Content Matrix Evaluation Guide

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Technical Support

If you are evaluating Content Matrix for purchase, contact your Metalogix Sales Representative or Solution Engineer for technical assistance.

For information about Metalogix Technical Support, please visit http://metalogix.com/support.

Technical support specialists can be reached by phone at 1.202.609.9100.

The level of technical support provided depends upon the support package that you have purchased. Contact us to discuss your support requirements.

Contents

Contents 3
Introduction 4
Prerequisites 4
Connecting to your SharePoint Source Environment 4
Connecting to your SharePoint Target Environment 7
Browsing and Previewing Lists, Folders and Documents 8
Creating Sites, Lists, Libraries and Folder destinations 11
Creating a Site 12
Creating a Document Library 14
Creating a Folder 16
Copy and Paste a Site or Site Collection 17
Using Incremental Copy to Migrate Changes Since Last Migration 20
Reorganizing Site Content From Within SharePoint Web Applications (On-Premises Only) 23
Copy a Document Library 24
Delete a Document Library 27

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Introduction

The purpose of this guide is to help prospects considering the purchase of Content Matrix to evaluate Content Matrix in their own SharePoint environment by performing a number of common pre-migration, migration, and post-migration activities.

Prerequisites

In order to use this Evaluation Guide, you are required to install the Content Matrix SharePoint Edition Console, as well as the Content Matrix Metalogix Extensions Web Services on your source and destination (if on-premises) environments. For instructions on how to install Content Matrix, please see the Content Matrix Console Advanced Installation Guide. Additional Content Matrix documentation can be found on the Metalogix website, on the Content Matrix Resources page.

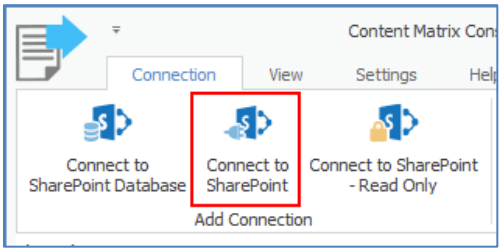
The scenarios in this document require you to prepare your environment as follows:

- A SharePoint environment that contains a site with sub-sites containing a library with documents.
- Identify a source SharePoint farm and a target SharePoint farm for content migration.
- Console installed on the source, target or a third computer.
- Source of SharePoint 2007 or SharePoint 2010 on premise with Extension Web Service installed.
- Target of SharePoint 2010, SharePoint 2013, 2016, or Office 365.
- If the target is on-premises then have Web Services installed as well.
- Content Matrix Web Components installed.

Connecting to your SharePoint Source Environment

This scenario demonstrates how to create a connection to a SharePoint 2007 or 2010 farm as your source SharePoint farm.

1. Start Content Matrix Console (SharePoint Edition).
2. Select **Connect to SharePoint** from the Connection tab.



3. In the "SharePoint Logon" window:

    a) Specify the farm URL for the Address (example: http://corporate).
    b) Change Target type to "Farm".

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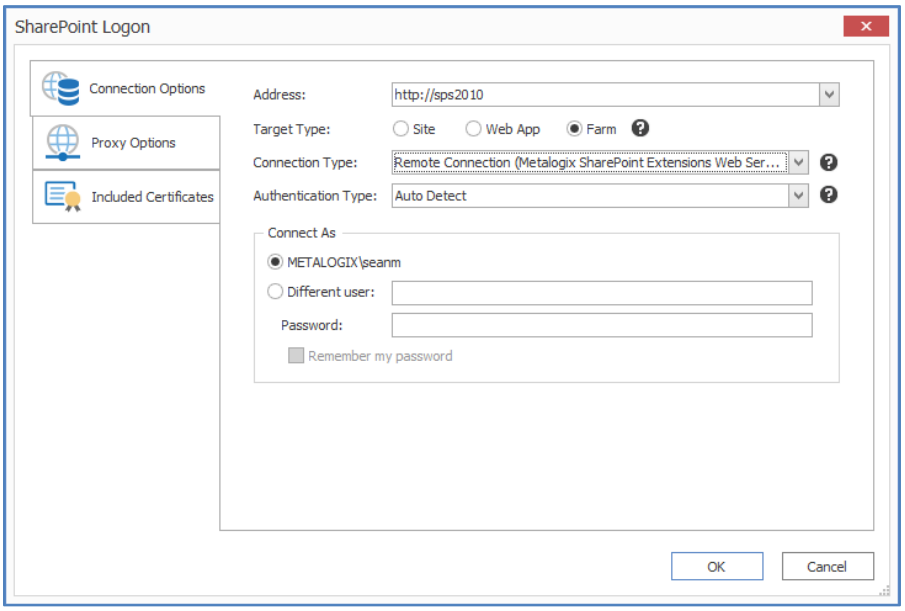
c) Change the Connection Type to "Remote Connection (Metalogix SharePoint Web Extension Service)".

d) If the current user is not the farm administrator, then enter the farm administrator's credentials into the "Different User and Password" fields under "Connect As".



4. Select **OK** to create the connection.

Confirmation

1. An item representing the root node of the farm shows up on the Explorer View panels.
2. Select + to expand and view the site collection, site, sub-site, list and library content in the farm.

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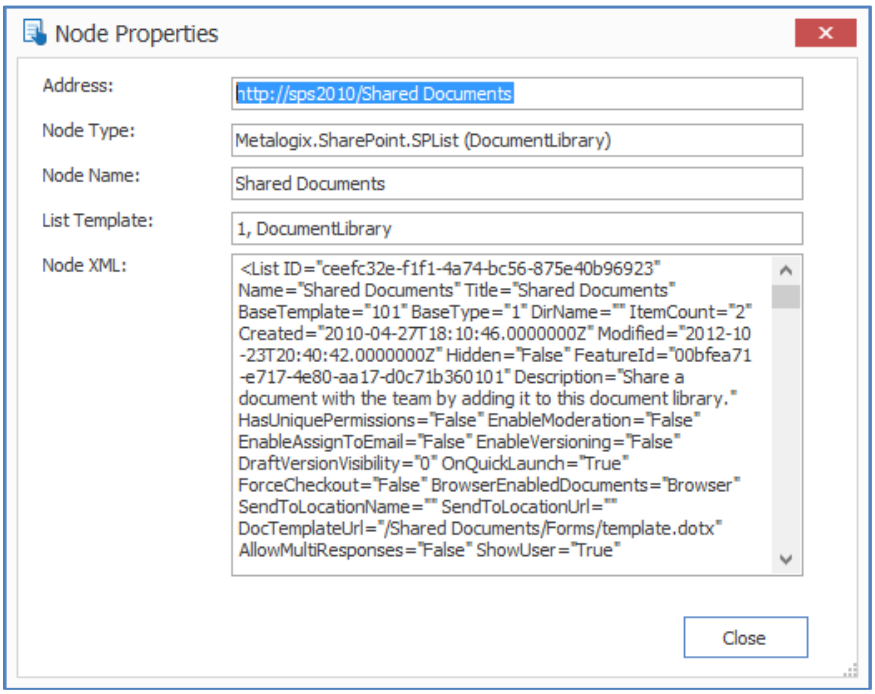
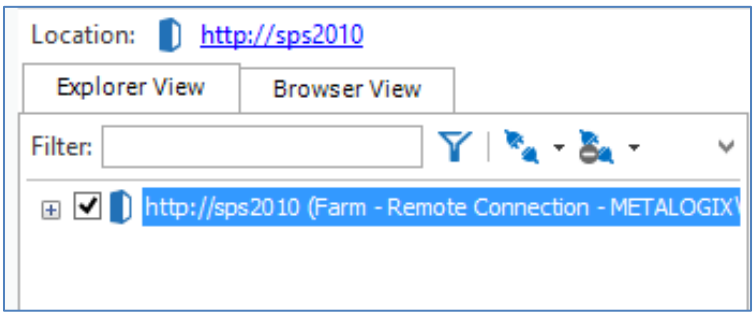
3. Right click on a site collection, site, sub-site, list or list library and select **Properties** to see more information about that item.



4. To view more information about a specific Site Collection or Site under the Farm root, select that node. Once Content Matrix has read data about this node, it will display the Site Collection or Site's size in the tree.



In this scenario you:

- ✓ Successfully created a connection to a SharePoint 2007 or 2010 farm with Content Matrix.
- ✓ Viewed farm structure by expanding tree control.
- ✓ Viewed properties specific to the node.

