Tzunami Deployer

Quick Start User Guide

Learn how to successfully migrate ECM contents to Microsoft SharePoint using Tzunami Deployer.

**Version 4.0**

Last Updated: March 31, 2024

Table of Contents

1 INTRODUCTION

The migration process in Tzunami Deployer is completed in four stages. First of all, a migration project is created. All of the information about the source and target items are stored in the project and will be available during and post migration as well. The second stage is connection of source and target. In this stage, connection to source and target is performed and related data is loaded in the project. The third stage is Deployment of items for migration and mappings of source metadata related to target for Security, Property and Values are performed. The fourth state is Commit. In this stage all deployed items are committed to target source.

Create Migration Project		Connect Source/Target		Deploy and Map		Migrate
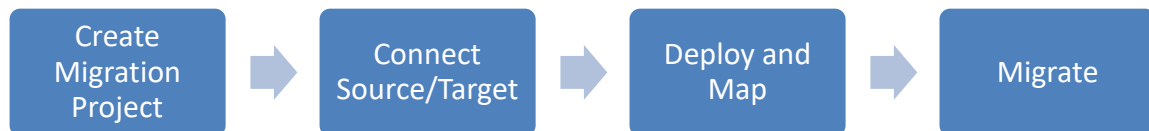
1.1 VERIFY INSTALLATION OF DEPLOYER COMPONENTS AND LICENSE

Tzunami Deployer components are needed to perform the migration process successfully. If the components are not installed and configured correctly, migration process will fail. It is recommended to check the following checklist before starting the migration process.
Basic Checklist:

In Tzunami Deployer
- Check the license in Tzunami Deployer. If there is no license for your source and target system, generate the license for the Deployer from Licensing Service Console (Tzunami Licensing Service Component).
- Check the Tzunami Deployer is pointing to Licensing Service and Link Resolver Service.

In Licensing Service and Link Resolver Service
- Check Licensing Service is installed and running. And you have valid license for your source system and target system. If there no license, please contact with Tzunami Support at Email: *sales@tzunami.com*, *support@tzunami.com*
- Check Link Resolver Service is installed and running.

In Remote Service (which is installed in SharePoint Server)
- Check Remote Service is installed and running.
- Check Remote Service is logged in with Farm Administrator's credential.
- Check Remote Service is pointing to Licensing Service and Link Resolver Service.

If you want to connect SharePoint On-Premise without using Remote Service, then you do not need to install Remote Service component. Instead, use license for **SharePoint Online** and select the **On-Premise as Online** option in connection wizard.
The Tzunami Exporter can be run independently and exported content can be imported in migration project. Moreover, Tzunami Exporter can be run from migration project and export and loading of exported content can be accomplished from migration project. To achieve this Tzunami Exporter should be installed in the computer where Tzunami Deployer is installed.

2 GETTING STARTED WITH TZUNAMI DEPLOYER

This chapter describes how to create a project in Tzunami Deployer and save Deployer project for future use. This chapter contains the following topics:

2.1 EXPORTING CONTENT FROM SOURCE ECM SERVERS

Tzunami Deployer supports exporting content from various enterprise content management systems (ECM). The supported systems are listed as:

- AquaLogic
- Confluence
- Confluence Cloud
- Documentum
- Documentum Cloud
- DocuShare
- eRoom
- Exchange
- FileNet
- Hummingbird DM
- Hitachi Content Platform (HCP)
- HPE Content
- Livelink
- OpenText Content Server
- LotusNotes
- Oracle WCI

Tzunami provides the exporter tools which exports the contents and loaded in Tzunami Deployer for migration. There are separate installer for each system. Once the exporter tool is installed, user can create an export project. The tool provides the options settings prior to export. Based on the selected options the source data are exported and all required information are stored in a file with .tdx extension, which should be loaded in Tzunami Deployer during migration. In this guide a Livelink Exporter will be briefly explained as an example.

2.1.1 Creating an Export Project in Exporter Tool.

1. Click **Start > All Programs > Tzunami > Tzunami LiveLink Exporter**.
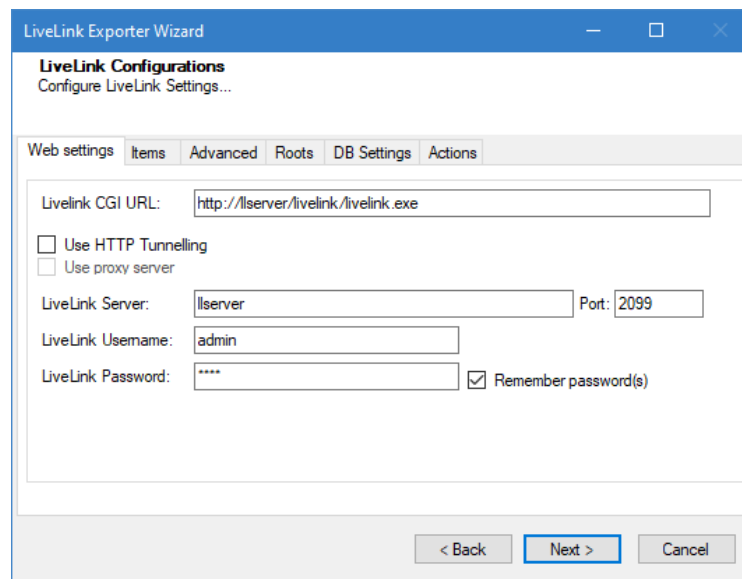
   Or

   In Tzunami Deployer, right-click in the LiveLink tab source store area and **select Export LiveLink to TDX**

   The Welcome screen of the Tzunami LiveLink Export Wizard appears.

2. Click **Next**. The LiveLink Configurations screen appears. Use this screen to enter the settings required for the exporter to connect to LiveLink. The screen includes tabs: Web settings, Items, Advanced and Roots.

a. **Web settings**

The Web settings tab allows you to enter the information required for connecting to the LiveLink service.

Figure 2-1: LiveLink Configurations Screen – Web Settings Tab

b. Items tab

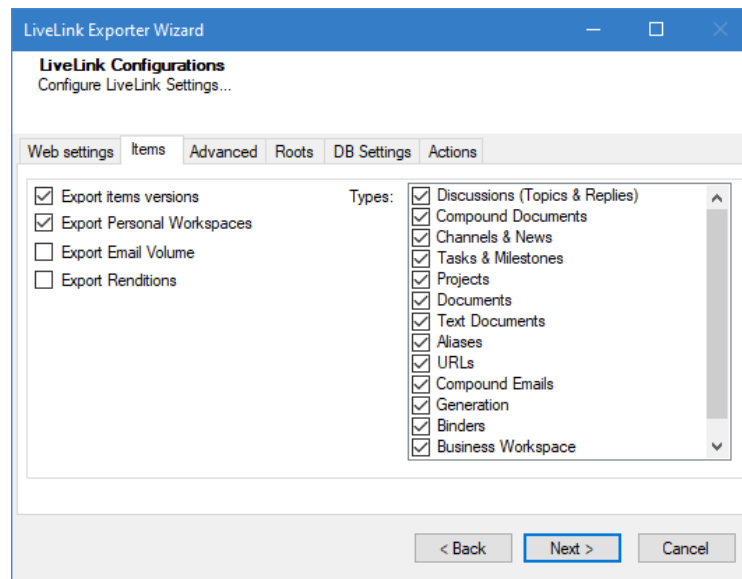The **Items** tab allows you to specify how the exporter should treat item versions.

Figure 2-2: LiveLink Configurations Screen – Items Tab

c. Advanced tab

The **Advanced** tab allows you to specify the export options such as attachments, security, Additional Node Attributes, Categories & Attributes, Personal Workspace, URLs and Aliases.
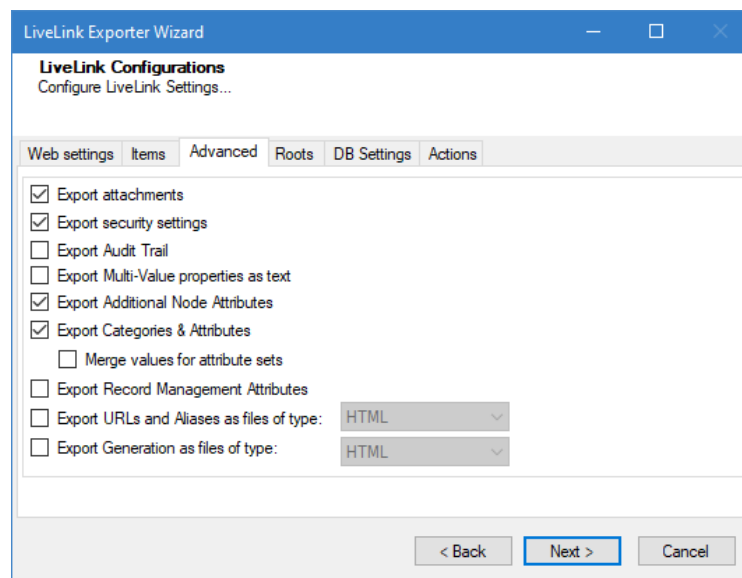

