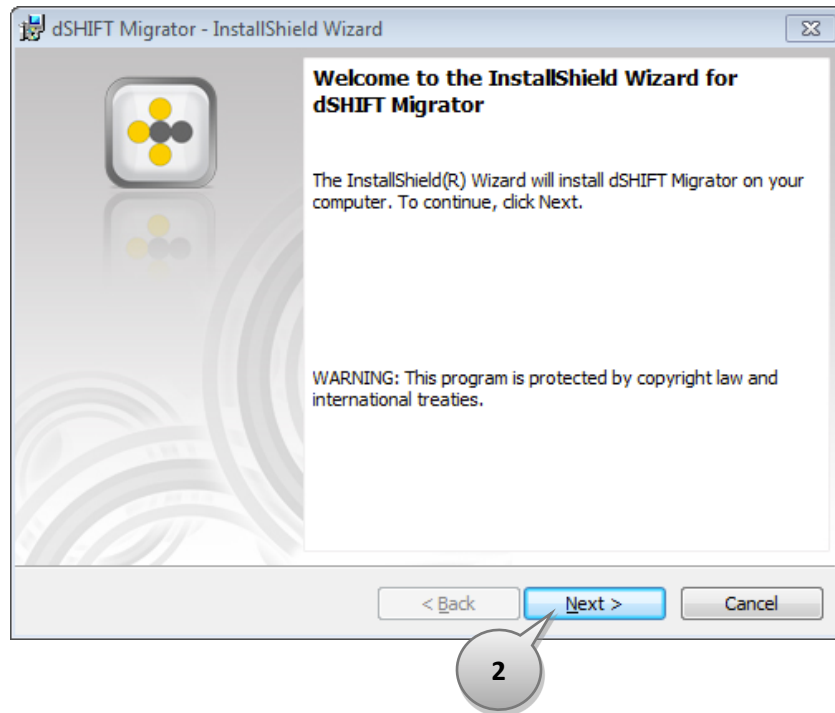
Once these pre-requisites are in place then download the installation package on the workstation where you wish to install the dSHIFT Client, unzip the package and run the “dSHIFT Setup” file to begin installation.

The installation steps are as follows:

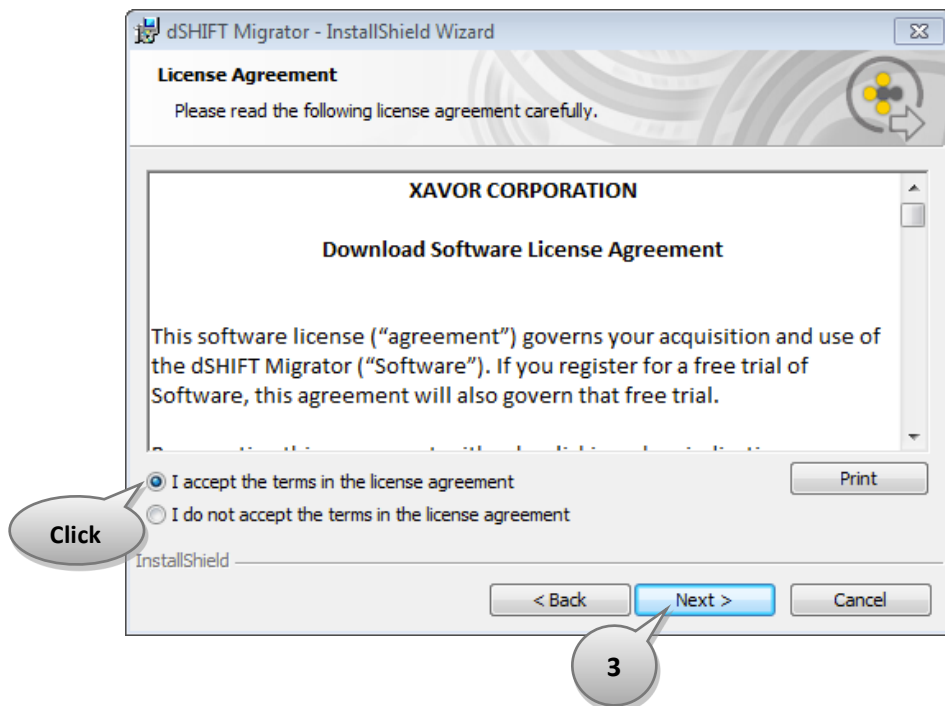
1. To advance through the installation wizard, click “Install”. Depending upon your system type i.e. 64-bit or 32-bit, the installer will download the relevant package and let you proceed with the installation.



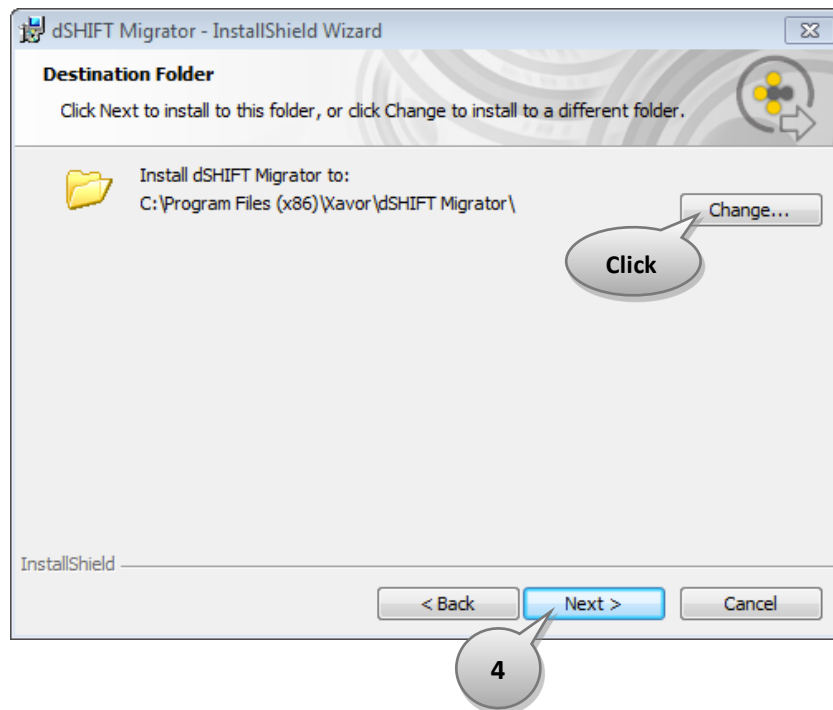
2. Once the relevant package is downloaded, click “Next” to advance.



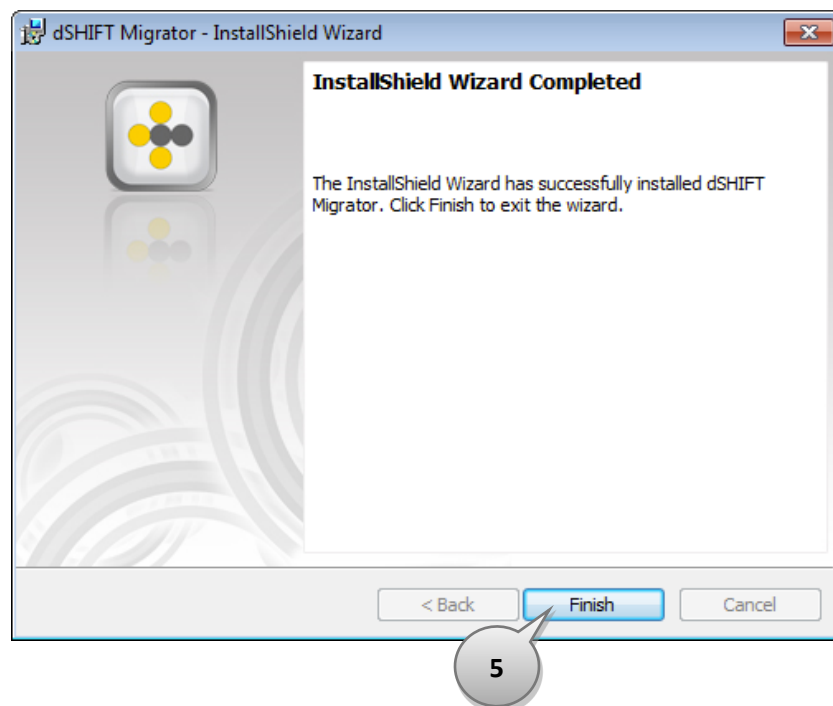
3. Review the Download Software License Agreement, and if you wish to accept the terms then click on the radio button to select “I accept the terms in the license agreement” then click “Next”.



4. By default, the dSHIFT Client is installed under the Program Files folder but if you wish to change the location then click Change and select the desired location where you wish to install, and then click “Next”.



5. Click “Install” to begin the installation or click “Back” if you want to review or change any of the installation settings. Once the installation is complete, click “Finish” to close the installation wizard.