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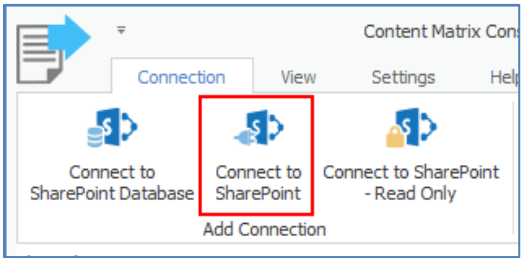
Connecting to your SharePoint Target Environment

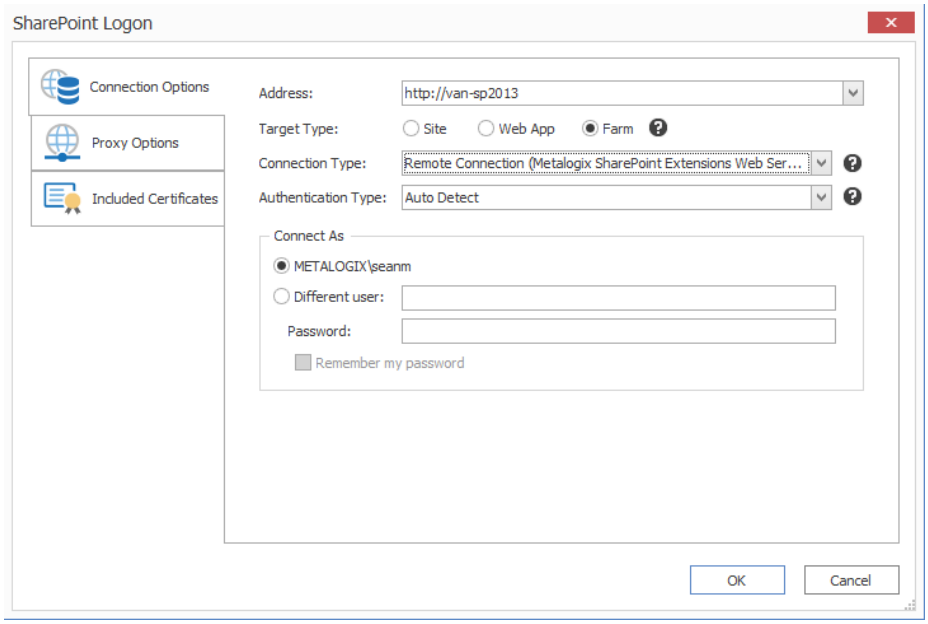
This scenario demonstrates how to create a connection to a SharePoint 2010, 2013, or 2016 farm or Office 365 site as target.

1. From the Content Matrix console, select **Connect to SharePoint** from the Connection tab.



2. In the "SharePoint Logon" window:

   a) Specify the farm URL for the Address.
   b) If your destination site is on Office 365, change the Target Type to "Site". If your target farm is on-premises, change Target Type to "Farm".
   c) If your destination site is on Office 365, change the Connection Type to 'Remote Connection (SharePoint Client Site Object Model 2013)'. If your destination site is on-premises, change the Connection Type to "Remote Connection (Metalogix SharePoint Web Extension Service)".
   d) If the current user is not the farm administrator, then enter the farm administrator's credentials into the "Different User and Password" fields.



3. Select **OK** to create the connection.

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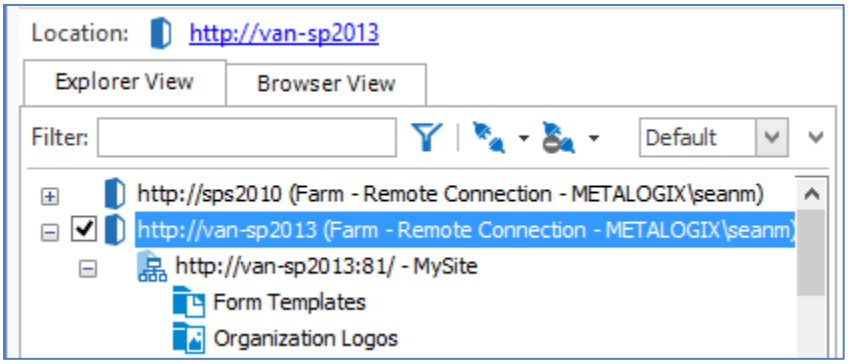
Confirmation

1. An item for the farm shows up on the Explorer View panels.
2. Select '**+**' to expand and view the site collection, site, sub-site, list and library content in the farm.
3. To view more information about a specific Site Collection or Site under the Farm root, select that node. Once Content Matrix has read data about this node, it will display the Site Collection or Site's size in the tree.



In this scenario you:

- ✓ Successfully created a connection to a SharePoint 2010, 2013, or 2016 farm or Office 365 site with Content Matrix.
- ✓ Viewed farm or site structure by expanding tree control.

Browsing and Previewing Lists, Folders and Documents

This scenario demonstrates how to browse your source content from the Content Matrix Console, select list or library content and view their properties.

1. Expand the farm node by clicking on **+** until you can see your site collection node.
2. Click on the source Site Collection node and wait for it to refresh from the server. The + on the left side of the node indicates that refresh has completed.
3. Once the Site Collection node has refreshed from the server, click on the '**+**' symbol next to the root of your Site Collection to expand it.

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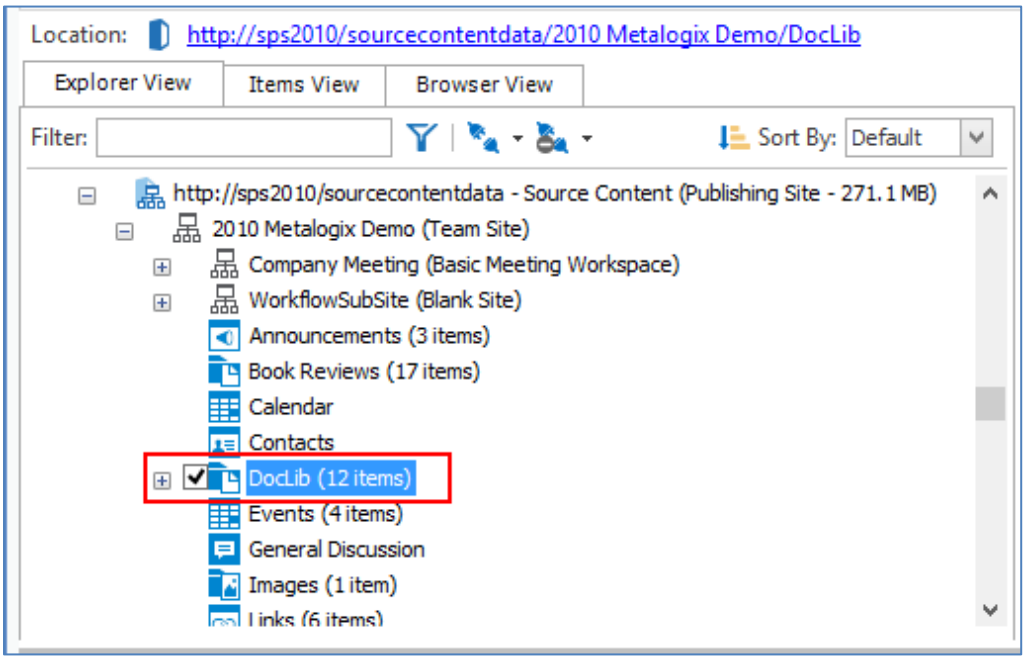
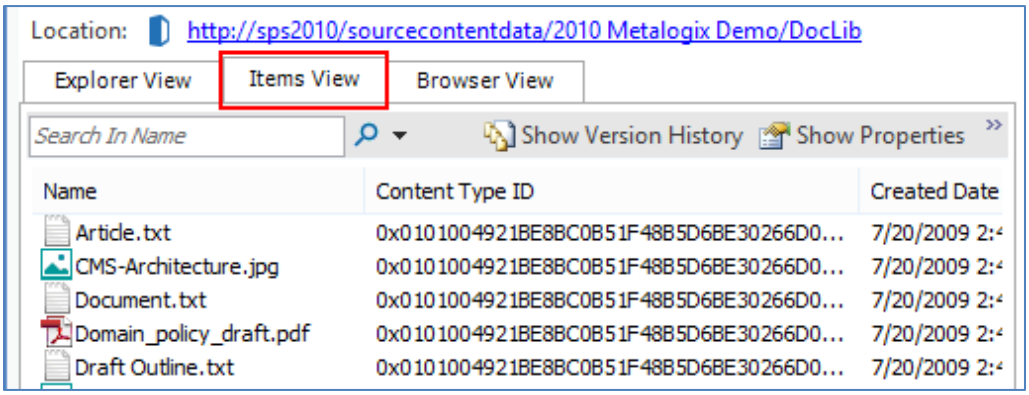
4. Find and select a Document Library that you're familiar with and has content you have access to, and select that Document Library.



5. Select the **Items View** Tab on top of the left hand tree. This will show you individual items in this document library including folders. This is the view that you will use to copy individual or multiple items from this library.



