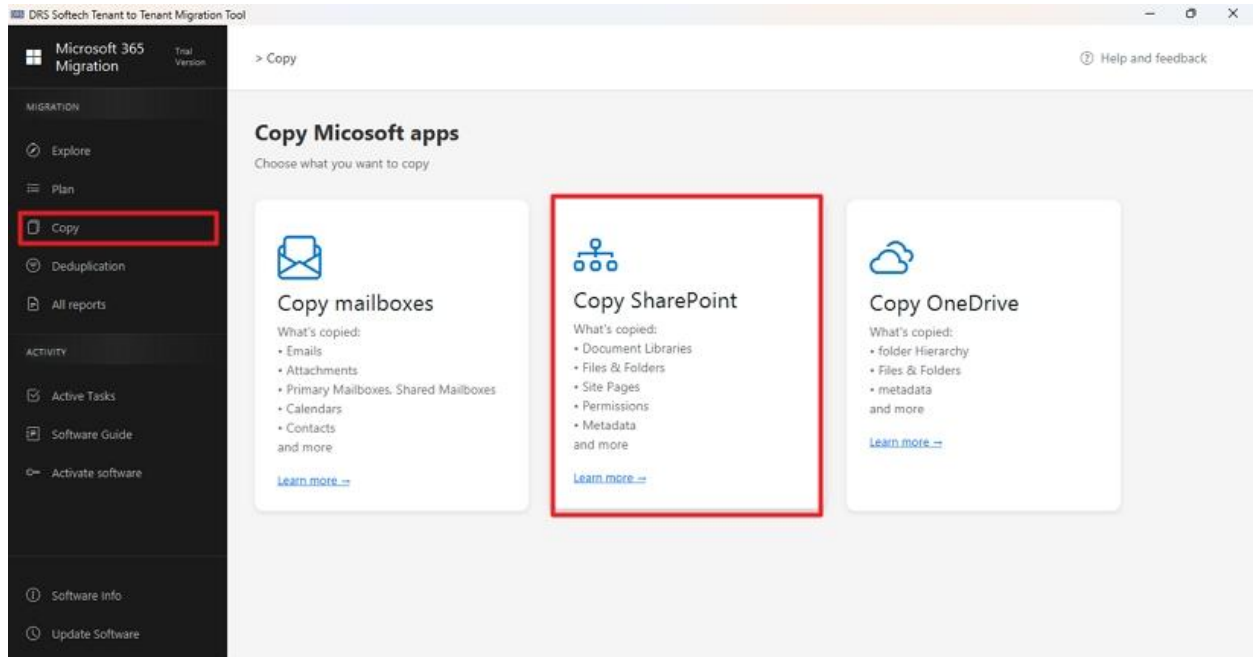


Copy (SharePoint) Module

Step 01: Select Copy SharePoint (Drive, List)

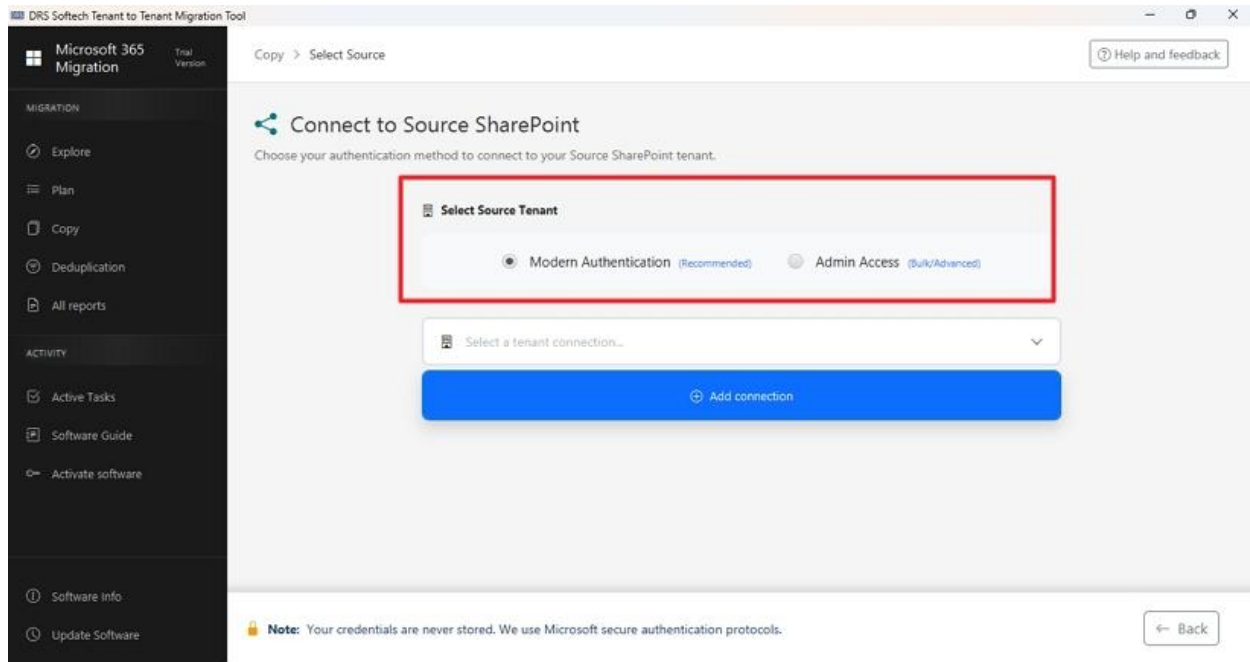
From the **Copy** section on the main dashboard, click **Copy SharePoint** to begin the SharePoint migration process.



Step 02: Choose Source Authentication Mode

Select the authentication method for the source Microsoft 365 tenant:

- **Modern Authentication:** Sign in using your Microsoft 365 Admin account.
- **Admin Access:** Connect using the Azure Client ID, Client Secret, and Tenant ID.

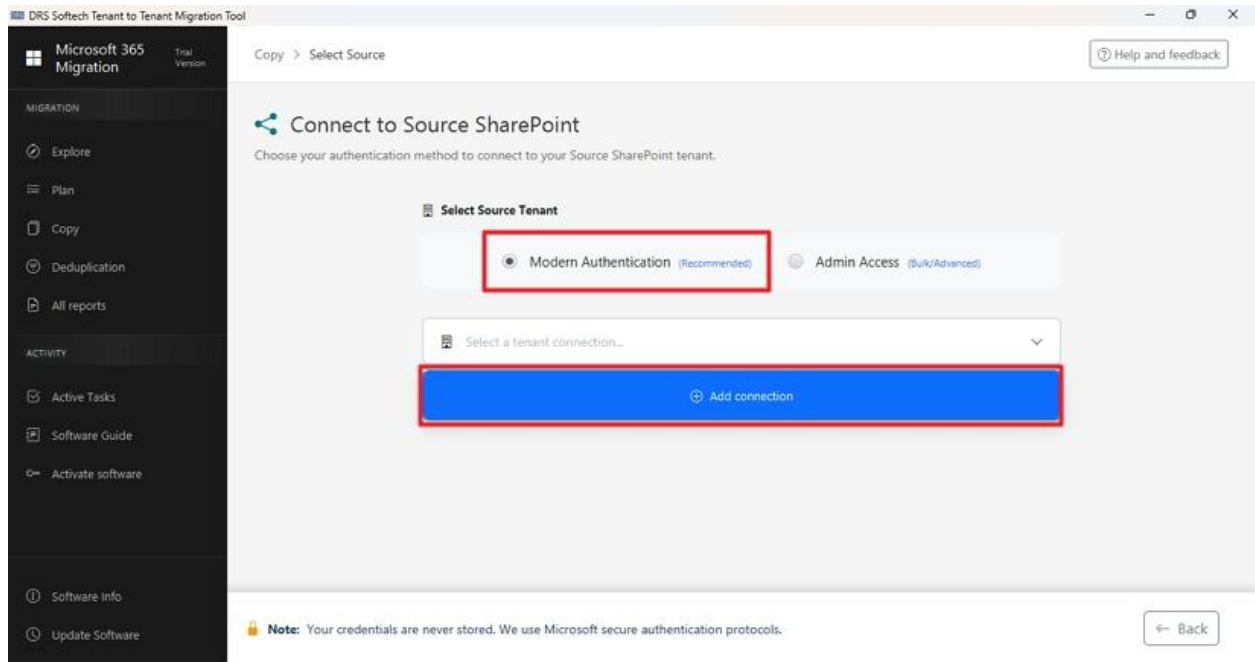


Step 03: Sign In Using Modern Authentication

Select **Modern Authentication**, then click on **Add Connection** to create a new connection. You will be redirected to the Microsoft sign-in page to authenticate your account.