## 2. Installing the dSHIFT Service

Once the dSHIFT client is successfully installed, you can begin with installation of the dSHIFT Windows service on both the source and destination SharePoint Servers, please ensure the following pre-requisites are in place:

1. An account with appropriate access rights as local admin, database admin and SharePoint admin.
2. Dot Net Framework version 3.5 SPI or higher installed.
3. Access to the SharePoint server, be it WSSv3, SharePoint 2007 or SharePoint 2010.

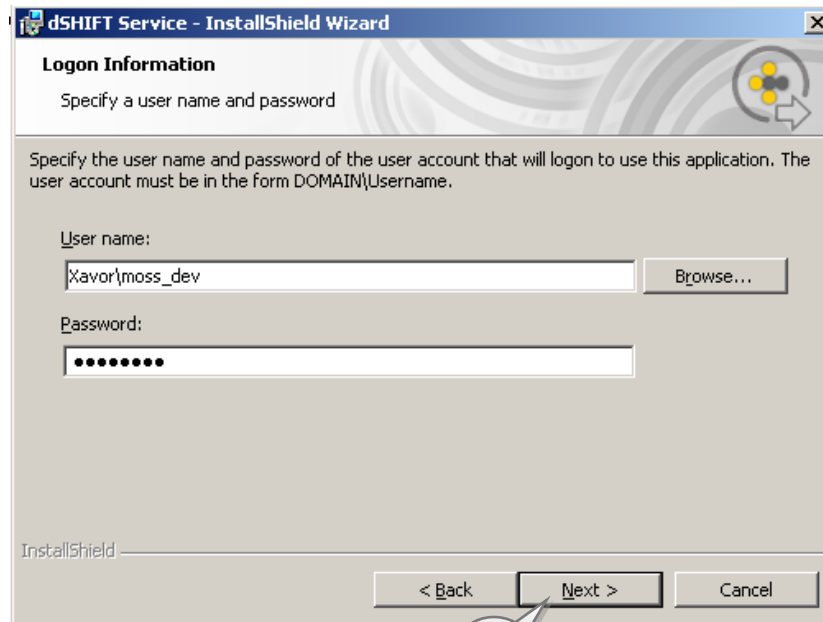
Once the pre-requisites are in place, open the installation package on the source SharePoint server, unzip the file and run the “dSHIFT Service Setup” to begin installation.

The installation steps are as follows:

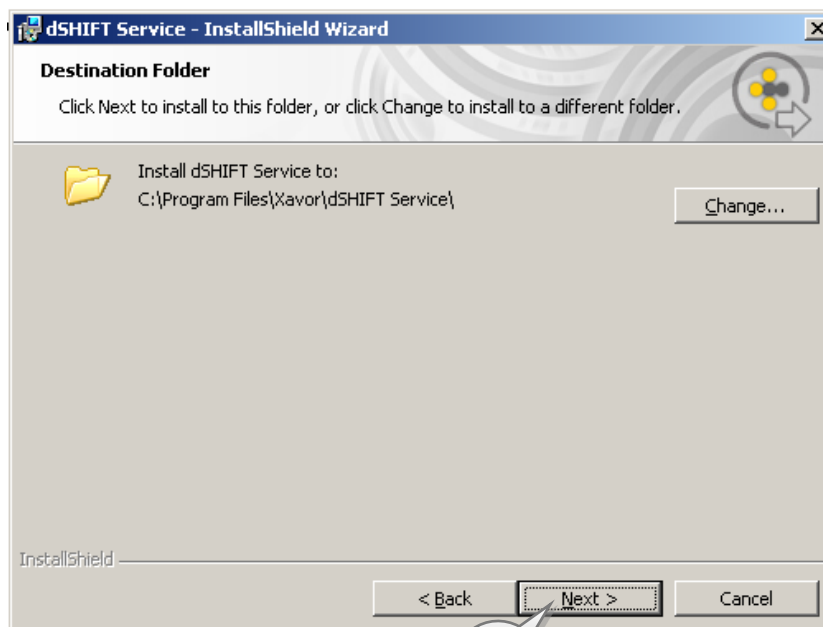
1. To advance through the dSHIFT service installation wizard, click “Next”.



2. Type in the username and password of an account that has 3 levels of access rights (Local Admin, Database Admin and SharePoint Admin). A good example of such an account is the one being used by the SharePoint Time Service or SharePoint Installer account.



3. By default, the dSHIFT service is installed under the Program Files folder but if you wish to change the location then click change and select the desired location where you wish to install then click “Next” to begin the installation. If you want to review or change any of your installation settings, click “Back”.

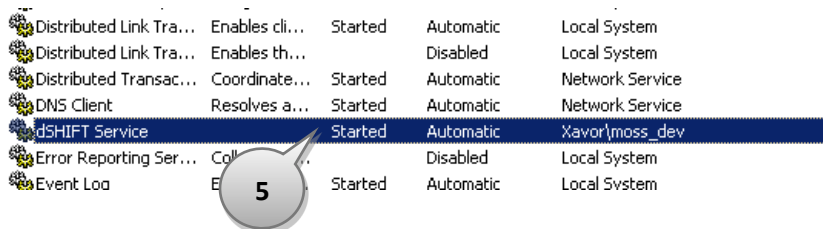




4. Once the dSHIFT service installation is complete, click “Finish” to close the installation wizard.



5. In order to ensure that the dSHIFT service has installed successfully and is running, please click on the “Start” menu, click “Run” and then type “service.msc” to open the Services dialog. Scroll down to the dSHIFT Service to confirm that it has started.

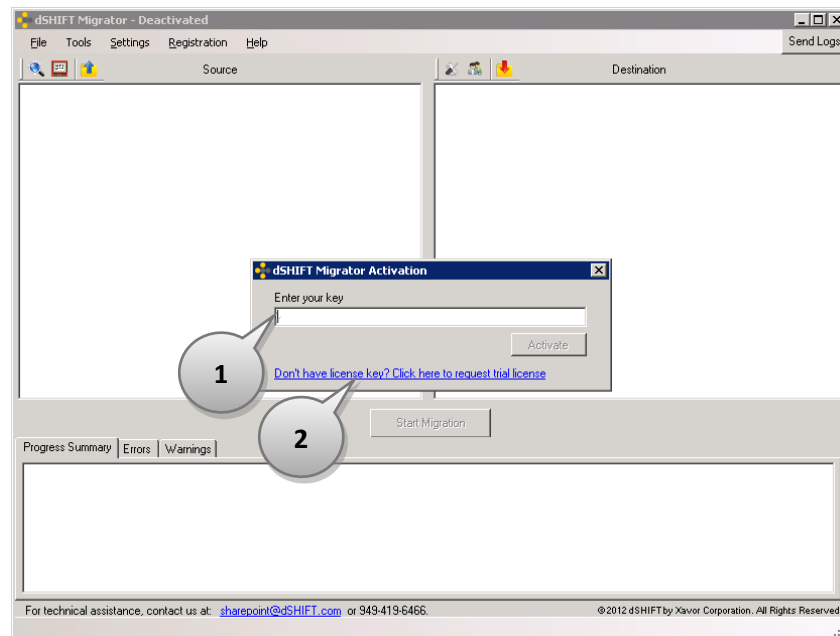


Once the Migrator client is installed on your workstation and the Migrator service is running successfully on the source server, you can then proceed with the activation steps.

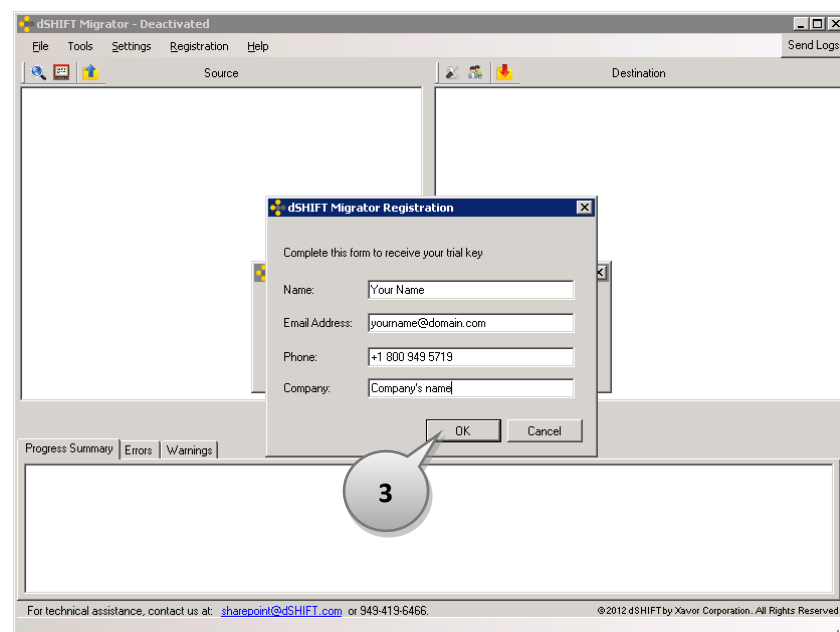
# Activation Steps

The dSHIFT Migrator must be activated before it can be used for SharePoint migrations.

