Metalogix

Content Matrix Organizer

User 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.

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Ribbon and Context Menus

From within the SharePoint list or library screens, you will see a new tab at the top of your page which will display a ribbon with selection-specific options available.

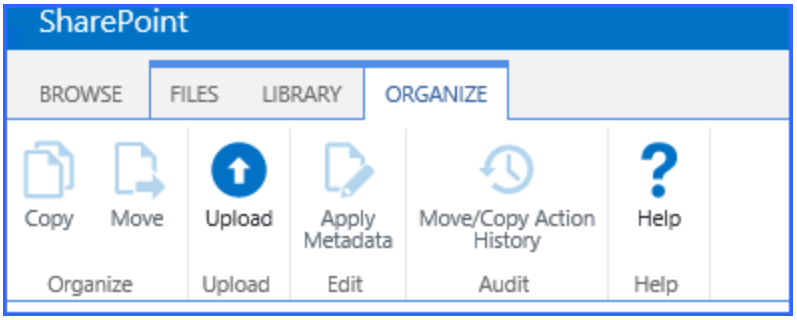
From within the context menu (drop down menu on Name field), you will see a new option as well, Manage Item.

Upload Items

Content Matrix allows an additional upload interface for SharePoint. It is very much like the upload option in SharePoint, but with greater control of the metadata for the content.

Uploads can be done by selecting files using regular navigation, or clicking and dragging files.

1. Navigate to the Library where the content is to be uploaded.
2. Click the Content Matrix tab at the top of the page. Click the **Upload** button.



OR

For SharePoint 2010, click the Documents tab at the top of the page, and from the Upload button dropdown, select **Upload and Apply Metadata to Multiple**

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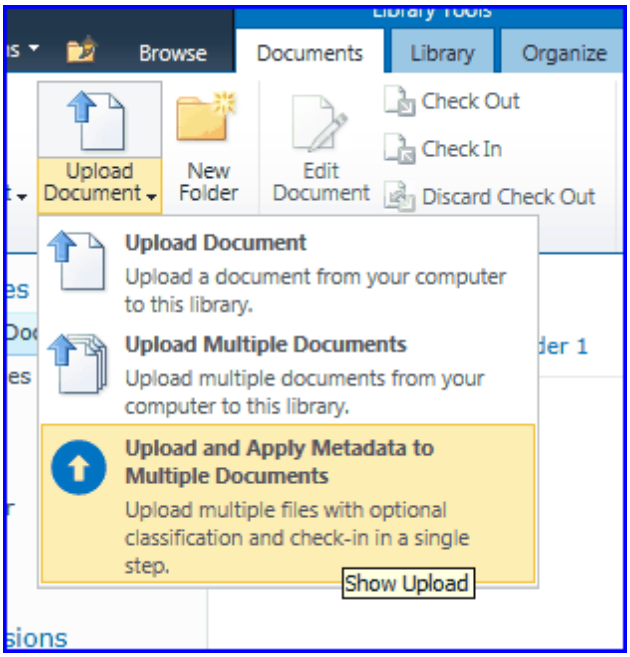
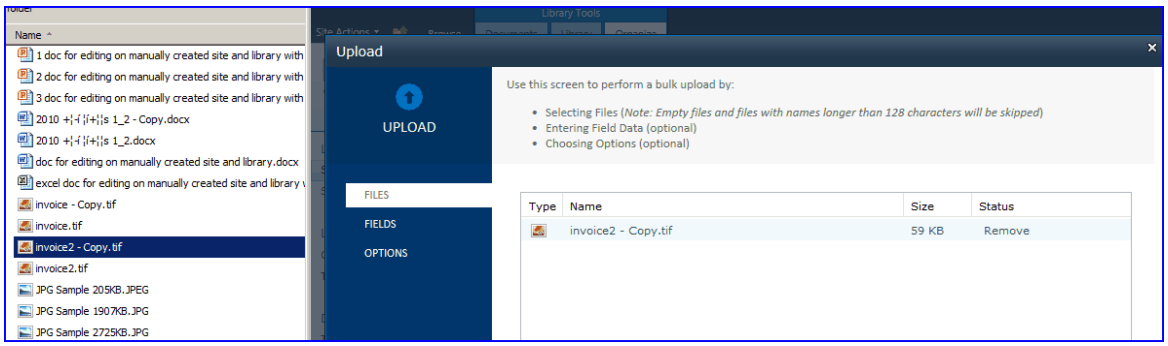
Documents.



3. A new window will open. If files or folders are selected in an open windows explorer, drag the files and/or folders to the window.



OR

Click the Select button (or click the Browse for Files Instead link) and navigate to the location of the files to be uploaded and select the files.