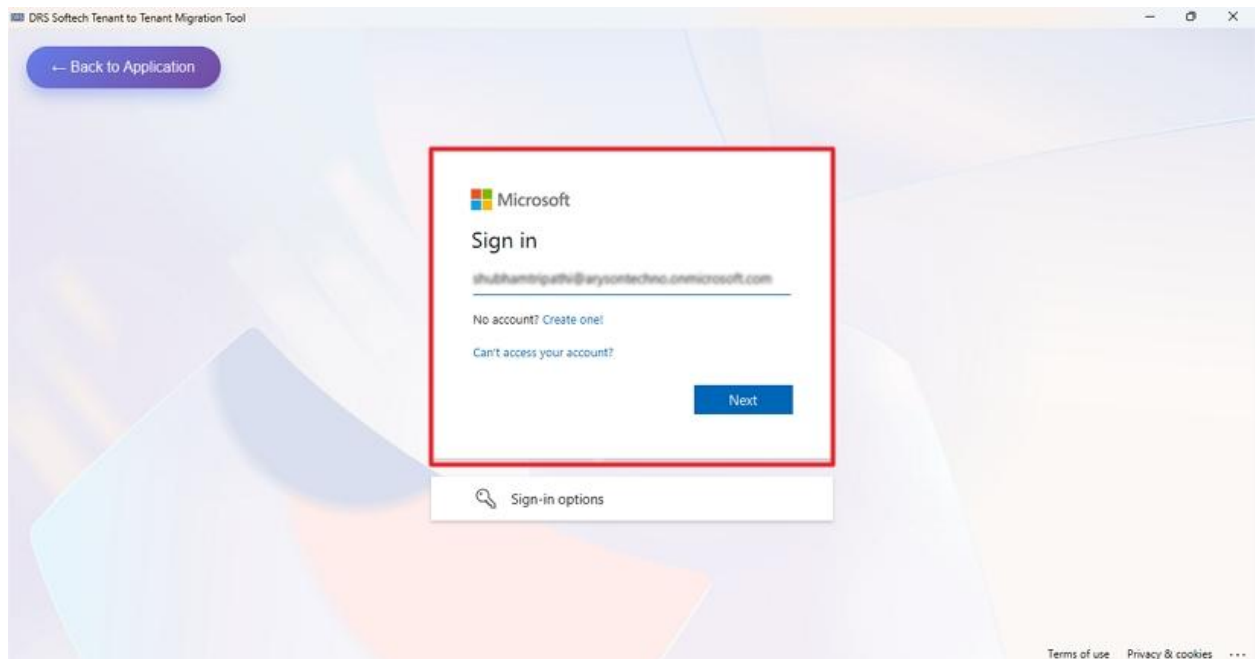
Note: The software securely saves your configured login connections. For future migrations, simply select a saved connection instead of entering the credentials again, making the login process faster and more convenient.

If Modern Authentication fails, you can proceed with these steps for an easier authentication process. Just check out this link: [Modern Authentication Fails](#)



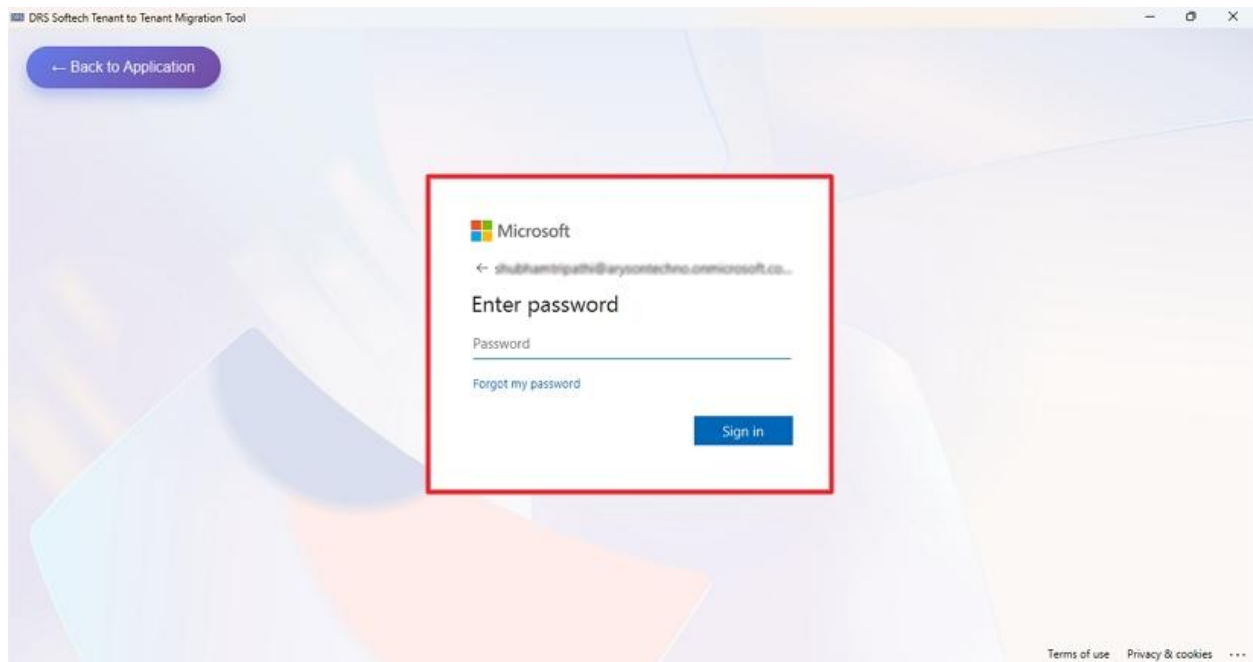
Step 04: Enter Your Microsoft 365 Account

Choose your Microsoft 365 Admin account or enter the **email address** manually, then click **Next**.



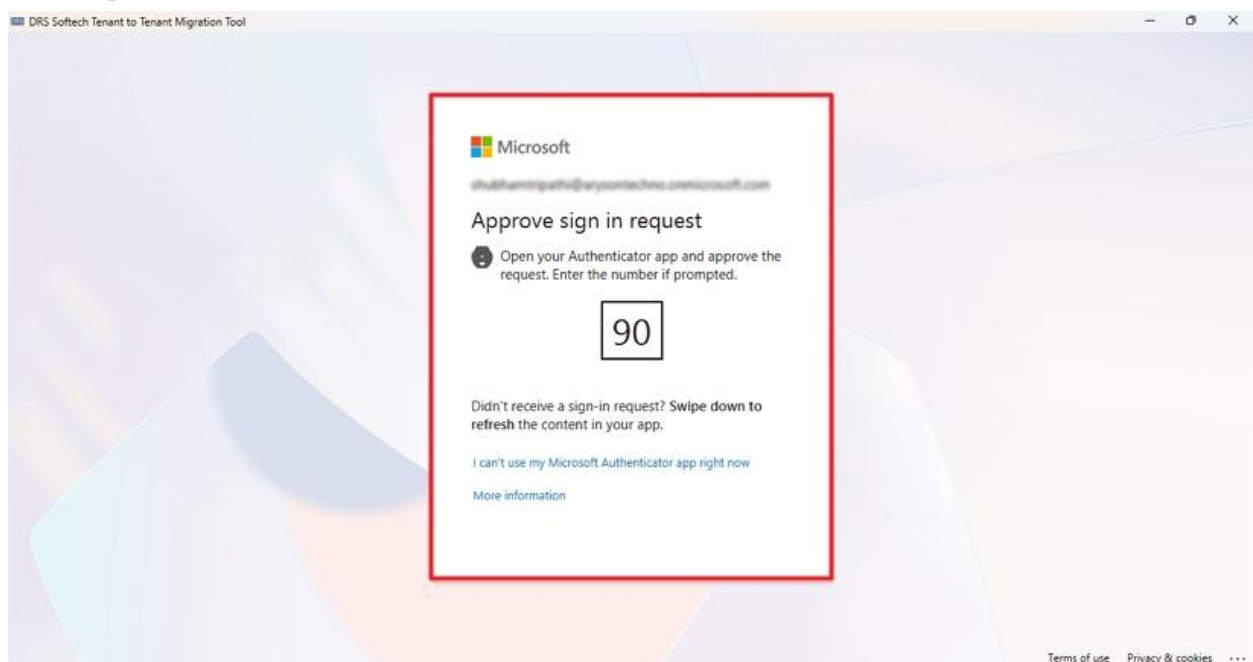
Step 05: Enter Your Password

Type your **Microsoft 365 Admin account password** and click **Sign In**.