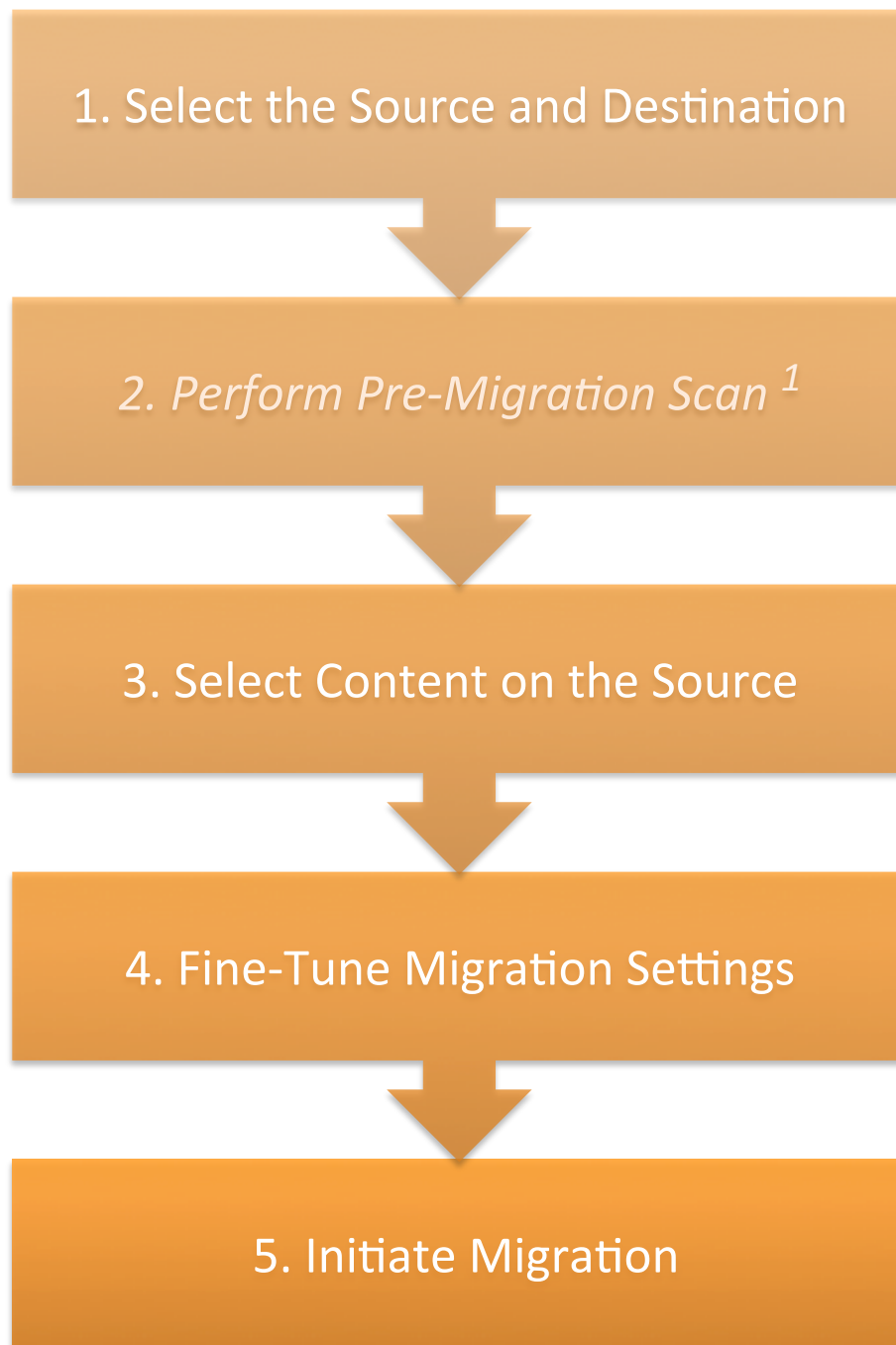
1. In order to activate the dSHIFT Migrator, please copy/paste or type in the license key that has been issued to you in the activation dialog. If you've downloaded the software from dshift.com, then your trial license key will be sent to the email address specified in the download form.
2. If you've not received the license key yet, then click "Don't have license key? Click here to request trial license" in the activation dialog.



3. Fill in the form with name, email, phone and company details, and then click "OK". You will receive a license key at the specified email address. Please use this key to activate the dSHIFT Migrator.



# The Migration Process



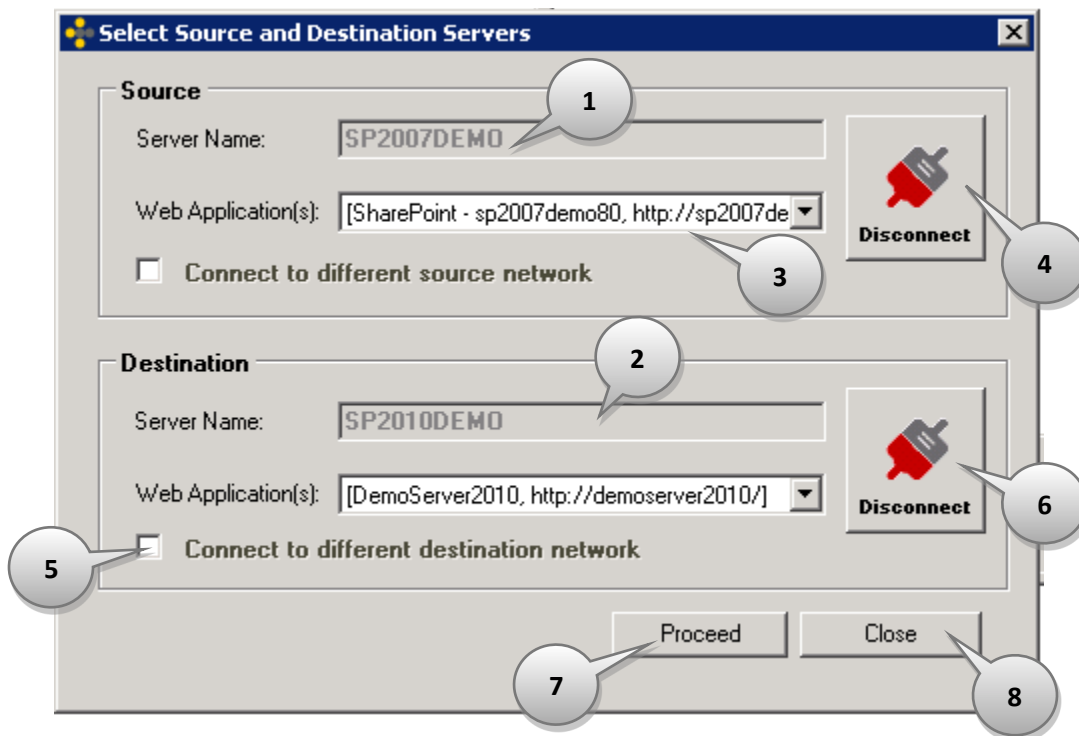
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<sup>1</sup> Optional.

## I. Select the Source and Destination

When you launch the application, a pop-up window will appear, requesting credentials for the source and destination servers.


1. Enter the source server's address (SharePoint farm name) on which the dSHIFT service is installed.
2. Enter the destination server's address (SharePoint farm name) on which the dSHIFT service is installed.
3. Select the Source Web Application from where the content is to be exported.
4. Click the Connect button for the source server.
5. If you have more than one domain networks available then check the "Connect to different source network" box, and enter your domain credentials in the dialog that appears.
6. Click the Connect button for the destination server.
7. Click the "Proceed" button to save changes and continue to the main screen.
8. Alternatively, click the "Close" button to close the dialog without proceeding and return to the main screen.