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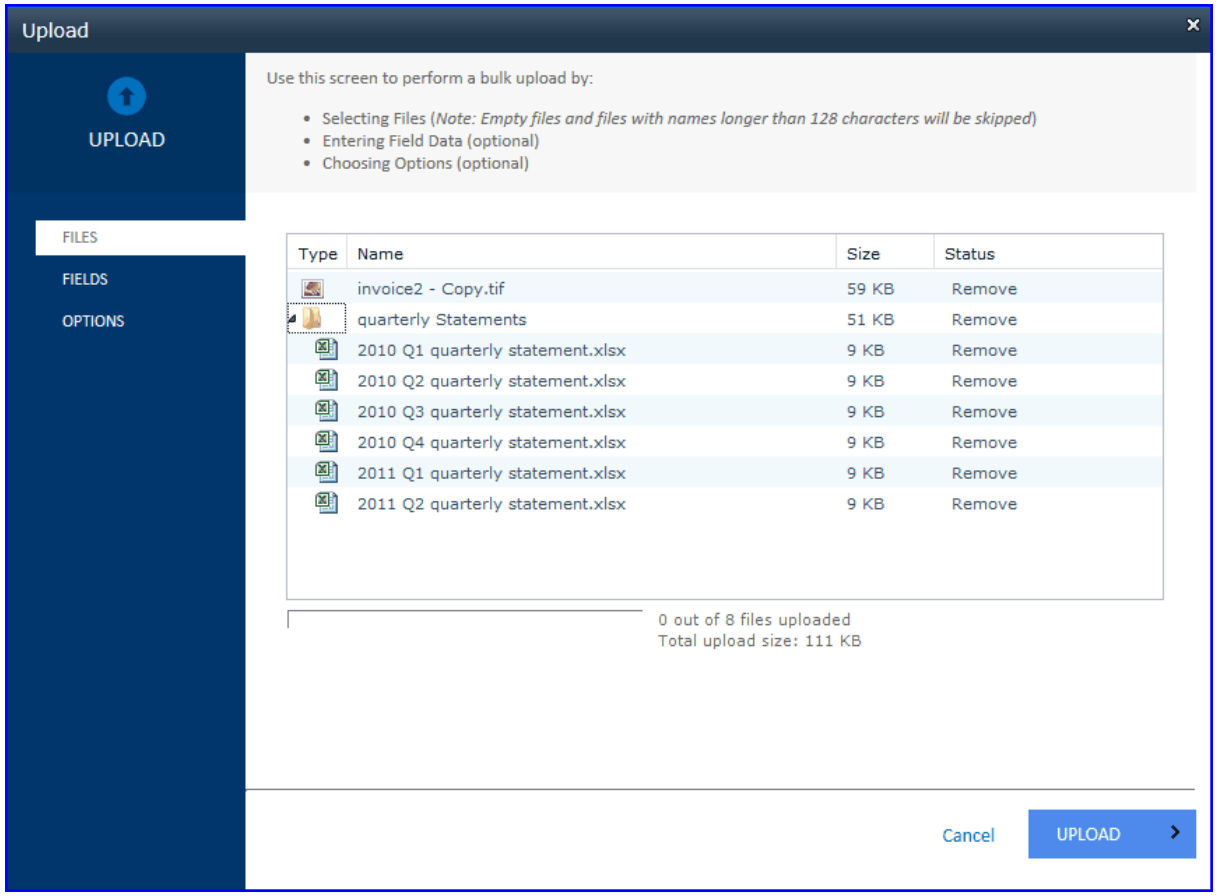
Note that Office 2010 users can upload an entire directory, and that directory will be created in SharePoint.



4. Click the **Fields** tab to select a content type and edit the metadata for the files being uploaded. Note that the values entered will apply to all files being uploaded.

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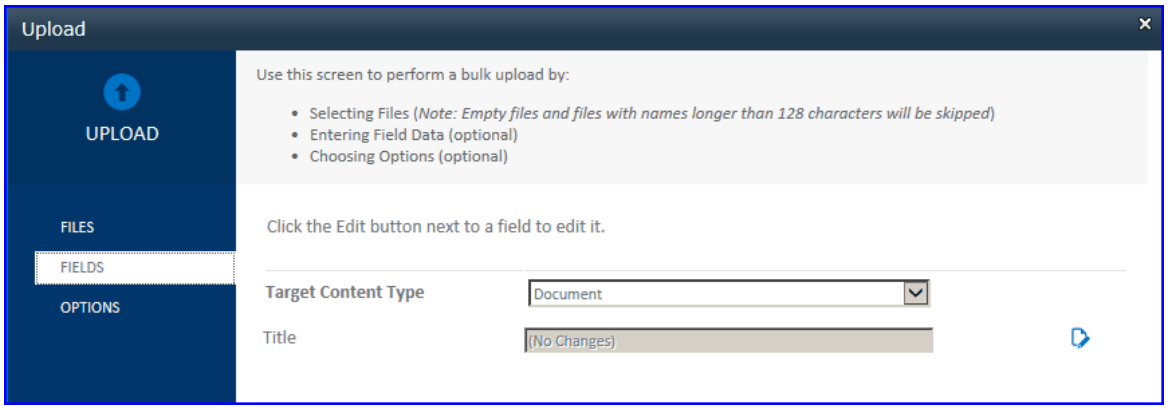
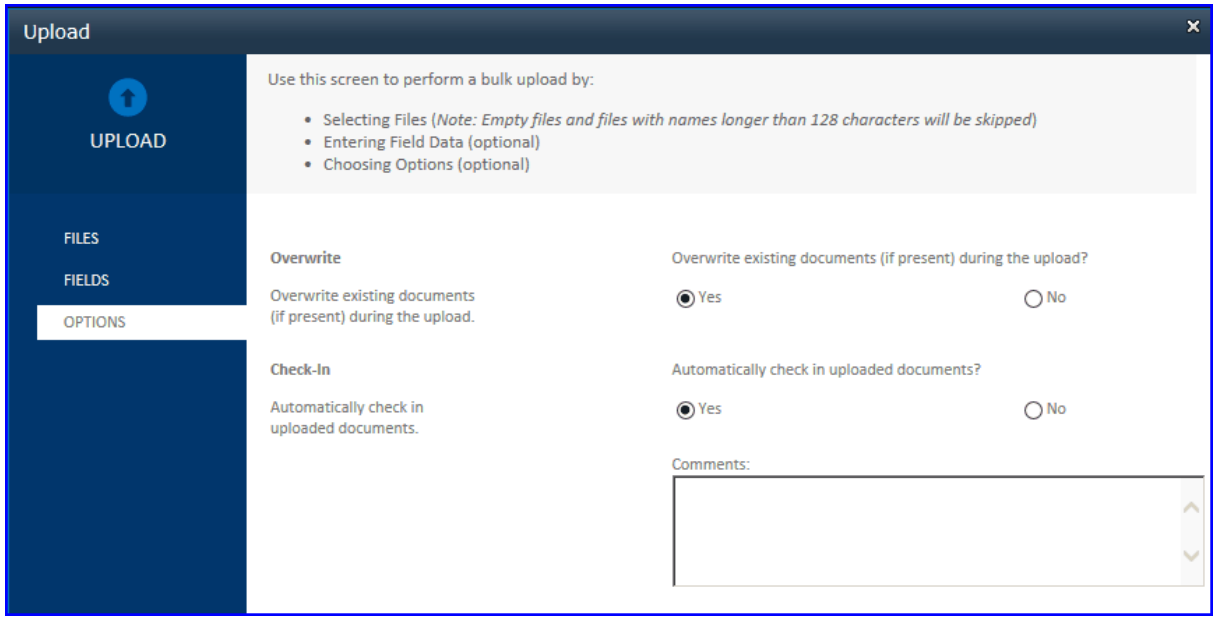
To enter the data for the fields, click the Edit button to the right of the field. Enter the data and go to the Options tab.