Figure 2-3: LiveLink Configurations Screen – Advanced Tab

d. Roots tab

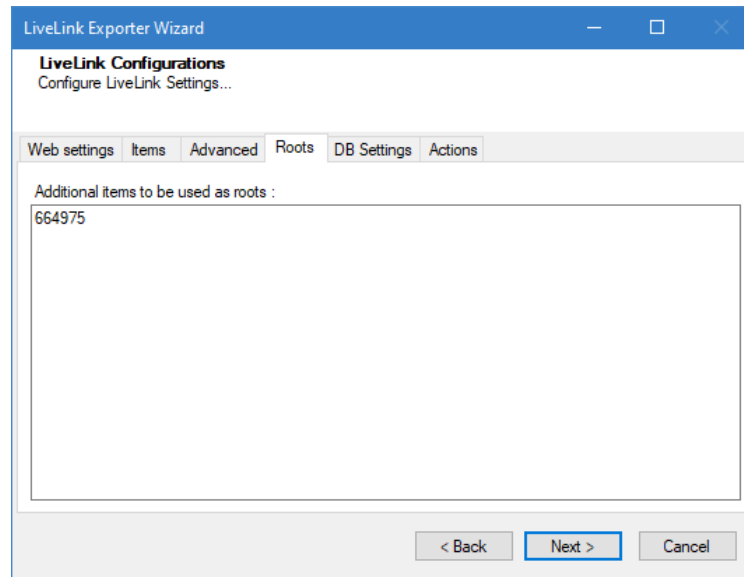The **Roots** tab allows you to enter URL or ID to be used as root folder.

Figure 2-4: LiveLink Configurations Screen – Roots Tab

e. DB Settings tab

The **DB Settings** tab allows you to enter Database Credential to connect with the LiveLink Database Server. To enable **DB Settings** tab in the LiveLink Configuration wizard, you must set " LiveLinkUseDB" to **True** in the Exporter Configuration file (TzunamiExporter.exe.config). By default, "TzunamiExporter.exe.config" is located at the "C:\Program Files (x86)\Tzunami\Deployer 4.0\Exporters\LiveLink", or where Tzunami LiveLink Exporter is installed.
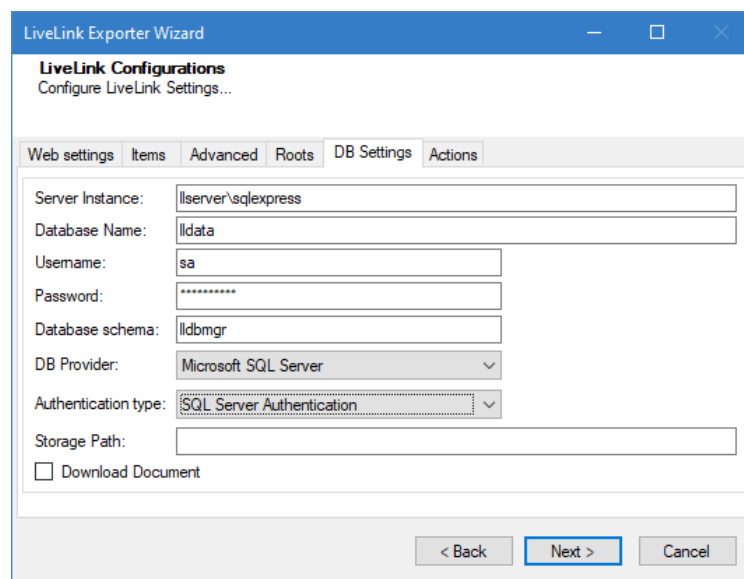

Figure 2-5: LiveLink Configurations Screen – DB Settings Tab

f. Actions tab

The **Actions** tab allows you to auto pause and resume settings for the export process in each instance. Check the **Use Auto Pause** check box and set the pause and resume settings to use the feature.
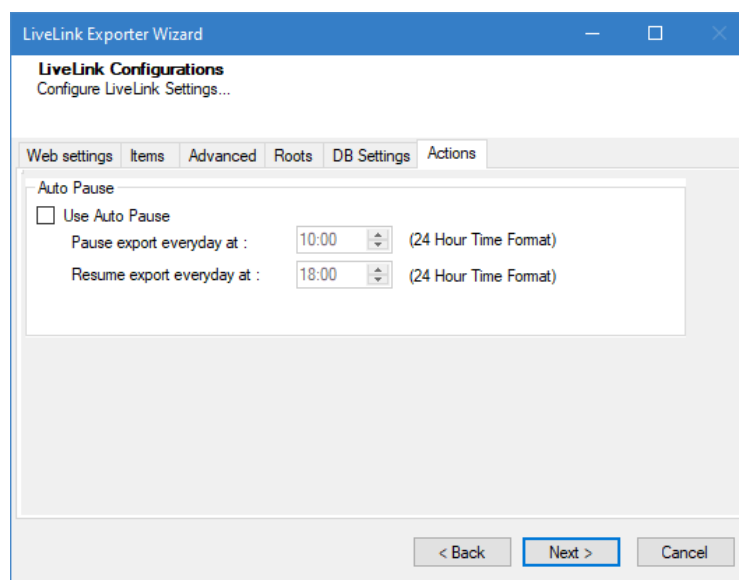

Figure 2-6 LiveLink Configurations Screen – Actions Tab

3. Click **Next**. The Folders screen appears.

Tzunami Exporter provides quick analysis option before exporting to know the size, count of contents inside selected folder.

If you want to analyze the content: Check on the Folder(s) in tree view, then **Analyze** button is enabled. Click **Analyze**.
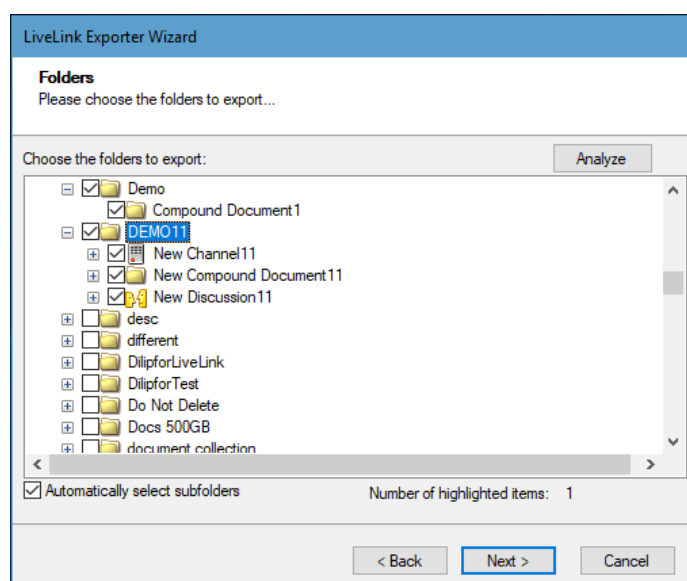

Figure 2-7 Analyze Option
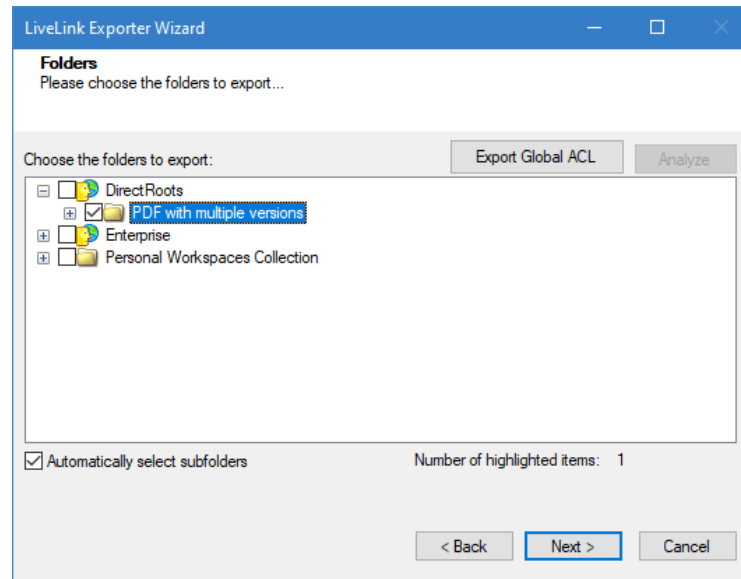
4. Select folders to export.