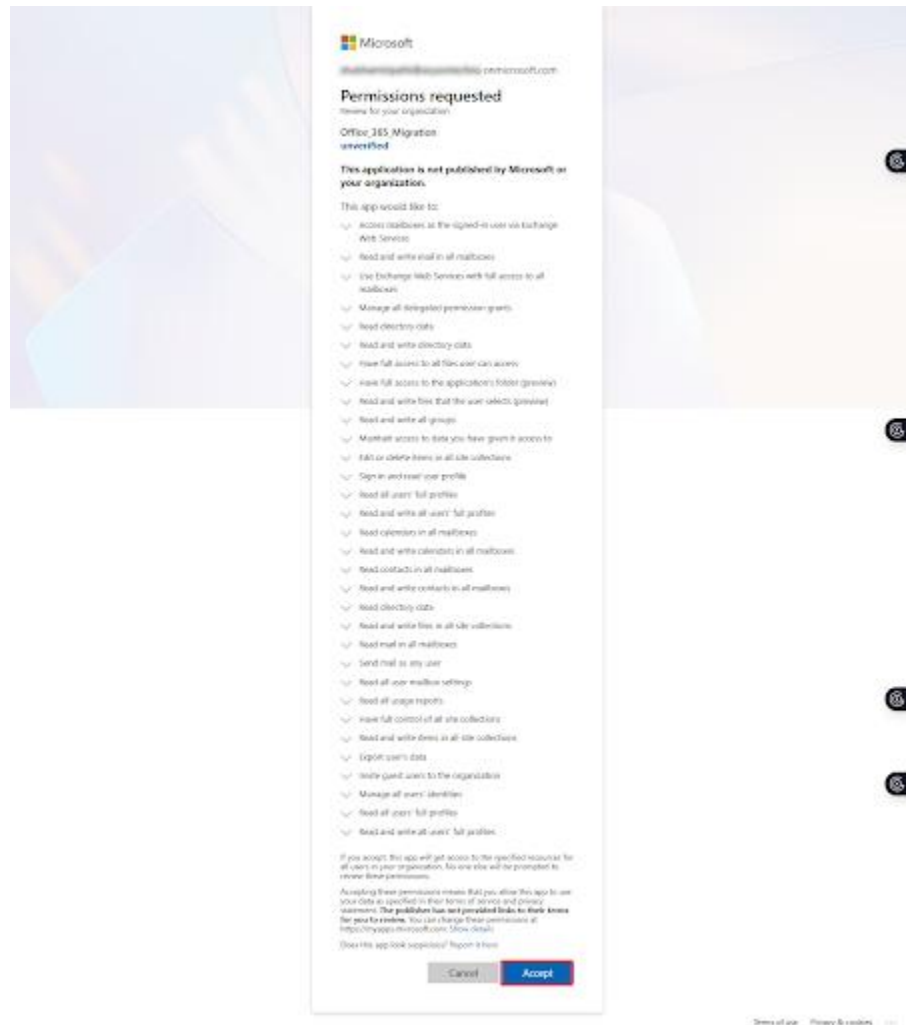
Step 06: Complete Multi-Factor Authentication (MFA)

If Multi-Factor Authentication (MFA) is enabled, approve the sign-in request in your Microsoft Authenticator app. Enter the displayed verification number (if prompted) to complete the authentication.



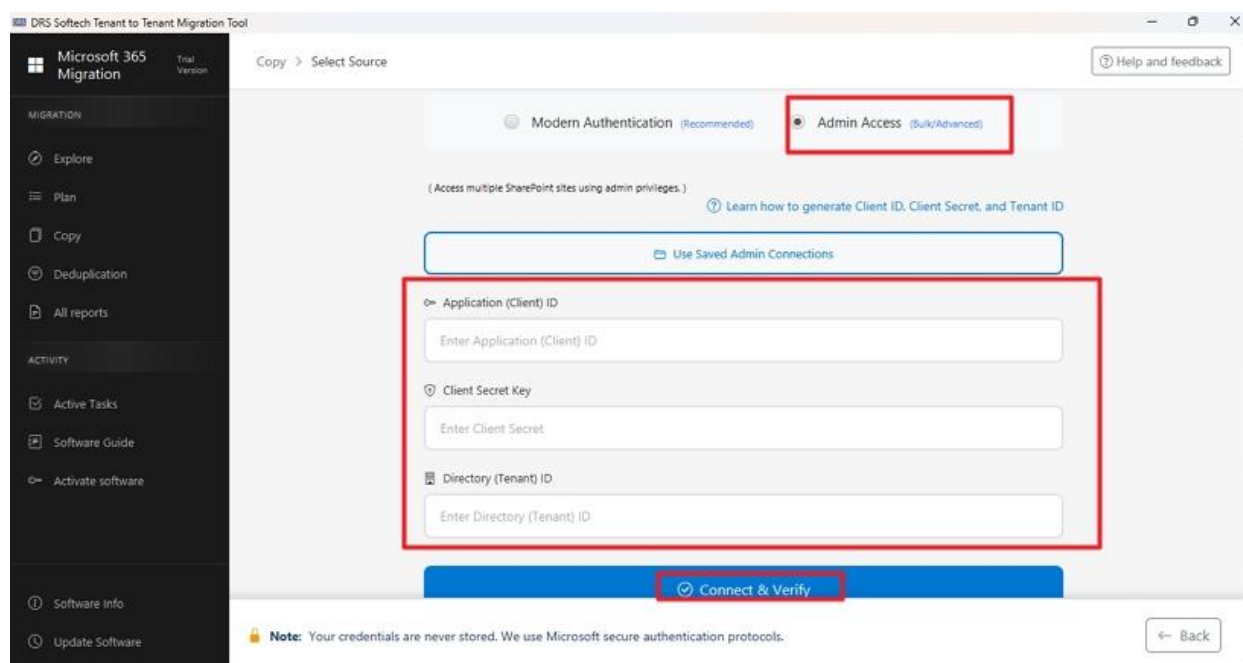
Step 07: Grant Required Permissions

Review the requested Microsoft permissions and click **Accept** to authorize the application.



Step 08: Sign In Using Admin Access

Enter the required **Client ID**, **Client Secret Key**, and **Tenant ID**, then click **Connect and Verify**. The software validates the credentials and securely connects to your Microsoft 365 tenant.



Note: If you have not created an Azure App Registration or generated the required credentials, follow the Azure configuration guide before proceeding.

<https://www.data-recovery-solutions.com/how-to/create-azure-active-directory-and-enable-api-permission/>

When the Azure application is configured correctly, the required Microsoft 365 API permissions are automatically granted through the App Registration. Therefore, no additional permission consent is required during the connection process. You can refer to the screenshot below to view the Microsoft 365 API permissions required during Azure App Registration.