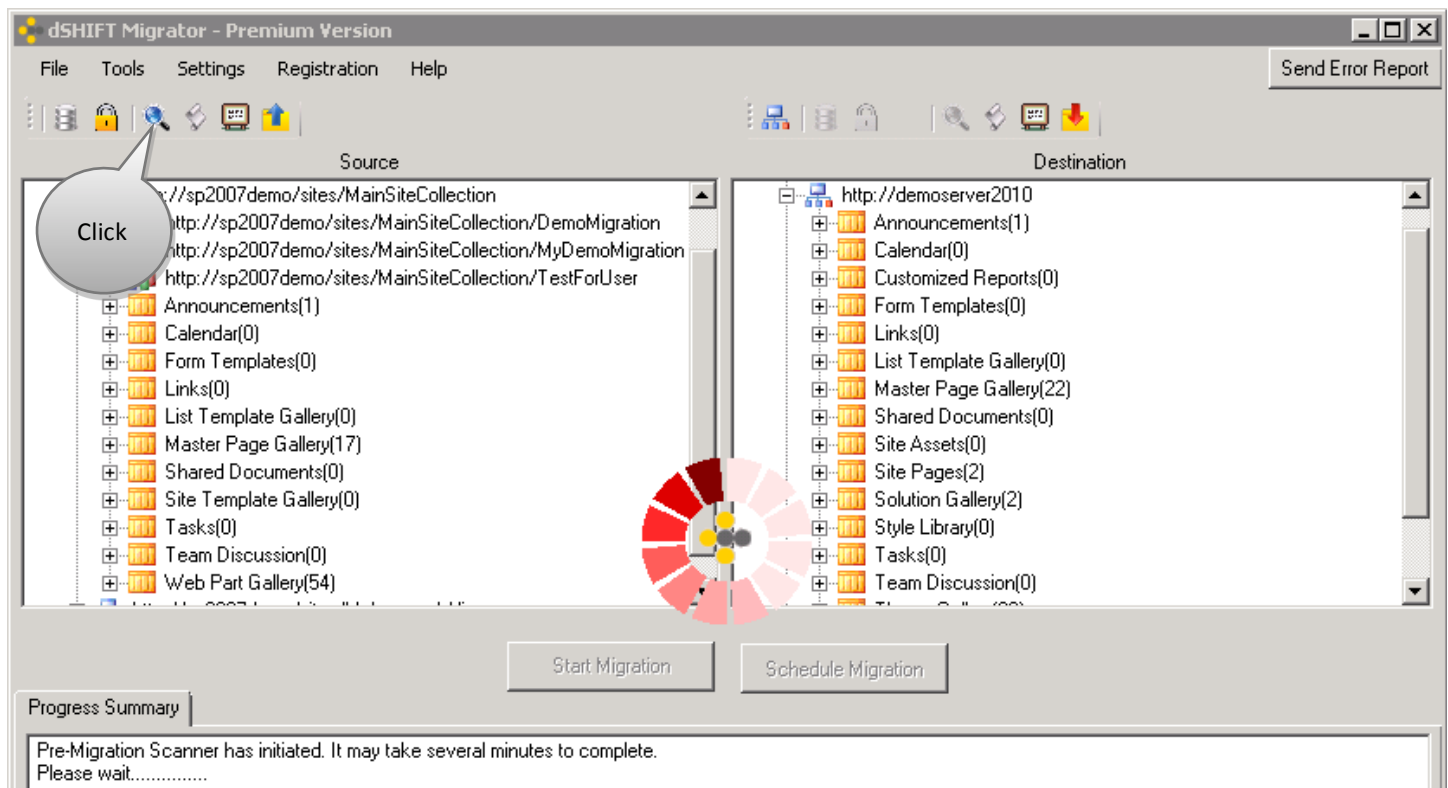


To modify these source and destination credentials later on, click "Change Site Collection" in the File menu.

## 2. Perform Pre-Migration Scan

The Pre-Migration Scanning feature generates a detailed report that can help you identify factors pertaining to your SharePoint environment that might have an impact on the migration process. Potential challenges are highlighted, allowing you to devise a well-informed migration strategy. Even though it is an optional feature, it is highly recommended to generate a pre-migration report before initiating the migration.

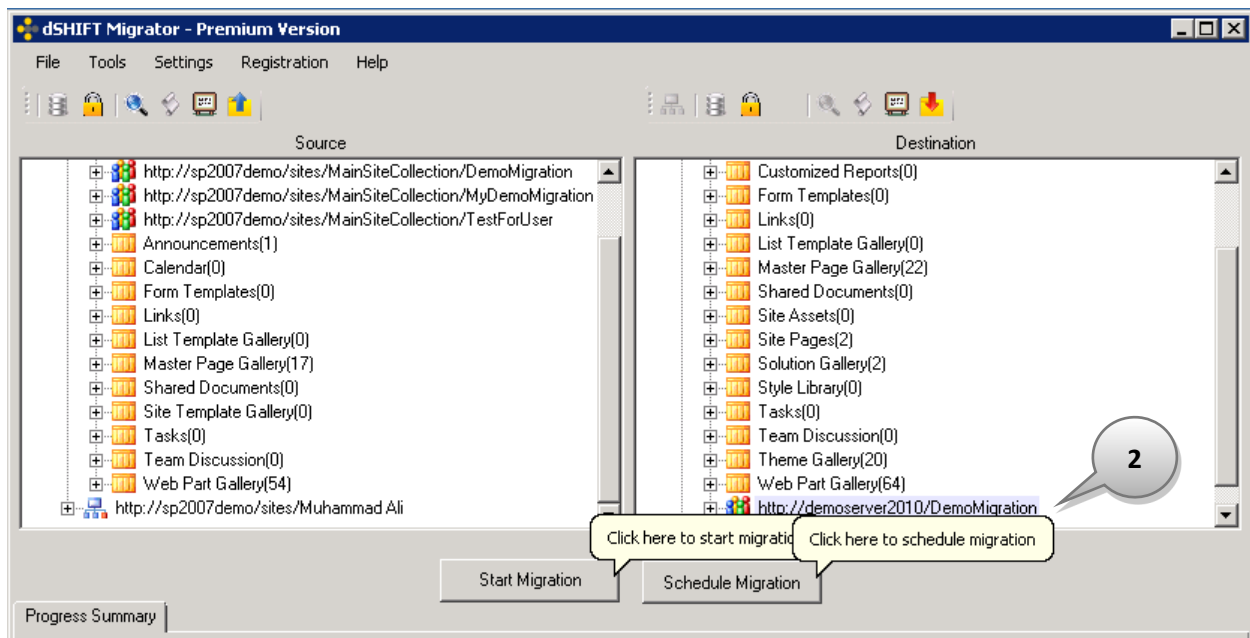
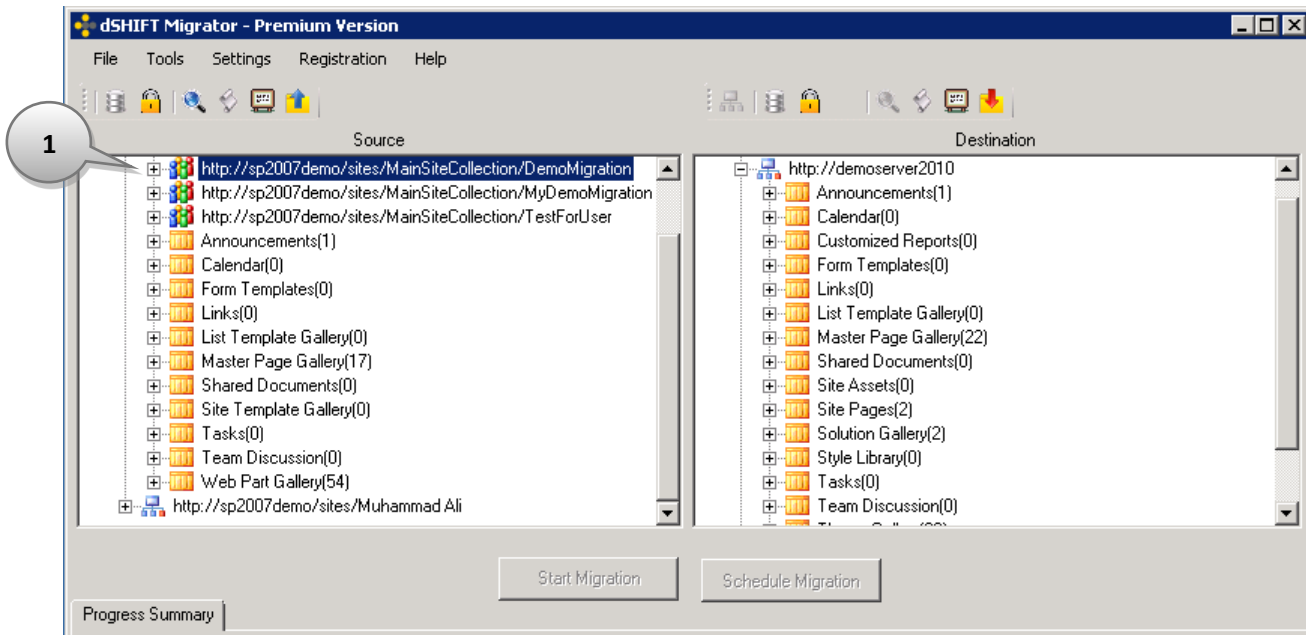
To start a pre-migration scan, click “Pre-Migration Scanner” in the Tools menu, or click the magnifying glass icon  the toolbar at the top of the main screen. Once the scan has finished, the pre-migration report is displayed in your web browser.



