


## Production Environments – Preparation Sheet (CS to SP On-Premise)

To ensure migration readiness is achieved, Gimmel recommends the following action items are prepared in advance.

PRODUCTON ENVIRONMENTS	
SharePoint 2013, 2016, 2019 environment (on premise or cloud) <ul style="list-style-type: none"> <li>Available as a destination migration repository</li> </ul>	SharePoint Url: _____
Content Server environment <ul style="list-style-type: none"> <li>Enterprise Web Services Enabled</li> <li>Records Management Web Services Enabled (optional)</li> <li><b>See Content Server Requirements checklist for additional requirements</b></li> </ul> (If you require assistance with configuration of EWS please contact us and we can assist you with the configuration.)	Content Server Url: _____  Enterprise Web Services Path: _____  Records Management Web Services Path: _____
Windows Server environment – if deploying Legacy Link Redirector <ul style="list-style-type: none"> <li>Windows Server box (ex. Windows Server 2008 R2), IIS 7.0+</li> <li>AD Login account with adequate local privileges</li> </ul>	Server Name: _____
SQL Server Database <ul style="list-style-type: none"> <li>The database is used for storing migration profiles</li> <li>Provide SQL Server Account credentials</li> <li>Enable mixed mode authentication</li> <li><b>See SQL Server Database Requirements checklist for additional requirements</b></li> </ul>	SQL Server Account Name: _____  Password: _____  Server Name, Database Name and Port: _____

ACCOUNTS	
SharePoint migration service account (ex. SPMigrationAccount) <ul style="list-style-type: none"> <li>With appropriate full permissions to destination Site Collections</li> </ul>	Service Account Name: _____
Content Server migration service account (ex. CSMigrationAccount) <ul style="list-style-type: none"> <li>With appropriate read access to Content Server source Collections</li> <li>We strongly recommend granting the service account System Admin privileges in Content Server to ensure all content is read accessible</li> </ul>	Service Account Name: _____

<p>AD Login account(s) For Shared Drives</p> <ul style="list-style-type: none"> <li>• With read/write access to source Shared Drive for importing to SharePoint</li> <li>• Write access is required for CSV control file use</li> </ul> <p>For Content Server</p> <ul style="list-style-type: none"> <li>• With Sys Admin access to the Content Server environment             <ul style="list-style-type: none"> <li>○ To enable access for analysis, validation, and config if required</li> </ul> </li> </ul> <p>For SharePoint</p> <ul style="list-style-type: none"> <li>• With Administrator level permissions to SharePoint test environment             <ul style="list-style-type: none"> <li>○ To enable access for analysis, validation, and config if required</li> <li>○ Central / Global Admin is nice to have (minimum Site Col. Admin)</li> </ul> </li> </ul> <p>(Ability to login to all of the Client PCs and Link Redirector server)</p>	<p>AD Account Name(s):</p> <p>_____</p> <p>_____</p> <p>_____</p>
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ACCOUNTS – Optional for use with the Content Server Discovery, Analytics and De-Duplication Tool	
 <p>This tool directly queries the Content Server database schema to conduct advanced queries and reporting. As such you must provide database credentials with the required minimum read access role to the entire Content Server schema.</p> <p>In addition the User ID specified must have default schema set to the Content Server schema.</p> <p><b>Example: Oracle or SQL Server User ID</b>  <b>User ID:</b> livelinkdb            Using SQL Server Management Studio or Oracle SQL Developer – you should be able to login using the database account specified for Tool use.</p>	<p>Database Account Name:</p> <p>_____</p> <p>Content Server Production Database Connection Details:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>* Specify TNS name info or file location for Oracle</p> <p>* SQL Server: if provisioning new account you must ensure mixed mode authentication is enabled</p>

MIGRATION CLIENTS	
<p>Client PCs – Migration Clients</p> <ul style="list-style-type: none"> <li>• Recommend 1 - 5 dedicated Client PCs (ex. VMs) depending on number of migration resources and planned migration thread usage</li> </ul>	<p>PC Name 1:</p> <p>_____</p>

<ul style="list-style-type: none"> <li>• On same internal network as Content Server / SharePoint             <ul style="list-style-type: none"> <li>○ Same datacenter if applicable</li> </ul> </li> <li>• Intel i7 64 bit OS or equivalent where possible</li> <li>• 16+ GB of RAM</li> <li>• .NET framework 4.6.1 installed</li> <li>• Login account with local admin access rights for installs</li> </ul>	PC Name 2: _____  PC Name 3: _____  PC Name 4: _____  PC Name 5: _____
<b>Remote Access</b>  If the nature of the engagement requires remote access – please ensure Remote VPN access is also made available.	

### Client Resource Availability Assumptions

Client resources should be available to provide assistance as required from a technical perspective for the tool configuration and training phases.

- Client project analyst resource responsibility:
  - Work with internal business and project stakeholders as required
  - Perform testing and validation
  - Provide scope and decision making
- Client Content Server resource and SharePoint resource:
  - Set up appropriate access to CS and SP (provide account ids and passwords)
  - Help with initial setup. (ie. web service urls)
  - Configure permissions in SharePoint
  - Answer questions about environment and provide architecture diagrams
  - Additional environment investigation, configuration or optimization as required
- From the Database side, we would require resource to create the actual DB and provide credentials
- Link Redirector
  - Someone to assist with the IIS specific configuration from Client perspective