Metalogix

Content Matrix Organizer

Reference Guide

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Introduction

Content Matrix Organizer is a tool that enables the upload, classification, move and copy of content within a SharePoint farm. The basic interface is available to users with contribute or higher level access in a Library or List. The Reorganize and Processing pages are available to Site Collection Administrators and Farm Administrators. Read more about this in the Reorganize section.

The upload window in Content Matrix has a drag-and-drop capability, making it easier than ever to add content to SharePoint libraries.

Content Matrix capitalizes on the functionality of Content Types and allows the added features of bulk editing of metadata through the processes mentioned above. It allows a user with enough access to apply new content types to a library or list, and it also allows metadata to be reused or mapped so that information is retained on the item.

Lastly, Content Matrix records the actions that have been done on the content, so that the user may see how the content came to be where and how it is.

NOTE: This guide is intended for farm administrators. Information about the ribbon menu and its options, plus Reorganize for Site Collection Admins and Site Owners is found within the application under the Help link.

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Requirements

Content Matrix is installed as a SharePoint solution on a single SharePoint web front-end (WFE), making for simple installation and deployment to the SharePoint farm. This section will outline the necessary software and security prerequisites needed to install Content Matrix.

Minimum Server Software Requirements

SharePoint Foundation Server (SFS) or Microsoft SharePoint Server 2010 (MSS)

- **Operating System** - Windows 2008 Server
- **SharePoint Server** - SharePoint Foundation Server (SFS)
  - Microsoft SharePoint Server 2010 (MSS), Standard or Enterprise

Server Hardware Requirements

Content Matrix does not have any hardware requirements beyond what is prescribed by Microsoft. For reference, those can be reviewed here: http://technet.microsoft.com/en-us/library/cc262485(office.14).aspx and http://technet.microsoft.com/en-us/library/cc262749(v=office.15).

Minimum Browser Requirements

Content Matrix follows the same minimum requirements as those for SharePoint. More detail on these specifications can be found at http://technet.microsoft.com/en-us/library/cc263526.aspx. Generally, these browsers are Internet Explorer 9.0+.

Security Requirements

The User Account used to perform the install must be a SharePoint Farm Administrator.

Screen Resolution Requirements

Metalogix Content Matrix Organizer requires a minimum screen resolution of 1024 x 768 for optimizing the user interface pages that are linked from the main menu on Application Administration in Central Administration.

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Planning Considerations

Content Matrix is designed to work on a SharePoint farm that has been carefully planned and architected.

- Users should be familiar with the layout and know where to find their most commonly used sites.
- Administrators and team leaders should be familiar with custom content types and custom columns that the team uses.
- Libraries should have Content Type Management enabled (Library settings>Advanced Settings>Allow Management of Content Types=Yes) in order to best utilize the Copy and Move functionality.

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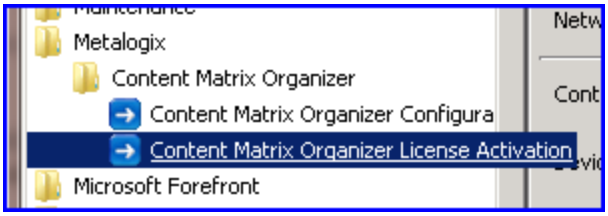
License Activation

There is a tool included that allows the admin to reactivate the license without reinstalling the product.

1. From the start menu, open the Metalogix folder>Content Matrix Organizer, and click the **Content Matrix Organizer License Activation** executable.



2. Verify the number of WFE servers in the farm. This can be less than the number requested with the license. An explanation must be entered in the Reason for Override field if the check the Override box is checked.

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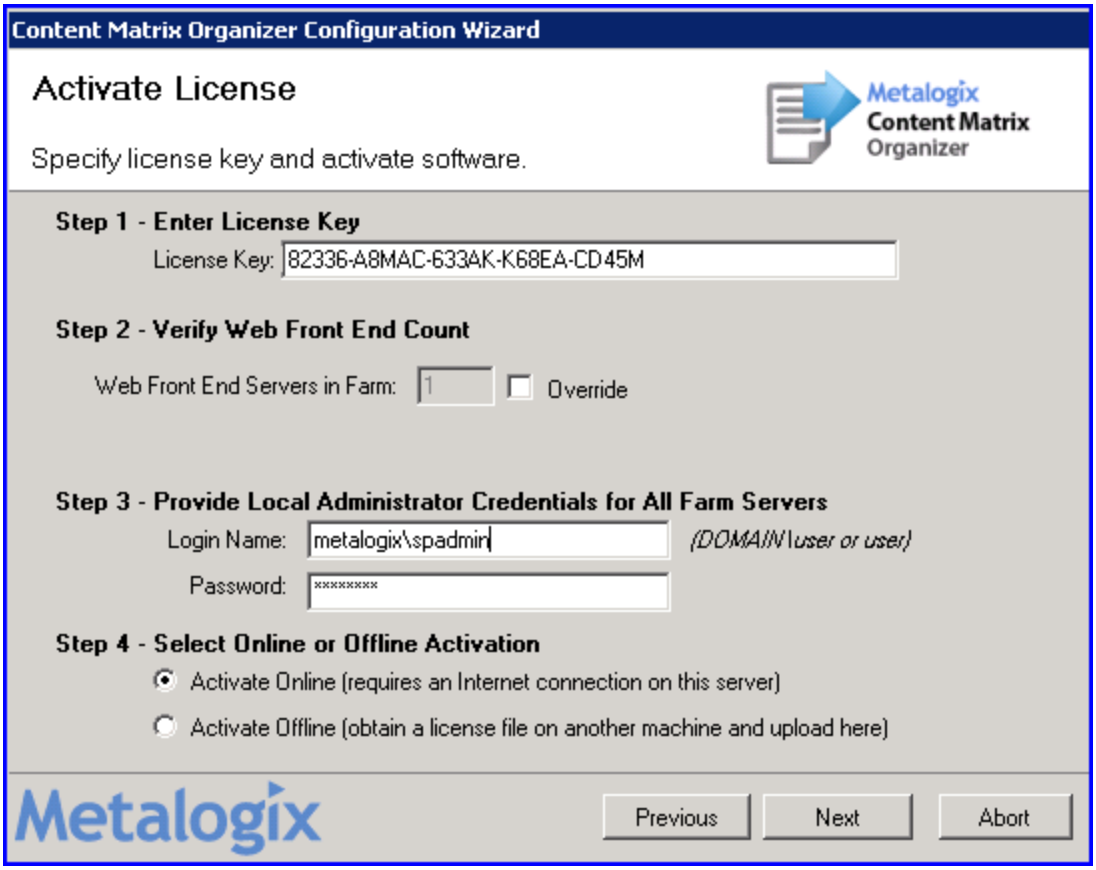
3. Provide the credentials for an account that has local administrator rights on the WFE(s). The activation and provisioning job that runs requires this access to register certain components on each WFE.

4. Select the ***Activate Online*** option and click ***Next***, or if the server does not have an Internet connection, click Activate Offline and go to the next step.



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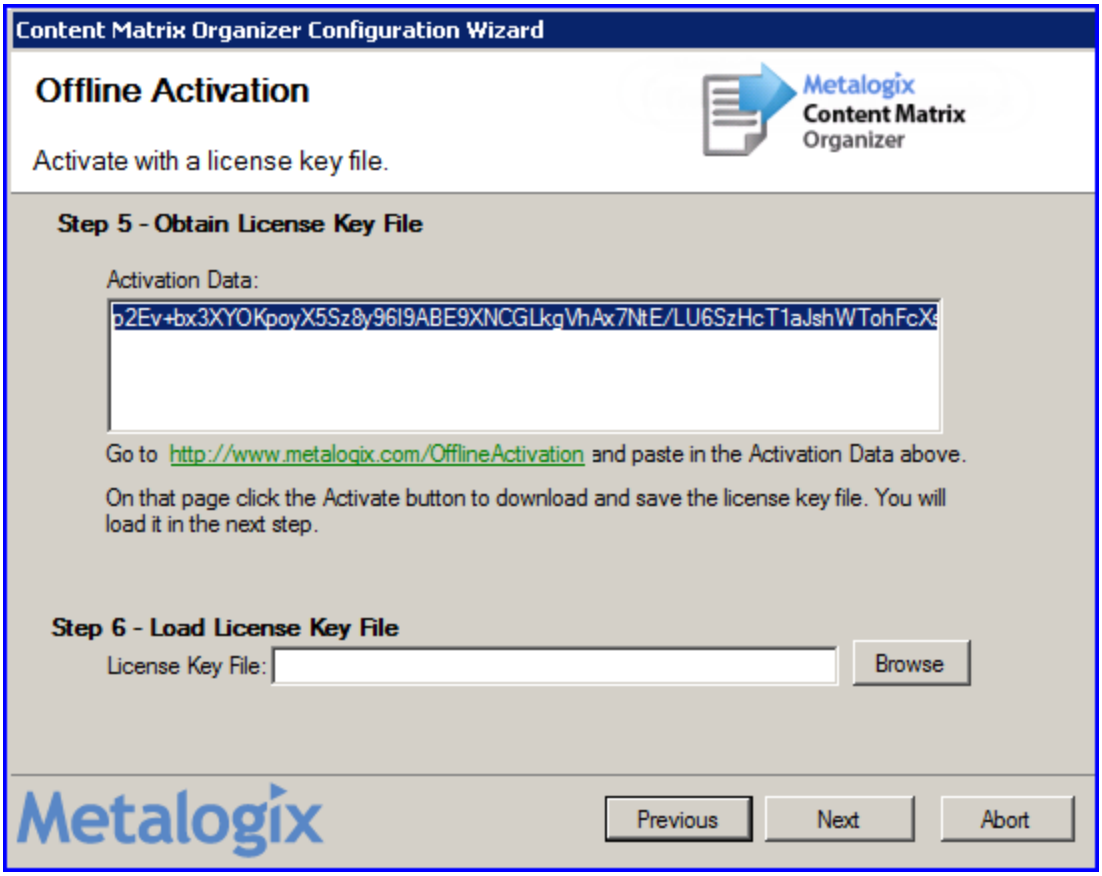
5. **(OPTIONAL)** If the Activate Offline option is selected, click ***Next***, and there will be a screen with Activation Data generated. The data is already selected; copy the data.



6. Click the link or open a browser on a computer with access to the internet and navigate to http://www.metalogix.com/OfflineActivation.

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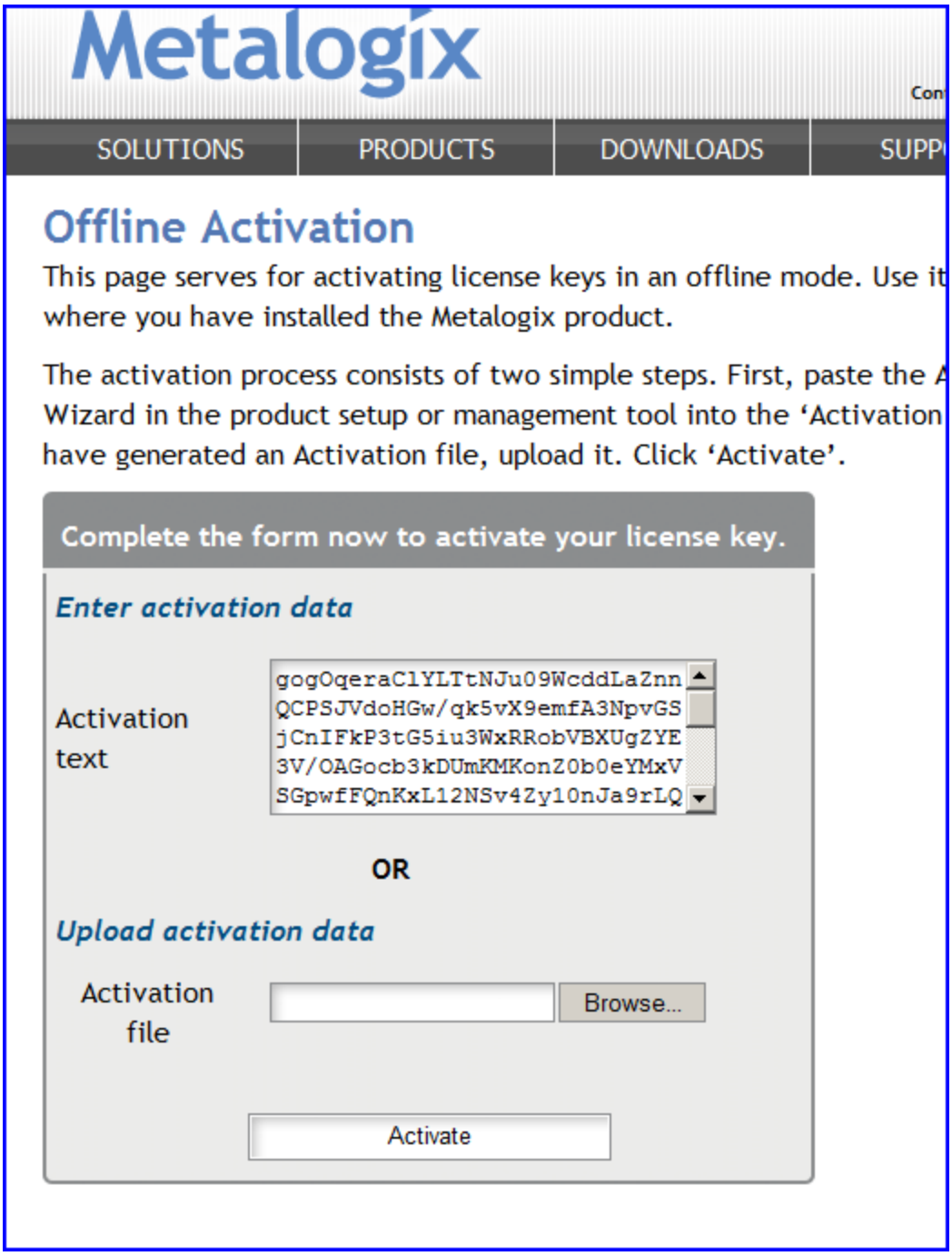
7. Paste the Activation Data in the top field and click the ***Activate*** button.