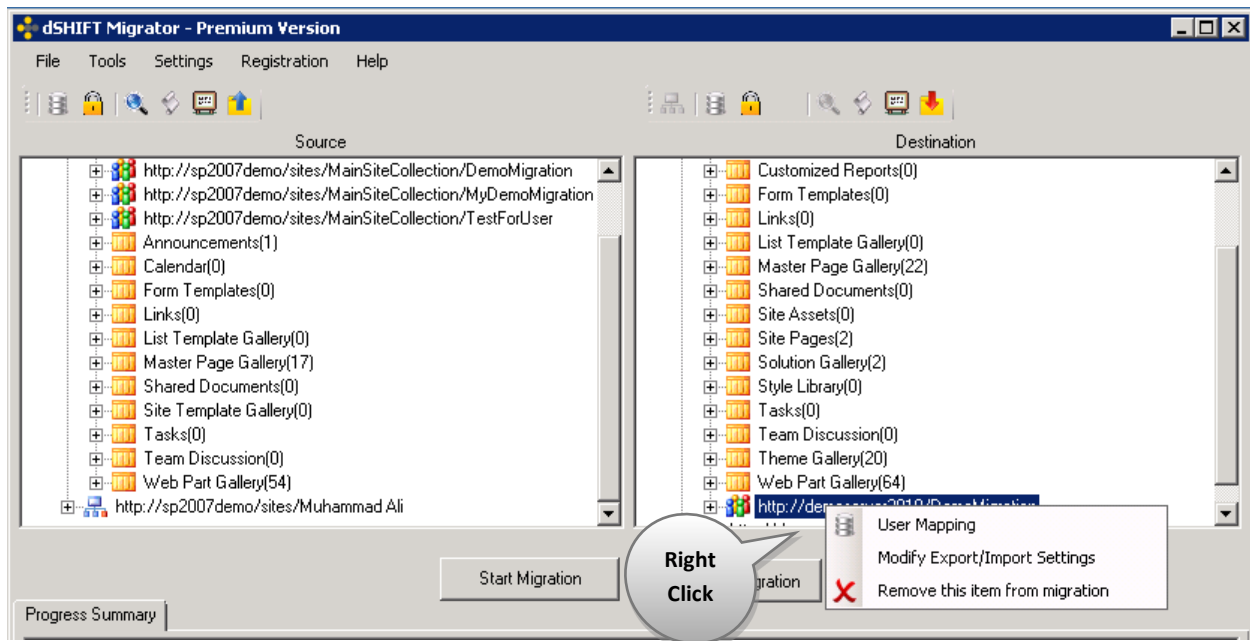
### 3. Selecting What to Migrate

The main screen displays the source farm's web applications in the Source panel on the left, and the destination's site collection hierarchy in the Destination panel on the right.

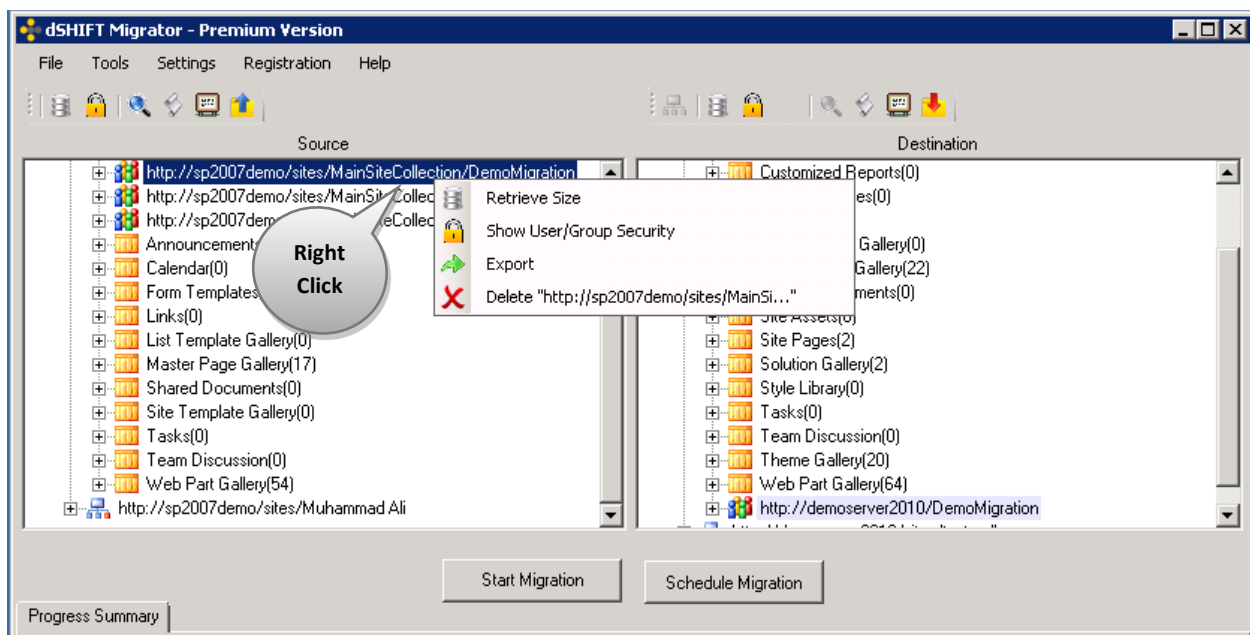
1. Select the sites, webs, and sub-webs or perform a granular migration at the document library or even at the item level in the Source panel that you wish to migrate. Multiple webs can be selected in the Source panel by holding down the Control key on your keyboard while clicking.
2. Drag the selected webs to their desired locations in the Destination panel.



To remove a web that was dragged to the Destination panel, right-click the web and select “Remove this item from migration”.

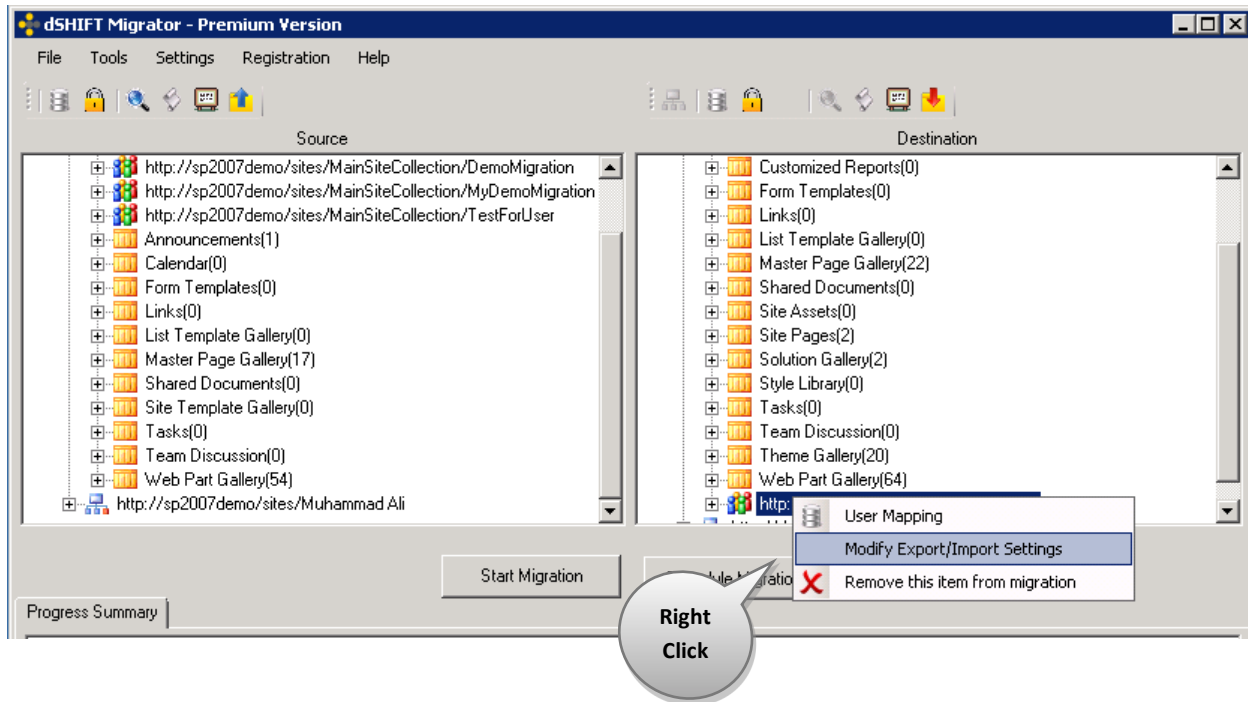


To retrieve the size of a site, web or sub-webs, right-click on the selected site and then click “Retrieve Size”. Similarly, selecting the “Show User/Group Security” will show the permissions assigned on the selected web.