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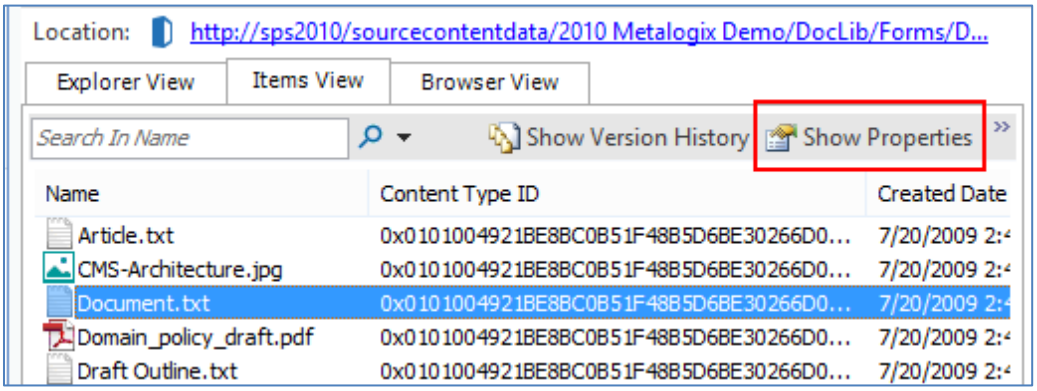
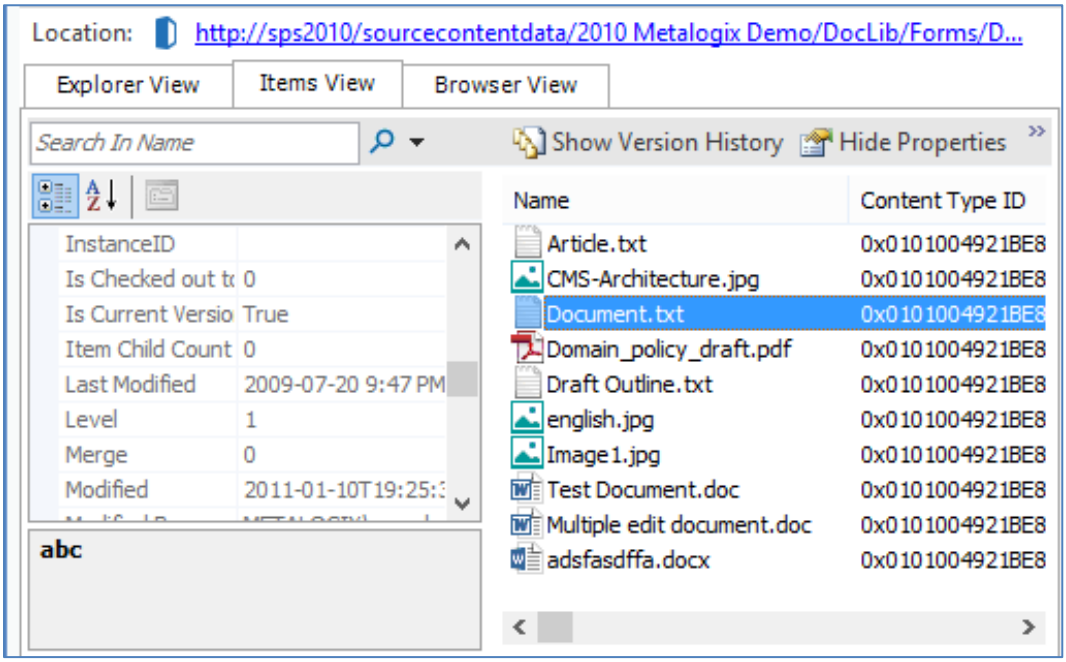
6. Select one or more items and then select the **Show Properties** button, found in the right corner of the item view pane.



This view allows you to see individual properties of a single document or common properties of multi-selected documents.



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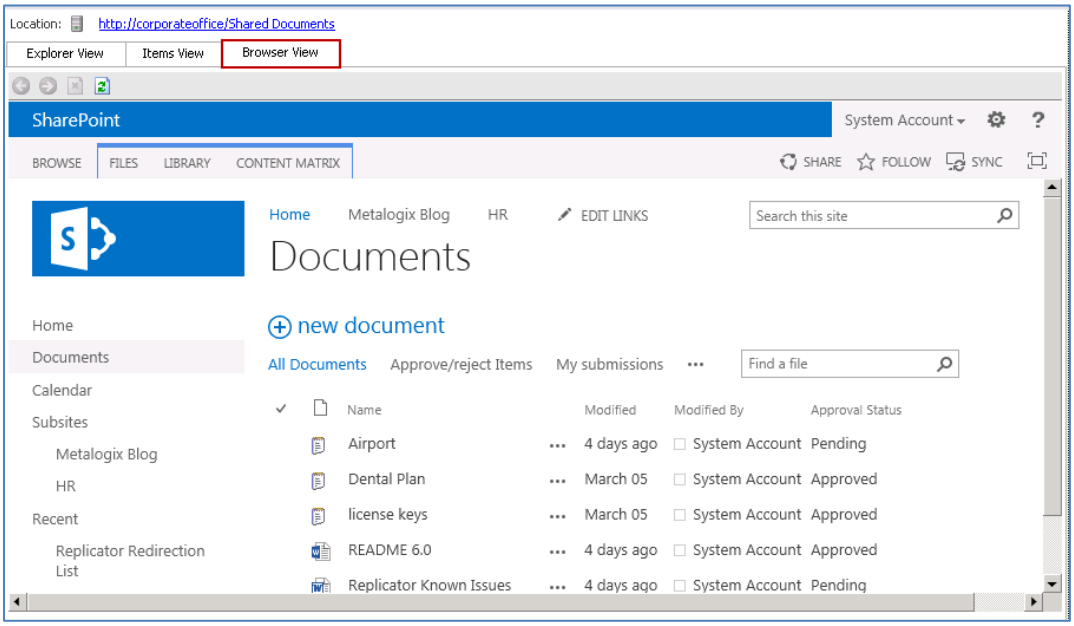
7. You can also view either the entire library, or individual documents by selecting the **Browser View** tab.



Confirmation

In this scenario you:

- ✓ Browsed through your source content from the Content Matrix Console.
- ✓ Viewed list or library contents.
- ✓ Viewed properties of list items or library documents.

Creating Sites, Lists, Libraries and Folder destinations

These scenarios describe how content Matrix can be used to create new sites, lists, libraries and folders on specified destinations.

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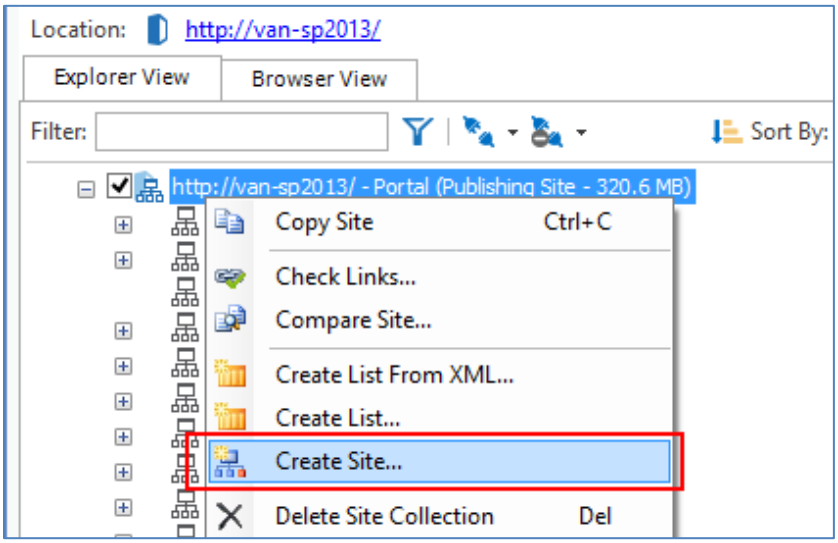
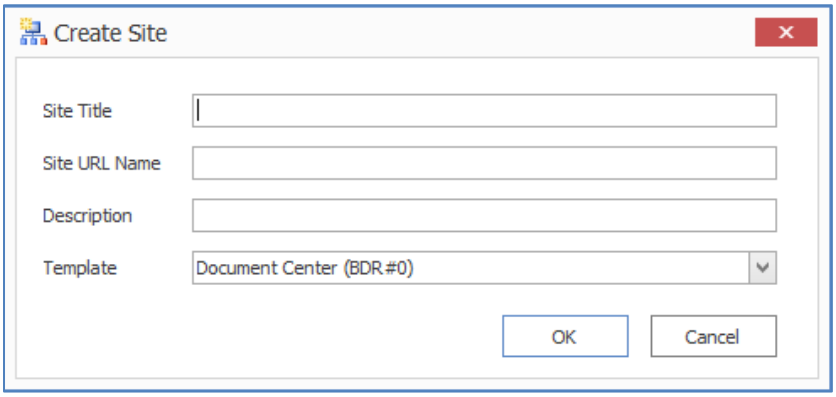
Creating a Site

1. In the **Explorer View**, right click on a website node and select "Create site".



2. Enter your preferred Site title, site URL name, and description. Note down the name and URL of the site you created for later scenarios.
3. Select your preferred site template.