8. An error will be displayed if an invalid registration key or Farm Id was entered. If all values entered are valid there will be a file download dialog. Save the file to a location

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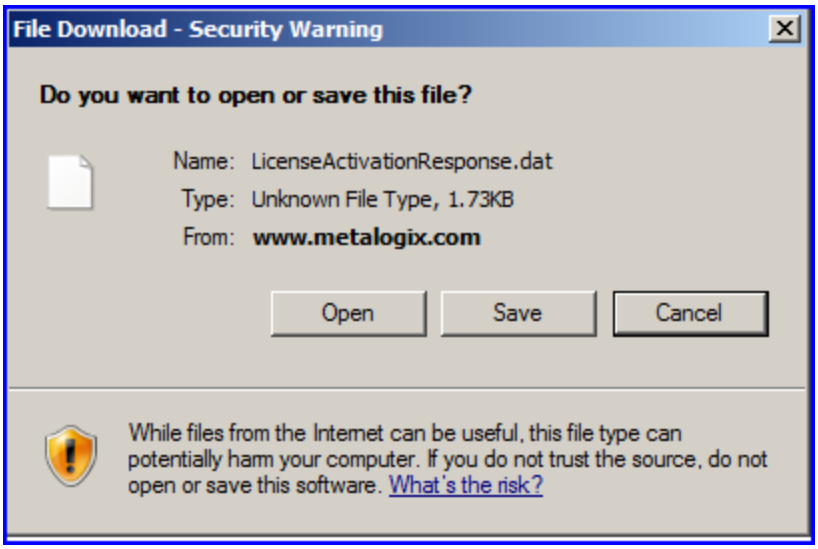
that is accessible by the server where the license activation is being performed.



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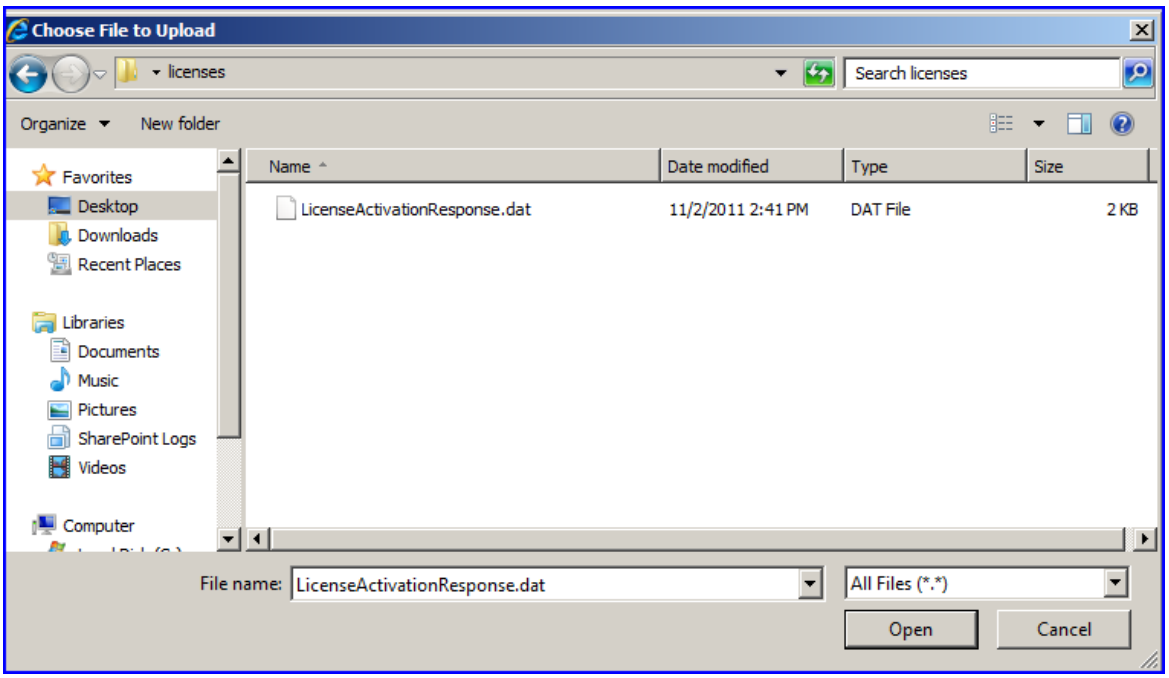
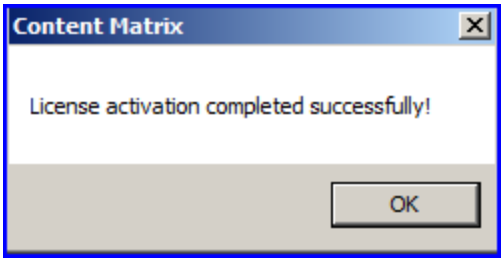
9. Back on the Offline Activation window, upload the license key file by clicking on the ***Browse...*** button.

    a. Navigate to the location of the file.

    b. Select the file and click ***Open***.



10. After successfully activating the license, click **OK** on the window.



11. Click **Close** on the activation window.

There is a Content Matrix License Verification timer job that will validate the status of the license. If the server does not have internet connection, and cannot run this verification timer job, the Manage License feature should be run at least once, every 180 days.

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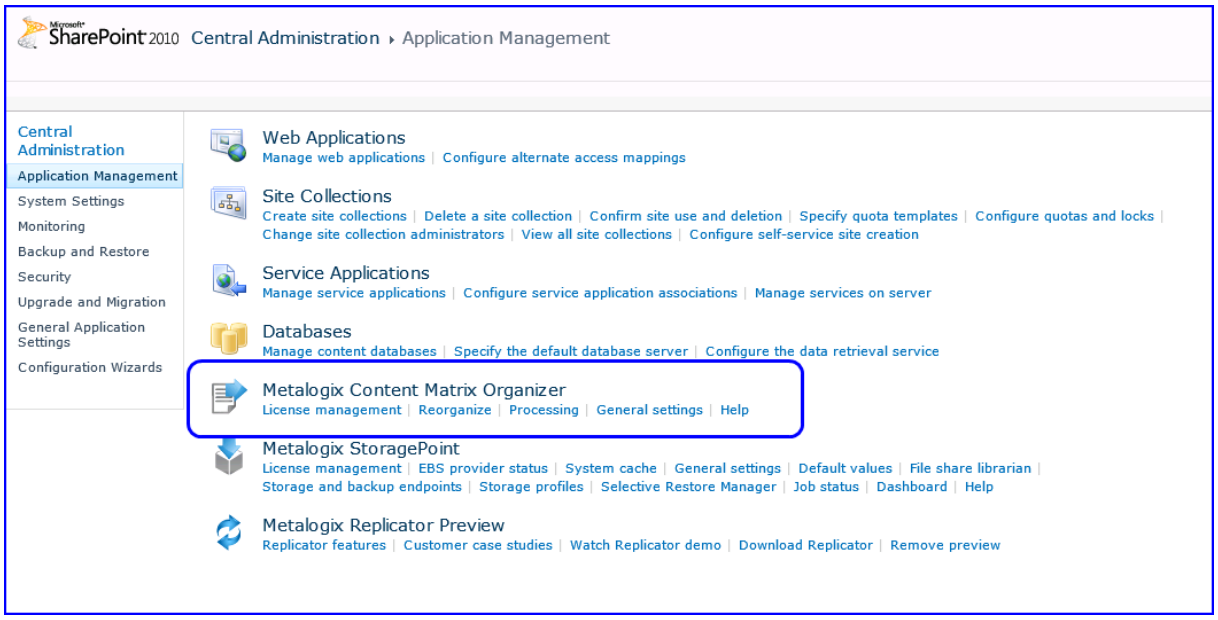
Access and Settings

The links are on the Application Management page: License Management, Reorganize, Processing, General settings, and Help.



The **Help** link opens this Reference Guide.

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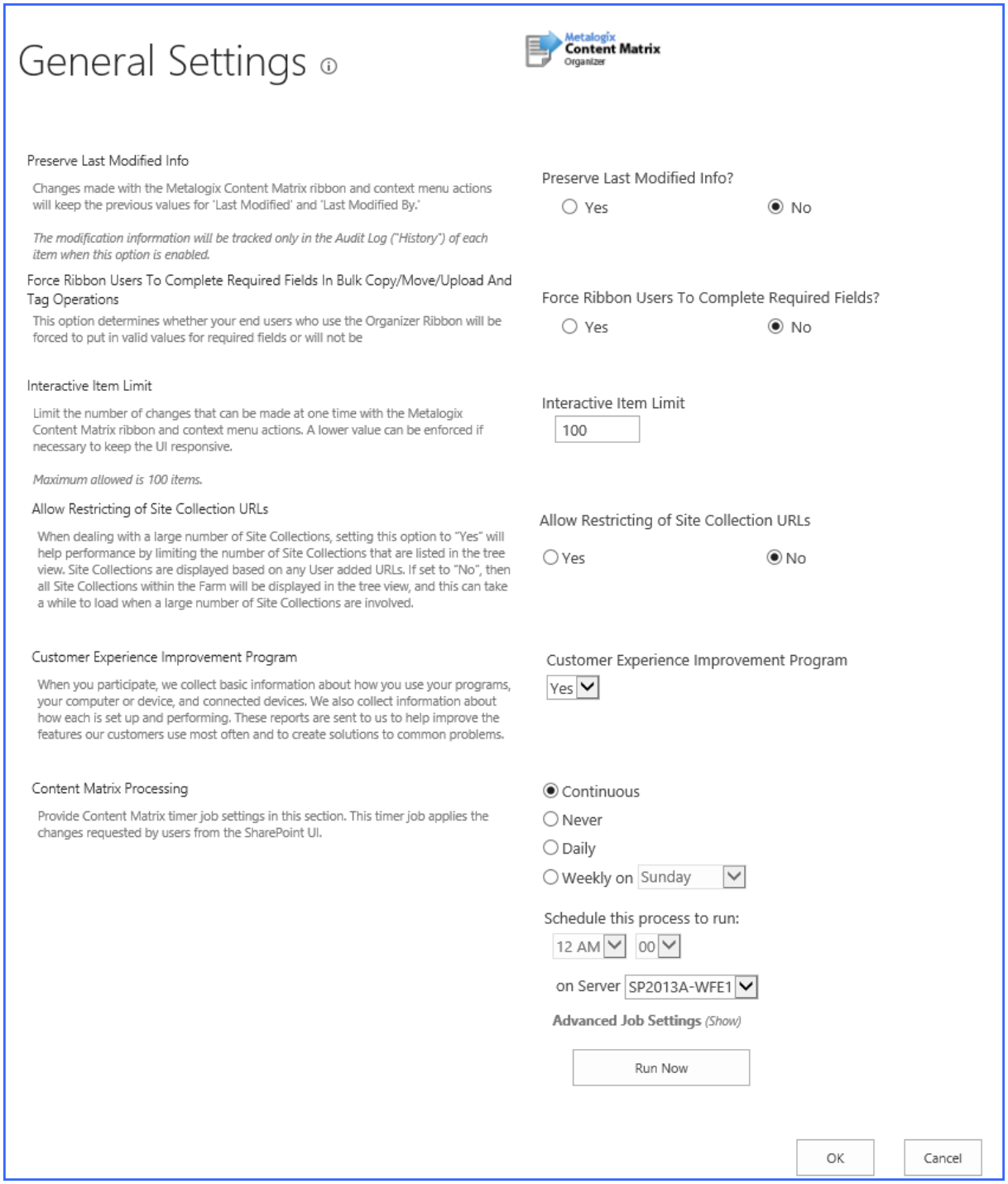
General Settings

The global settings available for Content Matrix Organizer can be found in General Settings.



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Silverlight Uploading Only

This feature will only be visible in SharePoint 2010. This setting, when set to yes, stops the Office ActiveX control from being used for uploads, even if it is available.

Preserve Last Modified Info

Changes made with the Content Matrix will keep the existing values for 'Last Modified' and 'Last Modified By' if **Yes** is selected. If **No** is selected, 'Last Modified' will be updated, but 'Last Modified By' will only update for the Classify action.