## 4. Fine-Tune Migration Settings

The migration settings for each web in the Destination panel can be fine-tuned before the migration process begins.



Right-click on a web in the Destination panel, and then click “Modify Export/Import Settings” to open the Migration Settings dialog.

The Migration Settings dialog is used to fine-tune the security and web part filtering for each selected web’s content so that the content can be migrated with or without security and with or without the web parts. The Security Migration drop-down menu can be set to migrate all or none of the selected web’s security settings.

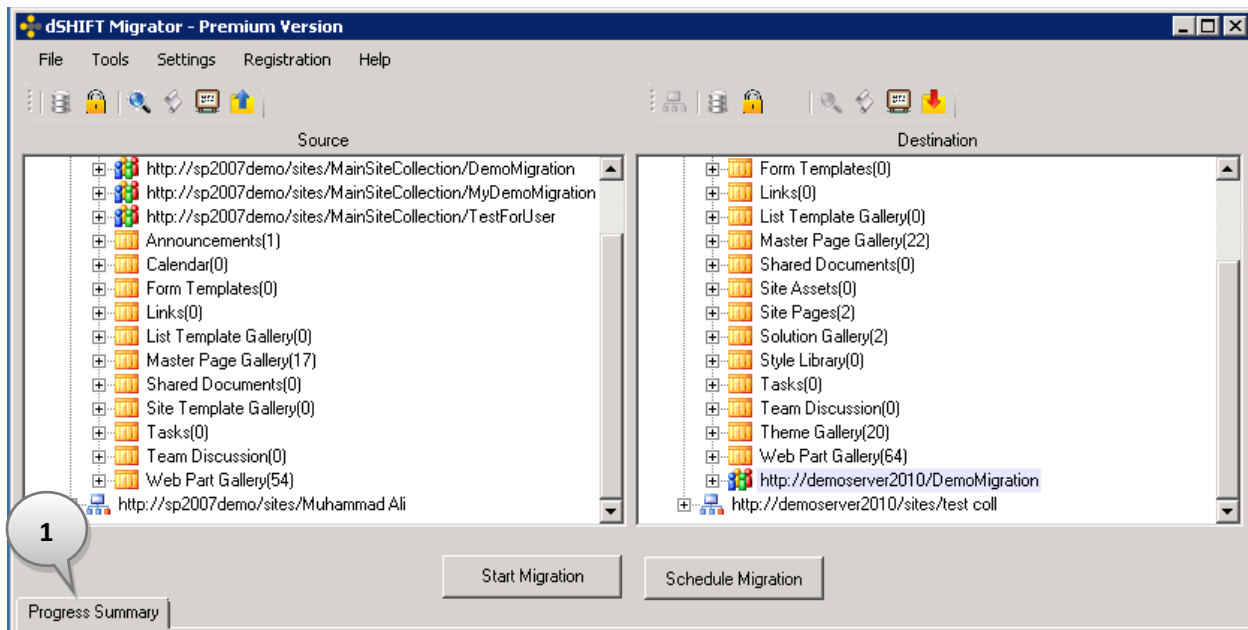


## 5. Initiate Migration

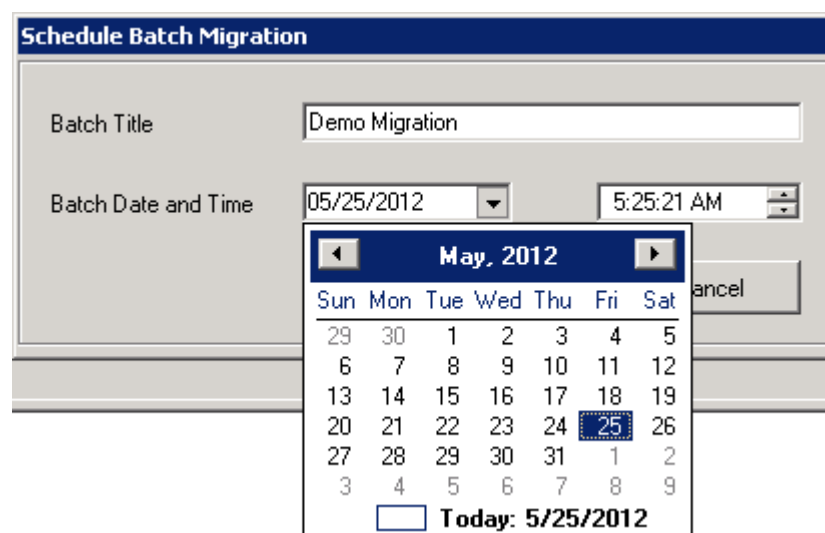
Once all webs from the Source panel have been moved to their desired locations in the Destination panel, click the “Start Migration” button to initiate the migration process. The time required for the migration to complete depends on network speed, server hardware, and the amount of data and number of items to be migrated.

The “Progress Summary”, “Errors”, and “Warnings” tabs at the bottom of the main screen keep users up-to-date on the status of the migration process.

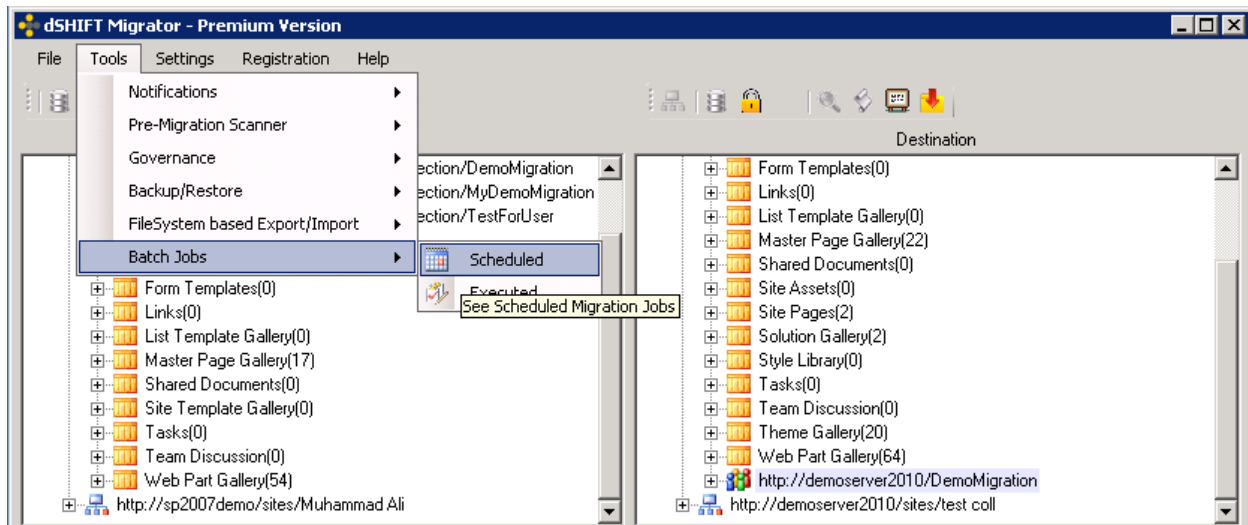
- I. The “Progress Summary” tab displays an overview of how the migration is progressing.