4. Click **Ok**.

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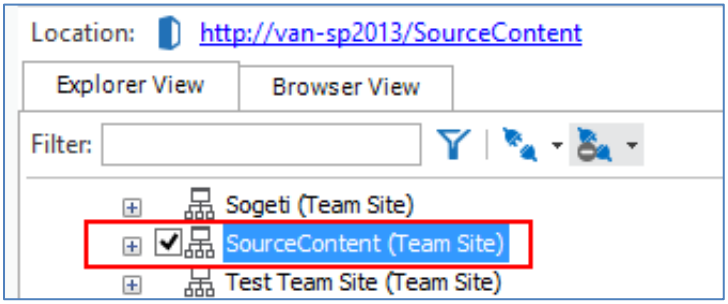
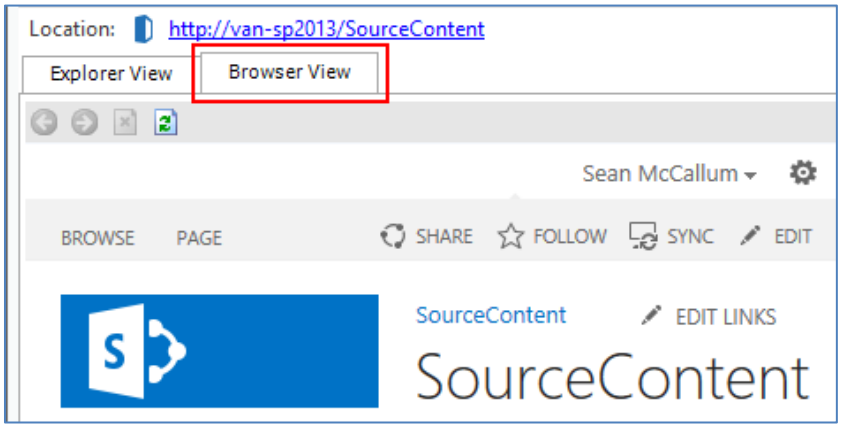
Confirmation

1. Check whether the site has been created in **Explorer View** by pressing the '**+**' for the node where you created a site, this will expand the node.



2. You can also validate the site's creation by opening the site in a browser. This can be done either by:
   a. Selecting the site you created in the tree view and clicking on the link found above the tree view titled "Location" to view the site in a browser window.

   b. Or selecting the site you created in the tree view and choosing the **Browser View** tab to view the site in the Content Matrix console.



In this scenario you:

✓ Created a site using Content Matrix Console.

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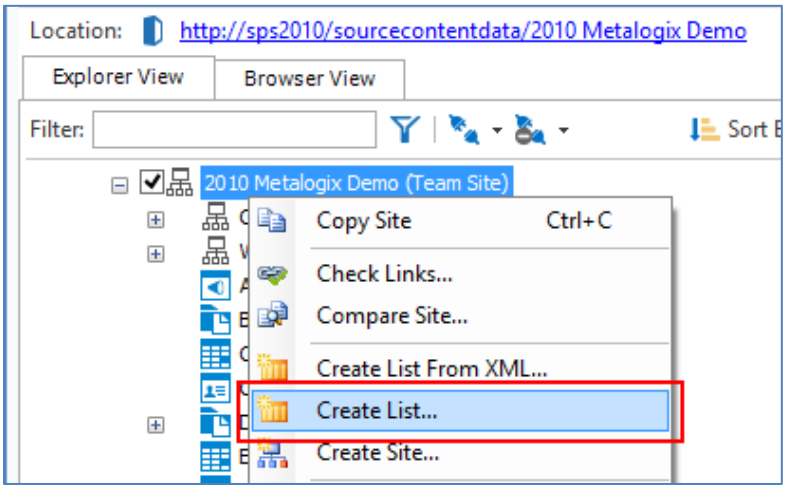
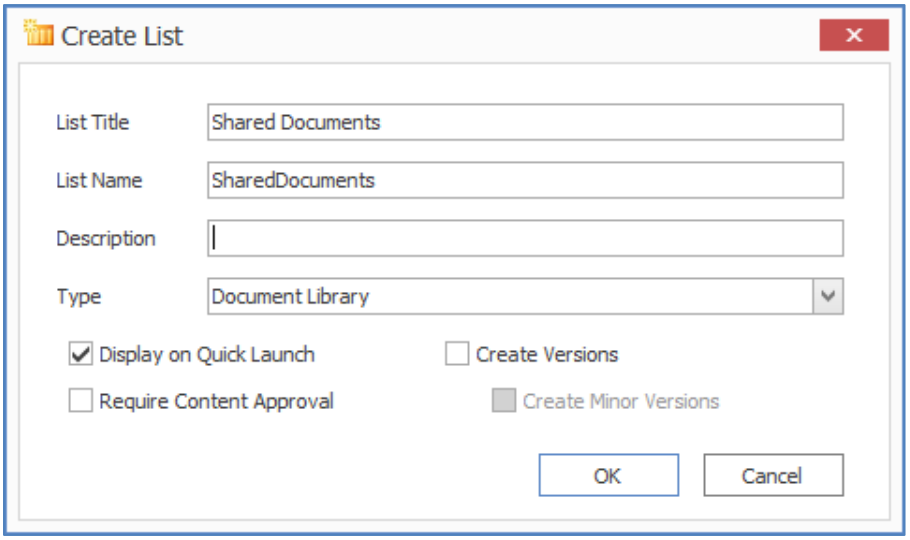
Creating a Document Library

1. In the **Explorer view**, right click on a site node and select "Create list".



2. Enter your preferred List title, list name and description.
3. Select "Document Library" as your type.
4. Select whether you want your Document library to appear on the quick launch bar and whether you want it to create versions and require approval.



5. Click **Ok**.

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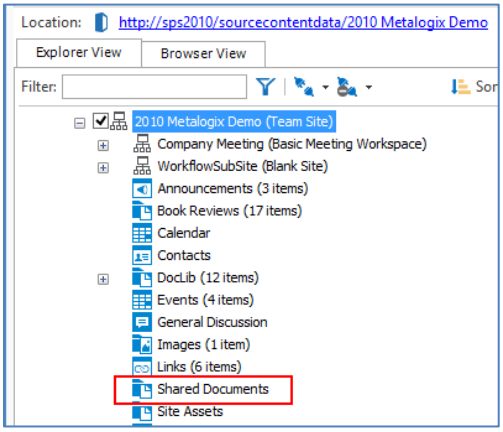
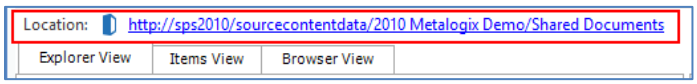
Confirmation

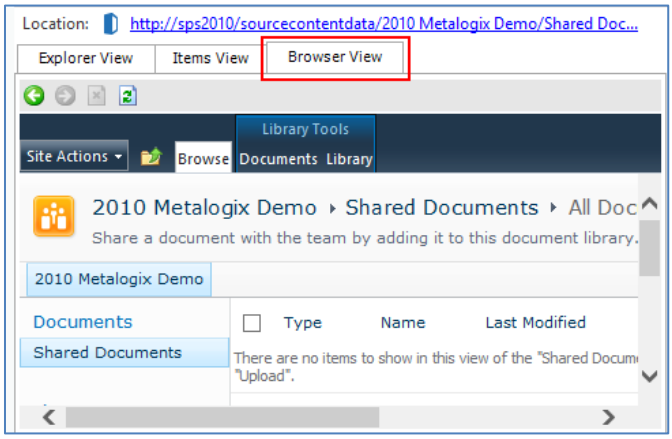
1. Check whether the document library has been created in **Explorer View** by pressing the '**+**' for the node where you created the document library, this will expand the node.



2. You can also validate the library's creation by opening it in a browser. This can be done either by:
   a. Selecting the library you created in the tree view and clicking on the link found above the tree view titled "Location" to open the library in a new browser window.



   b. Or selecting the library you created in the tree view and choosing the **Browser View** tab to view the library in the Content Matrix console.



In this scenario you:

✓ Created a library using Content Matrix Console.