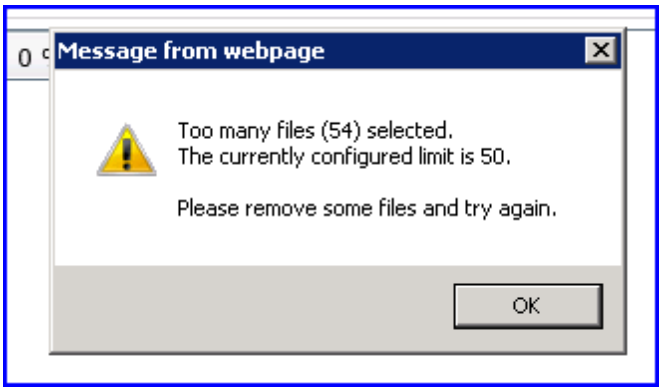
Force Ribbon Users to Complete Required Fields in Bulk Copy/Move/Upload and Tag Operations

If a user is modifying content using the ribbon, and that content has required fields, **Yes** will not allow the action to be completed without valid entries for those fields.

Interactive Item Limit

To limit the number of items that can be altered by the ribbon controls, enter a number between 1 and 1000. No more than 1000 items can be manipulated at a time. This limit is imposed to reduce the impact of these operations on the performance of the WFEs.

The end users will see a message similar to this, if the number of items selected for an action is exceeded.



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Allow Restricting of Site Collection URLs

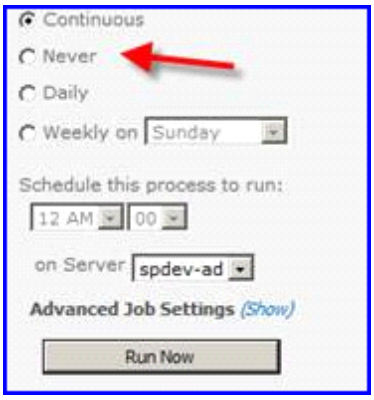
If this option is set to **Yes**, users will have to manually enter site collection URLs in the destination tree view during a Copy or Move, using the ribbon controls. The default will only display the Site Collection that is open, in the tree view. If **No** is selected, the entire farm will be available in the destination tree view. This may take a considerable amount of time to load, if there are a large number (>2000) site collections in the farm. More information can be found in the User Guide, under Copy Items or Move Items.

Customer Improvement Experience Program

The Customer Improvement Experience Program allows Metalogix to collect data that is useful for analyzing how the product is used, where there are improvements to be made, and any being notified of common errors.

Content Matrix Processing

The timer job that processes user requests to Copy or Delete content made on the Reorganize page of the user interface can be set to run Continuously, Never, Daily or Weekly. If Never is selected (default), an admin will need to manually process the requests on the Processing page. This option is a good idea to monitor and approve requests. Selecting Continuous will process all requests immediately. The Daily or Weekly options will process pending jobs at the designated time. The Run Now button on this page would process all pending jobs. The Advanced Job Settings allow failure notifications to be sent to designated email addresses. The timer job definition for this is called Content Matrix.



After making the selections on the General Settings page, click **OK** to save changes.

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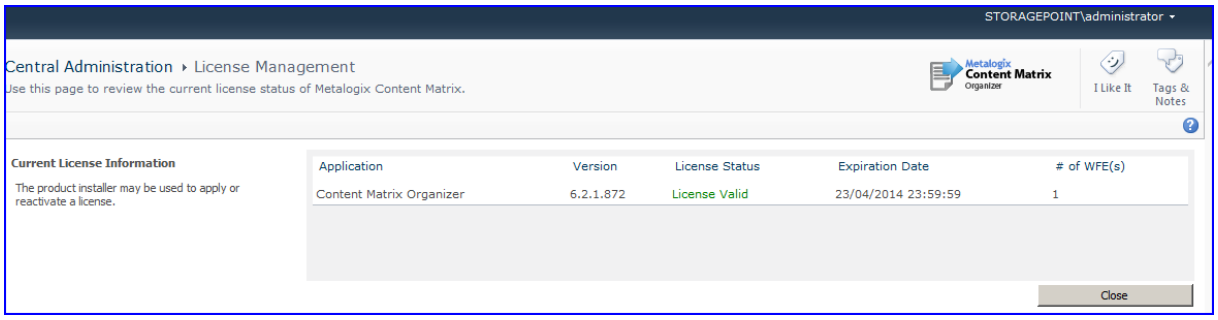
License Management

The licensing page will display the current version. Please use the installer License Activation feature to upgrade or modify the license.



Security Settings

At a minimum, a user must have *contribute* level access to utilize Content Matrix options. Users with *view* access (read only) will not see any part of the Content Matrix user interface.

Disabling the User Interface on a Web Application

The user interface can be disabled at a Web Application level by using the Manage Features on the Manage Web Applications page.

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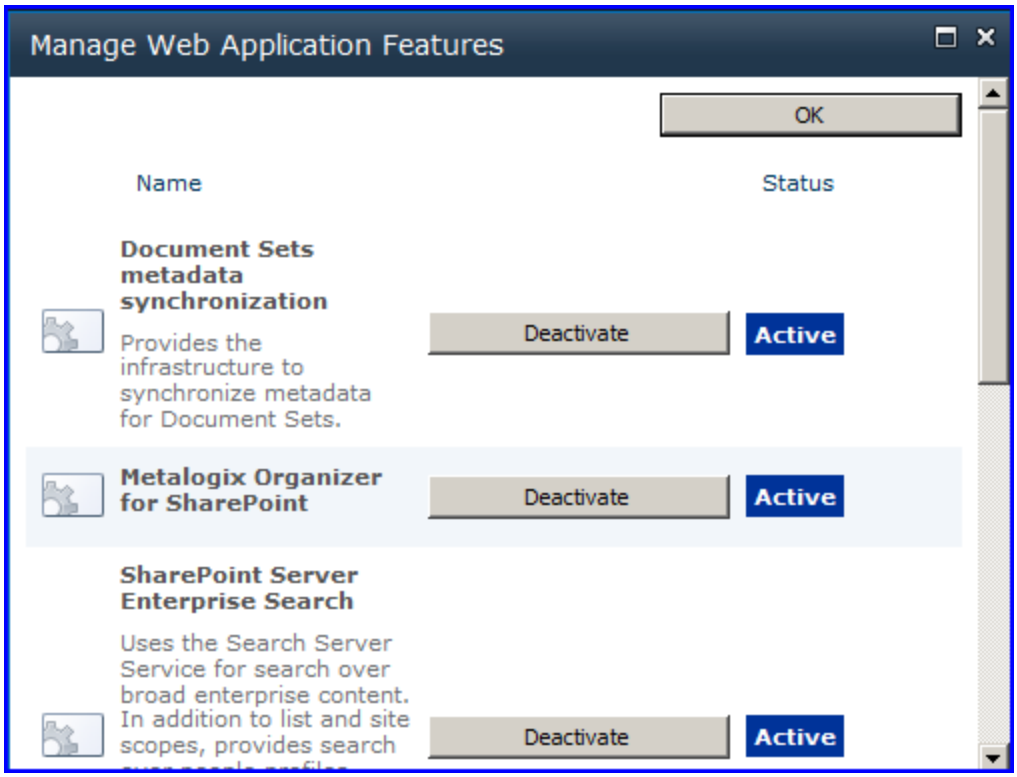

Disabling the User Interface on a Site Collection

Open the Site Settings page. With appropriate access, there will be a Site collection features link in Site Collection Administration.

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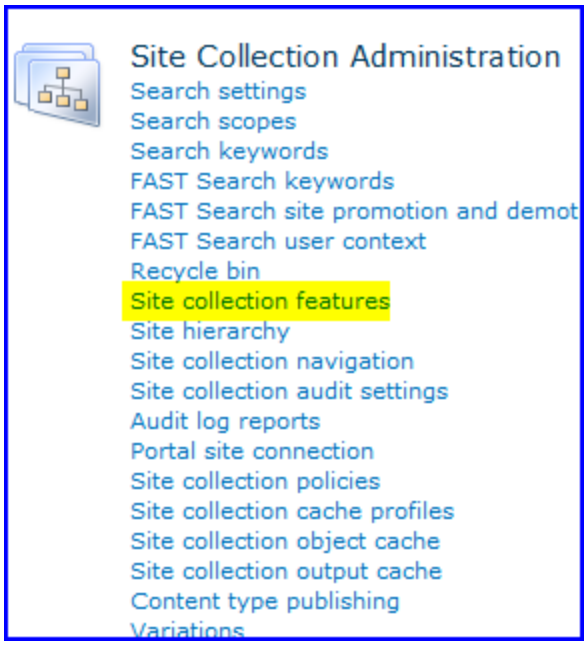
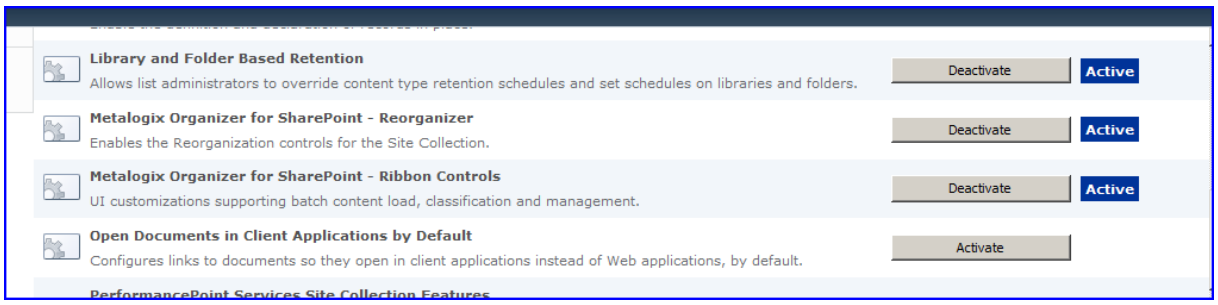


Use the Metalogix Organizer for SharePoint – Reorganizer, and the Metalogix Organizer for SharePoint – Ribbon Controls to deactivate these features on the site collection and any sites within that site collection.



Disabling the User Interface on a Site

Open the Site Settings page. There will be a Manage Site Features link in Site Collection Administration.

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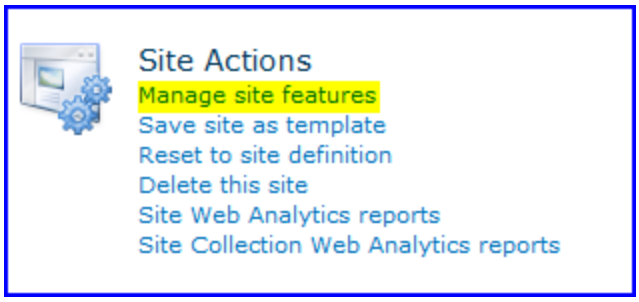
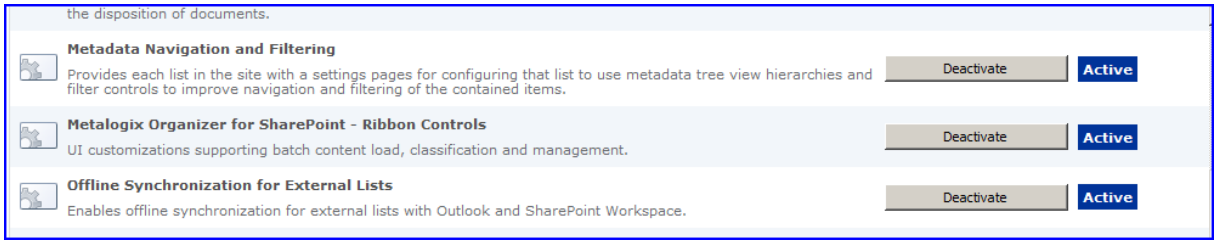
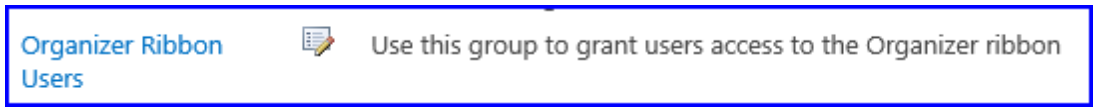


Use the Metalogix Organizer for SharePoint –Ribbon Controls to deactivate the feature on the site.



Organizer Ribbon Users Security Group

Within the security groups for a site collection, there is a group called Organizer Ribbon Users. By default, this group is created when the Content Matrix Organizer product is installed, and the Site Collection Administrator is the owner of the group. Users must be a member of this group and have at a minimum, contribute level access, to see the ribbon.



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Reorganize

Reorganize allows for the copy of content (Site Collections, Sites, Lists, Libraries or Folders) to other parts of the SharePoint farm. Content can also be deleted with this application, effectively allowing the Moving of content in two steps (Copy then Delete.)

A feature unique to this application is the promotion of folders to Lists or Libraries. An administrator or site owner can copy a folder and paste it in a Site or Site Collection, and the Folder becomes a List or Library. This is a good way to make frequently accessed content even more easily available and allows for customizations that can only be done at the List or Library level.

When a copy is performed, content is merged with existing content, *if the names are the same*. For example, if you copy a Shared Documents library, and pasted it into a site that already has a Shared Documents library, the content of you source will be copied into the Shared Documents library on your destination. However, you can rename folders, lists and sites during your copy operation. Also, your source content is still available if corrections are needed.

Loading the Reorganize Page

SharePoint farms may contain a lot of Site Collections and Sites, and for that reason, loading the entire hierarchy of a farm can be a cumbersome task. For this reason, the entire hierarchy isn't loaded by default.