To clear a field and go back to the non-editing mode, click the Undo button to the right of the field.

Click the **Options** tab to select the overwrite and check-in status options.



Note: Uploading a file that already exists, and selecting No to 'Overwrite existing docs', will present an error.

5. Click UPLOAD at the bottom of the page to complete the Upload.

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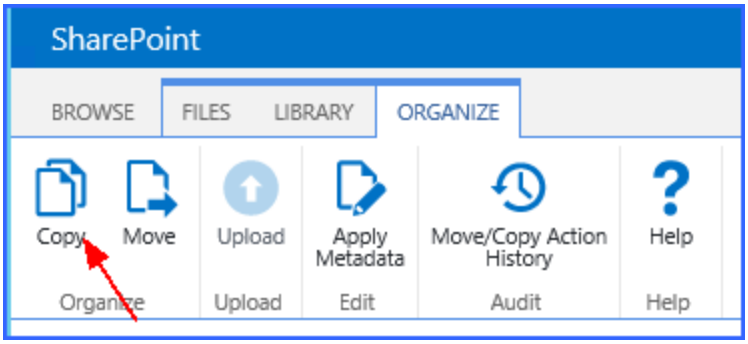
Copy Items

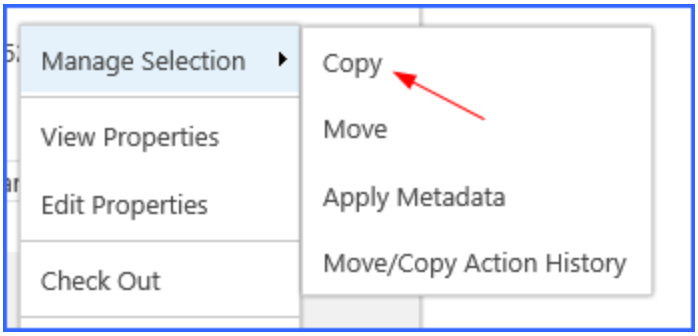
Copying items allows users to create duplicates of items to new locations within the SharePoint farm. Content can be copied from the source to the destination while keeping its current content type, or use the available content types on the destination. The data fields (columns) on the source can also be mapped to the fields of the content type on the destination.

Copying items can be useful if someone has recently moved to a new department and would like to keep previous work as a guide for new projects. Or maybe two teams have merged and are now using a shared workspace for collaboration. Copy allows you to preserve the original, while moving your content into another location using the destination's specific content types and data fields.

1. Navigate to the Library containing the content to be Copied (source) and select the folders and/or items. Click the Content Matrix tab at the top of the page. Click the **Copy** button.



The context menu can also be used, even with multiple items selected, as long as the context menu used is from one of the selected items.



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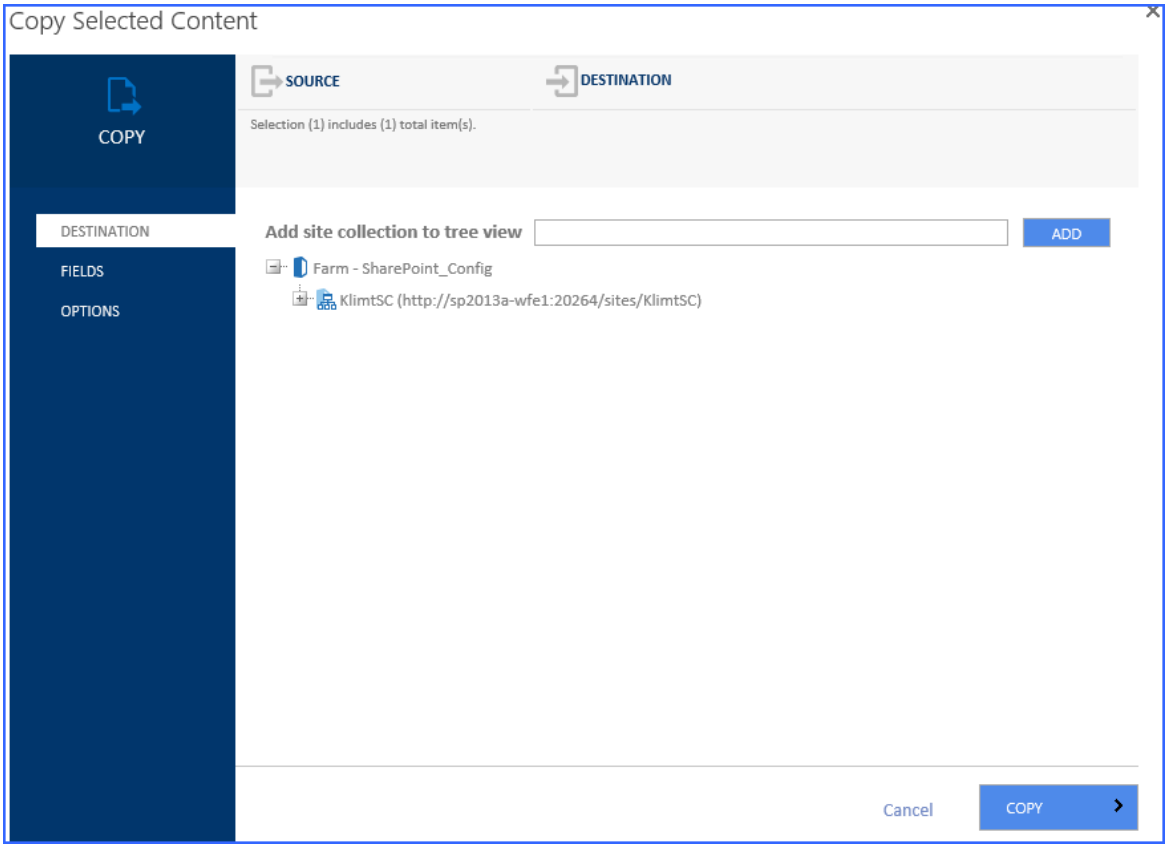
2. A new window opens that may display the structure of the SharePoint farm. If the entire farm isn't visible, it is because the Administrator has restricted the list to the current site collection, to allow the page to load faster. Enter the URL of the destination site collection and click Add, if needed.