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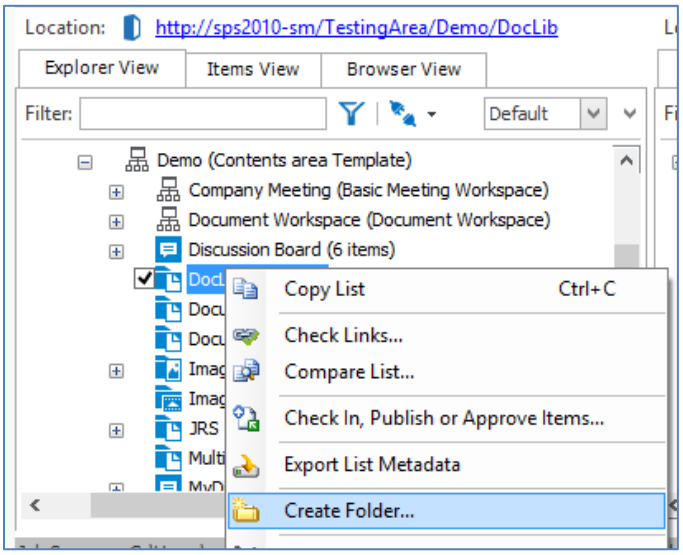
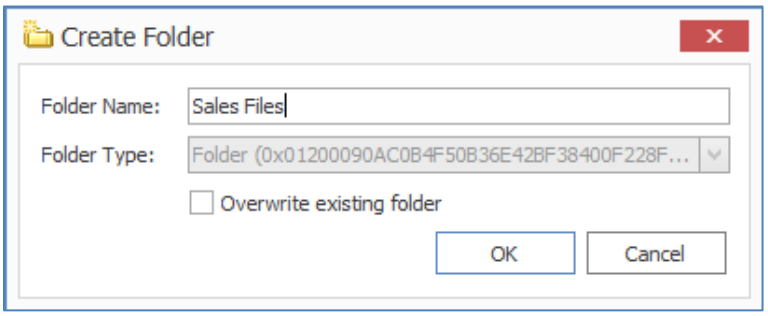
Creating a Folder

1. In **Explorer view**, right click on a Document Library and select "Create Folder".



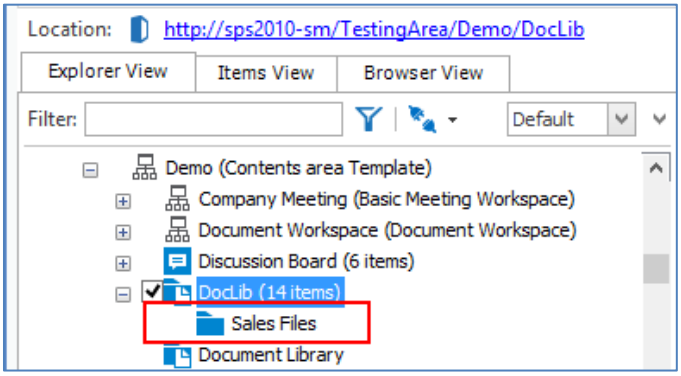
2. Enter your preferred folder name.
3. Select whether you want to overwrite existing folders with the same name.



4. Click **Ok**.

Confirmation

1. Check whether the folder has been created in **Explorer View** by pressing the '**+**' for the node where you created the folder, this will expand the node.



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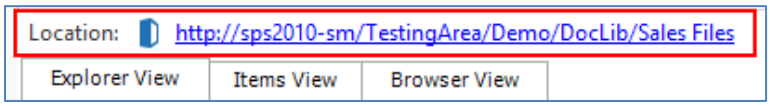
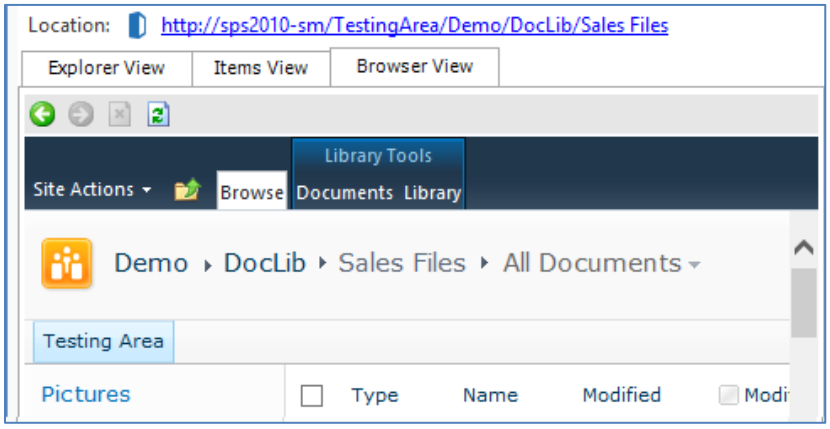
2. You can also validate the folder's creation by opening it in your web browser. This can be done either by:
   a. Selecting the folder in the tree view and clicking on the link found above the tree view titled "Location" to view the folder in a browser window.



   b. Selecting the folder you created in the tree view and choosing the **Browser View** tab to view the folder in the Content Matrix console.



In this scenario you:

✓ Created a folder using Content Matrix Console.

Copy and Paste a Site or Site Collection

This scenario demonstrates how to copy and paste a site or site collection. Please use a site that has a document library with a number of documents in it.

Note: If the Windows Domain in your source environment is different to the Windows Domain on your destination environment, or if you're using Claims Based authentication that is not mapped to a domain in either environment, you will need to map users from your source environment to your destination environment.

1. From the Explorer view in the Content Matrix console with two or more connections defined, expand the source connection tree and right click on a site or site collection node that contains a

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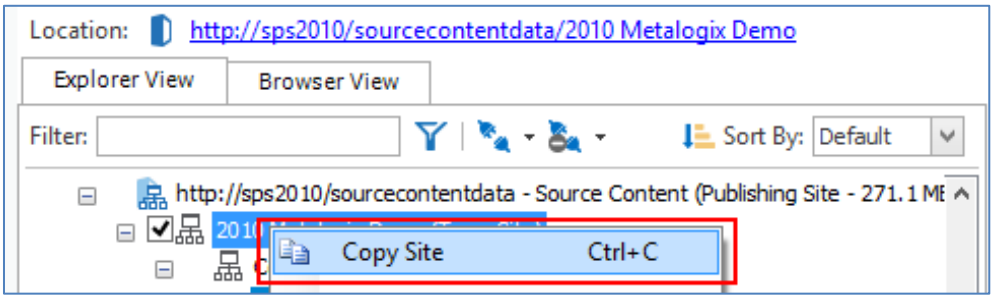
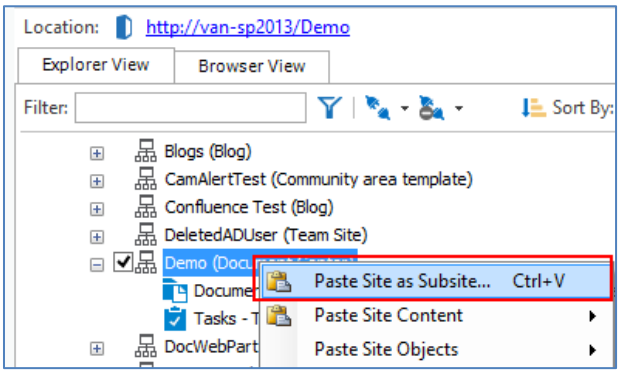
document library with several documents in it. Select "Copy Site".



2. Expand the target connection tree and right click on the target site node.
3. Select "Paste Site as Subsite". The "Configure Site Copy Options" window will open where you can configure the options for copying the site over.



Do the following steps to configure Site Copying options if your source and destination are in different domains:

1. If your domains are not the same, select the **Mapping Options** tab, and then select **Edit Global Mappings**.
2. Select **Domain Mappings** in the left hand menu.
3. Select **New**, found in the right hand menu.
4. Enter your Source and Target Domain names, click **Ok**. This will remap the users from your source domain to the same user on your target domain, if they exist.
5. Select **Ok** to close the Global Mappings screen, now you may also select the checkbox 'Map Missing Users to:' and enter the domain and user name of a user on the destination environment.