When the Reorganize page is opened, either go to a specific site by entering the URL and clicking Add Site, or click Load Hierarchy to load the entire farm.

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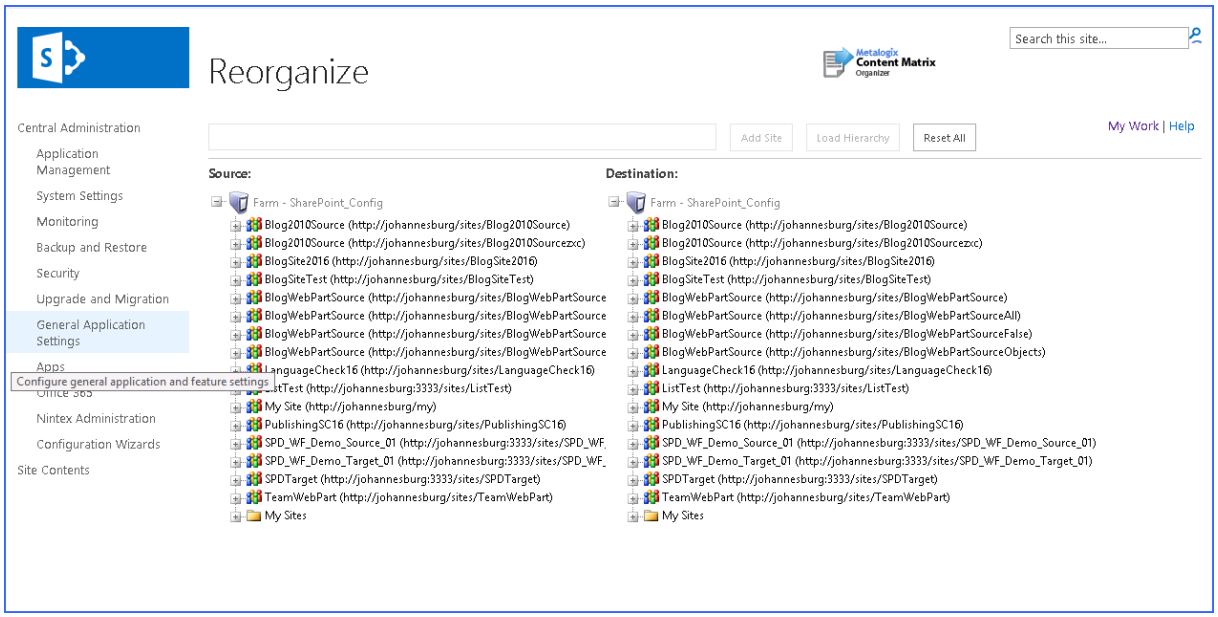
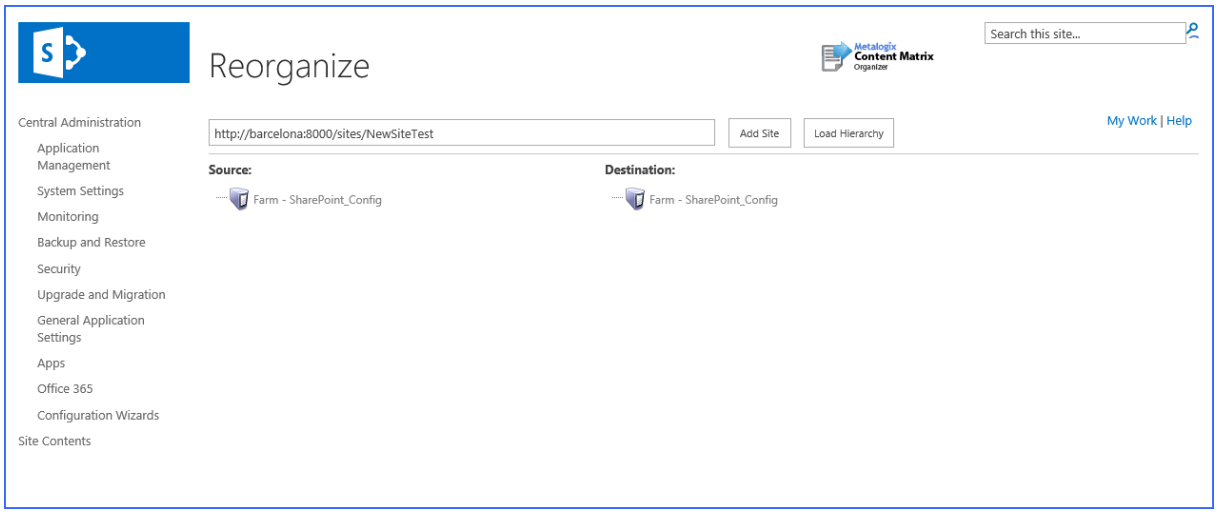
To load the entire farm hierarchy, click the Load Hierarchy button. A prompt will be displayed to confirm this action. Expand the selections until the content that is to be moved or copied is found.



To browse to a specific site, enter the URL and click Add Site.



The site will display in the Reorganize window. Each node can be continusly expanded until the desired content is located.

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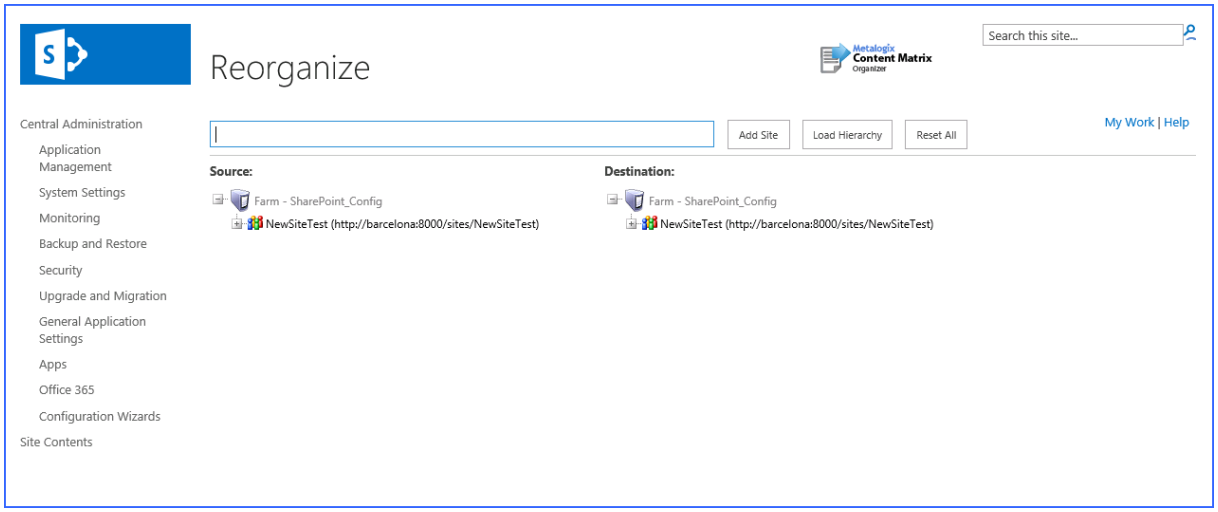

Click Reset All to clear the screen.

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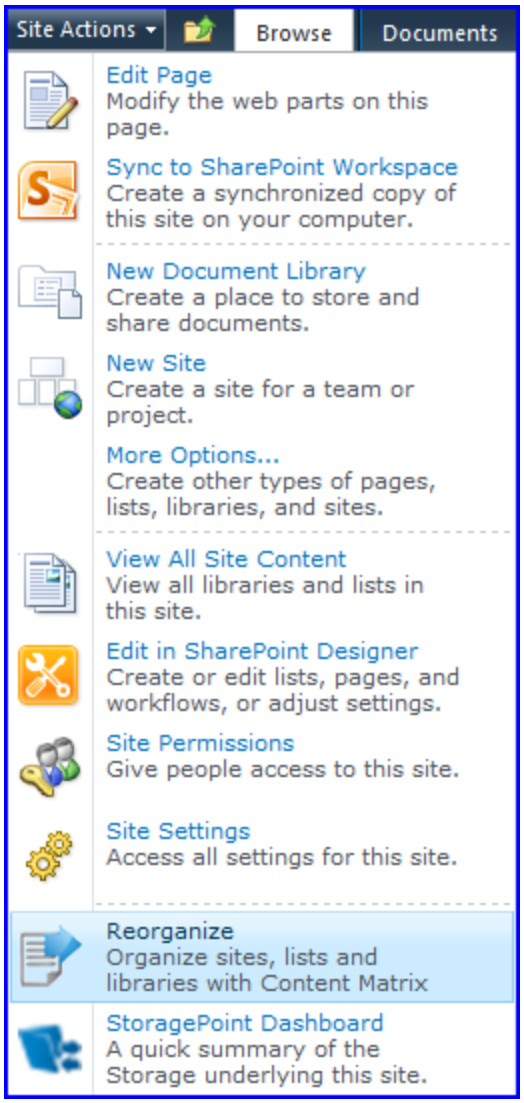
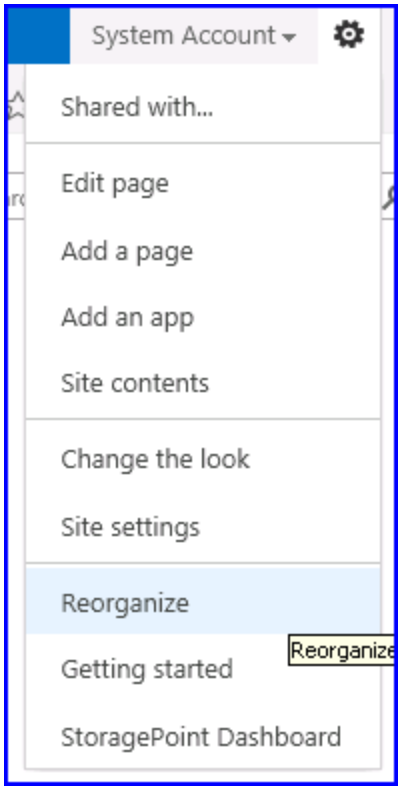
Access

This feature is found on the Site Actions menu.





as well as on the Application Management page.

There is a link in the upper right corner, **My Work** that opens the Processing Page.

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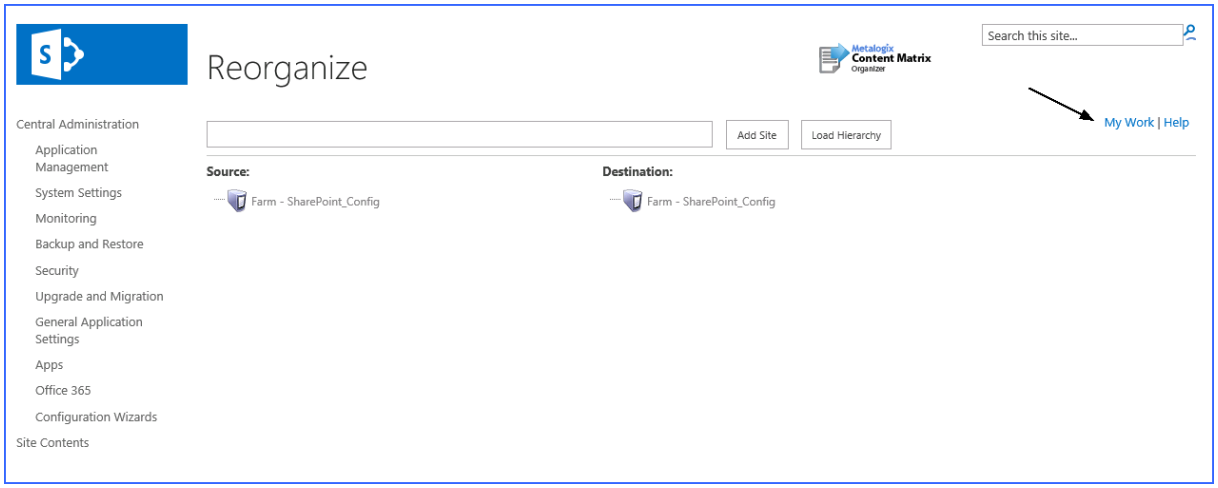

The **Help** link on the Reorganize page opens the User Guide.

Access for Site Owners

The menu option Reorganize Settings, found in Site Settings, allows the availability of the Reorganize page to users who have Site Owner Access.

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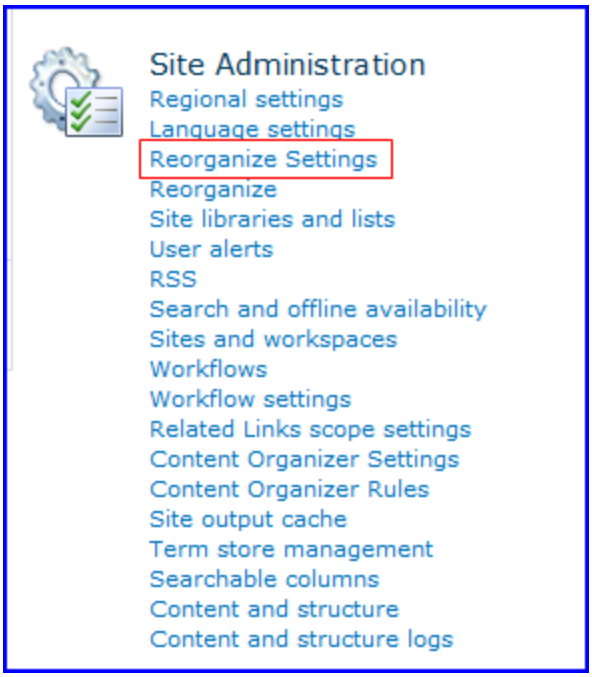

Grant Site Owners Access to Reorganize Feature

Selecting **Yes** to this setting will allow Site Owners access to the Reorganize page for the site to which they have access. The Default is **No**, and this restricts the access to Site Collection Administrators and Farm Administrators only.