This shows the screen if the site collection list hasn't been restricted. The destinations available reflect the security of the currently logged in user. Note that the last selected destination is displayed when this window is opened. Navigate to the desired list or library (destination).

Formatting has been applied to show which destinations match exactly in columns (**bold**), which are allowable but with different columns (*italics*) and the greyed out ones

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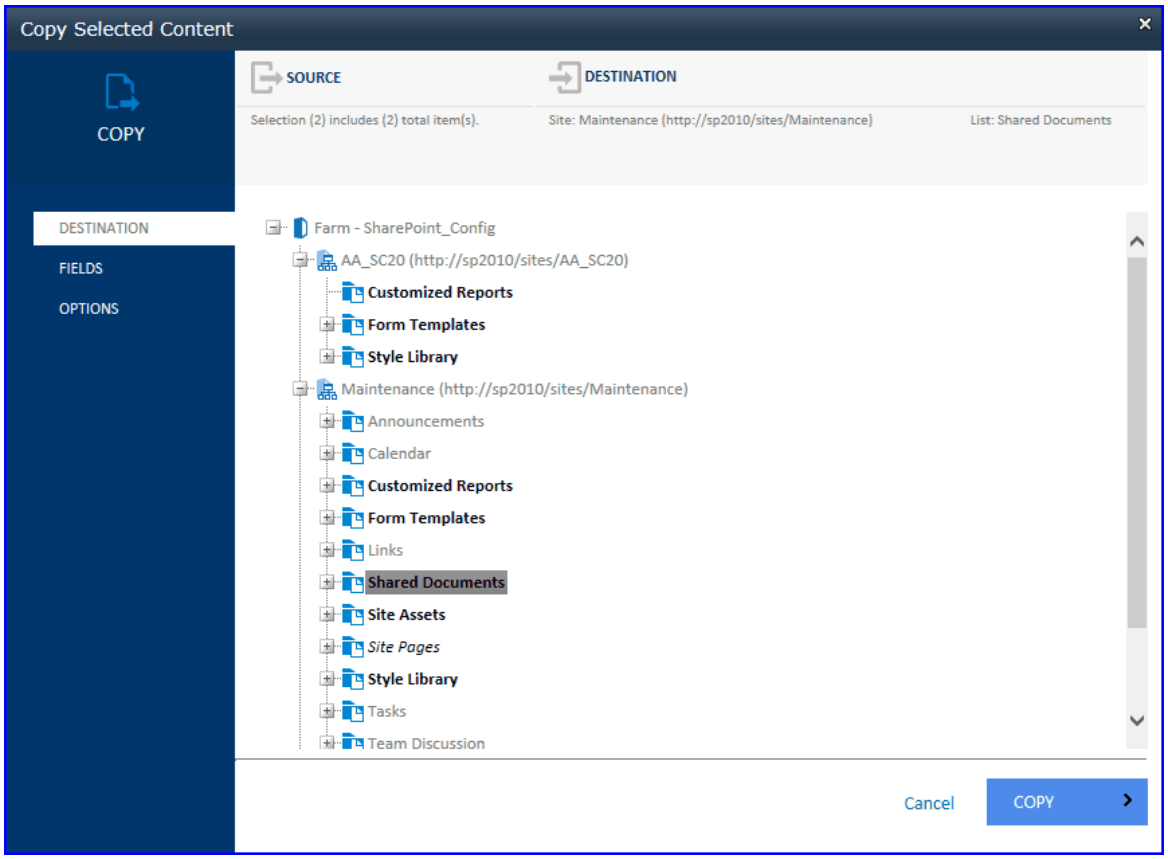
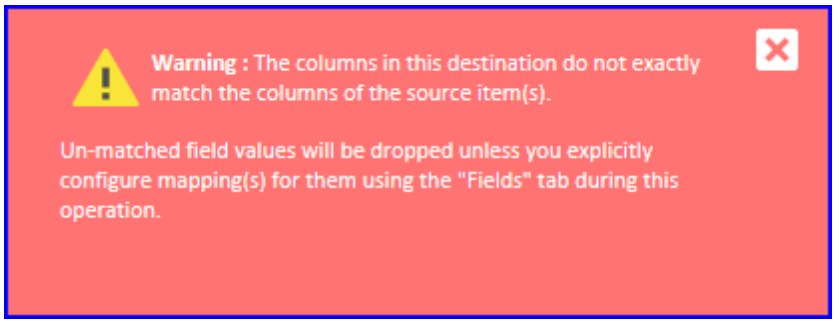
are not available.



3. If a destination is selected that does not have the custom fields that the selected content uses (*italicized*), there will be a warning that data could be lost if not mapped.



