

Quick Start Guide

Lotus Notes Migrator

Migrate Content Easily from Lotus Notes into SharePoint with the DocAve®5 Platform

This document is intended for anyone wishing to familiarize themselves with the user interface and basic functionality of the DocAve *Lotus Notes Migrator* module v5. It is not intended to be used for advanced installation, configuration, or troubleshooting. All other modules and topics are covered in the User Guides located on <http://www.avepoint.com/support/user-guides/>.



Backup & Recovery

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DocAve Setup Basics

Lotus Notes Connection Info

In order to access the Lotus Notes Domino Database, connection information is required:

1. **Navigate** to *Migration -> Lotus Notes -> Settings*.
2. Specify the **Notes .INI** path. Leaving this field blank takes the default installation path, shown in the example field.
3. Choose a **DocAve Agent** to connect to the Notes Database. The list will show all agents that are installed on the Notes machines.
4. Choose a **User ID File Name**, which will list all user IDs imported from the .INI file listed above.
5. Enter the **Password** and **Test** the account information.
6. Choose the **Language** of the Lotus Notes environment. The available languages are shown in the drop-down.

DocAve is now able to access your content from Lotus Notes. You can define multiple profiles for various environments.

Additional Setup

Lotus Notes deployments frequently use customized templates, content types, and metadata fields. DocAve allows you to configure your migration job to map these customizations to SharePoint directly from the GUI. For more information on the *Mapping Setup* and other options available for this migration module, please consult the DocAve v5 User Guide.

Live Migration

DocAve has two modes for migration, Live Migration and Plan Based Migration. Live migration is intended for quick migrations to SharePoint, testing mapping configurations, or other small projects that need to be accomplished quickly. Detailed and incremental migrations should be performed and scheduled using Plan Mode.

Migration Settings

Configure the plan with the settings below:

1. **Navigate** to *Migration -> Lotus Notes -> Live Mode*.
2. Select a **Source Agent**, along with its corresponding **User Profile**.
3. Select a **Domino Server** from the drop-down list. DocAve will attempt to connect using the profile defined in the previous step.

4. Choose either no **Filter Option** (Database or View) or the **Documents by Notes @Formula** to filter the tree.
5. Select a migration option using the **Options** drop-down. Choose from either Overwrite, Not-Overwrite, Append, or New Version for contents.

You do not need to select a mapping setup option for a standard migration. For information on configuring this, and which templates are supported by default, please consult the DocAve v5 User Guide.

Selecting Content

Migrating content in Live Mode is as simple as a drag-and-drop motion:

1. **Browse** the Lotus Notes tree to find the database or view you wish to migrate.
2. Choose a **Destination SharePoint Agent** from the drop-down on the right. You can expand the tree using the “+” icon to the desired destination.
3. **Drag** the desired content and **Drop** it in the SharePoint destination.

You will notice that the new mapping has appeared in the **Queue Window** below.

Running the Plan

You can choose to initiate one or many items in the Queue using the **Control** options or the **Start All** button on the table. You can view the progress of each mapped pair from this table.

Plan-Based Migration

For larger and scheduled migration jobs, we recommend configuring a migration plan.

Setting Up a Plan

Plan based migration can be configured in the same way as *Live Migration*:

1. **Navigate** to *Migration -> Lotus Notes -> Plan Builder*.
2. Name the plan in the **Plan Name** field on the top of the GUI.
3. **Select** all mapping, filter, connection, and other options described in the previous section.
4. **Browse** through the source and destination trees and **choose** your source and destination locations using the checkboxes available.
5. Click the **Save** button.

Running the Plan

In order to configure a schedule, follow the steps below:

1. Navigate to the *Schedule* tab.

2. Uncheck the box next to **No Schedule** to enable the schedule and activate the options below.
3. Using the Calendar Icon (📅) set a **Start Time** for this job.
4. Using the **Interval** options, you can make this a recurring job or have it run only once.
5. Select a migration option using the **Options** drop-down. Choose from either Overwrite, Not-Overwrite, Append, or New Version for contents.
6. You can enter a **Description** to easily locate and check the status of your plan in the *Job Monitor*.
7. Click on the **radio buttons** next to **Full** or **Incremental** to either migrate all content or to only the changes made since the previous job.

You do not need to schedule this migration. To run the plan without a schedule, choose **Run Now**. You will be presented with all applicable options in a popup.

Viewing the Progress

After a plan has been initiated, you can view the progress from the *Job Monitor*.

1. Navigate to the **Job Monitor** using the menu bar at the top of the interface.
2. From the drop-down menu on the top left, select **Lotus Notes Migration** and browse through the resulting table. This will display the current status and results of your replication jobs.

Congratulations!

This document has provided you with instructions for performing a select number of basic operations within DocAve v5 *Lotus Notes Migrator*, but it is nowhere near an exhaustive guide. This powerful module has a rich feature set, and allows for a broad array of configuration and scheduling options. For more guides like this on DocAve's other features, or detailed guidance regarding the DocAve *Replicator* module, please reference the DocAve v5 User Guides at <http://www.avepoint.com/support/user-guides>.

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