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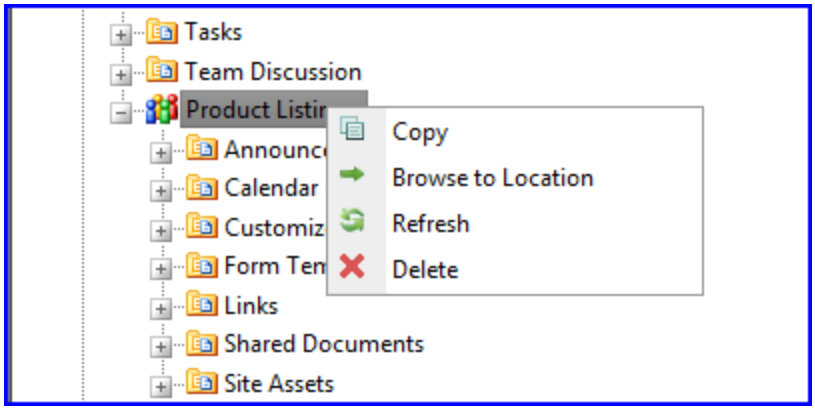
Browse to Location

The **Browse to Location** option in the right click menu opens the selected location in a new browser. You can verify content before performing any actions, and you won't have to navigate back to the Reorganize page afterward.



Refresh

The right click menu option of **Refresh** will update the tree view with any changes since the Reorganize page was opened. So for example, if you browsed to the site collection to verify content and made some changes, when you come back to the Reorganize page, click **Refresh** and you will see those changes immediately.

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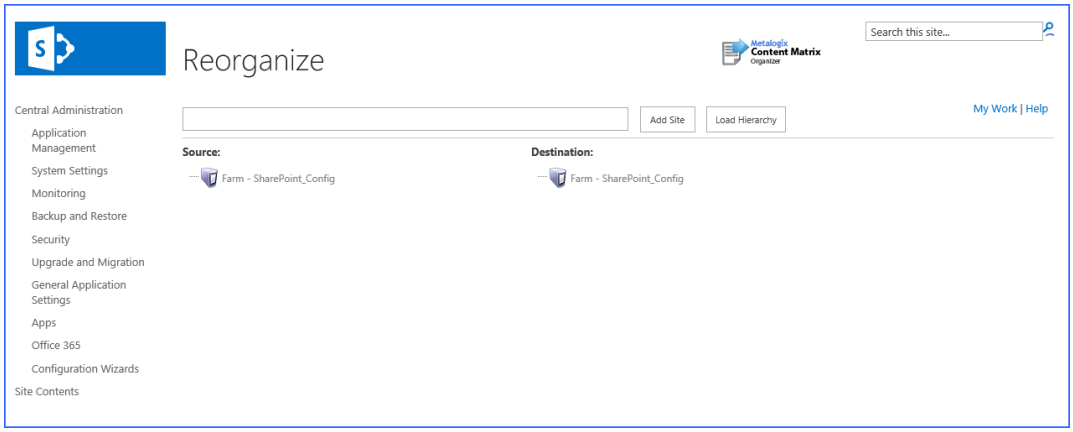
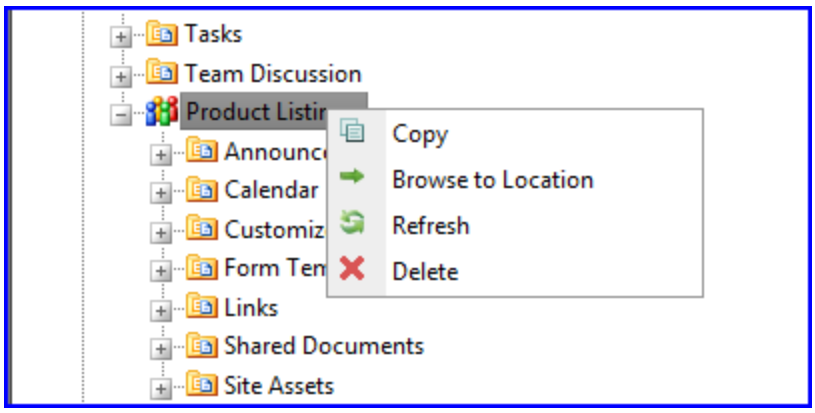
Reorganize - Copy

1. Enter the URL of a site, or click Load Hierarchy. See Loading the Reorganize Page for details.



2. Expand the hierarchy on the left until the content (Site Collection, Site, List, or Folder) you wish to copy is visible.

3. Right click on the object, and select **Copy**.



4. Expand the hierarchy on the right until the intended destination is visible.

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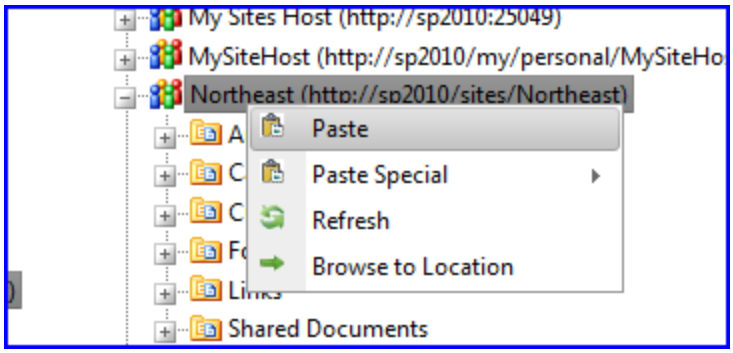
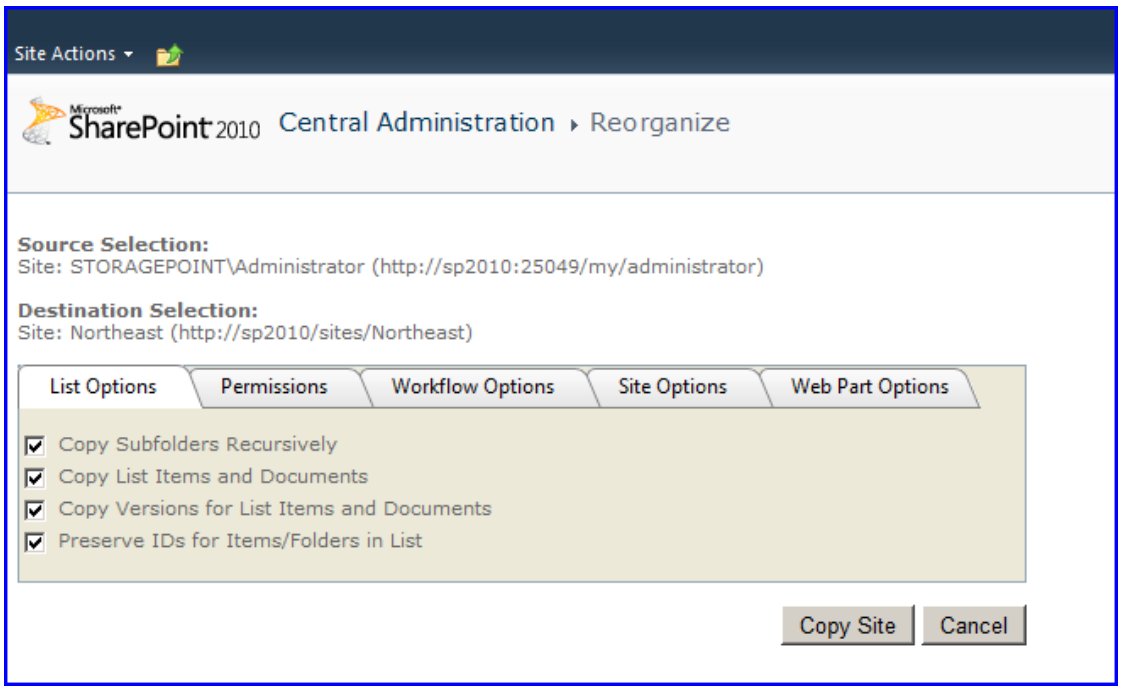
5. Right click on the destination object, and select **Paste**.



6. A page will open with options to apply, based on what level of content is being pasted and where that content is being pasted. Use the table below to consider what options need to be addressed before pasting the content.



Scenarios Source>Destination		
Folder>Folder, Folder>List		
Copy Options	**Default**	**Explanation**

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Folder Content Options		
• Rename Folder	✓	Gives the folder a new name in the destination. Checking the box opens a text field to enter the name.
• Copy Subfolders Recursively		This option allows for folders and sub-folders to be copied recursively, down through any existing levels.
• Copy List Items and Documents	✓	Include the content of your selection. Uncheck to build structure only.
• Apply new content types during copy	✓	Content types that are unique to the folder are included, and hence, available in the Site Collection content type library, and can be used in other locations within that site collection. The content type must be in use for it to be included in the copy.
• Copy Versions for List Items and Documents	✓	Include major and/or minor versions of the content. Versioning must be enabled on the destination for the versions to be included. Select Copy All Versions (default) or the Number of versions to copy.

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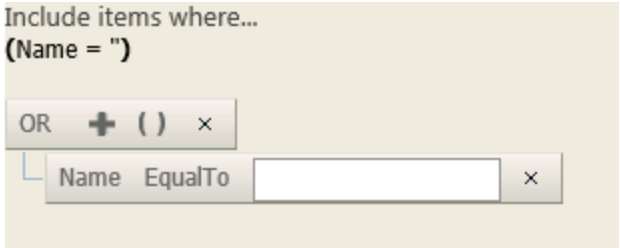
• Preserve IDs for Items/Folders in list	✓	When selected, this option will preserve IDs for any folders and items in SharePoint Lists, so each item and folder will have the same ID on the target as the item does on the source. If this option is not selected then SharePoint will assign an item ID automatically.
Permissions Options		
• Copy Folder Permissions		Permissions unique to the folders being copied.
• Copy Item Permissions		Permissions unique to the specific list or library items being copied.
Filtering 		
•		Use the + (plus sign) to add conditions to the filter or group of filters. Use the () (parenthesis) button to add a filter group. Use the x to delete a condition or group.
• And/Or		If the **Or** value is set, the filter will be added as an alternative filter value. *Default = Or*

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• Grouping		Use the parenthesis to create groups of filters. This allows for multiple conditions to be analyzed, the end result being an include or exclude decision, that is further analyzed by any previous conditions in the hierarchy.
• Field		This determines what field the filter will be applied to. Selecting the **Field** cell will open a drop down list that allows users to select from any field column from the source. The available options in the **Operator** and **Value** fields will be based on the **Field** value that is selected. *Default = Name*
• Operator		This determines the condition that the filter will be applied to the content. The available values are determined by the **Field** that the filter is being applied to. Some of the possible **Operators** are: Start with, Not Starts with, GreaterThan, Equals, GraterThanOrEquals, LessThan, EndsWith, IsNull, Regex, etc. *Default = EqualTo*
• Value		This is the value that the filter is searching for, and trying to apply against the migrating content. The type of value that can be entered depends on the **Field** column. If a date/time field was selected

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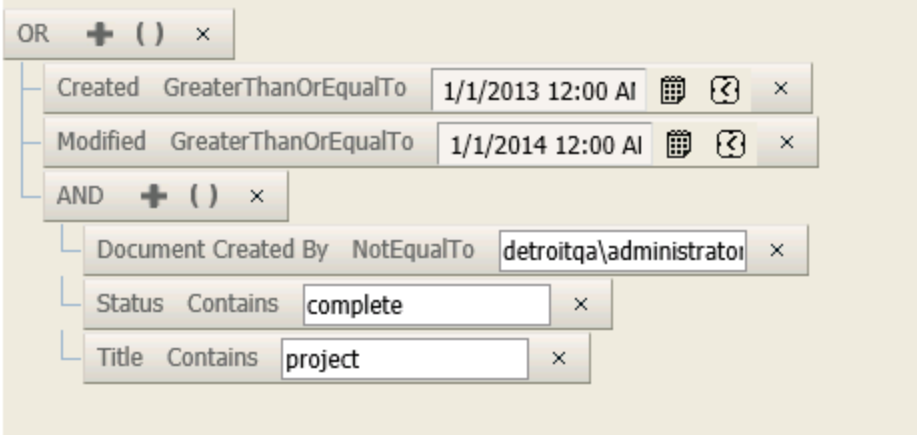
		(for example, "Created") then users can select the desired date/time value from a calendar view. If a field was selected that can only have number values (for example, "ItemID"), then only number values can be entered in the **Value** column. *Default = Blank*

Example:



If content was created by anyone other than detroitqa\administrator and the status is complete and the title is project, it would be included if the created on or after 1/1/2013 or if it was modified on or after 1/1/2014. So if nothing meets the criteria in the grouping, nothing would even make it to be analyzed for the created or modified date.