Figure 2-8 Folders Selection Screen
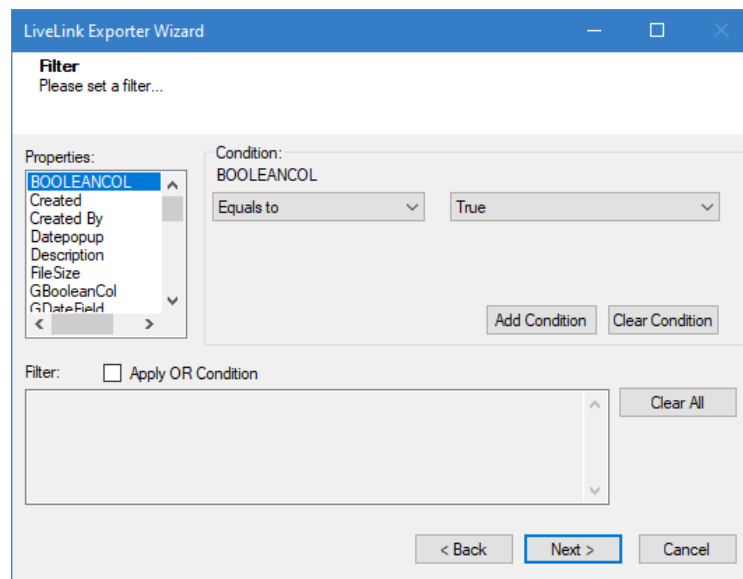
5. Click **Next**. The Filter screen appears.

Figure 2-9: Filter Screen

6. Set up filtering as follows:

   a. In the Properties field, select a property.

   b. In the Condition field, select a condition from the dropdown list and enter or select values in the corresponding field.

   c. Click Add Condition. The condition is added to the Filter area, displaying the full filter expression.

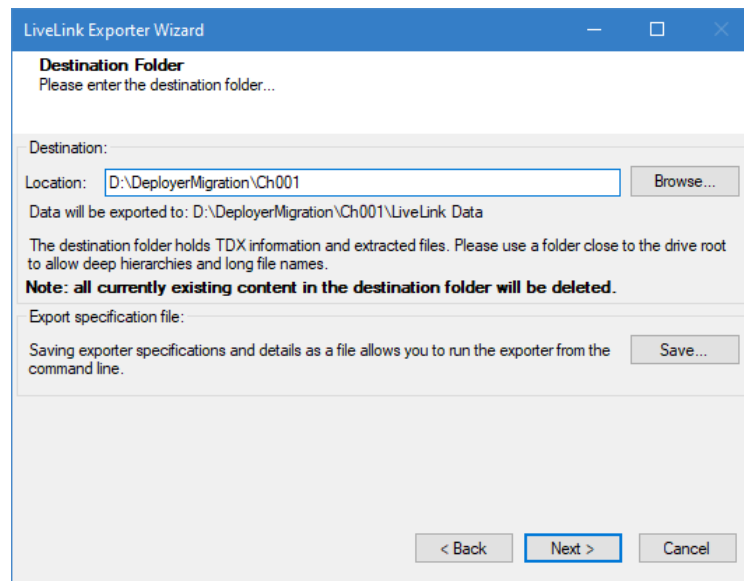7. Click **Next**. The Destination Folder screen appears.

Figure 2-10: Destination Folder Screen

8. Specify where to export the files and generated TDX information. Make sure you are saving to a folder with a descriptive name and under a well-organized file system hierarchy. It is recommended to export to a folder that is as close to the root as possible.

   Click **Save** for saving export specification details as an XML file which can be used to run the exporter in command-line mode. See the section 'Command-line Export' below for more details.

9. Click **Next**.

   An Exporting screen appears with a progress bar and execution report, and the export process begins.
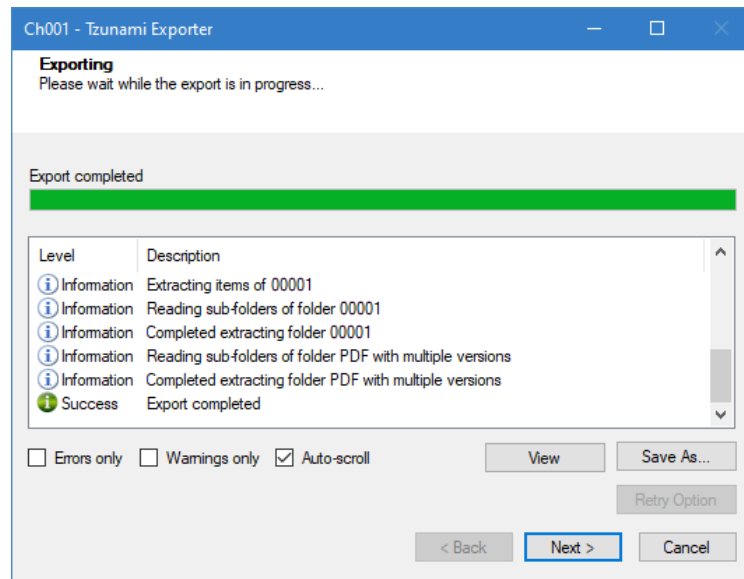
Figure 2-11: Export Progress Screen

10. Click **Next**. The Export Complete screen appears.

11. Click **Done**. The Tzunami LiveLink Exporter wizard is closed.

After the extraction process completes successfully, you are prompted to load .tdx file in Deployer or you can browse the file to load in Deployer.

2.2 CREATING A NEW MIGRATION PROJECT IN DEPLOYER

The migration project stores all required the information about the source system and target system that will be used during subsequent stages of migration process. Source and target system will be enabled only if appropriate license is available in Tzunami Deployer. This guide present migration steps for LiveLink as source and SharePoint Online as target system as an example. The steps for other source and target system is similar. If any further information is applicable, it will be explained in the note.

2.2.1 Creating a new project.

1. Launch Tzunami Deployer and select **File > New**. The New Project window appears.
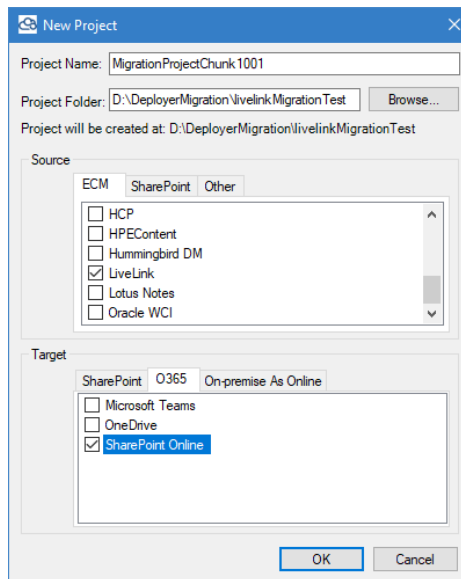

Figure 2-12: New Project Window

Enter a name for the project in the Project name field.

In the Project folder field, enter the location to save the project.

2. Select the source system to be migrated in this project.

One of Tzunami Deployer's advantages is its ability to consolidate several source systems (Enlisted in ECM, SharePoint and Other tabs) into a single target SharePoint server.

The following table shows the supported source system enlisted under ECM, SharePoint and Other tabs.

Table 2-1 Supported Source Systems

Source ECM	SharePoint Server	Other
AquaLogic	SharePoint 2001	File System
Confluence	SharePoint 2003	HyperWave
Documentum	SharePoint 2007	
DocuShare	SharePoint 2010	
eRoom	SharePoint2010	
Exchange	Remote	
FileNet	SharePoint 2013	
Google	SharePoint 2016	
Hummingbird DM	SharePoint 2019	
Hitachi Content Platform (HCP)	SharePoint Online	
HPE Content	*Use **SharePoint Online** to connect SharePoint On-Premise as Online	
Livelink		
LotusNotes		
Oracle WCI		

3. Select a target system for the migration in this project. The options that are available for selection are determined by the license that you installed. The following table shows the supported target systems.

Table 2-2 Supported Target Systems

SharePoint Server	Office 365	On Premise As Online
SharePoint 2016 SharePoint 2019	Microsoft Teams OneDrive SharePoint Online	SharePoint 2019 *When this option is selected to connect SharePoint 2019 server, a Tzunami Remote Service component is not required to be installed in SharePoint 2019 server.

You can select only one target system among the three tabs available in New Project window. The target available under **O365** and **On-Premise As Online** tab uses the license for SharePoint Online.