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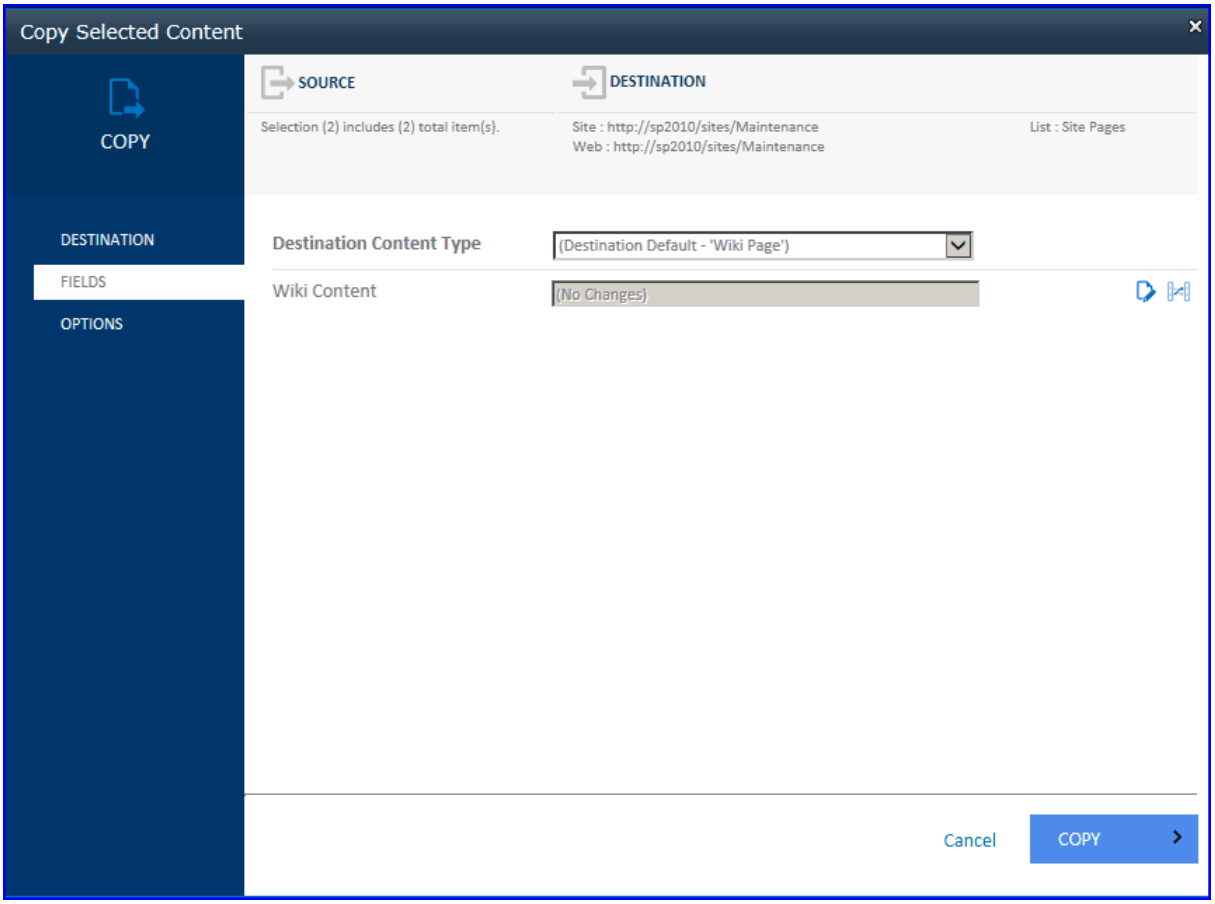
4. Using the Destination Content Type dropdown field, select….

   - (PRESERVE EXISTING) to maintain the existing content type of the items being copied, or
   - (DESTINATION DEFAULT) for these items to be copied using the default content type of the destination, or
   - (OTHER) a new content type from the list of available content types in the destination.

The selection will determine which fields become available for editing or mapping.

NOTE: You will not be able to select (Preserve Existing) if the content type doesn't currently exist on the destination, and you do not have enough access to apply content types in the destination. The content will use the default content type.

Note that the values entered will apply to all files being copied.



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To enter the data for the fields, click the Edit button to the right of the field.

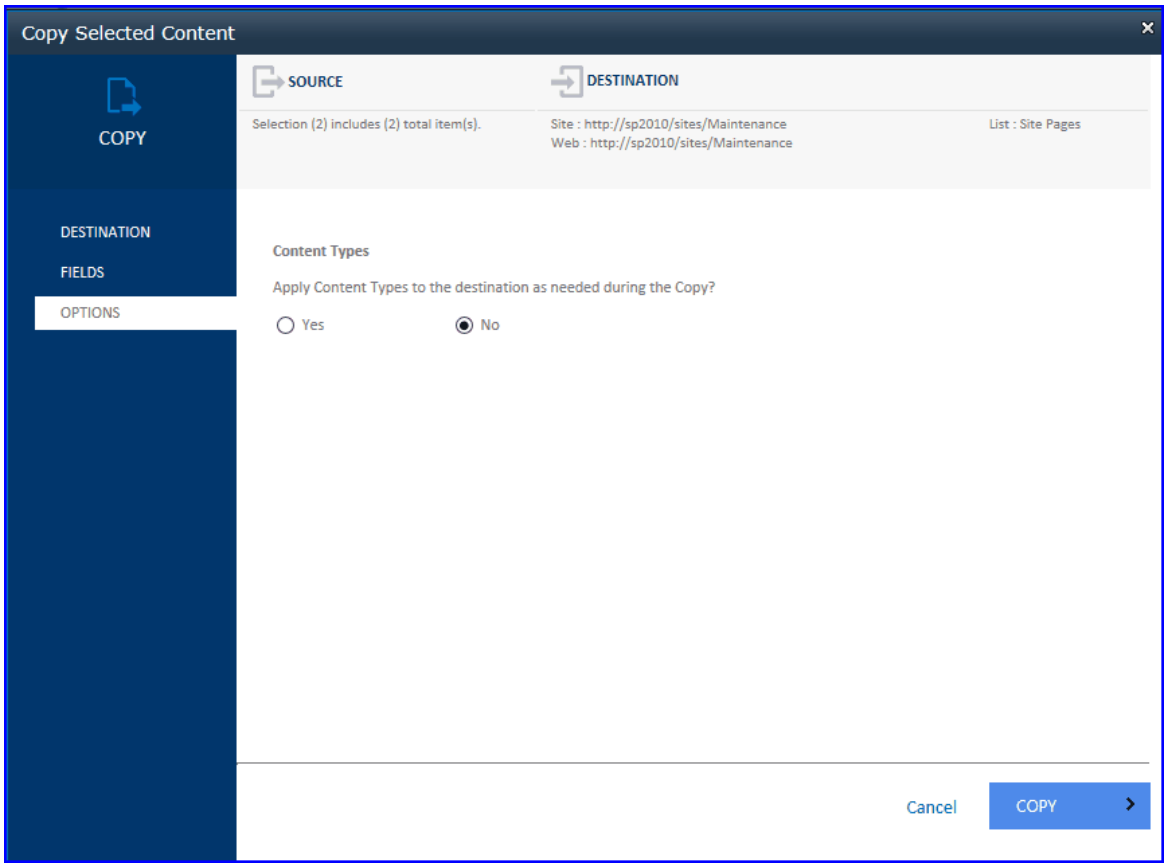
To clear a field and go back to the non-editing mode, click the Undo button to the right of the field.