Folder>Site, Folder>Site Collection		
Are you sure you want to Copy and Promote this Folder to a Library?		Folder>Folder/Folder>List copy options are implied. The folder becomes a List on the destination.

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List>Site, List>Site Collection		
Copy Options	**Default**	**Explanation**
List Content Options		
• Rename List		Gives the list a new name in the destination. Checking the box opens a text field to enter the name.
• Copy Subfolders Recursively	✓	This option allows for folders and sub-folders to be copied recursively, down through any existing levels.
• Copy List Items and Documents	✓	Include the content of your selection. Uncheck to build structure only.
• Copy Versions for List Items and Documents	✓	Include major and/or minor versions of the content. Versioning must be enabled on the destination for the versions to be included. Select Copy All Versions (default) or the Number of versions to copy.
• Preserve IDs for Items/Folders in list	✓	When selected, this option will preserve IDs for any folders and items in SharePoint Lists, so each item and folder will have the same ID on the target as the item does on the source. If this option is not selected then SharePoint will assign an item ID automatically.
Permissions		
• Copy List Permissions		Permissions unique to the lists being copied.
• Copy Folder Permissions		Permissions unique to the folders being copied.
• Copy Item Permissions		Permissions unique to the specific list or library items being copied.
Workflows		
• Preserve List Workflow Associations		Keep Workflow content types on the content being copied.

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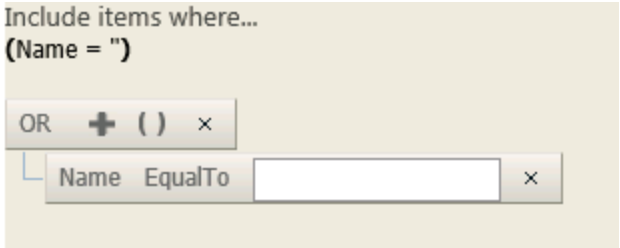
Filtering		
		
•		Use the + (plus sign) to add conditions to the filter or group of filters. Use the () (parenthesis) button to add a filter group. Use the x to delete a condition or group.
• Grouping		Use the parenthesis to create groups of filters. This allows for multiple conditions to be analyzed, the end result being an include or exclude decision, that is further analyzed by any previous conditions in the hierarchy.
• And/Or		If the **Or** value is set, the filter will be added as an alternative filter value. *Default = Or*
• Field		This determines what field the filter will be applied to. Selecting the **Field** cell will open a drop down list that allows users to select from any field column from the source. The available options in the **Operator** and **Value** fields will be based on the **Field** value that is selected. *Default = Name*
• Operator		This determines the condition that the filter will be applied to the content. The available values are determined by the **Field** that the filter is being applied to. Some of the possible **Operators** are: Start with, Not Starts with, GreaterThan, Equals, GraterThanOrEquals, LessThan, EndsWith, IsNull, Regex, etc. *Default = EqualTo*
• Value		This is the value that the filter is searching for, and trying to apply against the migrating content. The type of value that can be entered depends on the **Field** column. If a date/time field was selected (for example, "Created") then users can select the desired date/time value from a calendar view. If a field was selected that

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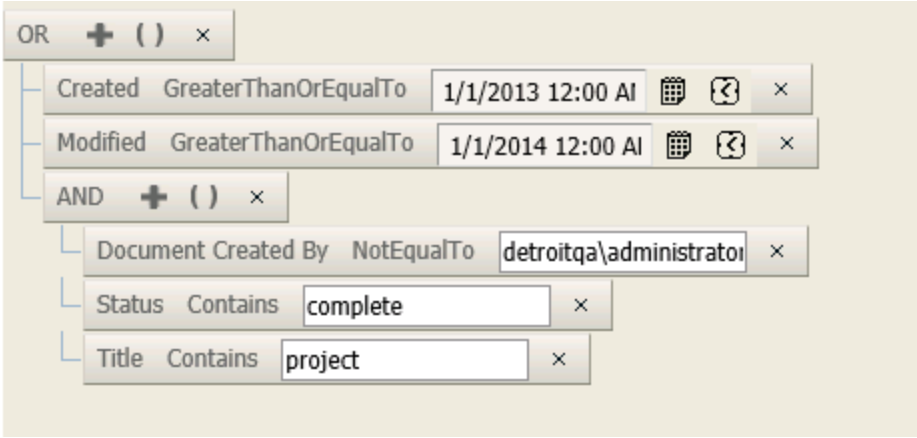
		can only have number values (for example, "ItemID"), then only number values can be entered in the **Value** column. *Default = Blank*

Example:



If content was created by anyone other than detroitqa\administrator and the status is complete and the title is project, it would be included if the created on or after 1/1/2013 or if it was modified on or after 1/1/2014. So if nothing meets the criteria in the grouping, nothing would even make it to be analyzed for the created or modified date.

Site>Site, Site>Site Collection, Site Collection>Site, Site Collection > Site Collection		
Copy Options	**Default**	**Explanation**
List Options		
• Copy Subfolders Recursively	✓	This option allows for folders and sub-folders to be copied recursively, down through any existing levels.
• Copy List Items and Documents	✓	Include the content of your selection. Uncheck to build structure only.
• Copy Versions for List Items and Documents	✓	Include major and/or minor versions of the content. Versioning must be enabled on the destination for the versions to be included. Select Copy All Versions (default) or the Number of versions to copy.

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• Preserve IDs for Items/Folders in list	✓	When selected, this option will preserve IDs for any folders and items in SharePoint Lists, so each item and folder will have the same ID on the target as the item does on the source. If this option is not selected then SharePoint will assign an item ID automatically.
Permissions		
• Copy List Permissions		Permissions unique to the lists being copied.
• Copy Folder Permissions		Permissions unique to the folders being copied.
• Copy Item Permissions		Permissions unique to the specific list or library items being copied.
Workflows		
• Preserve List Workflow Associations		Keep Workflow content types on the content being copied.
Site Options		
• Change Template		Uses a new site template on the destination. Checking the box opens a drop down with available templates on the destination.
• Rename Site		Gives the Site a new name in the destination. Checking the box opens a text field to enter the name.
• Copy Child Site Recursively	✓	This option allows child Sites to be copied recursively, down through any existing levels.
• Copy Navigation and Tree View Settings	✓	Include navigation settings and structure for the global navigation and quick launch navigation, as a part of a site copy.
• Copy Site Features	✓	Includes any site features on the source to be copied over and activated on the destination, provided that these features exist on the destination server.

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Web Part Options		
• Copy Web Parts on Landing Pages	✓	Copies web parts on "Landing Pages" (i.e. "Default.aspx" pages).
• Copy Closed Web Parts	✓	This check-box option allows for any web parts that are closed to be copied. In some cases web parts can be closed on a page without being removed. This option will allow for these web parts to be copied with the page content.

Site>Farm, Site Collection > Farm		
Copy Options	**Default**	**Explanation**
Site Collection Options		
• Web Application		Select a web application from the dropdown.
• Language		If more than one language is available, select the correct one from the dropdown.
• Content Database		After selecting the web application, this filed will populate with available content databases.
• Site URL		Enter a path and site name for the site collection
• Primary Admin		Enter the name of the primary site collection administrator. This will be verified upon paste.
• Secondary Admin		Enter the name of the secondary site collection administrator.
• Copy Site Quota		The quota value from the source site will be used.
• Copy Audit Settings		Retain the site collection audit settings from the source.
Site Options		
• Change Template		Select from the list of available templates to be applied to the new site.
• Rename Site		Give the copied site a new name.

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• Copy Child Sites Recursively	✓	Include existing child sites in the copy and paste action.
• Copy Navigation and Tree View Settings	✓	Use the same navigation and tree view settings on the copied site collection.
• Copy Site Features	✓	Keep the same features enabled or disabled on the copied site collection.
List Options		
• Copy Subfolders Recursively	✓	This option allows for folders and sub-folders to be copied recursively, down through any existing levels.
• Copy List Items and Documents	✓	Include the content of your selection. Uncheck to build structure only.
• Copy Versions for List Items and Documents	✓	Include major and/or minor versions of the content. Versioning must be enabled on the destination for the versions to be included. Select Copy All Versions (default) or the Number of versions to copy.
• Preserve IDs for Items/Folders in list	✓	When selected, this option will preserve IDs for any folders and items in SharePoint Lists, so each item and folder will have the same ID on the target as the item does on the source. If this option is not selected then SharePoint will assign an item ID automatically.
• Preserve List Workflow Associations		Keep workflow associations within the site or site collection.
Permissions		
• Copy List Permissions		Permissions unique to the lists being copied.
• Copy Folder Permissions		Permissions unique to the folders being copied.
• Copy Item Permissions		Permissions unique to the specific list or library items being copied.

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Web Parts		
• Copy Web Parts on Landing Pages	✓	Copies web parts on "Landing Pages" (i.e. "Default.aspx" pages).
• Copy Closed Web Parts	✓	This check-box option allows for any web parts that are closed to be copied. In some cases web parts can be closed on a page without being removed. This option will allow for these web parts to be copied with the page content.
Master Pages		
• Copy Master Page Gallery		This option is only available if the source is a site collection.
• Copy Master Pages		This check-box option will copy all the master pages listed in the source site's Master Page Gallery.
• Copy Page Layouts		This check-box option will copy all the page layouts listed in the source site's Master Page Gallery.
• Copy Other Resources		This check-box option will copy all items that are listed (except Master Pages or Page Layouts) from the source site's Master Page Gallery
• Correct Links on Master Pages		This will correct any links to reflect the new location of the master pages.

Also verify the Source and Destination at the top of the screen.

Click Copy, or click Cancel to return to the Reorganize page.

7. You will be redirected to the Processing page.

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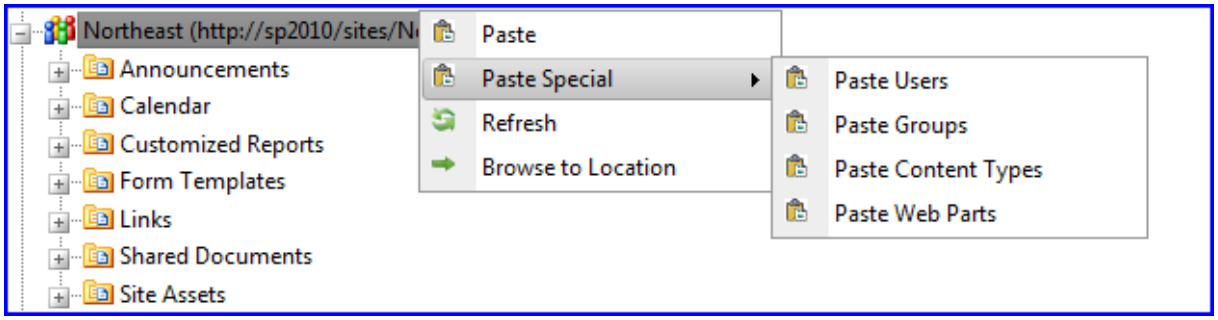
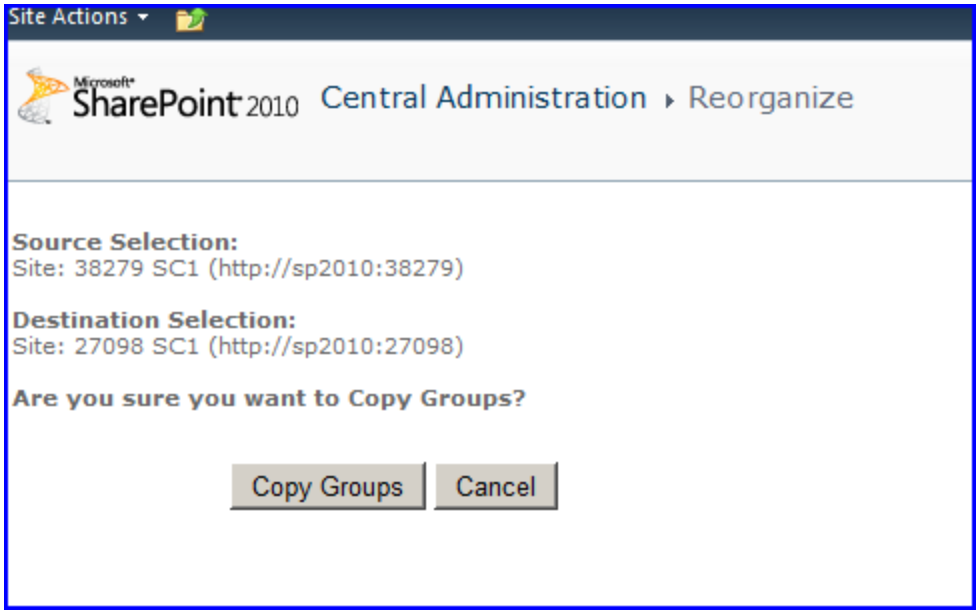
Reorganize - Paste Special

There are Paste Special operations that allow for specific actions to be completed on their own. These options are automatically completed when pasting an entire site or site collection.





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Paste Users

This option is generally used when trying to migrate a user account for a user that exists on the source, but is no longer active or may not be in the Active Directory (AD). While the user may not exist, their data may still need to be migrated to the target. However, that user account may not exist on the target side AD since the user would not exist in the new environment and will likely not be required.