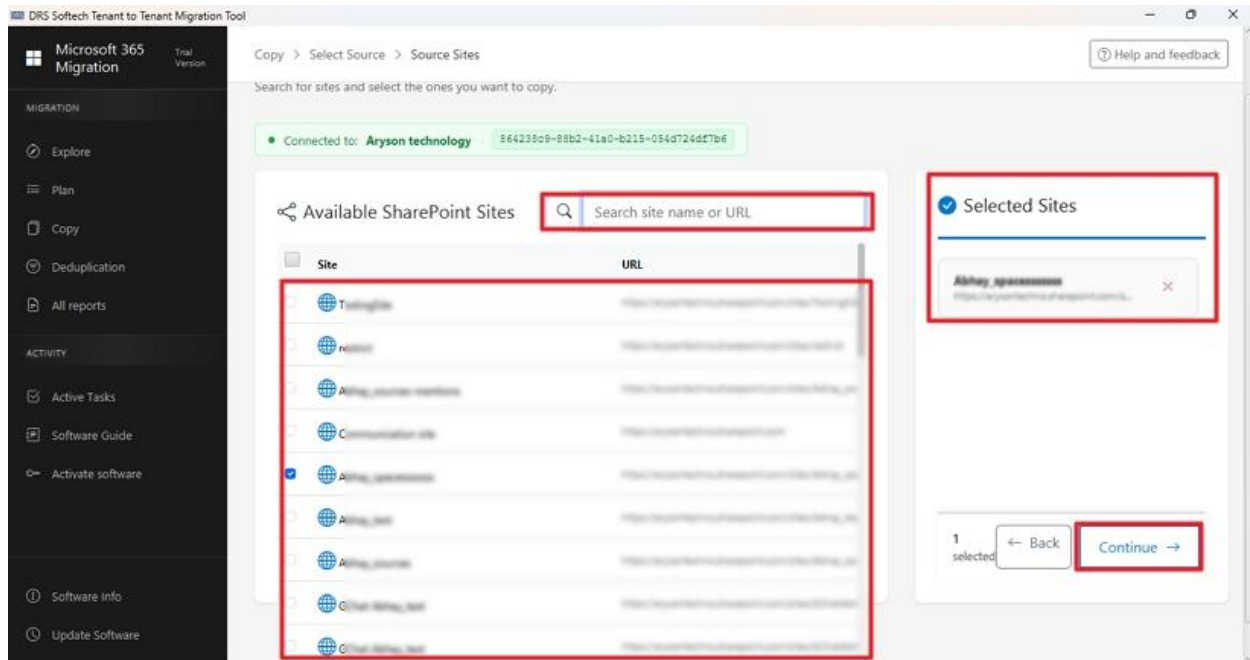
API / Permissions name	Type	Description	Admin consent requ...	Status
▼ Microsoft Graph (30)				
Calendars.Read	Application	Read calendars in all mailboxes	Yes	✔ Granted for BUSINESS ...
Calendars.ReadWrite	Application	Read and write calendars in all mailboxes	Yes	✔ Granted for BUSINESS ...
Channel.ReadBasic.All	Application	Read the names and descriptions of all channels	Yes	✔ Granted for BUSINESS ...
ChannelMessage.Read.All	Application	Read all channel messages	Yes	✔ Granted for BUSINESS ...
Contacts.Read	Application	Read contacts in all mailboxes	Yes	✔ Granted for BUSINESS ...
Contacts.ReadWrite	Application	Read and write contacts in all mailboxes	Yes	✔ Granted for BUSINESS ...
Directory.Read.All	Application	Read directory data	Yes	✔ Granted for BUSINESS ...
Files.ReadWrite.All	Application	Read and write files in all site collections	Yes	✔ Granted for BUSINESS ...
Group.Read.All	Application	Read all groups	Yes	✔ Granted for BUSINESS ...
Group.ReadWrite.All	Application	Read and write all groups	Yes	✔ Granted for BUSINESS ...
GroupMember.ReadWrite.All	Application	Read and write all group memberships	Yes	✔ Granted for BUSINESS ...
Mail.Read	Application	Read mail in all mailboxes	Yes	✔ Granted for BUSINESS ...
Mail.ReadWrite	Application	Read and write mail in all mailboxes	Yes	✔ Granted for BUSINESS ...
Mail.Send	Application	Send mail as any user	Yes	✔ Granted for BUSINESS ...
MailboxSettings.Read	Application	Read all user mailbox settings	Yes	✔ Granted for BUSINESS ...
Reports.Read.All	Application	Read all usage reports	Yes	✔ Granted for BUSINESS ...
Sites.FullControl.All	Application	Have full control of all site collections	Yes	✔ Granted for BUSINESS ...
Sites.ReadWrite.All	Application	Read and write items in all site collections	Yes	✔ Granted for BUSINESS ...
Team.Create	Application	Create teams	Yes	✔ Granted for BUSINESS ...
Team.ReadBasic.All	Application	Get a list of all teams	Yes	✔ Granted for BUSINESS ...
TeamMember.Read.All	Application	Read the members of all teams	Yes	✔ Granted for BUSINESS ...
TeamMember.ReadWrite.All	Application	Add and remove members from all teams	Yes	✔ Granted for BUSINESS ...
TeamsActivity.Read.All	Application	Read all teams' settings	Yes	✔ Granted for BUSINESS ...
TeamworkTag.CreateAll	Application	Create chat and channel messages with anyone's identity	Yes	✔ Granted for BUSINESS ...
TeamworkTag.ReadWrite.All	Application	Read and write tags in Teams	Yes	✔ Granted for BUSINESS ...
User.Export.All	Application	Export user's data	Yes	✔ Granted for BUSINESS ...
User.Invite.All	Application	Invite guest users to the organization	Yes	✔ Granted for BUSINESS ...
User.ManageIdentities.All	Application	Manage all users' identities	Yes	✔ Granted for BUSINESS ...
User.Read.All	Application	Read all users' full profiles	Yes	✔ Granted for BUSINESS ...
User.ReadWrite.All	Application	Read and write all users' full profiles	Yes	✔ Granted for BUSINESS ...

Step 09: Select Source SharePoint Sites

- Search the available SharePoint sites by **Site Name or URL**. You can also view and select **Group Sites** (Microsoft 365 Groups-connected SharePoint sites) for migration.
- Select the **sites** you want to migrate and verify them in the **Selected Sites panel**. Click **Continue**.

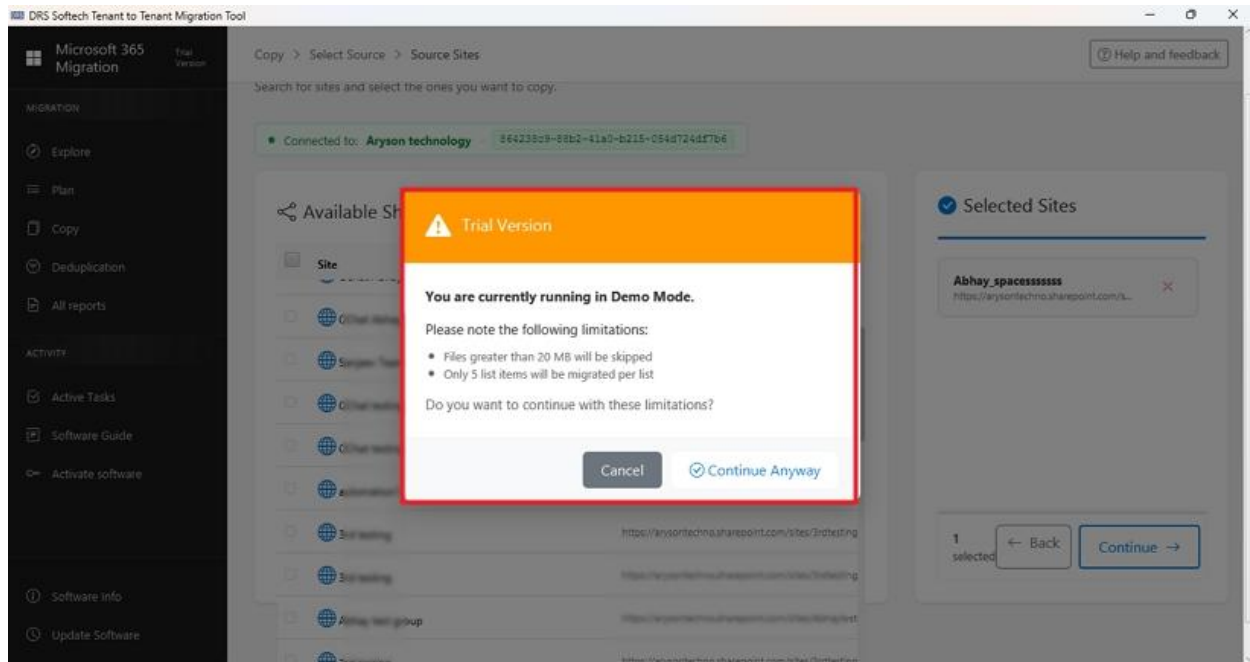
Note: The software supports migration of SharePoint Drive content, Generic

Lists, and specified columns/metadata from the selected sites. However, certain components may have limitations during migration, including permissions, workflows, external SharePoint sites, guest user mapping, and blob storage data.



Step 10: Demo Version Notification (Optional)

If you are using the Trial Version, a pop-up appears displaying the demo limitations, such as the **maximum supported file size** and the **number of list items per migration**. Click **Continue Anyway** to proceed with the migration in demo mode, or click **Cancel** to return to the previous screen.



Step 11: Select Destination Tenant

Choose one of the following methods to connect to the destination Microsoft 365 tenant.

Option 1: Modern Authentication

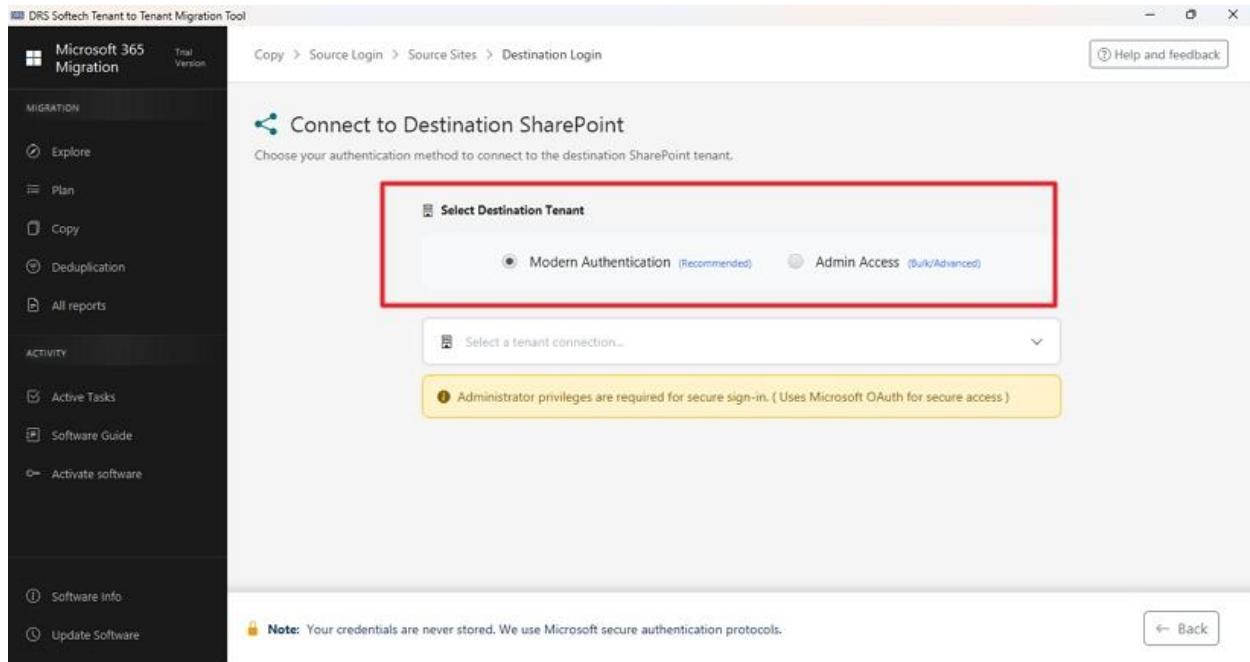
Select Modern Authentication and click Choose an **Account Connection**. Select a saved connection or click **Add Connection** to create a new one.

