
Livelink/Content Server -> SharePoint Migration

Sharelink Overview



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Table of Contents

1	MIGRATION OVERVIEW	1
1.1	SOFTWARE PRODUCTS	1
1.1.1	<i>Overview</i>	1
1.1.2	<i>Sharelink: Exporter</i>	2
1.1.3	<i>Connect for Sharelink</i>	2
1.1.4	<i>Connect SharePoint Extensions</i>	3
1.2	DATA MIGRATION	3
1.2.1	<i>Overview</i>	3

1 Migration Overview

1.1 Software Products

1.1.1 Overview

When moving from one system to another a number of areas typically are of concern:

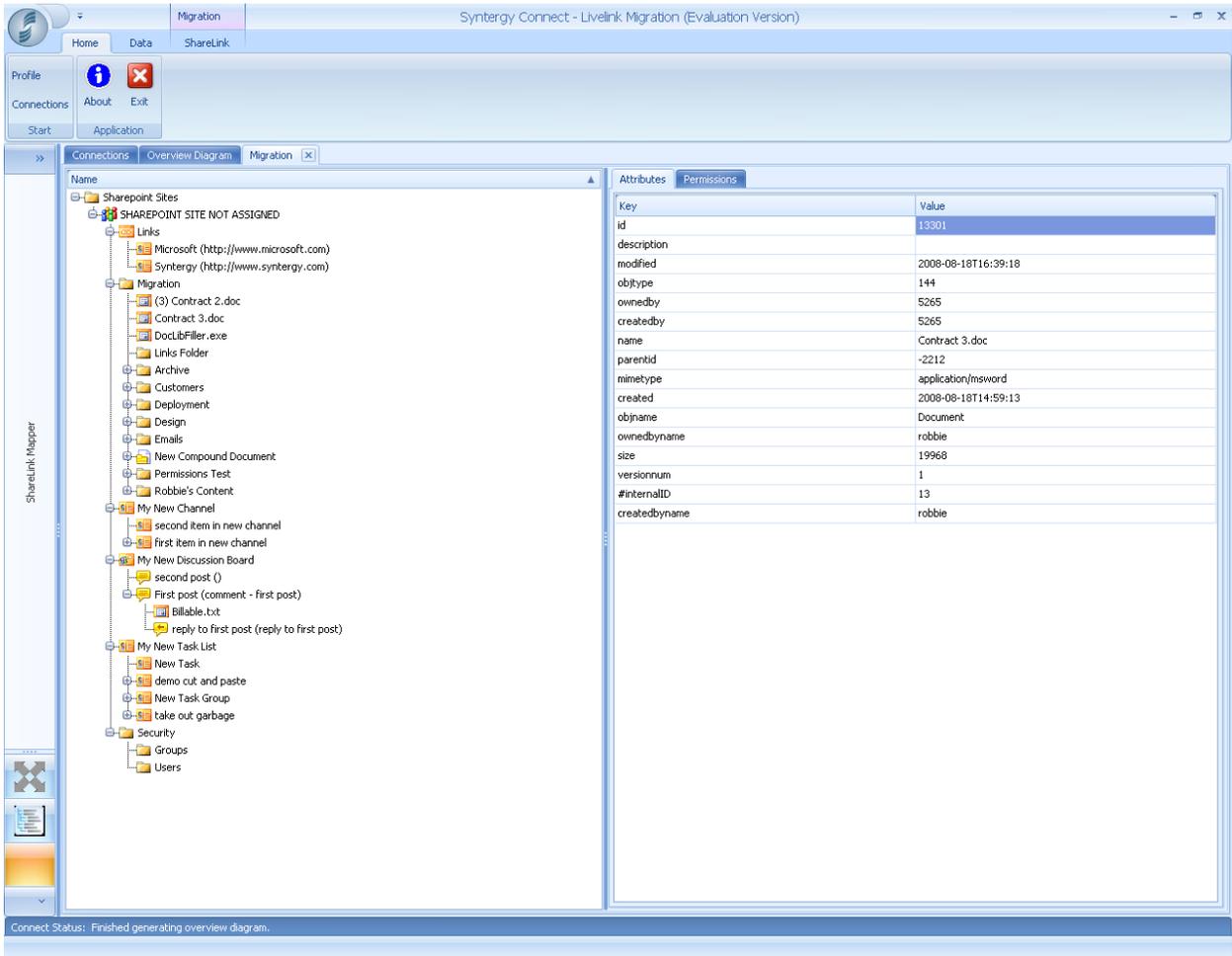
- **Permission model:** Item level permissions can be preserved when moving data from Livelink to SharePoint. However, during migration planning, it is always a good idea to review the permission structure in Livelink and determine if it is a good fit with SharePoint.
- **Document Versions:** By default, all versions are migrated to SharePoint. However, there are options during the export to control the number of versions migrated. This will provide customers the option to save storage space when the additional versions are not required.
- **Metadata mapping:** Livelink Categories and Attributes are mapped to list columns in SharePoint. Advanced metadata constructs are also available in Livelink that may not be available on a one to one mapping. Typical solutions are to re-architect the data during migration to support the required functionality. Once the data is extracted from Livelink it can be edited to add new metadata columns and map existing data to new fields. The analysis module will report any categories that may create this situation.
- **File Naming:** SharePoint has a number of restrictions in the allowable characters in a filename. Livelink Exporter and Sharelink Mapper take care of renaming the files to allowable URL safe names.
- **Path lengths:** SharePoint has a restriction on the length of a filename (128) and the total path length of the URL (260). Typically this is an issue when there are deep levels of descriptive navigation structures in Livelink. The Sharelink Analysis module supports the interrogation of the Livelink environment to determine the scope of this issue. For areas with deep paths, re-architecting the data to create views using metadata is commonly used. The Livelink Exporter will do filename remapping if the feature is selected (i.e. files greater than 120 characters can be auto-truncated).
- **User mapping:** There are two areas of user migration, (1) if Livelink is managing the user space there is a reconciliation of the usernames in Livelink to the Active Directory that is required. Sharelink Mapper supports the use of a mapping table to rename all created-by and modified-by usernames to the new format, (2) Users that are no longer with the company are maintained in Livelink (username(deleted)). Business rules are required to identify the desired ownership of the migrated files and are also mapped using the same processes as (1).
- **Existing Links (URLs/Aliases):** Currently aliases are not migrated as they typically point at a structure that is no longer valid.