Paste Groups

This option allows groups that are unique to a site or site collection to be copied to another site or site collection without copying content.

Paste Content Types

Content types can be applied the Site Collection gallery and made available to lists and libraries without recreating them or copying the content using the content types.

Paste Web Parts

Web parts can be copied and pasted without pasting the entire site collection. This is useful if you want to reuse web parts, but don't need all the other content (lists, libraries) of a site or site collection.

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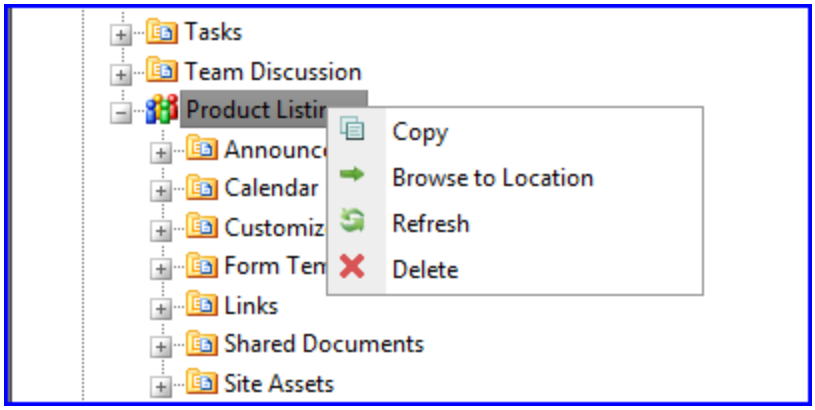
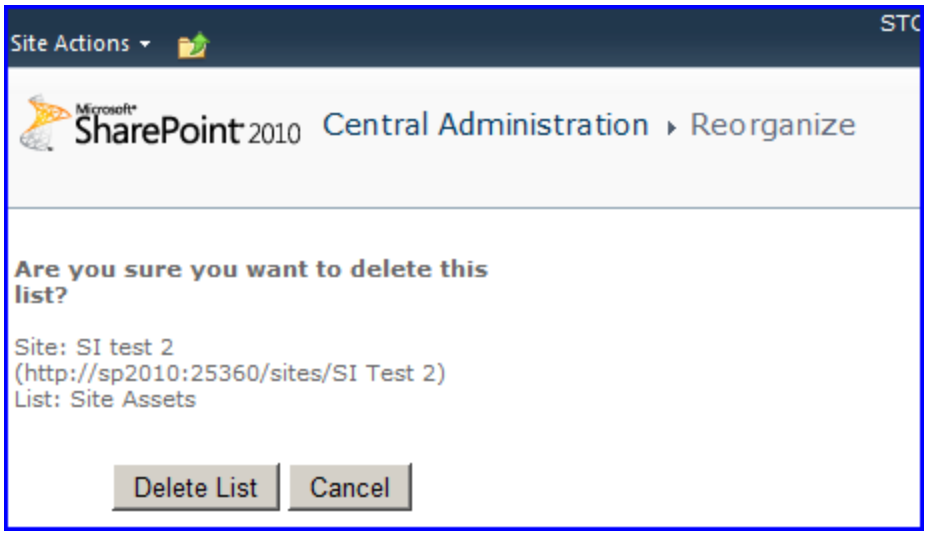
Reorganize - Delete

1. (Optional) Right Click on the Source object, and click **Delete**.



2. A confirmation page is loaded. Click Delete or click Cancel to go back to the Reorganize page.



3. You will be redirected to the Processing page.

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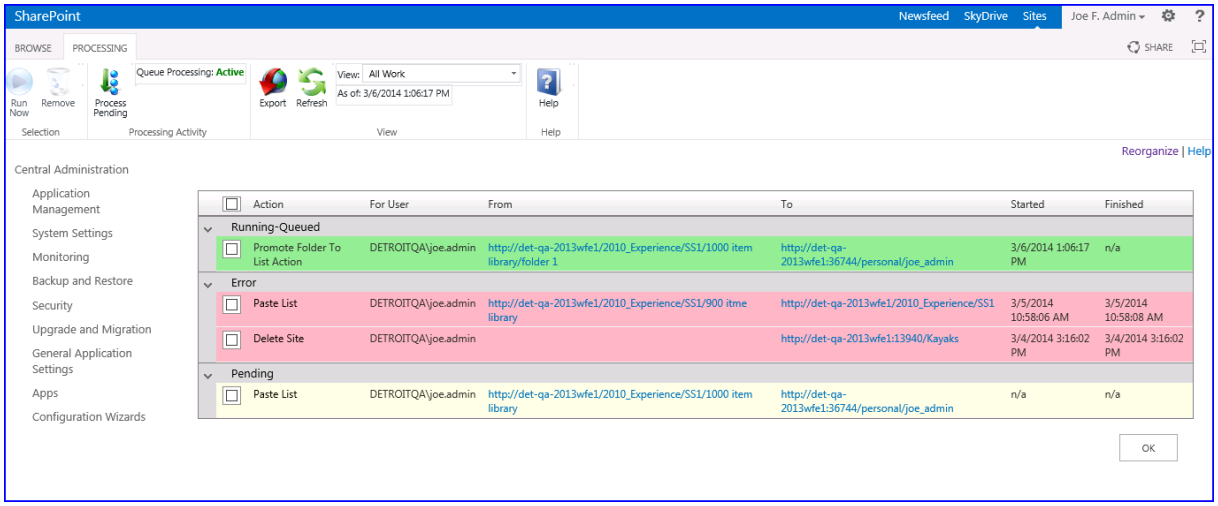
Processing Page

The processing page shows jobs that were submitted by the reorganize interface, and the status of that job.

The Processing page will reflect how the page was accessed. For example, if the site-specific Reorganize page was used, then only requests by the logged in user will display. The Ok button at the bottom of the page will close the Processing Page and return to the Reorganize page or the Application Management page, depending on where it was accessed from.

The Processing page shows timer jobs that have been initiated by using the Reorganize tool. They are categorized by where they are in the process – Pending, Active, Complete, or Failed.



The links in the **From** and **To** columns will open that location in a new browser.

The Queue Processing field shows the status of the timer job, whether it is scheduled to run, or running.

The **Refresh** button (green arrows) will refresh the list of jobs on the page. Note the As of: field that shows the last time the page was refreshed.

To filter which jobs are viewed, use the dropdown in the center of the ribbon.

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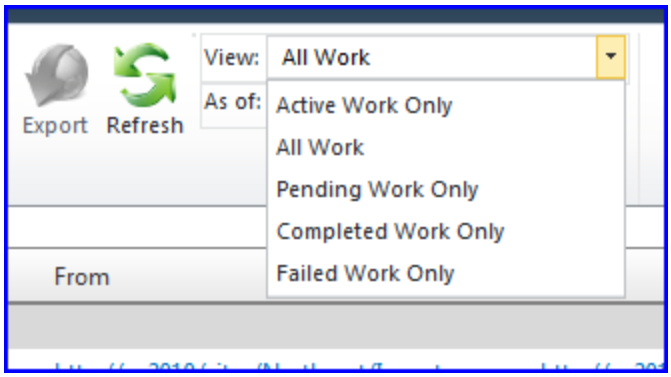
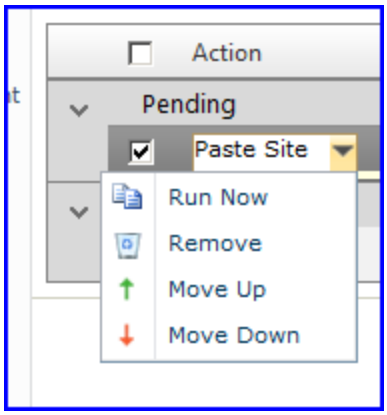


If the timer job was set to Continuous in General Settings, the jobs will be picked up automatically. If it is scheduled, it will be completed the next time that the timer job runs. The Farm Administrator has the option to run the request immediately.
To run a Pending job immediately, you can click the dropdown of the Action and select **Run Now**.



NOTE: Move Up and Move Down are currently unavailable.

If the job is in Pending, click **Process Pending** to start all jobs in the Pending state, or select individual jobs in the Pending state, and click the **Run Now** button.

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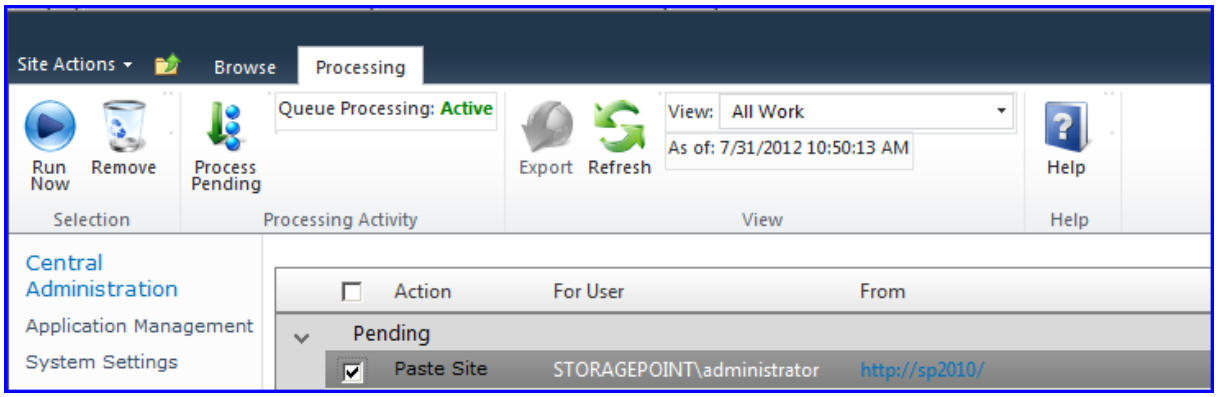
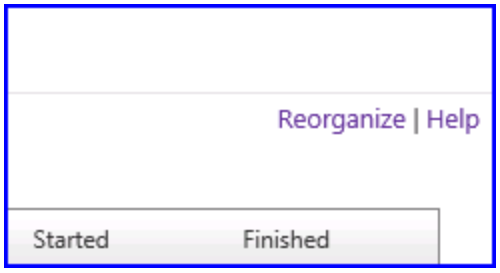


NOTE: The Process Pending and Run Now buttons will not be available if the Processing page was accessed from the Site Actions Menu of a Site Collection. They are only visible on the farm-wide Processing page that shows all Content Matrix Reorganize jobs.

The Reorganize link in the top right corner will take you back to the Reorganize page. The Help link will open this user guide.



Access

Similar to the Reorganize page, the Processing page is accessed from Application Management page. You will also be redirected to the Processing page after submitting any job on the Reorganize page. There is a link in the upper right corner, **My Work** that opens the Processing Page.

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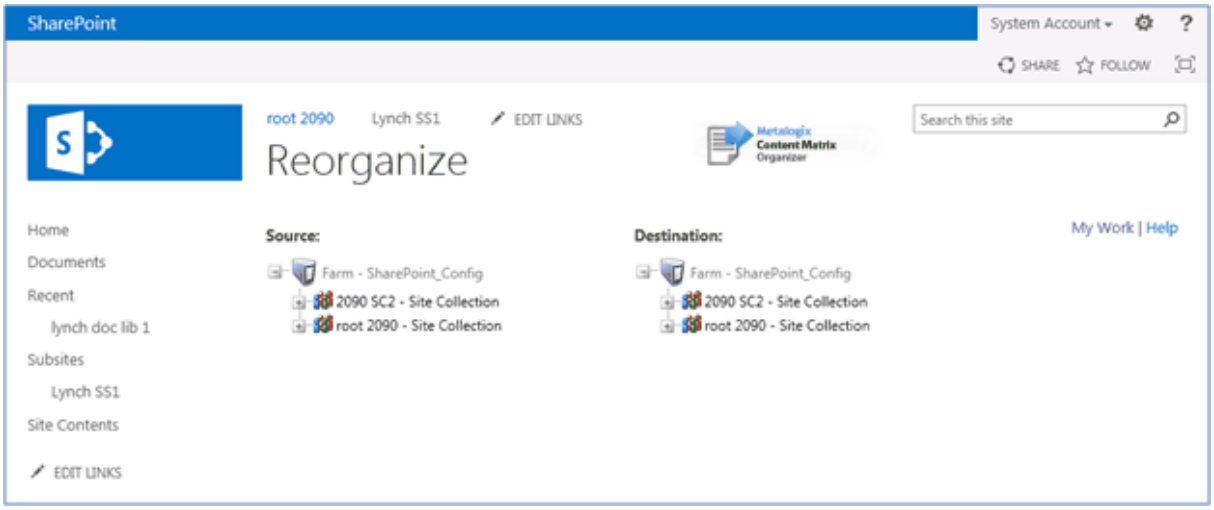
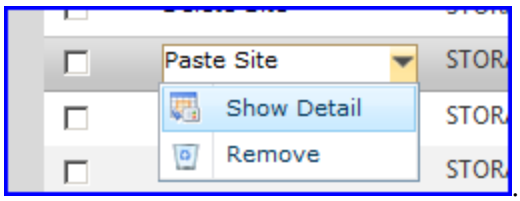


Job Summaries

To view details about the job, right click on the title of the job and select Show Detail.