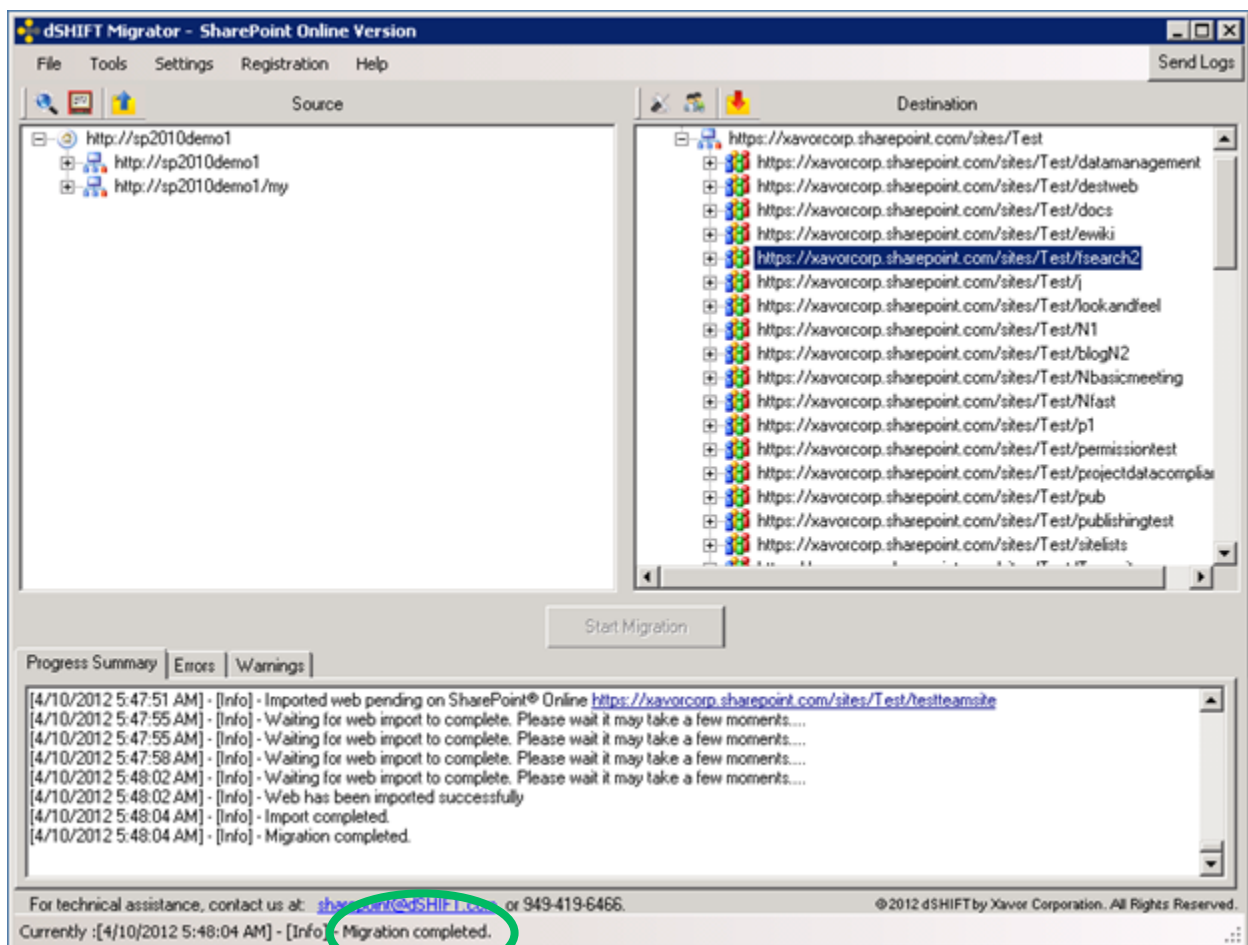
You can schedule migrations by clicking on the “Schedule Migration” button, the following dialog will appear:



You can also schedule or perform migration in smaller batches.



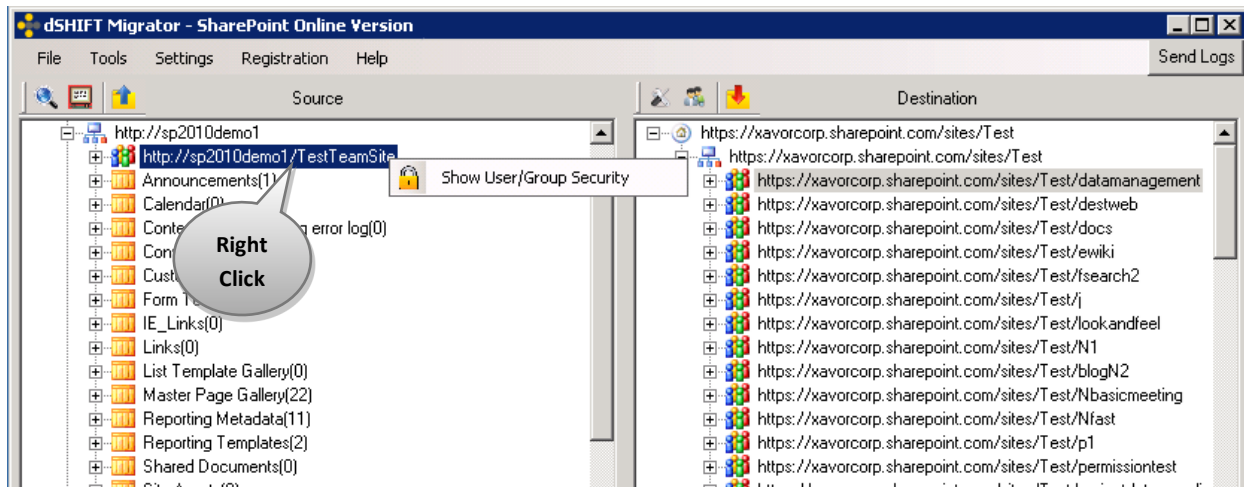
The following screenshot shows a successfully completed migration:



# Additional Migrator Features

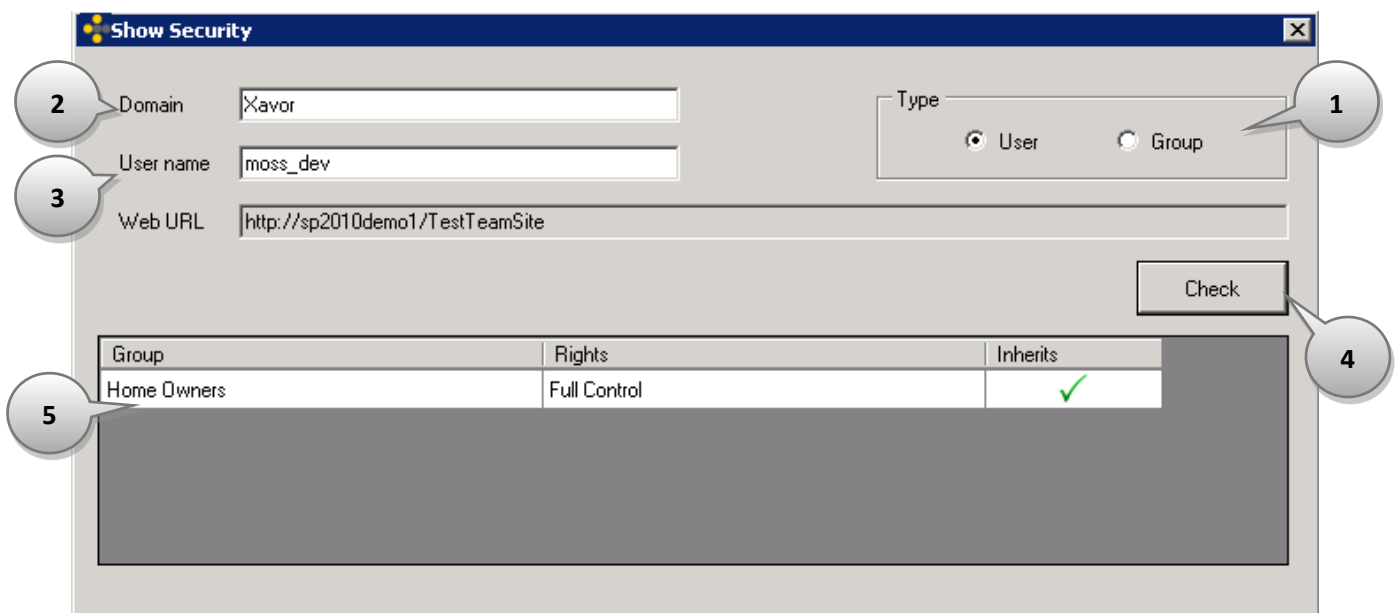
## View User or Group Security

The View User or Group Security dialog shows the selected web's user and group rights. Right-click on a web in the Source panel, and then click "Show User/Group Security" to access the User or Group Security dialog.




The User or Group Security dialog is a quick search feature to find a specific user or group's permissions for the selected web within the dSHIFT Migrator.

1. Select whether to search for a user or group.
2. Enter the domain on which the user or group exists.
3. Enter the user or group name to search for.
4. Click "Check" to fetch the user or group's permissions.
5. The panel at the bottom of the dialog displays the specified user or group's permissions, and whether these permissions are inherited from the web's parent.