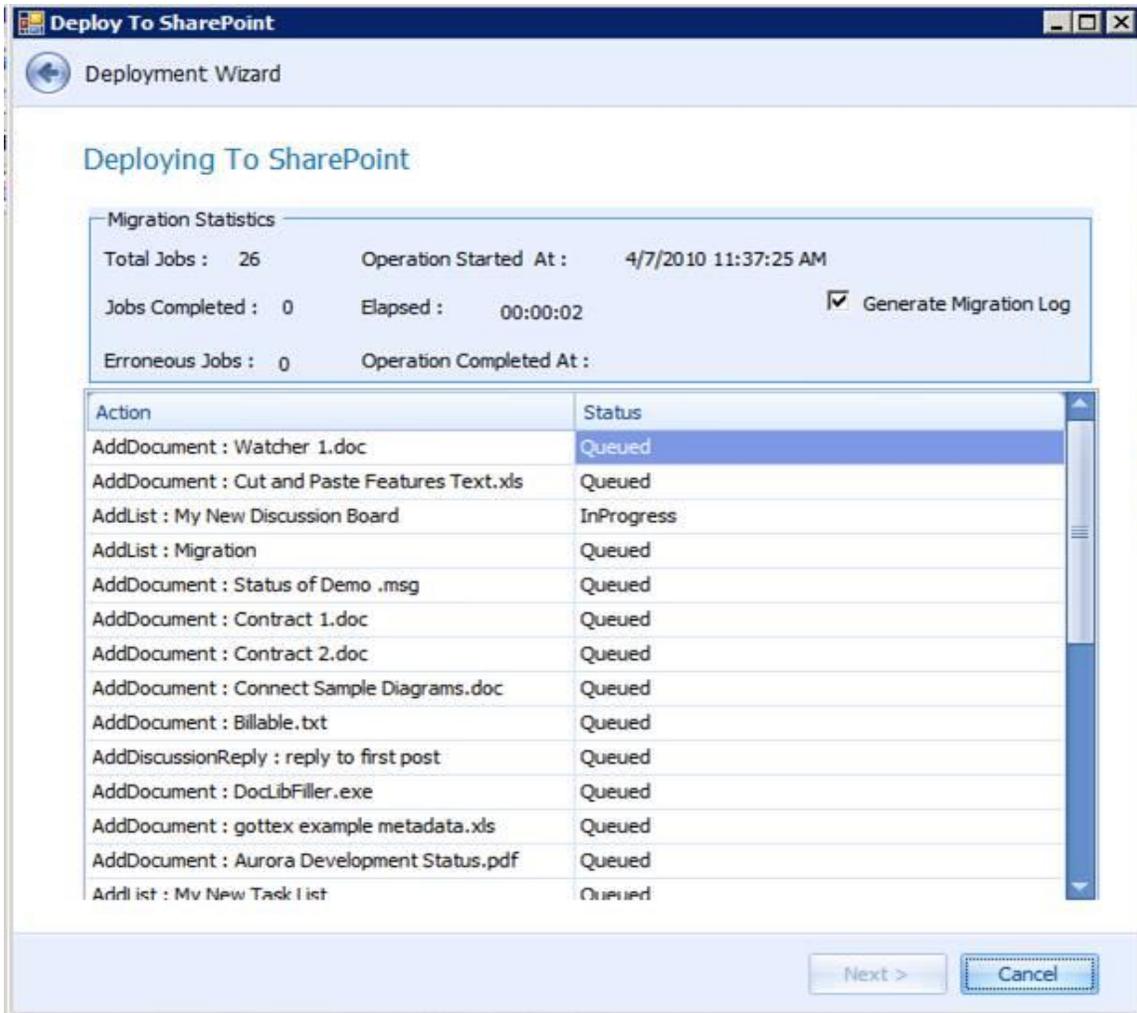
1.1.2 Sharelink: Exporter

This Livelink module extracts data from Livelink to the file system with all of the metadata information. Features include the ability to select the versions with a cutoff date or total number of versions as well as exporting the metadata only and selecting the specific area to export.

1.1.3 Connect for Sharelink

This utility is a windows application that can be run on the user's desktop or SharePoint web front end server. It provides a graphical user interface to map folders to document libraries, or to specific sites. It visualizes any permission issues and allows the permissions to be either changed, or the data to be mapped to another document library or site.





1.1.4 Connect SharePoint Extensions

The Connect SharePoint Extensions consists of a SharePoint solution that will be installed on the SharePoint farm. The solution deploys a web service that will be utilized for the import process. Connect for Sharelink leverages this web service to import all data and set the appropriate metadata values. In addition, it supports adding users/groups to sites, creating content types and columns, creating list columns, etc.

1.2 Data Migration

1.2.1 Overview

Overall, the process of migrating data from Livelink to SharePoint can be described in the following steps:

1. Analyze Livelink and determine a migration plan, based on the data and business requirements. This is mainly covered in an initial proof of concept; overall the migration plan should integrate with the overall deployment which includes provisioning the

hardware and a full taxonomy/user/group definition and communication plan. Syntergy will review and provide comments and tasks to your master plan.

2. Set up a SharePoint environment with the applicable business requirements and taxonomy. This includes the site structure, permission model, users and groups, and metadata requirements. You can use the information from the Livelink analysis and some sample extractions to determine the detailed needs. At this point, you have an empty SharePoint system with the sites created for each organizational unit and applicable users.
3. Migrate the data, including enterprise data, personal data, and projects. In each case, the target is a site in SharePoint with the creation of document libraries, task lists, or discussions as needed in the existing site.

Data To Migrate	Description