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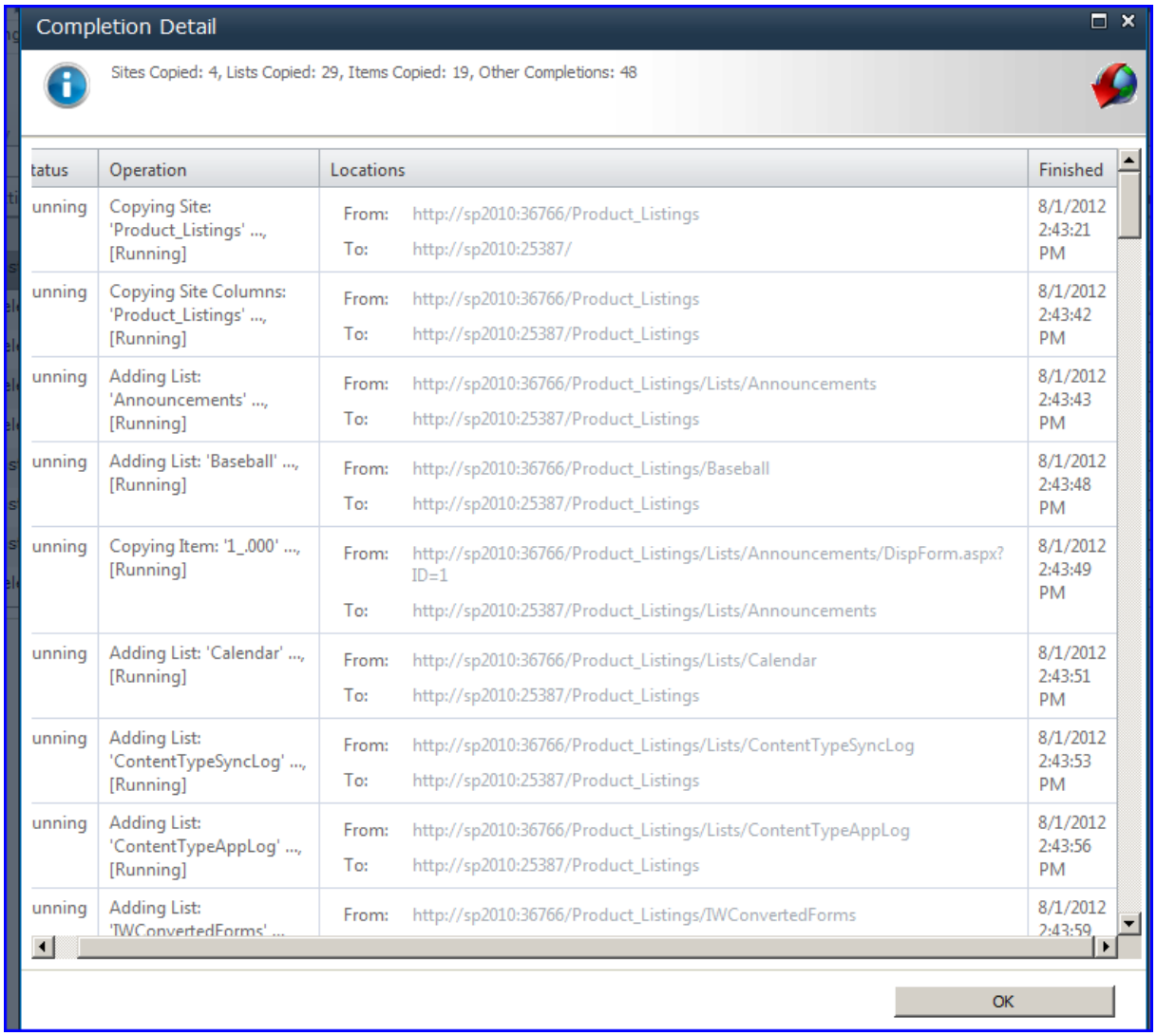

tatus	Operation	Locations	Finished
unning	Copying Site: 'Product_Listings' ..., [Running]	From: http://sp2010:36766/Product_Listings To: http://sp2010:25387/	8/1/2012 2:43:21 PM
unning	Copying Site Columns: 'Product_Listings' ..., [Running]	From: http://sp2010:36766/Product_Listings To: http://sp2010:25387/Product_Listings	8/1/2012 2:43:42 PM
unning	Adding List: 'Announcements' ..., [Running]	From: http://sp2010:36766/Product_Listings/Lists/Announcements To: http://sp2010:25387/Product_Listings	8/1/2012 2:43:43 PM
unning	Adding List: 'Baseball' ..., [Running]	From: http://sp2010:36766/Product_Listings/Baseball To: http://sp2010:25387/Product_Listings	8/1/2012 2:43:48 PM
unning	Copying Item: '1_.000' ..., [Running]	From: http://sp2010:36766/Product_Listings/Lists/Announcements/DispForm.aspx?ID=1 To: http://sp2010:25387/Product_Listings/Lists/Announcements	8/1/2012 2:43:49 PM
unning	Adding List: 'Calendar' ..., [Running]	From: http://sp2010:36766/Product_Listings/Lists/Calendar To: http://sp2010:25387/Product_Listings	8/1/2012 2:43:51 PM
unning	Adding List: 'ContentTypeSyncLog' ..., [Running]	From: http://sp2010:36766/Product_Listings/Lists/ContentTypeSyncLog To: http://sp2010:25387/Product_Listings	8/1/2012 2:43:53 PM
unning	Adding List: 'ContentTypeAppLog' ..., [Running]	From: http://sp2010:36766/Product_Listings/Lists/ContentTypeAppLog To: http://sp2010:25387/Product_Listings	8/1/2012 2:43:56 PM
unning	Adding List: 'IWConvertedForms' ...	From: http://sp2010:36766/Product_Listings/IWConvertedForms	8/1/2012 2:43:59

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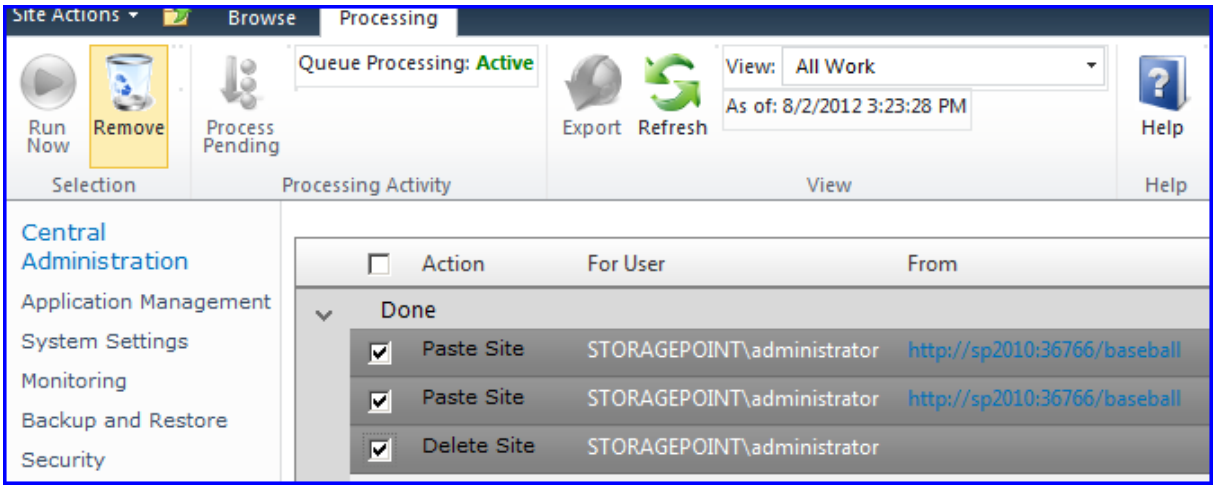
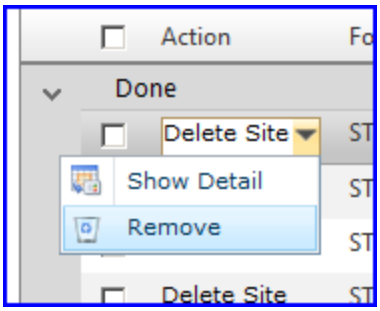
Removing Job Summaries

Job summaries are kept indefinitely, but can be deleted by selecting job summaries and clicking the Remove button at the top of the page,



or by using the Remove link in the Action dropdown menu of an individual job summary.



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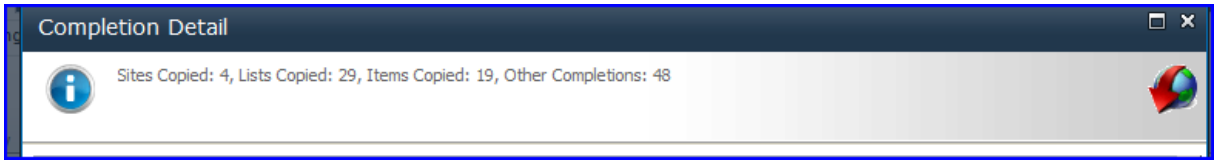
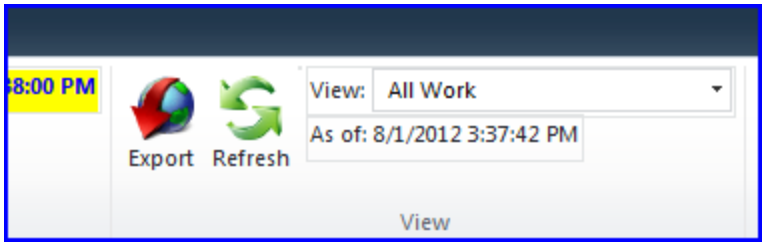
Exporting Job Summaries

The job summaries can be exported into a Microsoft Excel sheet if needed. On the Completion Detail, use the Export button in the top right of the window, and on the Processing page, use the Export button to the left of the Refresh button.





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Additional Information

Doc sets are a special content type that allows many documents to be grouped and use the same metadata information. Users can upload docs into doc sets, and classify documents within a doc set. If a doc set is moved or copied to a location that doesn't support the content type, the doc set will be treated as a folder, and the documents will be in that folder.

Libraries contain documents, while lists contain items that may or may not have documents attached. Because of this difference, there are scenarios where a copy or move is not possible by the very nature of the differences in content types. For example Team Discussions can't be moved or copied to any other location. The end user may see notifications if their move or copy was not successful.

Known Issues

Occasionally the provisioning job on the install may get hung up.

Workaround: Restarting the timer service resolves this issue.

If a site collection is deleted, it may not immediately refresh in the tree view.

Workaround: An iisreset will take care of this.

If a content type is added to a list or library as the result of copying or moving, (notably when the content type has managed metadata fields), and the content type was not added successfully, there may be issues trying to copy or move the content using this content type to other locations.

Workaround: Correct the content using the Apply Metadata feature in the ribbon.

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If a field in a list has a unique value constraint, copying that content within the same list will present errors. Moving that content will also present errors.

Workaround: Remove the unique value constraint or select another value before copy or move.

External Data that is selected during Apply Metadata or Upload is not retained.

Workaround: The content can be edited using the SharePoint interface.

Certain MySites users may not see the Content Matrix Organizer Ribbon on their document libraries and the Reorganizer option from the Site Actions.

Workaround: The user can enable the ribbon through the Site Features and the Reorganizer option from the Site Collection features page.

Unique list permissions (non-inherited) are overwritten if a site is pasted over previous copy of the site.

Workaround: Consider removing the previous site copy before pasting.

Copying or moving a document with a Managed Metadata column is failing if preserve existing option is used.

Workaround: Pre-create the content type with the managed metadata column on the target site before copying.

Copying or moving a document with a managed metadata column to a text field on the target list will cause the managed metadata term name and the internal term id to appear in the text field.

Workaround: The internal term id can be edited out of the text field.

SharePoint 2010:

- The 'Automatically check in uploaded documents' option present in the Upload ribbon option is not working OR
- 'Automatically check in uploaded documents' option present in Upload option is not working OR
- Documents are added with the default content type rather than the selected one in Upload option OR

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- Fields are not saved while uploading a document using the Upload option

Workaround: Run the Content Matrix Organizer Configuration Wizard and do a Repair installation. Switch to using the Silverlight uploader using the General Settings page in Central Admin.

If you are using Metalogix Content Matrix and Metalogix StoragePoint, AND your storage profiles use asynchronous externalization, content that is copied or moved with Content Matrix will not be externalized to the final endpoint. The content remains in the system cache.

Workaround: The farm administrator will need to run the Unused BLOB cleanup job for the storage profile covering the destination, and then the Content Migrator job for the farm. This will externalize the BLOBs to their final endpoints.

Administrators may not see all available Site Collections on the Reorganize page. Some SharePoint topologies may have been configured so that WebApps run under a different AppPool account or identity. This will isolate content between WebApps, and thus mean Content Matrix (by design) will security trim that part of the hierarchy.

Workaround: The resolution is to use the same AppPool account/identity for all WebApps, or grant the limited AppPool identity a login (with membership in the "db_owner" role) to any desired Content Databases in SQL.

For Reorganize, content types may not be applied if the copy is a List or Library. They will apply to the destination if the source is a folder, site or site collection.

Uploading a file that already exists, and selecting No to 'Overwrite existing docs', will present an error; it is not possible to have two documents with the same name in SharePoint.

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