4. Click **OK**. Tzunami Deployer creates the new project folder and initializes the project files in it. The Project window appears. Initially, both parts of the Project window are empty.
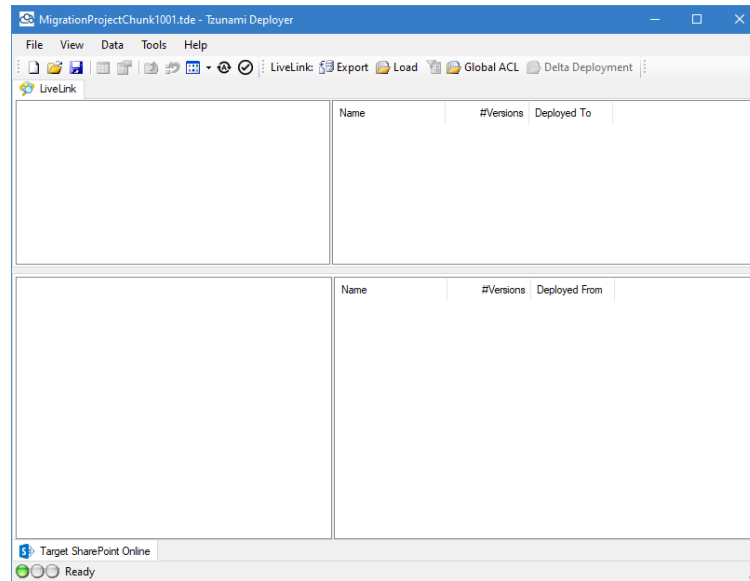

Figure 2-13: Project Window

The top half of the Project window uses a Windows Explorer style folder tree and details list to display the structure and content that has been loaded from the source systems.

The bottom half of the Project window uses a similar approach to display the structure and content of the target SharePoint. The details list in the top and bottom parts of the Project window show columns of metadata properties and other information for the children items. The status bar indicates various types of information, such as the currently listed and selected items and the status and progress of Tzunami Deployer processes.

5. Save the project. The project is saved as <ProjectName>.tde file.

3 CONNECTING AND LOADING SERVERS

This chapter explains how to connect and load sources content and target SharePoint in Deployer project. This chapter contains the following topics:

3.1 CONNECTING AND LOADING SOURCE SERVER

3.1.1 Connecting and Loading from Source SharePoint

To connect the source system, perform the following steps:
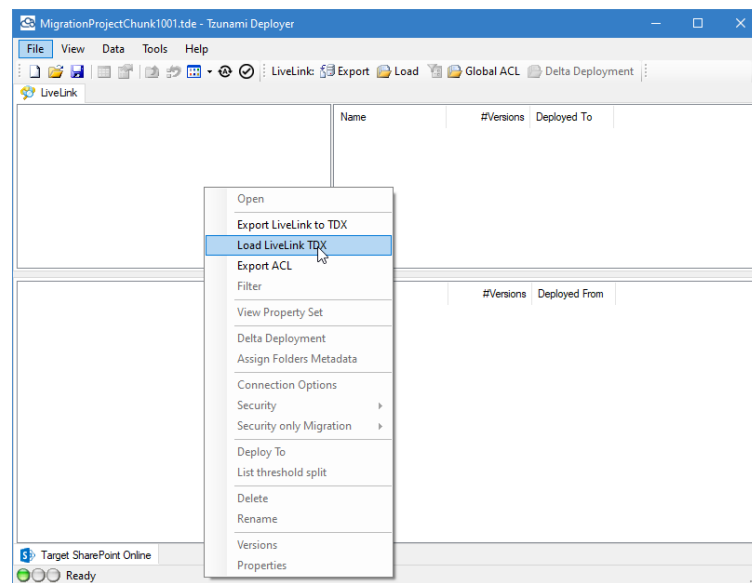
1. Click on **Data** on file menu.

Figure 3-1 Menu options for Source and Target Connections

Select the source system. For example LiveLink as source, select **Load LiveLink TDX**. A browse dialog appears, enter the name and browse the **exportData.tdx** file. The exported content will be loaded in source.

If Tzunami Exporter is installed in the computer where Tzunami Deployer is installed, you can start export and load the ECM content with **Export <ECM System> to TDX** option.
If you have selected the SharePoint source (e.g. SharePoint 2010), follow the connection wizard.
If you have selected the File System source, browse the content from file system

3.2 CONNECTING AND LOADING TARGET SERVER

3.2.1 Connecting Target SharePoint

To connect the source system, perform the following steps:

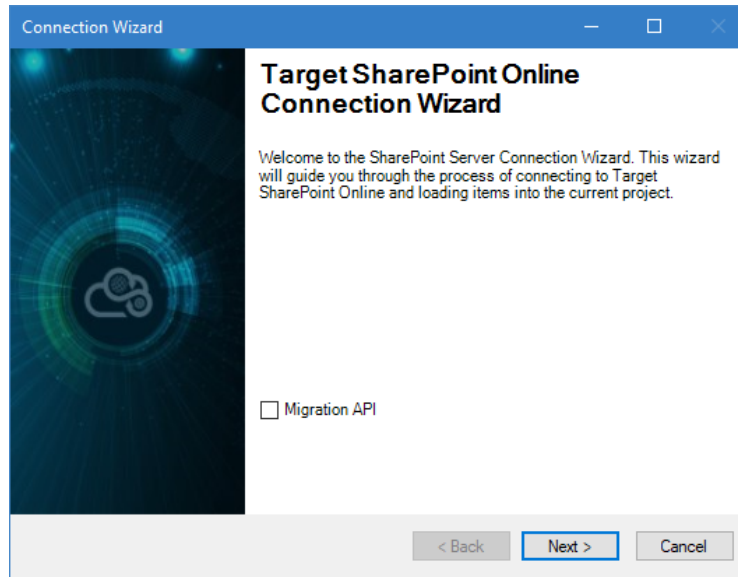1. Click **Data > <Target SharePoint > Connect to <Target SharePoint >**.

Figure 3-2 SharePoint Online Connection Screen

2. Click **Next**. The Connection Wizard progresses to the Access SharePoint Server screen.

   In the Site Collection URL field, enter O365 admin URL. For example: **https://asteroidnepal-admin.sharepoint.com**.
   You can enter the full url of a SharePoint site collection as well for example: https://asteroidnepal.sharepoint.com/sites/tzuanami.
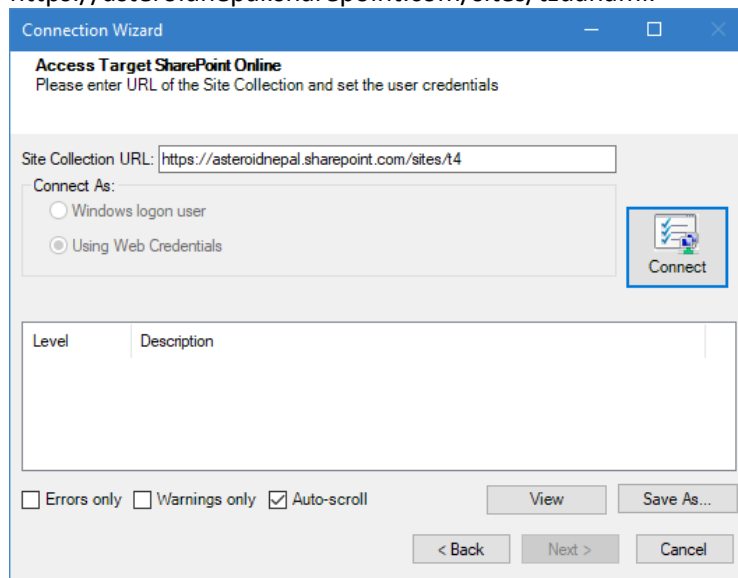
Figure 3-3 Connection Screen

In case of SharePoint On-Premise, enter server name (where SharePoint server is installed) for Site Collection URL. There is no need to provide full URL of site collection

3. Provide the credential in the browser for connection.
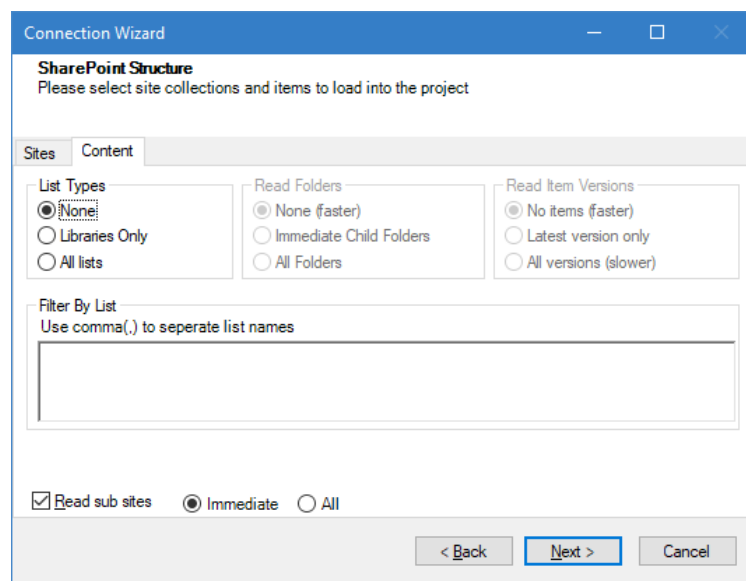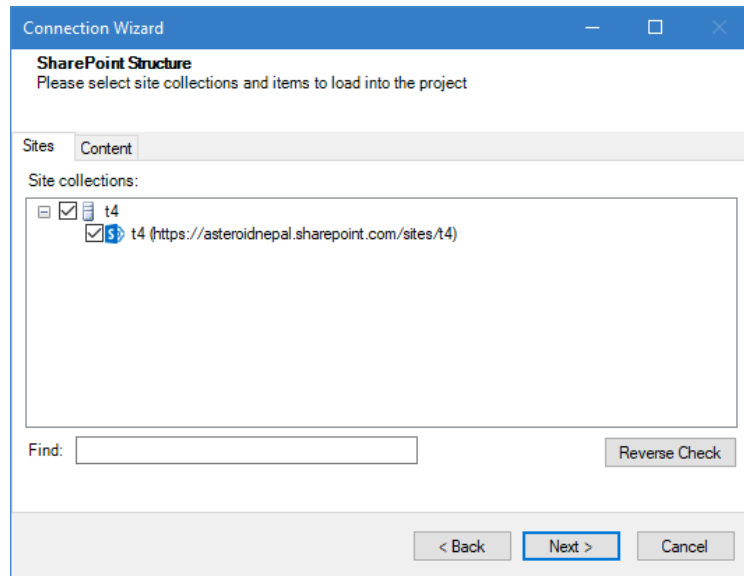   a. The SharePoint Structure appears with tabs: Select the site in **Sites** Tab

Figure 3-4: SharePoint Connection Wizard – SharePoint Structure

Select **None** in lists types In **Content** Tab to load the structures only.