4. Click **Run**.

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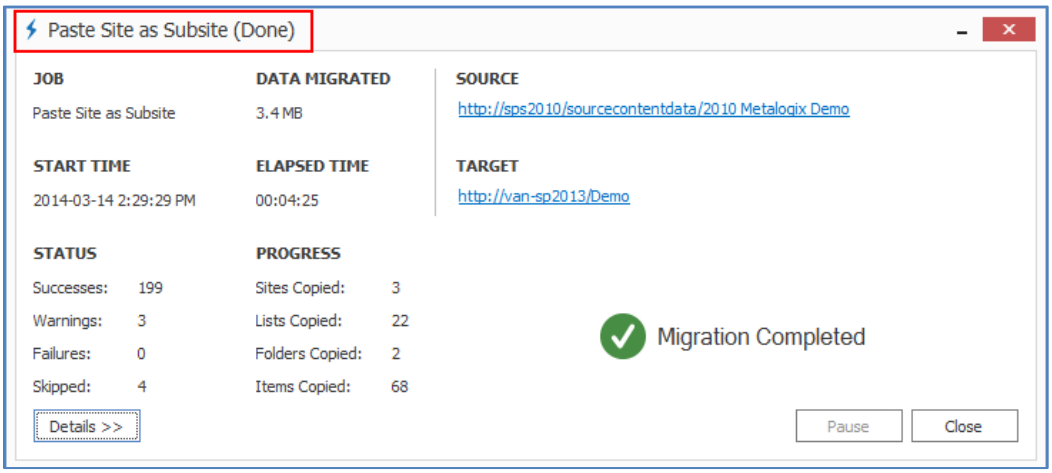
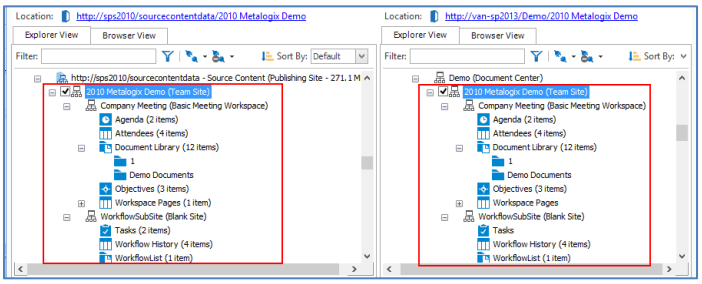
5. The site creation is complete when the Paste Site progress window title says "Done". You can press **Details** to watch the process of the site paste.



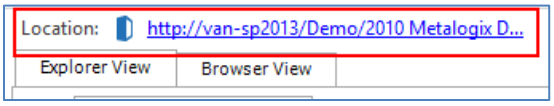
6. Select **Close** to dismiss this window once the job is done.

Confirmation

1. In **Explorer View** check to see that the Site node for the copied site is shown in the target connection tree.
2. Expand the site on the target connection tree, and the source connection tree to compare that the list and libraries are the same on the source and target.



3. You can also validate that the Site Paste has worked by opening it in your web browser. This can be done either by:
   a. Selecting the pasted site in the tree view and clicking on the link found above the tree view titled "Location" to open the copied site in a browser window.



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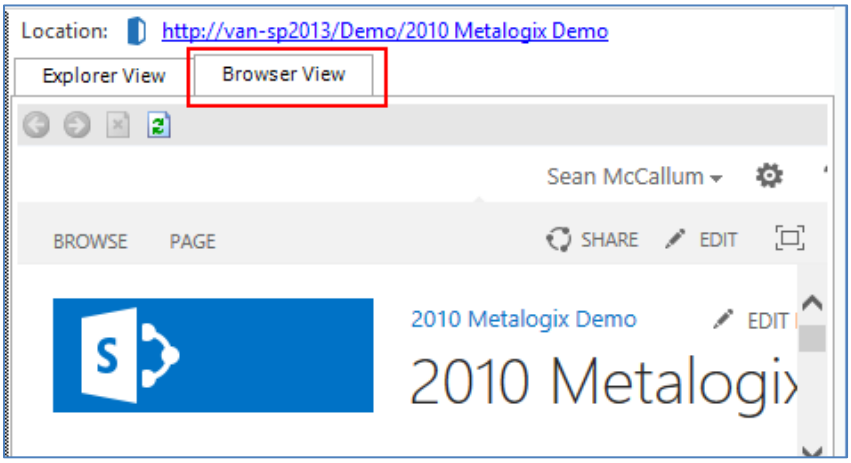
b. Or selecting the pasted site the tree view and choosing the **Browser View** tab to open the copied site in the Content Matrix console.



In this scenario you:

- ✓ Copied a site using Content Matrix Console.
- ✓ Configured paste settings and pasted a site using Content Matrix Console.

Using Incremental Copy to Migrate Changes Since Last Migration

For this scenario you will need a library with documents that exists on both the source and target. You can use the site or site collection from the previous Copy Site scenario that contained a document library with a number of documents.

This scenario demonstrates that only new or changed content can be copied using incremental copying:

1. In a web browser, open the document library that was part of the site you copied over in the previous scenario.
2. Add 1 document to the document library on the source site.

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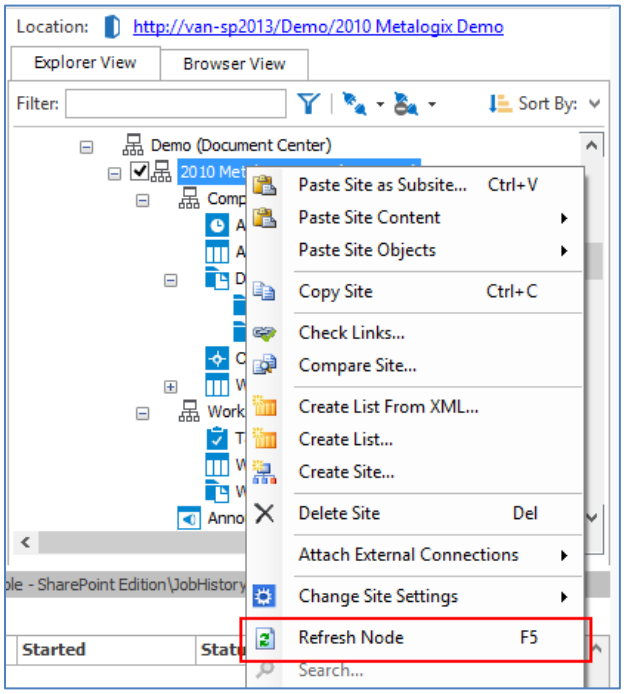
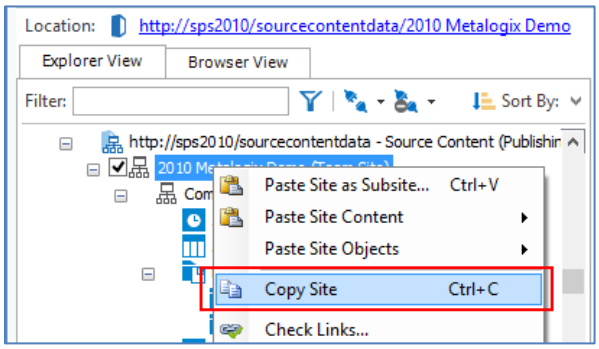
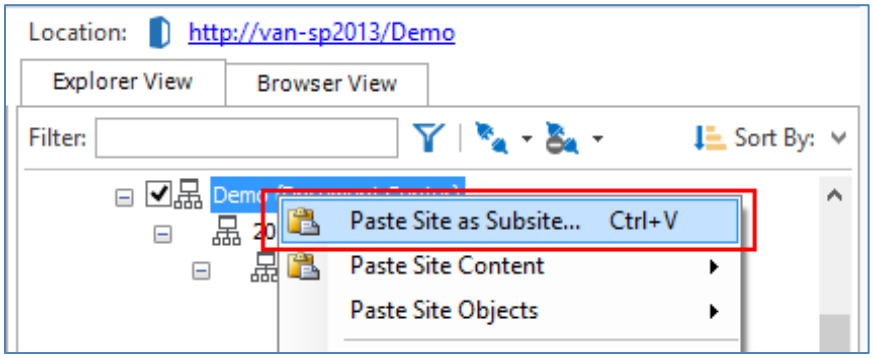
3. Within Content Matrix, right click on the site node where you just added a document, and select "Refresh Node". The item count will be updated once the node is refreshed.



4. Right click on the site node once again and select "Copy Site".



5. Right click on the parent node of the site that was pasted in the previous scenario and select "Paste Site as Subsite".