Enterprise Data	<ul style="list-style-type: none"> <p>• Extracting the data. You can extract data from Livelink using the Sharelink: Livelink Exporter module. This lets you select an area in Livelink and extract the documents to a staging area. Typically a reasonable amount of data is selected for migration (<5,000 documents, <5 GB data, one department, targeted for 1<10 sites in SharePoint). Note: the technical limitation on the size of the export is the size of the disk space available.</p> <p>The staging area needs sufficient disk space to hold the extracted data and metadata information stored in .xml file format. This staging area needs to be accessible from the Livelink Admin server and the desktop that Connect for Sharelink is installed on. If there is not access, the data can be manually copied to a location that is accessible to the user's desktop.</p> <p>• Mapping the data. Connect for Sharelink lets you visualize the permission issues and make decisions. The .xml file from the extraction process also has the information that you can modify to create reports to help end users make decisions. You also need to decide about ownership for users that are no longer in the system and the reorganization of data or groups. Connect for Sharelink lets you change permissions, either by inheriting the permissions or moving the data to a new document library or site. You can then use the Connect for Sharelink to select the target sites in SharePoint for the data.</p> <p>• Importing the data – When the data is properly mapped to SharePoint, the Connect for Sharelink's deployment wizard will guide users through the process on importing the data. Statistics and logging is available to tracking the progress of the importer data.</p>

If required based upon the specific Livelink implementation, Syntergy will enhance the current tools to accomplish the requirements outlined from the initial proof of concept. Once complete, Syntergy will provide on-site staff that will, working with your personnel, select sample Livelink data and follow a

complete extraction and loading process. A larger set of data will be staged and migrated and the tools will be further refined.

Once all of the migration components have been tested and staged, the core migration can begin. Another snapshot of the production data will be taken and migration will be performed from that dataset. Once all the data is migrated, either in phases where certain departments move first, or in whole, the areas exported will be marked as read-only and a final export of any changes will be made and migrated.

Step by Step documentation will be developed based upon the environment and will be delivered after the software has been updated and additional sample migration is completed.