To map fields, click the Map button to the far right of the field. From the drop down, select the source column name that you would like mapped to destination field on the left.

Destination fields are on the left, and Source fields are in the dropdowns.

For example, in the screenshot above, Title is the name of the field on the destination. You can select from the dropdown, one of the source columns you would like mapped to the Title column on the destination.

5. Click the Options tab to select whether the content type should be applied to the destination.



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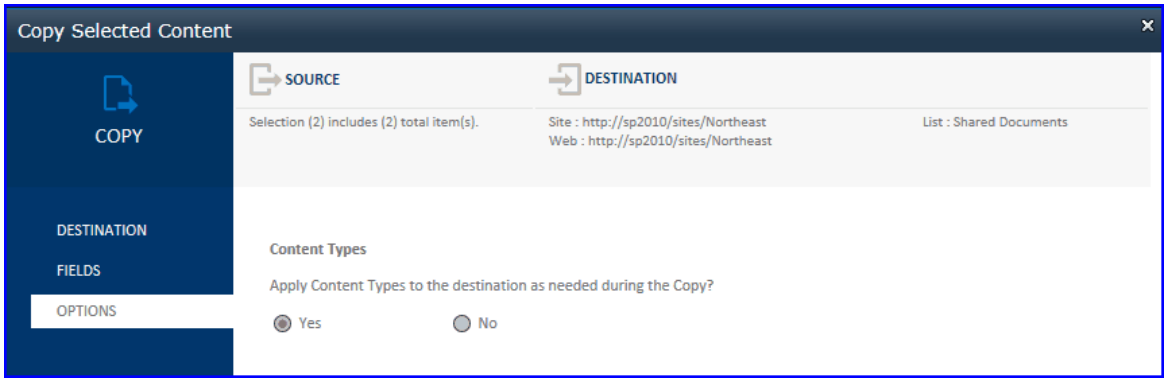
Apply Content Types may be greyed out if you've chosen to Preserve Existing on the Fields tab, and that requires that the content type be applied to the destination.



6. Click COPY at the bottom of the page to complete the copy.

Move Items

Move Items allows content to be moved to another part of the SharePoint farm. When items are moved, there is the option to make custom content types available in the destination as well.

Moving content can be used for situations like the merging of departments or websites. The team leaders should be careful about what content types are preserved and/or created, and how this will impact content that is moved into the new destination.

Moving will remove the content from the source. If users will still access this content on the source location, consider using Copy instead of Move.

Moving content is a two-step process. A copy is created in the new destination, and the original is deleted.

Content that is checked out or in a workflow cannot be moved.

For moving large amounts of content (>100 items or whole Site Collections), consider using the Metalogix Content Matrix Console.

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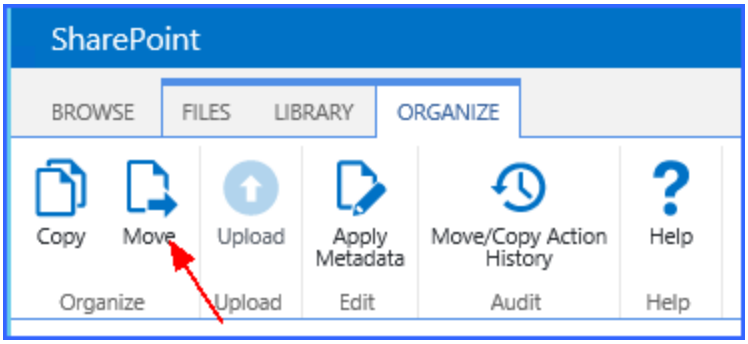
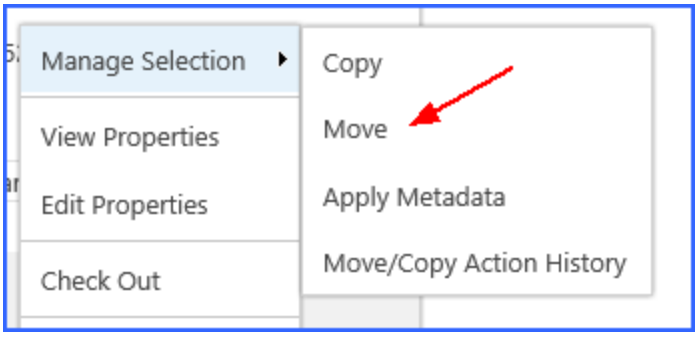
1. Navigate to the Library where the content is, and select the folders and/or items to be moved. Click the Content Matrix tab at the top of the page. Click the **Move** button.



The context menu can also be used, even with multiple items selected, as long as the context menu used is from one of the selected items.



2. A new window opens that may display the structure of the SharePoint farm. If the entire farm isn't visible, it is because the Administrator has restricted the list to the current site collection, to allow the page to load faster. Enter the URL of the destination site collection and click Add, if needed.