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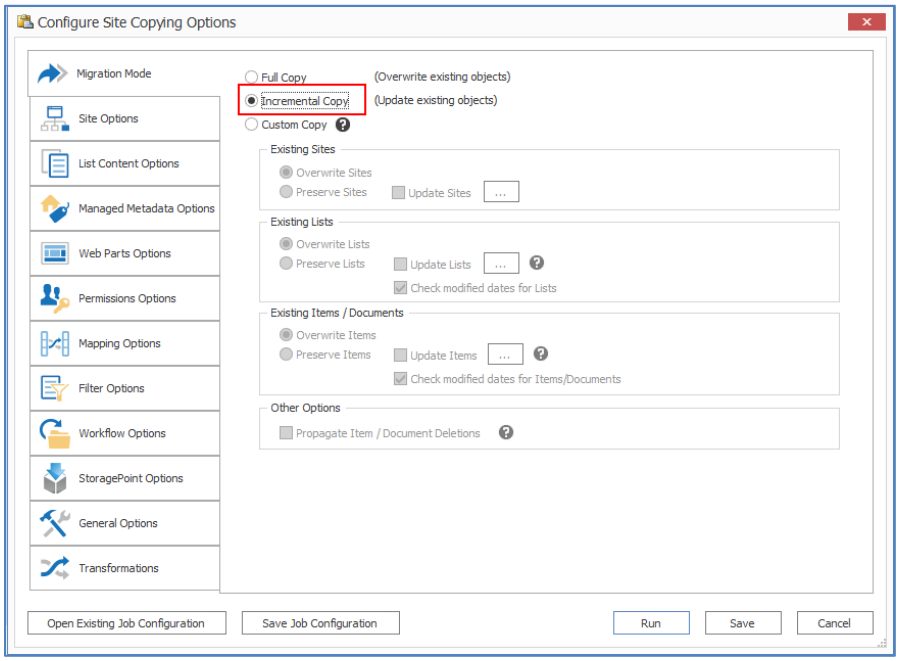
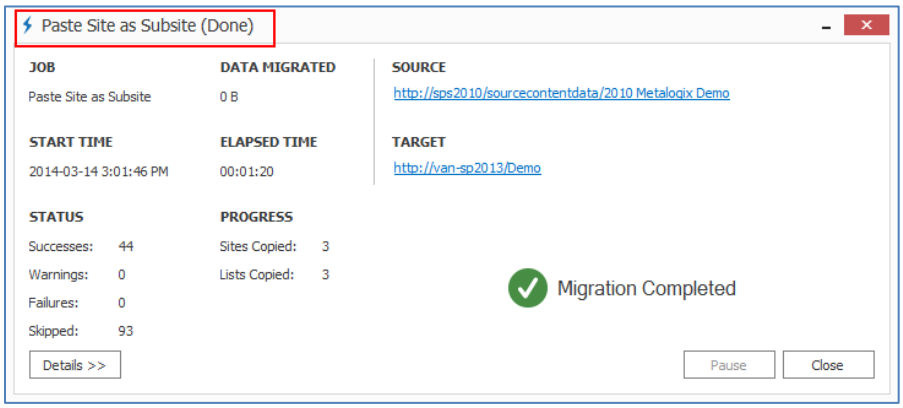
6. In the 'Configure Site Copying Options' dialog box, select **Incremental Copy**.



7. Select **Run**. While the operation is running, select **Details** to view the actions as they occur.
8. The site creation is complete when the Paste Site progress window title says "Done".



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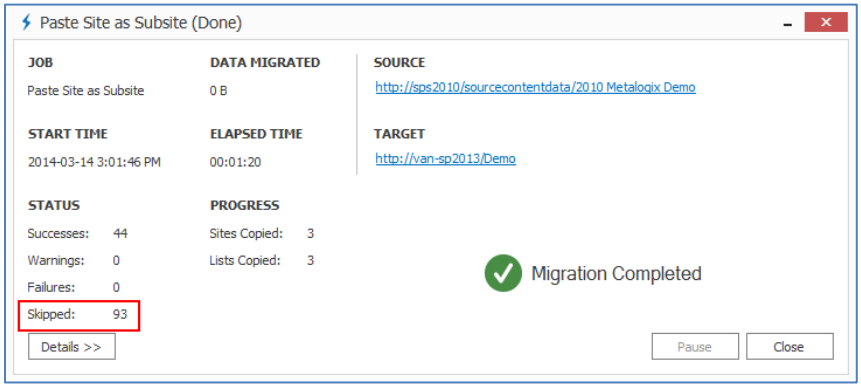
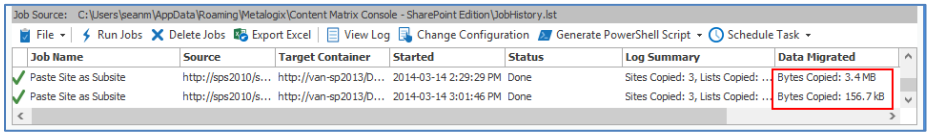
Confirmation

1. Note the skipped items, this is a sign that certain items were not copied over a second time because they already existed on the site.



2. Look at the job source window found below the explorer view. If you compare the data migrated during the previous copy site scenario, to the data migrated during this scenario, you will notice that the number of bytes for this data migration is significantly less, because only the document we added in this scenario was copied over. This is incremental copying and migration of changes.



In this scenario you:

- ✓ Copied the same site after the addition of a document to the document library using the incremental copy setting.
- ✓ Observed that only new or changed items were copied and pasted as part of the incremental copy.

Reorganizing Site Content From Within SharePoint Web Applications (On-Premises Only)

This scenario demonstrates how to copy and paste document libraries in SharePoint from within your browser, using Content Matrix Web Components. Users can reorganize SharePoint content using the user interface available from within the SharePoint website. This scenario can only be performed if source and target are on-premises and Web Components have been installed.

Content Matrix Web Components allows SharePoint Administrators to offload pre-migration, migration, post-migration and Continuous Improvement reorganization tasks to SharePoint Site Collection Owners, Site Owners, and End Users. In order to perform the tasks in this step, please install Web Components on your destination server (on-premises only). For instructions on how to install Content Matrix Web Components, please see *Content Matrix Organizer Advanced Installation Guide*.

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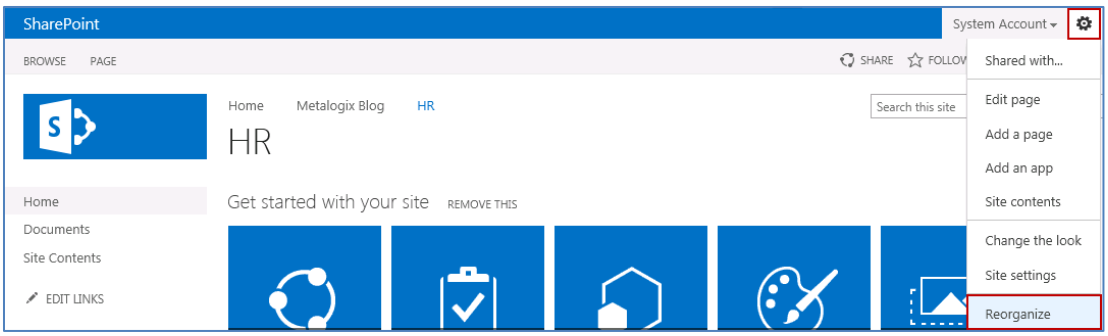
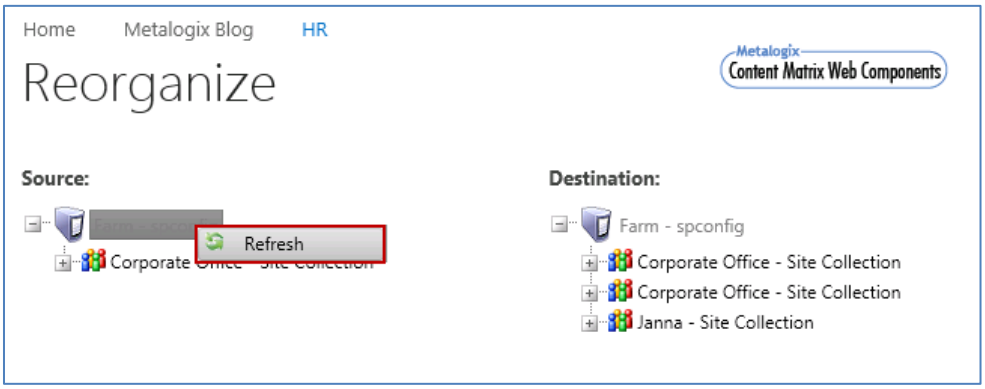
Copy a Document Library

1. If you did not complete the "Creating Sites, Document Libraries and Folder destinations" and "Copy and Paste a Site or Site Collection" scenarios above, complete each of them so that you have 2 sites to work with on your destination environment.
2. From a web browser open your SharePoint site using site collection owner credentials.
3. Expand the site Actions menu and select **Reorganize**.