To authenticate:

- Enter your Microsoft 365 Admin email address.
- Enter the corresponding password.
- Complete Multi-Factor Authentication (MFA), if enabled.
- Review and click Accept to grant the required Microsoft permissions.

Option 02: Admin Access

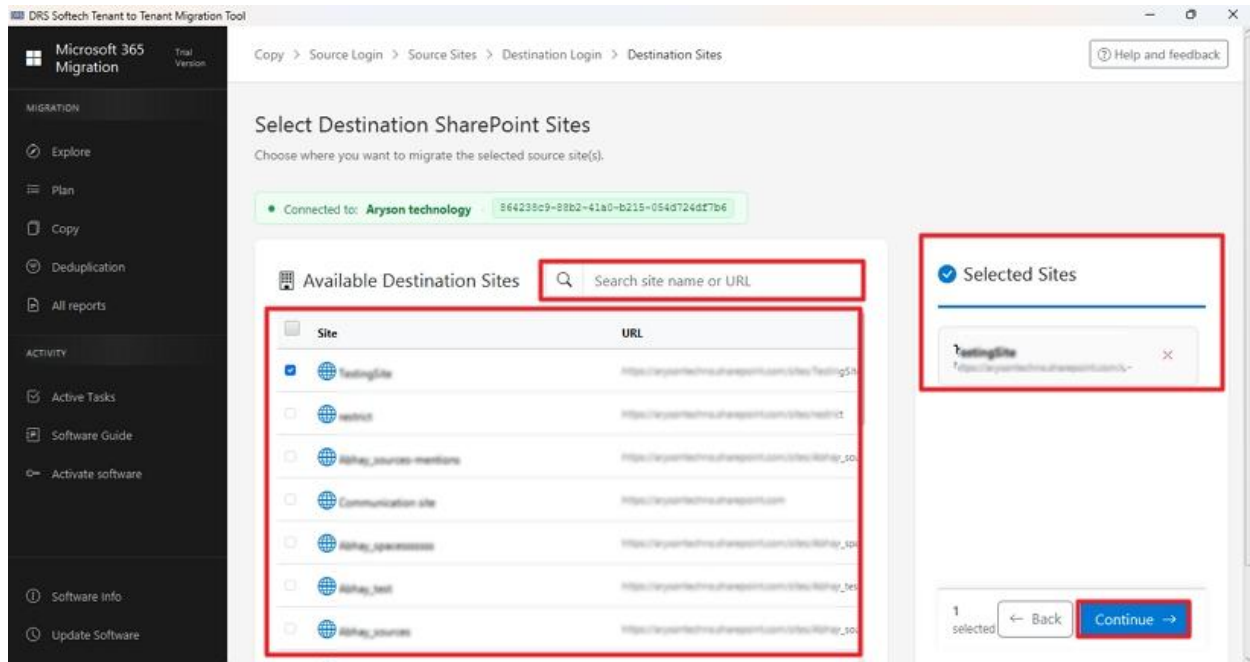
Select **Admin Access** and enter the following details: **Client ID**, **Client Secret Key**, and **Tenant ID**. Click **Connect and Verify**. The software validates the provided credentials and securely connects to the destination Microsoft 365 tenant.



Step 12: Select Destination SharePoint Sites

Search and **select** the destination SharePoint sites. Confirm your selection in the **Selected Sites panel** and click **Continue**.

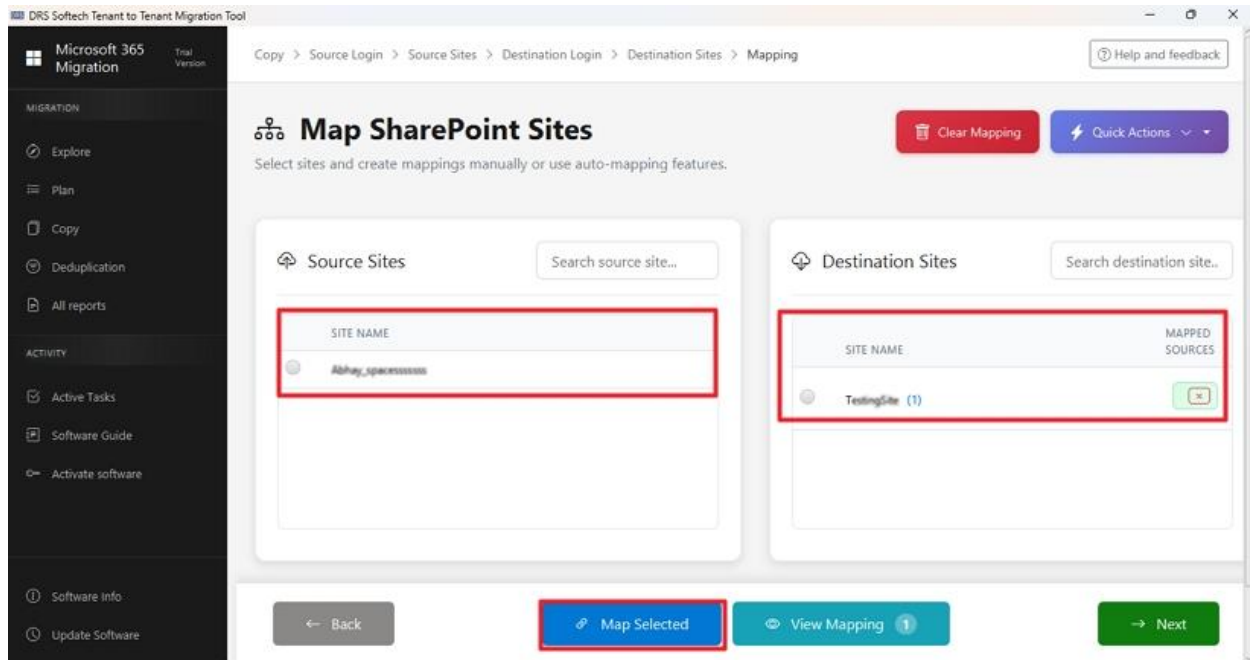
Note: Before starting the migration, ensure that the required SharePoint sites are created manually in the destination Microsoft 365 tenant. The software migrates data to existing destination sites and does not automatically create new SharePoint sites due to API limitations.



Step 13: Map SharePoint Sites

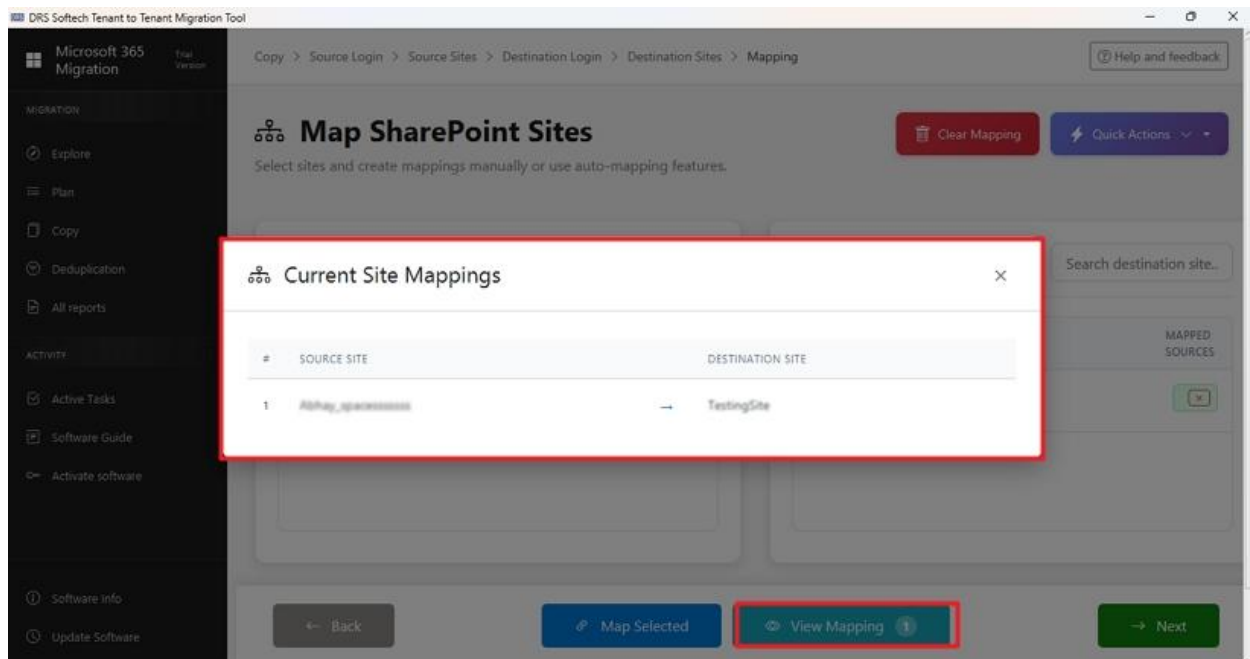
The selected source and destination sites are displayed for mapping. To create a manual mapping:

- Select a **source site**.
- Select the **corresponding destination site**.
- Click **Map Selected**.
- A confirmation message will appear once the mapping is created successfully.
- Different Mapping Option:
 - **One-to-One Mapping**: One source site mapped to one destination site.
 - **One-to-Many Mapping**: One source site is mapped to multiple destination sites.
 - **Many-to-One Mapping**: Multiple source sites are mapped to a single destination site.
 - **Many-to-Many Mapping**: Multiple source sites are mapped to multiple destination sites.



Step 14: Verify Site Mapping

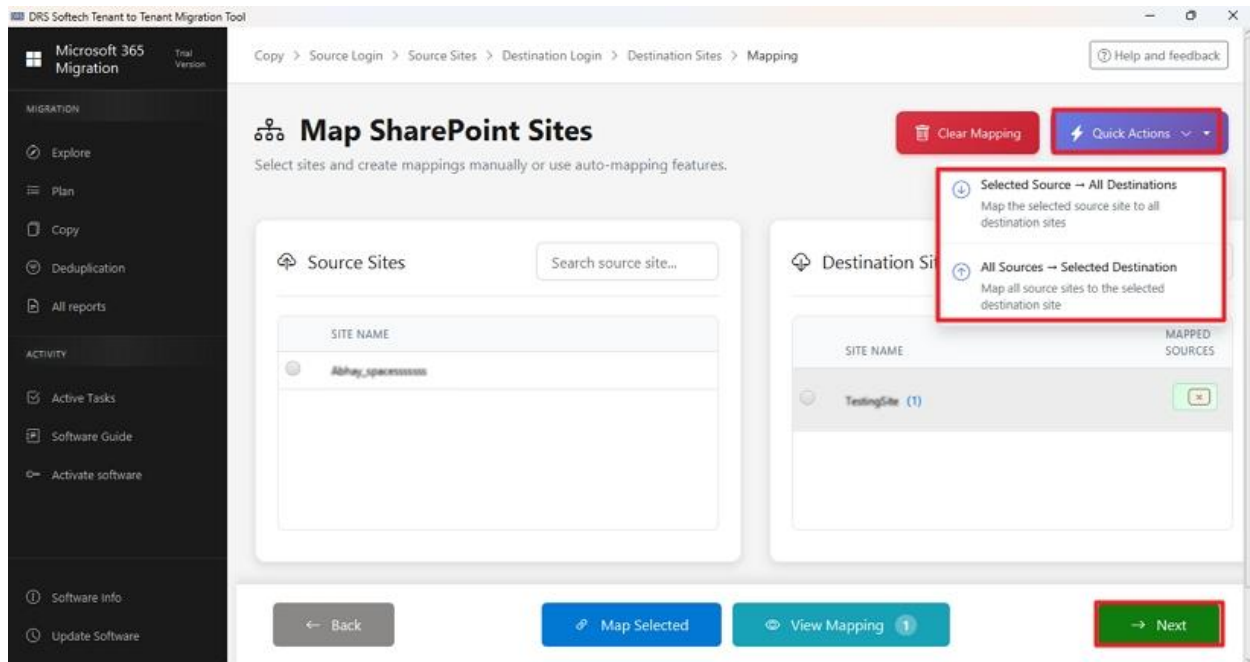
Click **View Mapping** to review all mapped source and destination SharePoint sites in the Current Site Mappings window.



Step 15: Use Automatic Mapping (Optional)

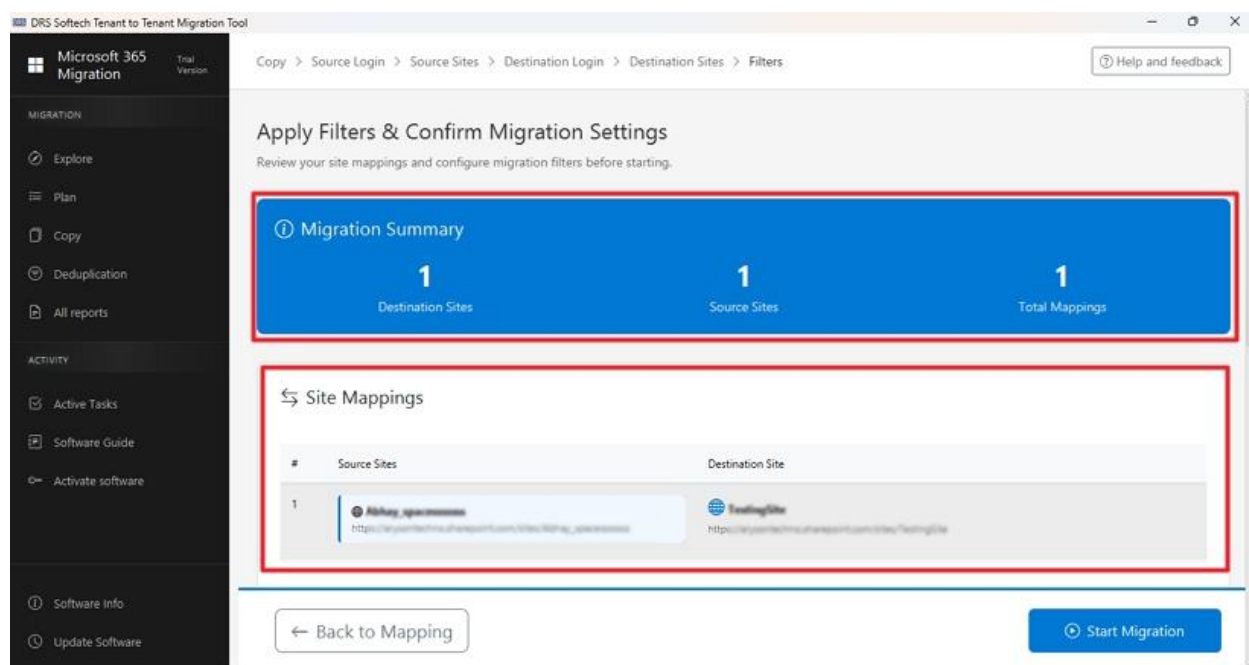
Click **Quick Actions** and choose one of the automatic mapping options:

- **Selected Source → All Destinations:** Maps the selected source site to all destination sites.
- **All Sources → Selected Destination:** Maps all source sites to the selected destination site.