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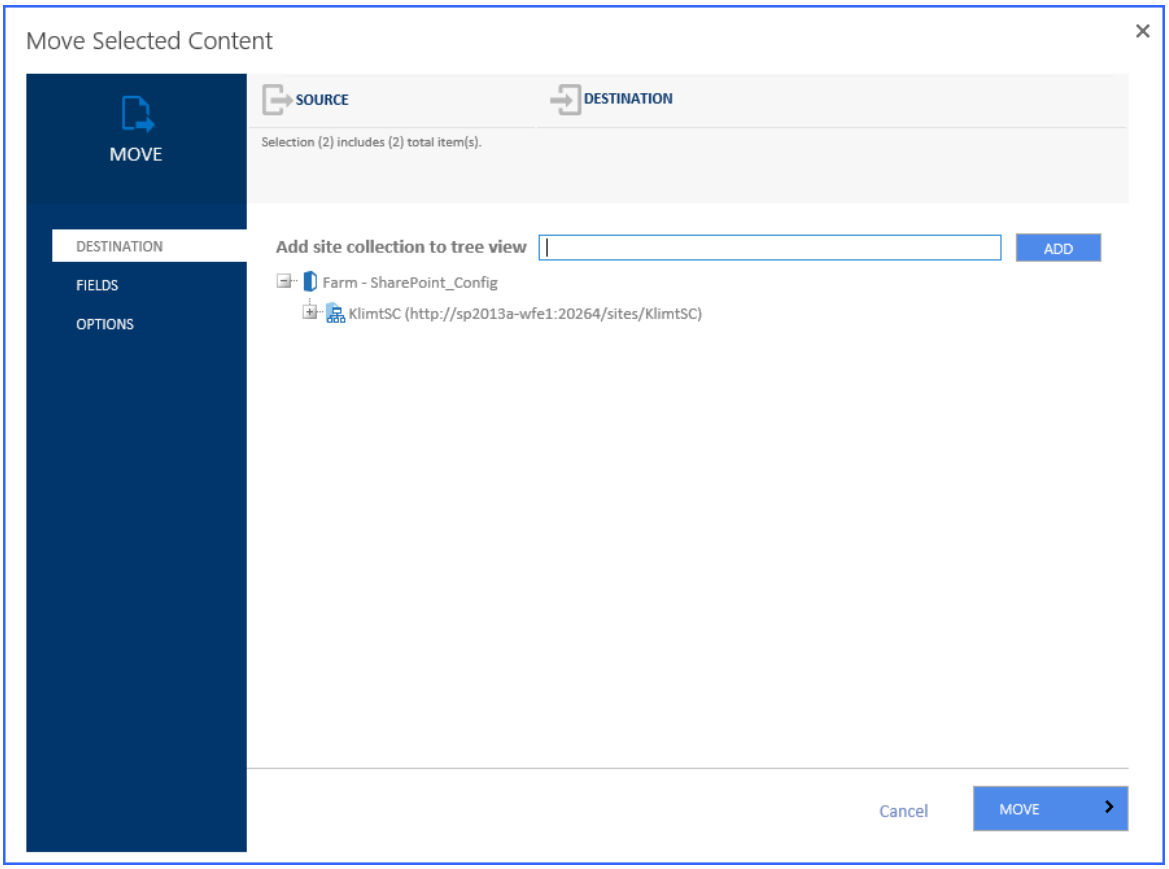

This shows the screen if the site collection list hasn't been restricted. The destinations available reflect the security of the currently logged in user. Note that the last selected destination is displayed when this window is opened. Navigate to the desired list or library (destination).

Formatting has been applied to show which destinations match exactly in columns (**bold**), which are allowable but with different columns (*italics*) and the greyed out ones are not available.

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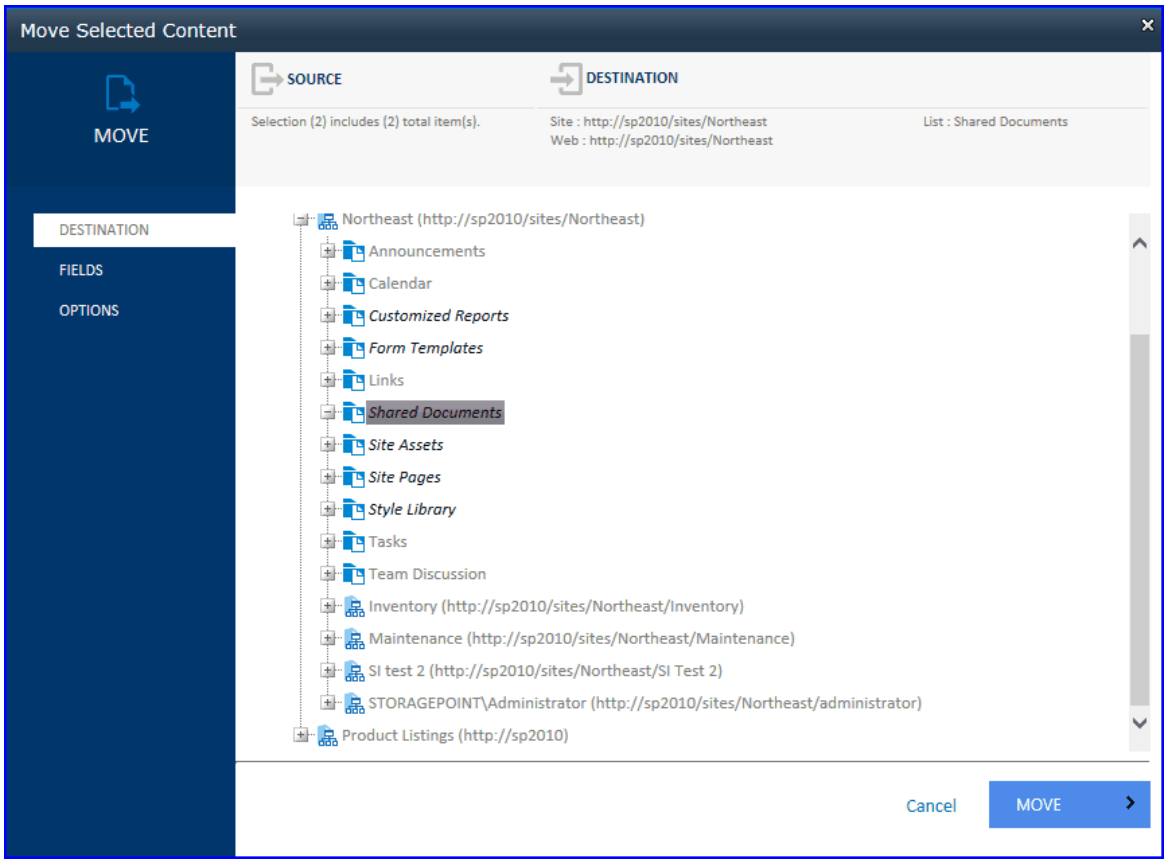
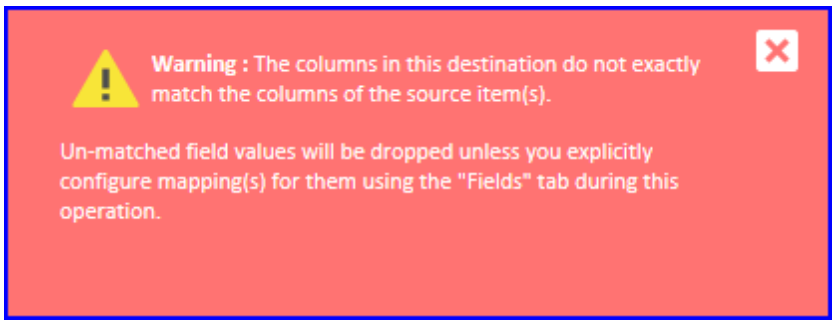