4. Right click on the farm on the left hand side of the tree and select **Refresh**.



5. Expand the Farm node until you see the site you created in the "Copy and Paste a Site or Site Collection" scenario on the left hand side tree. Right click on any Document Library you have in

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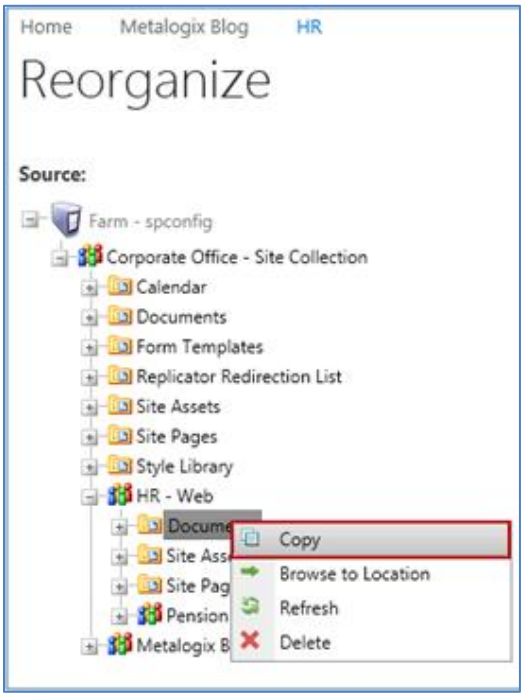
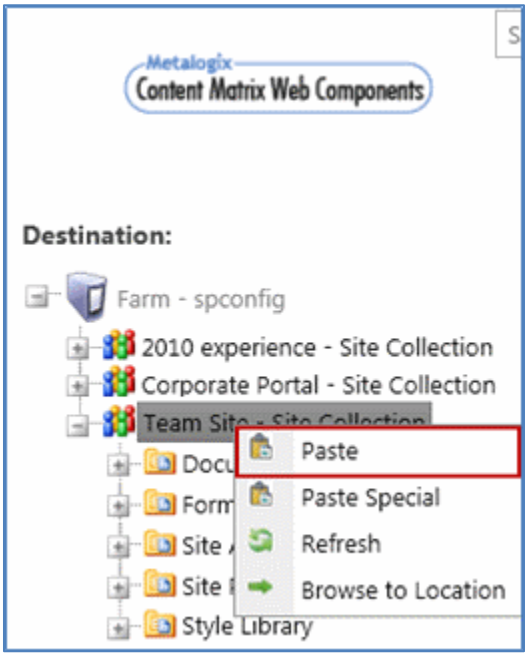
this Site and select **Copy**.



6. On the right hand side tree, expand the tree until you find the site you created in the "Creating Sites, Document Libraries and Folder destinations" scenario. Right click on the site and select **Paste**.



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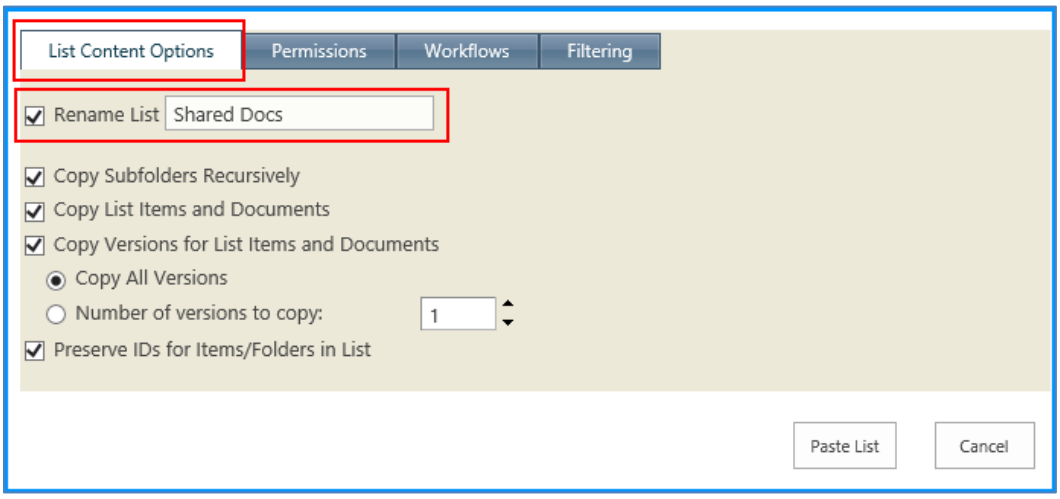
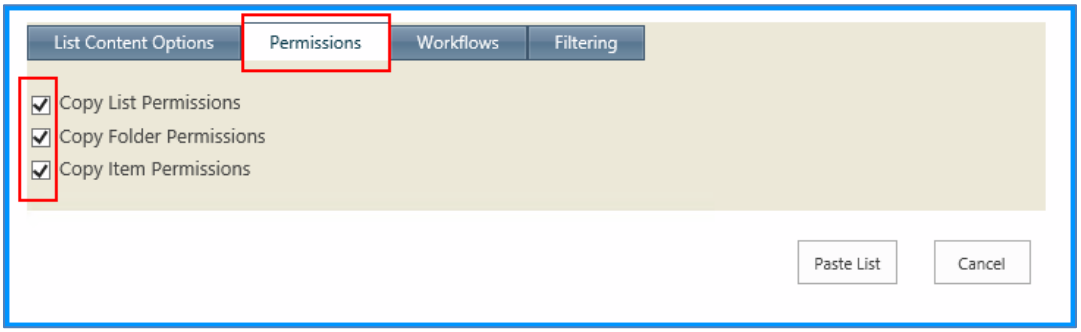
7. In the **List Content Options** tab, select "Rename List", and rename the document library to a different name.



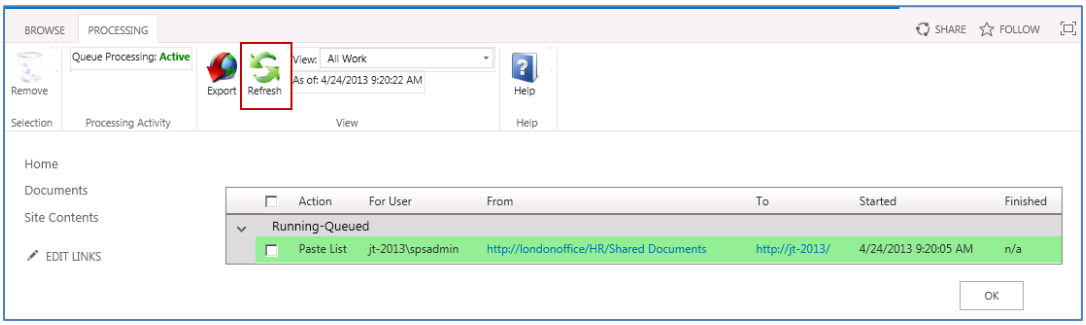
8. In the **Permissions Tab**, select all three of the checkboxes to Copy list, folder, and item permissions.



9. Click on **Paste List**. This will take you to the Processing Queue screen that shows a list of jobs that you are running.

Confirmation

1. On the Processing Queue screen, select the job you just created, and then click on **Refresh** every few minutes until the status changes to "Done".



2. Refresh and view the document folder in the destination tree.

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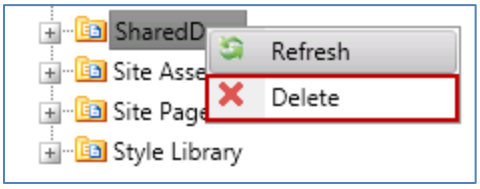
3. Browse to the copied list on your SharePoint site to ensure that the document library and all its documents are now available on the destination site.

In this scenario you:

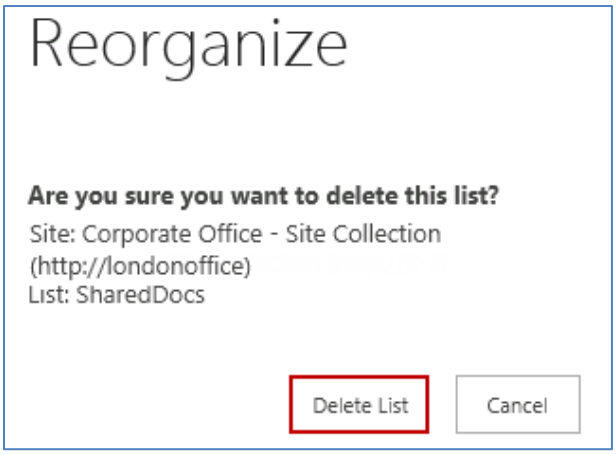
- ✓ Copied and pasted a document library using Content Matrix Web Components.
- ✓ Monitored the completion of the copy and paste job using the Processing Queue.

Delete a Document Library

1. Now that you have copied the Document Library from the site you copied in the "Creating Sites, Document Libraries and Folder destinations" scenario (on the source tree) to the Site you created in the "Copy and Paste a Site or Site Collection" scenario (on the destination tree), right click on the document library you just copied (on the source tree), and select **Delete**.



2. Confirm that you want to delete the document library.



Confirmation

1. Refresh the site node.
2. Check the left hand tree and make sure that the document library you selected to delete has in fact been deleted.
3. Browse to the site and make sure that the document library has been deleted.

In this scenario you:

- ✓ Deleted a document library using Content Matrix Web Components.

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