4. Click **Next**. The Thank you for using the Connection Wizard screen appears.

5. Click **Done**. Tzunami Deployer begins scanning the target SharePoint and loads information about the selected site collection, including sub sites, lists, folders, files and list items.

6. The load Source and Target appears as below:
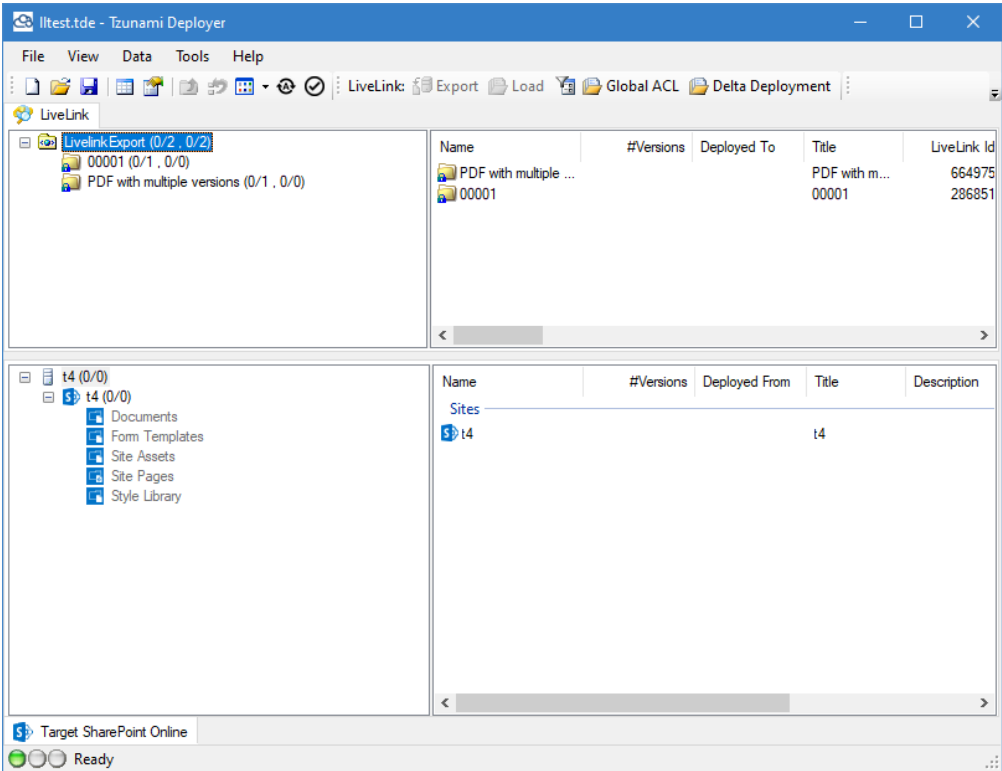
Figure 3-5 Source and Target in Project

4 DEPLOYING SOURCE DATA FOR MIGRATION

This chapter explains how to deploy source content to the target source content.

Tzunami Deployer provides Auto deploy and manual deploy processes. In auto deploy process, all required security, property and value mapping are automatically deployed when you drag and drop the content from source system to target. In manual deploy process, mapping wizards for security, property and value mappings are displayed subsequently deployed when you drag and drop the content from source system to target.

4.1 AUTO DEPLOY SOURCE ITEMS TO TARGET

The following steps describe how to deploy source items to a target SharePoint:

• Check "Add All Missing Properties in Target" option in Deployer Menu as shown below
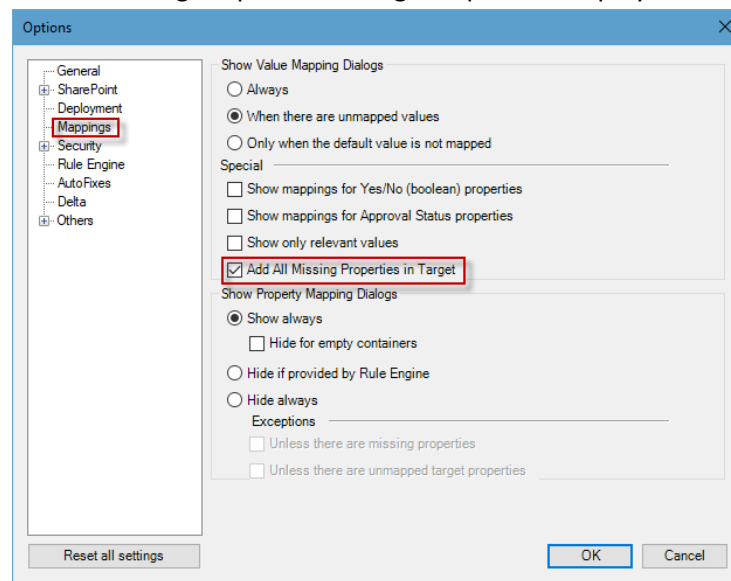
Figure 4-1 Mappings Options Screen

• Drag and drop the actual items to be deployed from the source to the target SharePoint.

• Specify the various deployment options, related to structure, files, and security.

• Keep track of the deployment process to ensure that you have deployed all the items that are required.

The steps are as follows:

1. Drag and Drop the source item to target, Deploy Wizard screen appears.

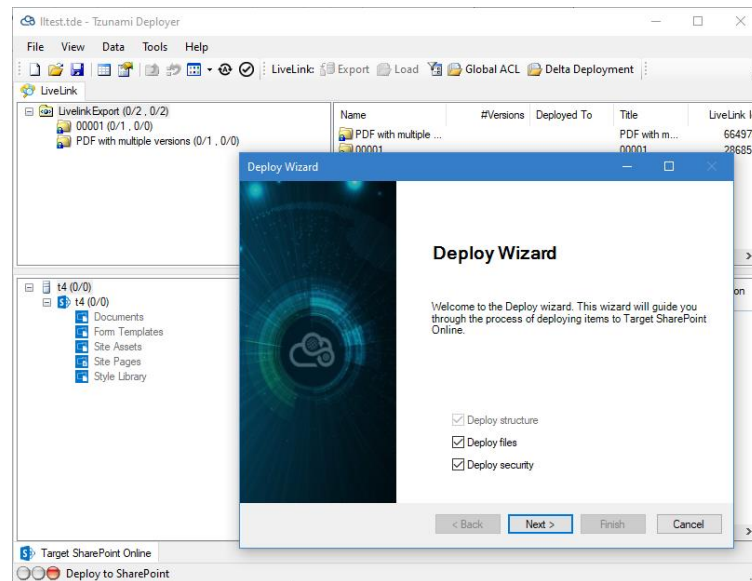   For example in following figure **LivelinkExport** is dragged and dropped in **t4**.

Figure 4-2 Deploy item from source to target

Here, you can check the deployment option(s) to deploy structure, files and security.

Deploy structure: Check to preserve the hierarchy of source structure or Uncheck to deploy as flat structure.

Deploy files: Check to include files or uncheck to exclude the files.