Step 16: Review the Migration Summary & Site Mapping

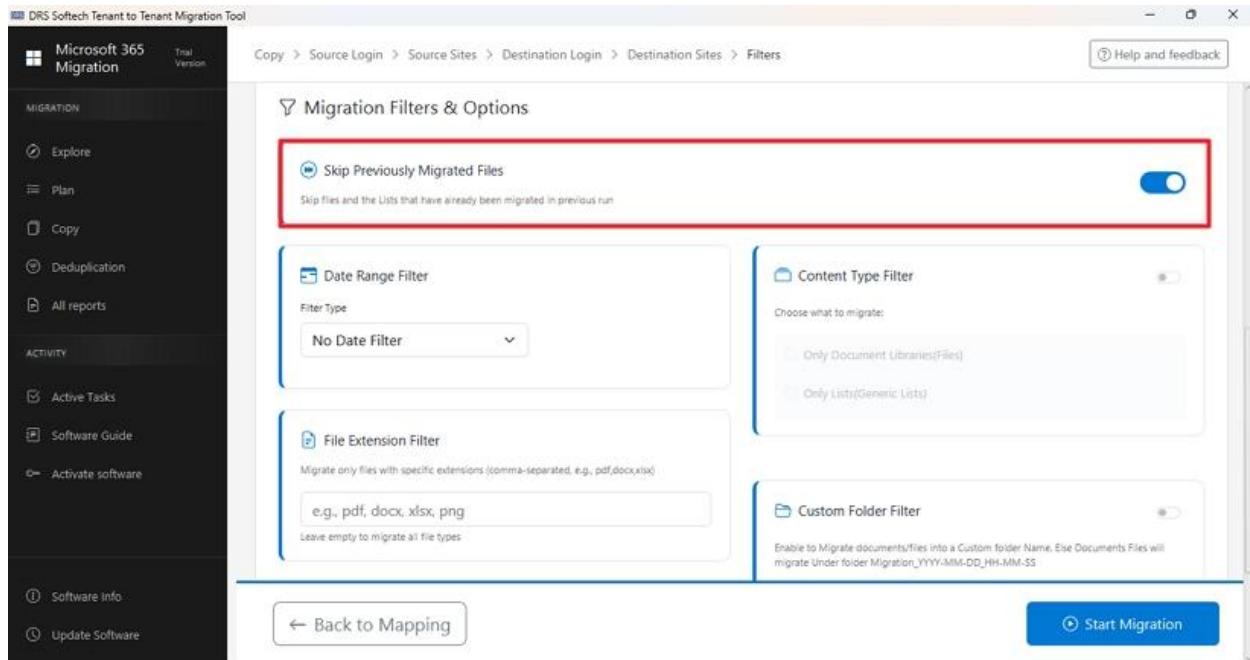
Review the migration summary, including the total Source Sites, Destination Sites, and Site Mappings. Verify that all SharePoint site mappings are correct before proceeding with the migration.



Step 17: Apply Skip Previously Migrated Filter

Enable Skip Previously Migrated Files to perform incremental migrations and avoid transferring data that has already been migrated.

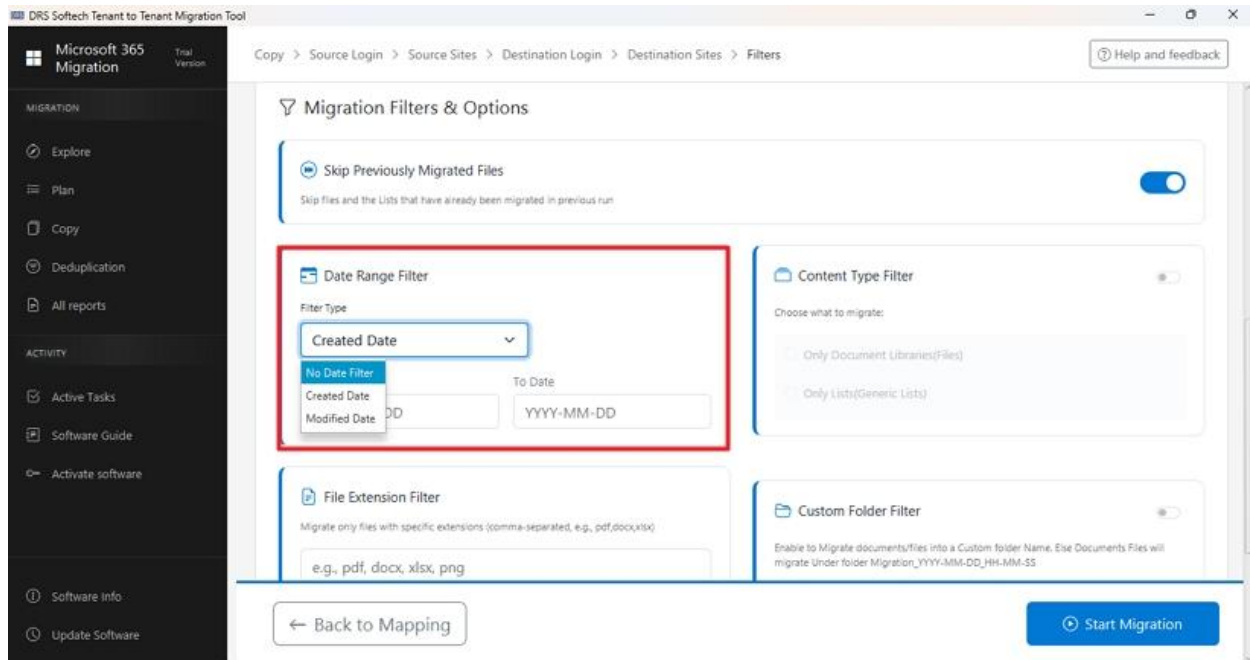
For example, if a SharePoint site contains 100 GB of data and 60 GB was migrated during a previous session. The software automatically detects the migrated content and transfers only the remaining 40 GB. This saves time, reduces bandwidth usage, and prevents duplicate migration.



Step 18: Apply Date Range Filter

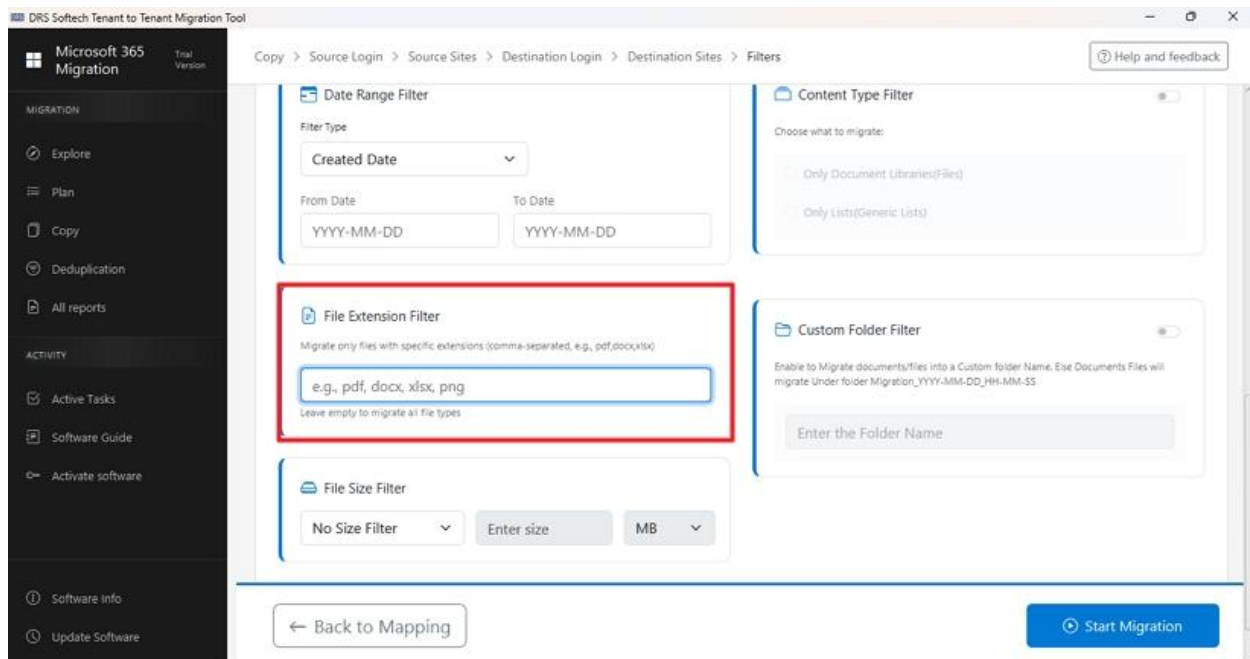
Use the **Date Range filter** to migrate content based on **Created Date** or **Modified Date**. Specify the **start** and **end dates** to migrate only the required SharePoint data.

Note: By default, when destination sites are loaded, the Modified Date filter is applied. If you want to migrate data based on Created Date, you can manually select it from the Date Range filter options. The software applies the selected filter to both Created and Modified fields to ensure complete and accurate migration without missing any files.