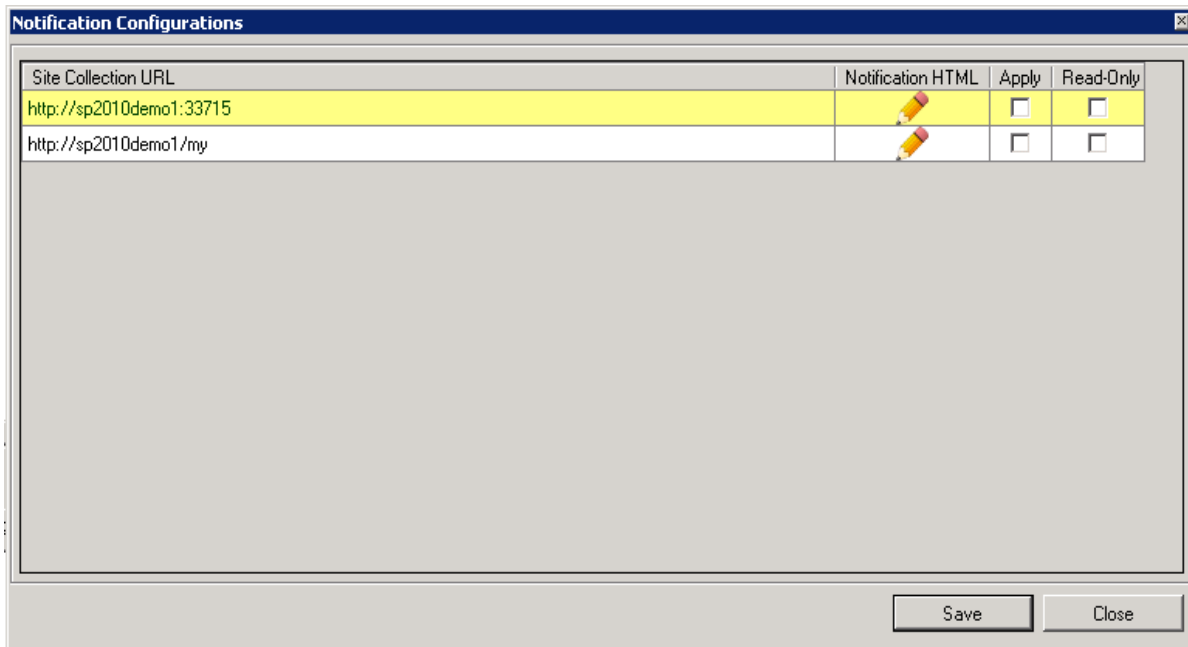


## Manage Server Notifications

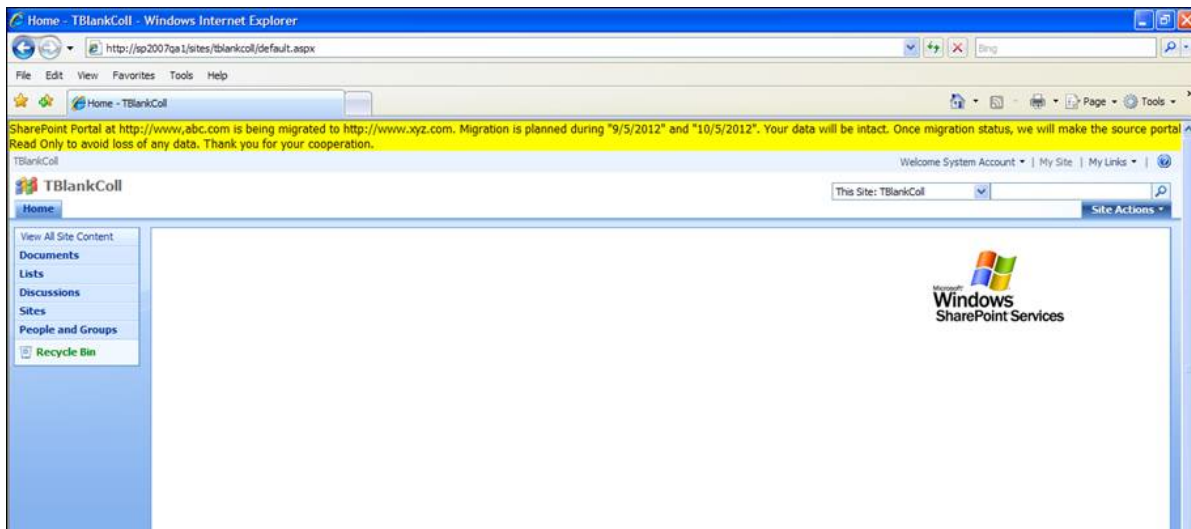
The Manage Server Notifications dialog is used to post notifications on the source server's site collections. It also allows changes to site collections to be disabled so content is not updated during migrations. Click "Manage Server Notifications" in the Tools menu or click the Notifications icon  in the toolbar at the top of the main screen to access this dialog.

The Manage Server Notifications dialog displays the URLs for each site collection, and allows an HTML notification banner to be displayed at the top of each SharePoint site.

1. To prevent a site collection from being modified, check its Read-Only box.
2. To edit a site collection's notification banner, click its pencil icon in the Notification HTML column.
3. To apply the notification banner to a site collection, check its Apply box.

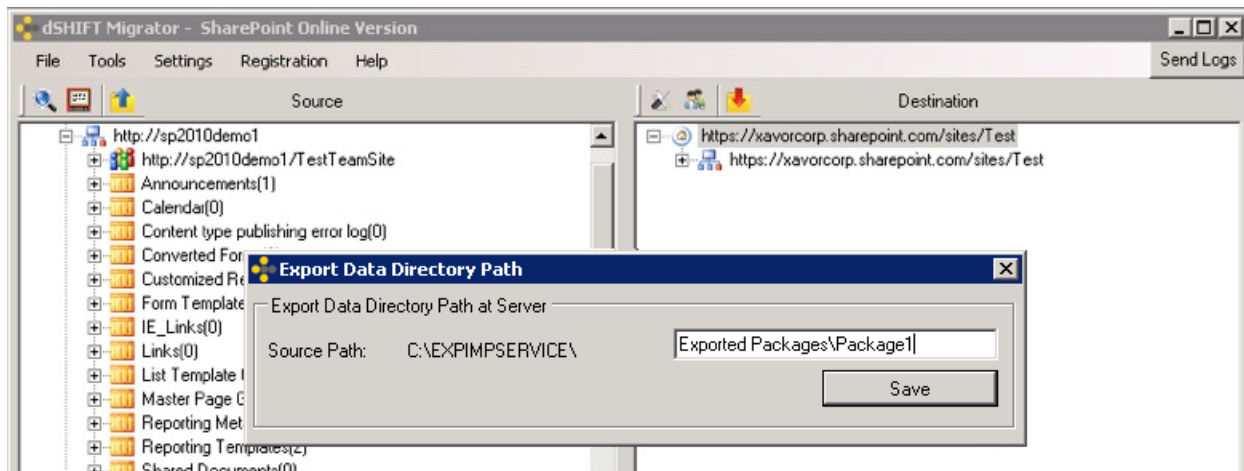


The drafted message will be displayed on specified site collections in the following manner:



## Import/Export

The Import and Export features can be accessed from the Tools menu. Click on the “Export” option to export your site collections, and when you wish to import them, click on the “Import” option from the Tools menu.



# Migration Features Summary

- Pre-Migration Scanning
- Schedule Migrations
- Governance Rules
- Managing Server Notifications
- Import/Export
- Managing Site Collections
- Migrate SharePoint Site Collections
- Migrate SharePoint Sites
- Migrate SharePoint Blogs
- Migrate SharePoint Wikis and Enterprise Wikis
- Migrate SharePoint Publishing Sites
- Migrate SharePoint Meeting Workspaces
- Migrate SharePoint Recurring Meeting Workspaces
- Migrate SharePoint Multi-Tab Meeting Workspaces
- Selecting Content Database for Migration Target
- Migrate SharePoint OOTB Lists
- Migrate SharePoint Lists with Versions
- Migrate SharePoint Document Libraries with Versions
- Migrate SharePoint Form Libraries
- Migrate SharePoint Issue Lists
- Migrate SharePoint Surveys
- Migrate SharePoint Discussion Boards
- Migrate SharePoint Calendars and Events
- Migrate SharePoint Link Lists
- Migrate SharePoint Image Libraries
- Migrate SharePoint Custom Lists
- Migrate SharePoint Folders
- Migrate SharePoint Sub-Folders
- Migrate SharePoint Items
- Restructure or Reorganize SharePoint Lists/Libraries
- Migration Activity Logging
- Metadata Migration (Authorship Columns)
- Metadata Migration (Custom Metadata)
- Copy Master Page Gallery
- Migrating Using Custom Templates
- OOTB Web Part Migration
- Web Part View Customization Migration
- Publishing SharePoint Web Pages
- Migrating Items with its Versioning
- Navigation Copying (Global and Quick Launch)
- Migrate Views
- Migrate Item Level Permissions
- Migrate Document Libraries
- Migrate Look-up Fields/Lists
- Preserve Document/Item IDs
- Migrate in Batch
- Permissions Copying for SharePoint Sites/Lists/Folder/Items
- User Copying
- Migrate Security/Security Groups from WSS 3.0, MOSS 2007 & SharePoint 2010
- Migrate Groups
- Allow Copying of Deleted Active Directory Users
- Migration of Ghosted/Un-Ghosted Pages
- Preserve Approval Status
- Migration of Content Types
- Updates Navigation URL's and links (Global and/or Quick launch) Automatically
- Review Post Migration Report

If this user manual has not answered your question, please have a look at the [FAQs](#) or email us at [sharepoint@dshift.com](mailto:sharepoint@dshift.com), or call our helpdesk at +1 949 419 6266.