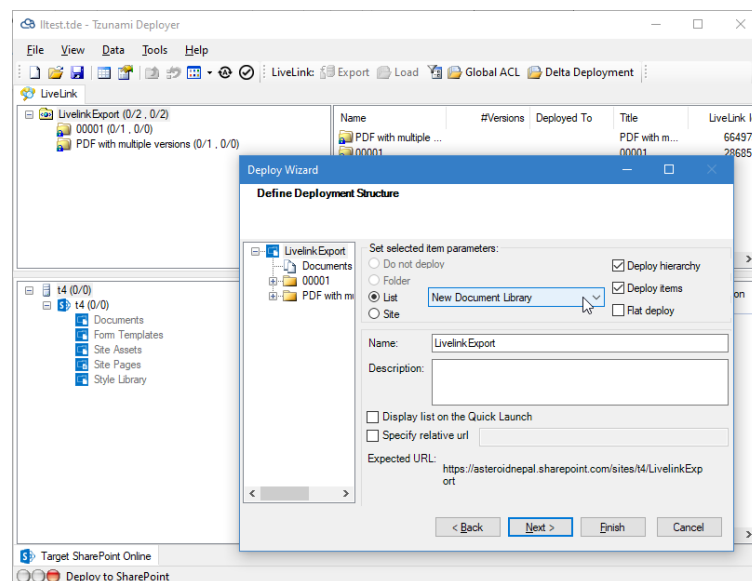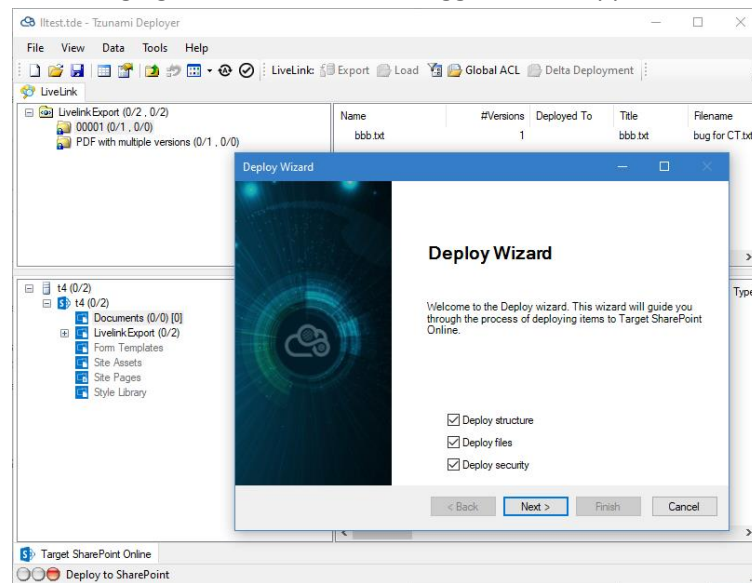**Security:** Check to include the security (Groups/Users/Roles) migration or uncheck to exclude the security migration.

Figure 4-3 Deployment Structure

2. Click **Finish** button. The Deploy process is carried out automatically.
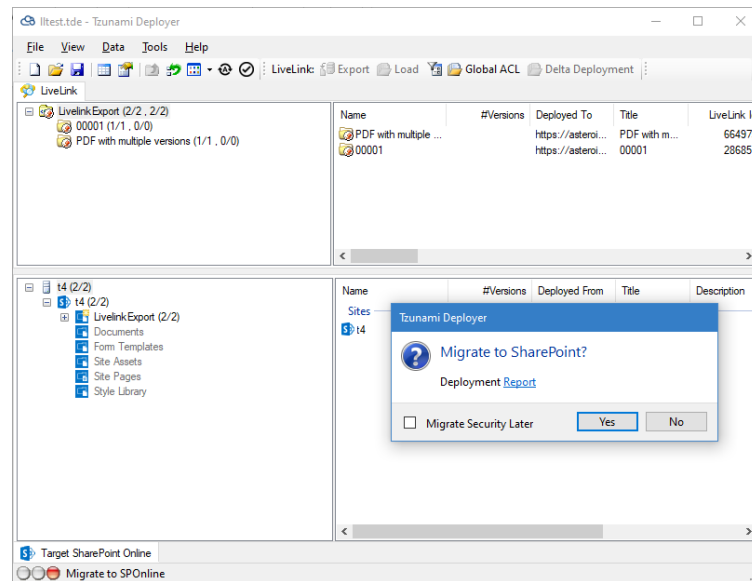
Figure 4-4 Auto Deployed Screen

3. Click **Yes** to start migration process.
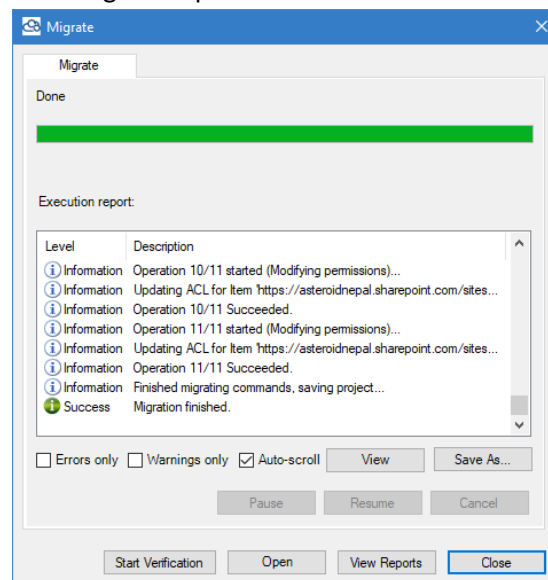
Figure 4-5 Migration Finish Screen

The content has migrated to target SharePoint. Now you can browse the content in target site and verify the content. You can skip section 5 of this document.

4.2 MANUAL DEPLOY SOURCE ITEMS TO TARGET

The following steps describe how to deploy source items to a target SharePoint:

- Drag and drop the actual items to be deployed from the source to the target SharePoint.
- Specify the various deployment options, related to structure, files, and security.
- Keep track of the deployment process to ensure that you have deployed all the items that are required.

The steps are as follows:

4. Drag and Drop the source item to target, Deploy Wizard screen appears.

For example in following figure **00001** folder is dragged and dropped in **Documents**

Figure 4-6 Deploy item from source to target

Here, you can check the deployment option(s) to deploy structure, files and security.

Deploy structure: Check to preserve the hierarchy of source structure or Uncheck to deploy as flat structure.

Deploy files: Check to include files or uncheck to exclude the files.

Security: Check to include the security (Groups/Users/Roles) migration or uncheck to exclude the security migration.

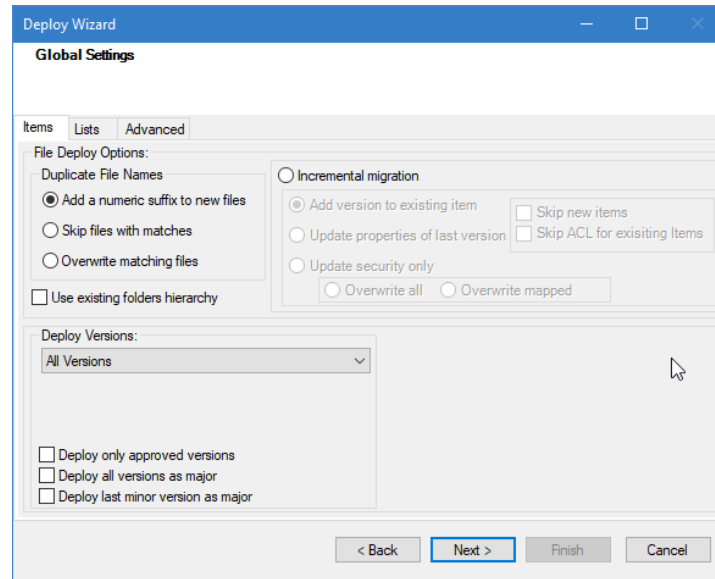5. Click **Next**. The Deploy wizard displays the Global Settings screen.

Figure 4-7 Global Setting screen

For more, refer Deployer User Guide on section *Defining Global Settings*.

6. Click on **Next**, Define Deployment Structure screen appears.
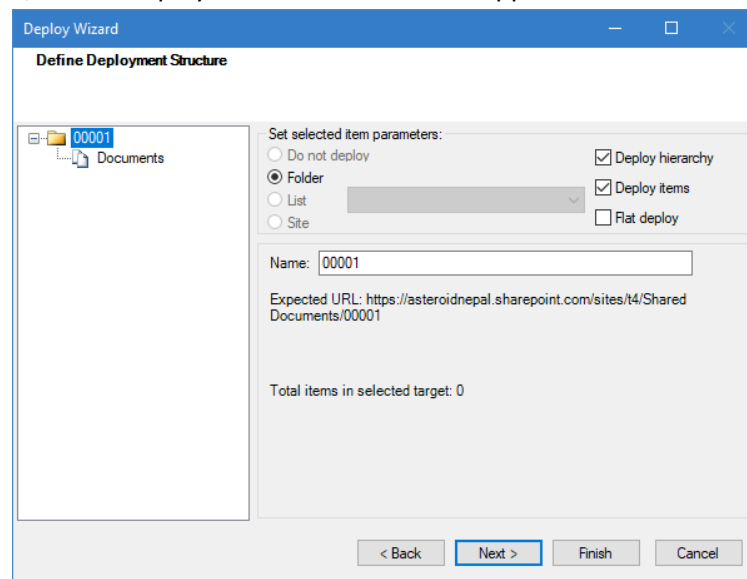

Figure 4-8 Define Deployment Structure Screen

For more, refer Deployer User Guide on section *Defining the Deployment Structure*.