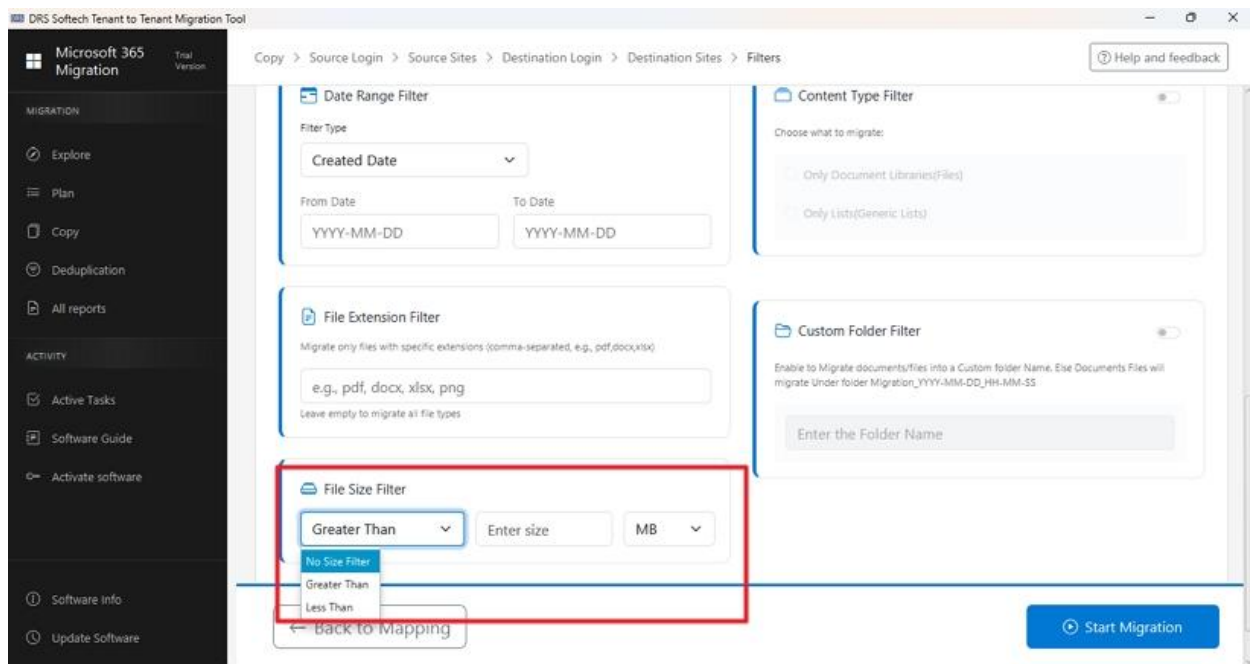
Step 19: Filter by File Extension

Specify one or more file extensions (such as .pdf, .docx, .xlsx, .csv) to migrate only selected file types. Leave this field blank to migrate all supported files.



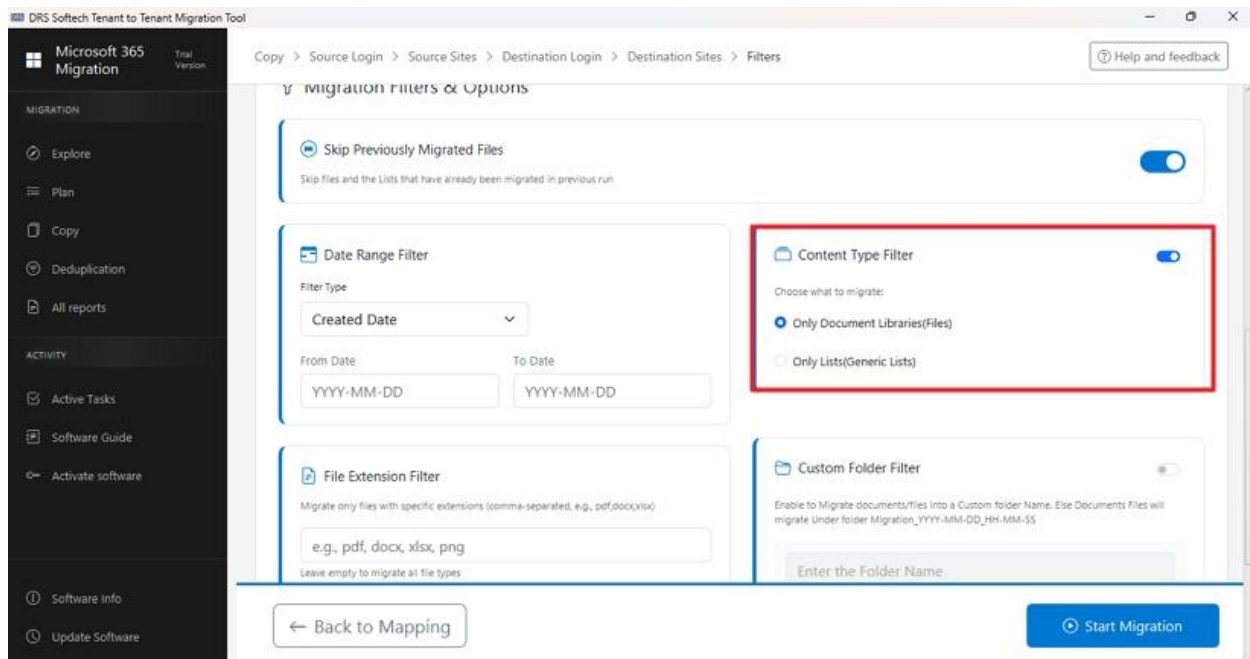
Step 20: Filter by File Size

Use the File Size filter to migrate files based on size using Greater Than, Less Than, or No Size Filter options. Enter Size and choose KB, MB, or GB.



Step 21: Select Content Type

Choose the SharePoint content to migrate, such as **Document Libraries** or **Lists**, based on your migration requirements. If you do not select any content type, the software migrates both Document Libraries and Lists by default.



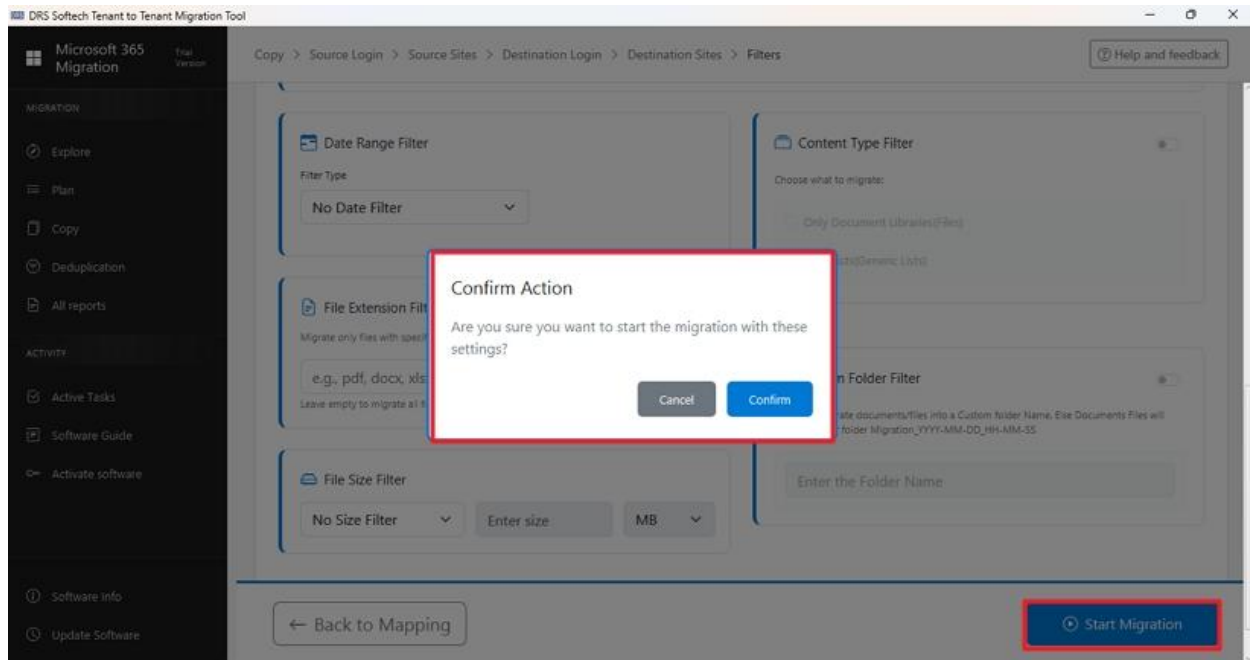
Step 22: Configure Custom Folder Name

Enable **Custom Folder** to specify a folder name for storing migrated data. If not configured, the software automatically creates a folder using the default naming format.

The screenshot shows the 'Filters' configuration page in the 'Microsoft 365 Migration' tool. The interface includes a sidebar with navigation options like 'Explore', 'Plan', 'Copy', 'Deduplication', and 'All reports'. The main area contains several filter sections: 'Date Range Filter' (with 'Created Date' selected), 'Content Type Filter' (with 'Only Document Libraries (Files)' selected), 'File Extension Filter' (with 'e.g., pdf, docx, xlsx, png' entered), and 'File Size Filter' (with 'Greater Than' selected). The 'Custom Folder Filter' section is highlighted with a red box and contains a toggle switch that is turned on, a description of the custom folder naming convention, and a text input field labeled 'Enter the Folder Name'. At the bottom, there are buttons for 'Back to Mapping' and 'Start Migration'.

Step 23: Start SharePoint Migration

After reviewing all settings, click **Start Migration**. Verify the migration summary in the confirmation window and click **Confirm** to begin the SharePoint migration.



Step 24: Monitor Migration Progress

The Migration Progress window displays the migration status in real time, including overall progress, transferred files, skipped items, failed items, current activity, elapsed time, and applied filters. You can stop the migration at any time using Cancel Migration.