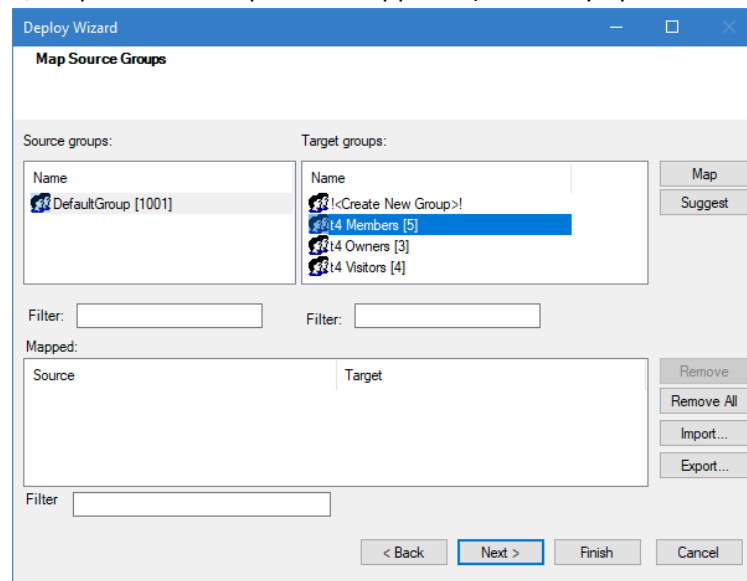7. Click on **Next**, Map Source Groups screen appears (if Security option is selected in step 2).

Figure 4-9 Map Source Groups Screen

Here, you can perform following:

- Map source to target group: Select source group and select target group then click Map button. or,
- Create Source group in target: Select source group and select <Create New Group>, then click Map button.

8. Click on **Next**, Map Source Users and Groups screen appears (if Security option is selected in step 2)
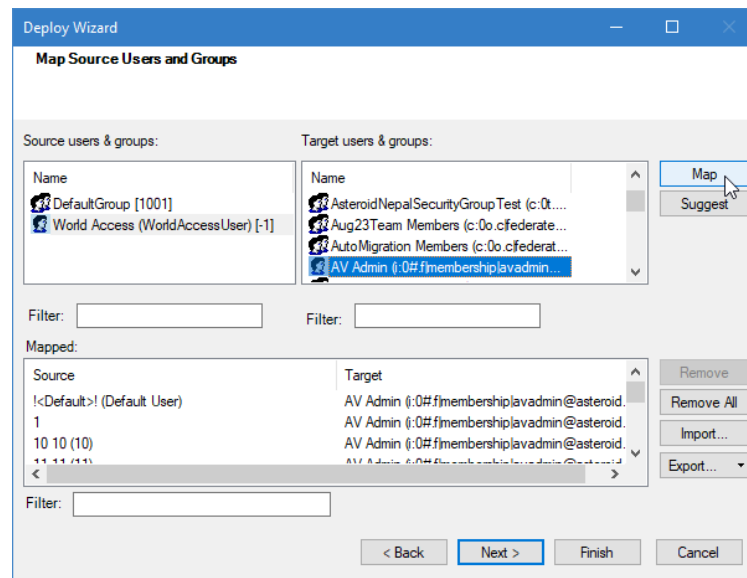
Figure 4-10 Map Source Users and Groups Screen

Select source user and select target user then click Map button. Users can be filtered using filter option as shown.

9. Click on **Next**, Map Source Users Roles to Target Roles screen appears (if Security option is selected in step 2)
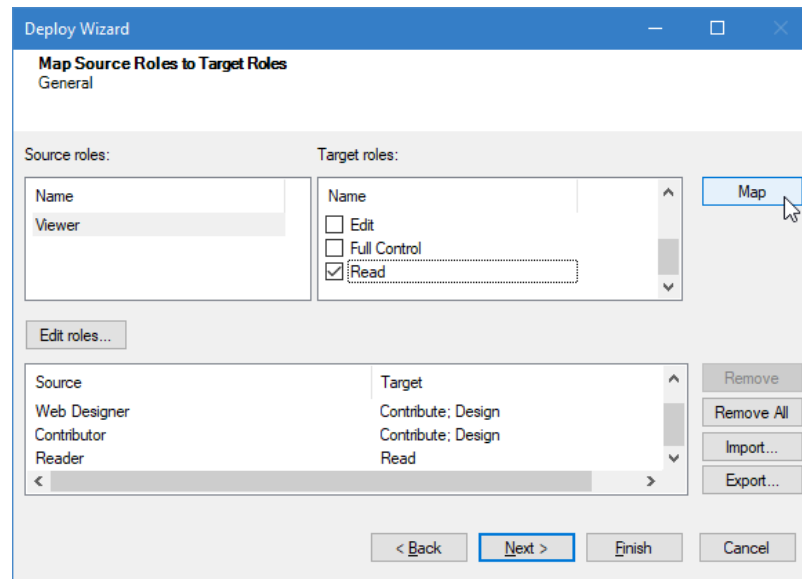
Figure 4-11 Map Source Roles to Target Roles Screen

Here, Source roles are mapped to target roles by default.

If source roles are not mapped with target roles by default, select source role and select target role then click on Map button.

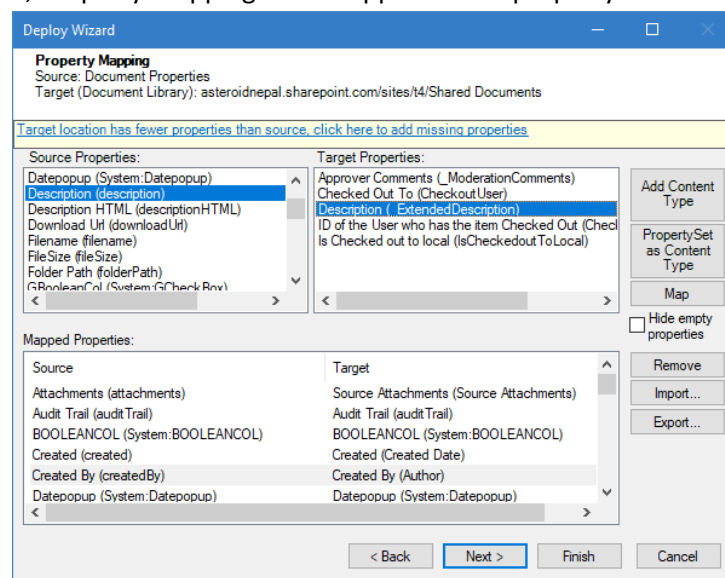10. Click on **Next**, Property Mapping screen appears for a property set.

Figure 4-12 Property Mapping Screen

Here, Source properties are mapped with target properties by default.

If source properties are not mapped with target properties by default, select source property and select target property then click on Map button.

If Yellow marked clickable area appears, additional properties might be available in source. To include these additional properties in target as well, perform following action:

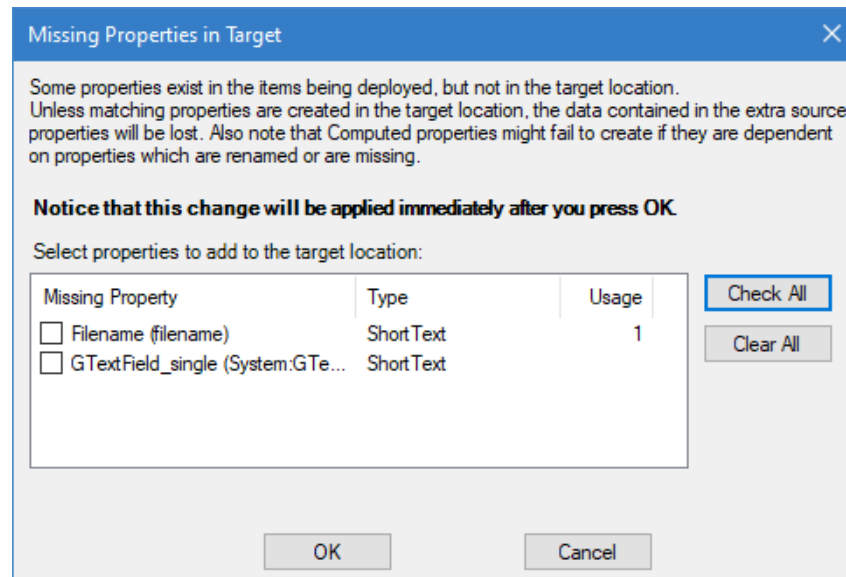- Click on yellow marked clickable area, Missing Properties screen appears

Figure 4-13 Missing Properties in Target Screen

- Select required properties or all, then click on OK button.

11. Click on **Next**, Property Mapping screen appears for another property set. Perform the action as described in step 8 until Value mapping screen appears.
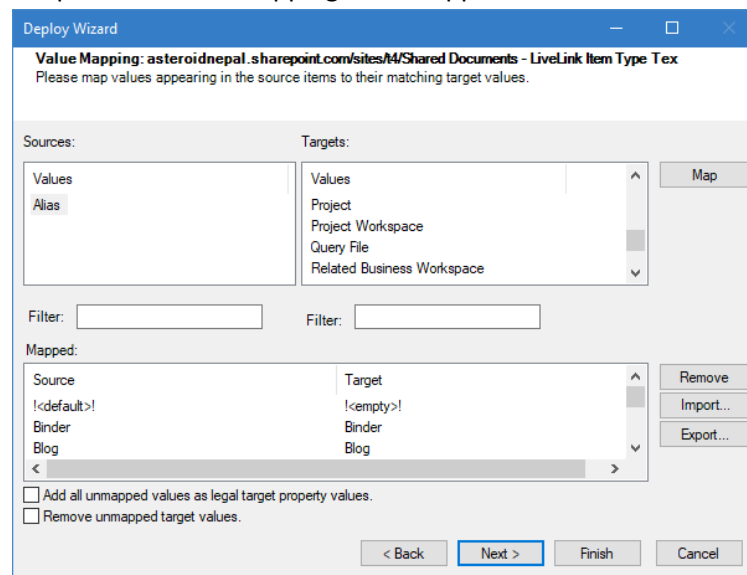
Figure 4-14 Value Mapping Screen

Here, value mappings for Groups/Users/Property value appears in subsequent screens.

You can select the source value and map with the target value as described in previous steps.

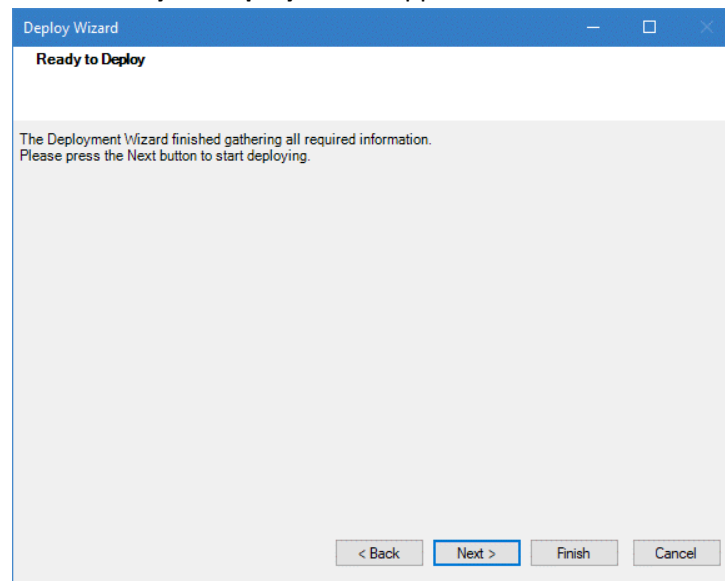12. Click on **Next** until **Ready To Deploy** screen appears.

Figure 4-15 Ready To Deploy Screen

13. Click on **Next**, Deployment wizard finishes. A deployment report is generated and link for it is displayed. Click on link to view the deployment report. The report is opened in the browser.

14. Click on **Next,** Deploy Security screen appears (if Security option is selected in step 2).
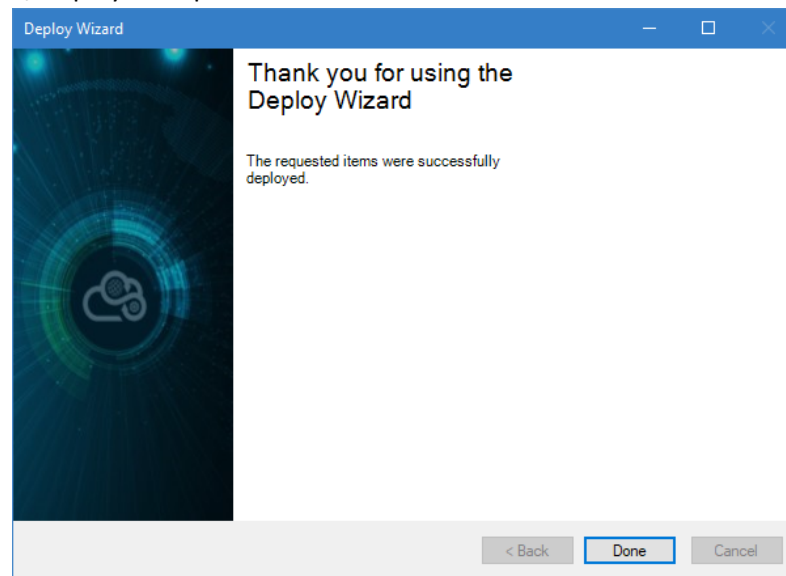
15. Click on **Next,** Deployment process finishes.

Figure 4-16 Deploy Finish Screen

16. Click on **Done** to close the screen.

Here, the deployment process is completed. Your project window seem like:
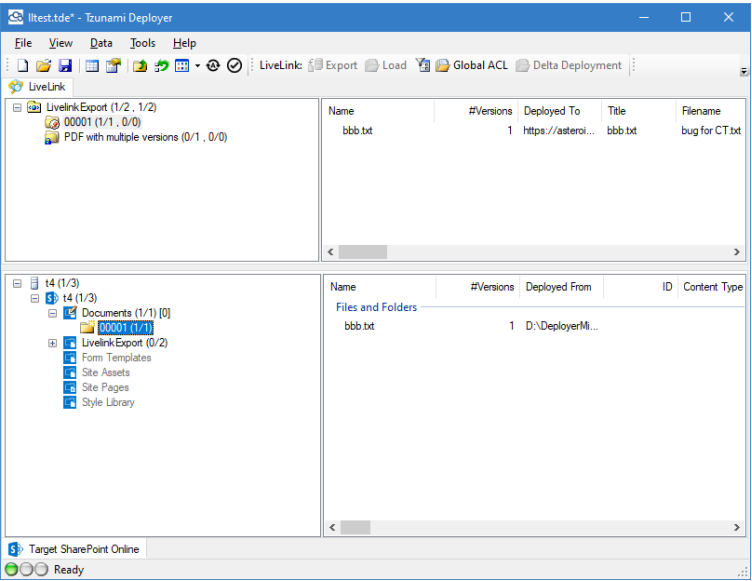
Figure 4-17 Deployed Content in Project

Here, you can view the structure, property and values for the deployed items in lower section of the screen. The target source is not updated yet. When you perform the commit process, the deployed content will be migrated to target source.

5 MIGRATTING DATA

This chapter explains how to commit the deployed content to target SharePoint. This chapter contains the following topics:

5.1 START THE MIGRATION PROCESS

5.1.1 Migrate

To migrate the changes to the SharePoint server:

1. Select **Data > Target SharePoint <SharePoint version> Migrate to <SharePoint version>**.
    If the Tzunami Deployer project was modified since it was last saved, Tzunami Deployer informs you that the current project data will be saved.
    Tzunami Deployer prompts you to verify that you wish to commit your changes to SharePoint.

2. Click **Yes**. Tzunami Deployer begins committing your changes and displays a progress window indicating the number of modifications being made to the SharePoint server, as well as the progress and time estimation.
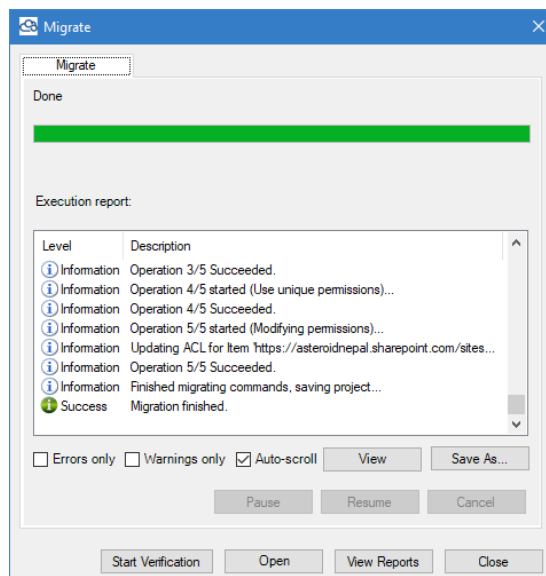
Figure 5-1: Commit Progress Screen

When the committing process completes successfully, you have finished migrating your content. Now, the deployed content is reflected in the target. You can open the target site and verify the contents with respect to source items.

6 COPYRIGHT AND TRADEMARK

For further information, you can contact Tzunami Inc. at:

Tzunami Inc.

601 108th Avenue, NE

Suite 1900

Bellevue, WA 98004, USA

Email: *sales@tzunami.com*, *support@tzunami.com*

Web: *http://www.tzunami.com*