3. If a destination is selected that does not have the custom fields that the selected content uses (*italicized*), there will be a warning that data could be lost if not mapped.



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4. Click the Fields tab to select a content type and edit the metadata for the files being moved. Using the Destination Content Type dropdown field, select….
    - (PRESERVE EXISTING) to maintain the existing content type of the items being moved, or
    - (DESTINATION DEFAULT) for these items to be moved using the default content type of the destination, or
    - (OTHER) a new content type from the list of available content types in the destination.

The selection will determine which fields become available for editing or mapping.

NOTE: You will not be able to select (Preserve Existing) if the content type doesn't currently exist on the destination, and you do not have enough access to apply content types in the destination. The content will use the default content type.

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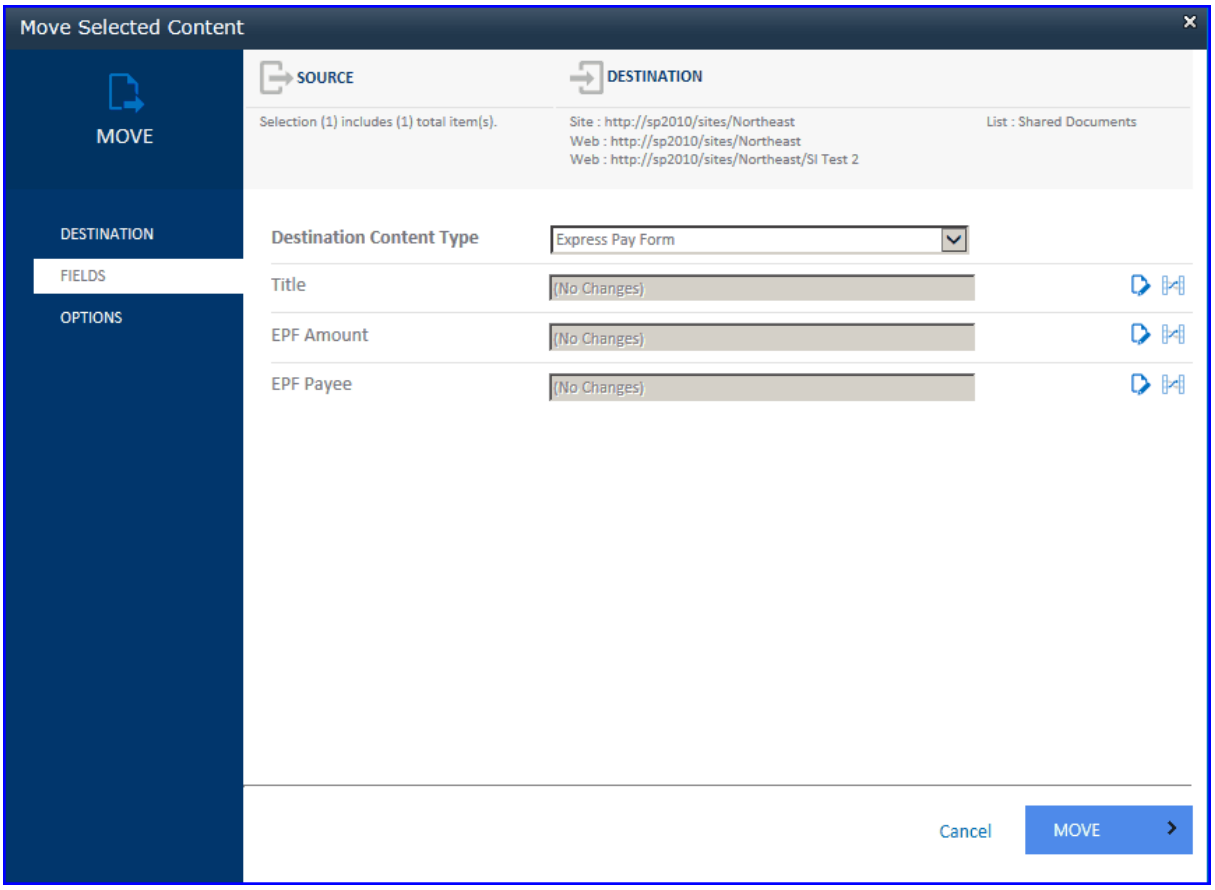
Note that the values entered will apply to all files being moved.



To enter the data for the fields, click the Edit button to the right of the field.

To clear a field and go back to the non-editing mode, click the Undo button to the right of the field.

To map fields, click the Map button to the far right of the field. From the drop down, select the column name that you would like mapped to field name on the left.

Note that if more than one content type was selected to be moved, it is not possible to apply changes to the data fields without first selecting a Destination content Type other than (Preserve Existing).

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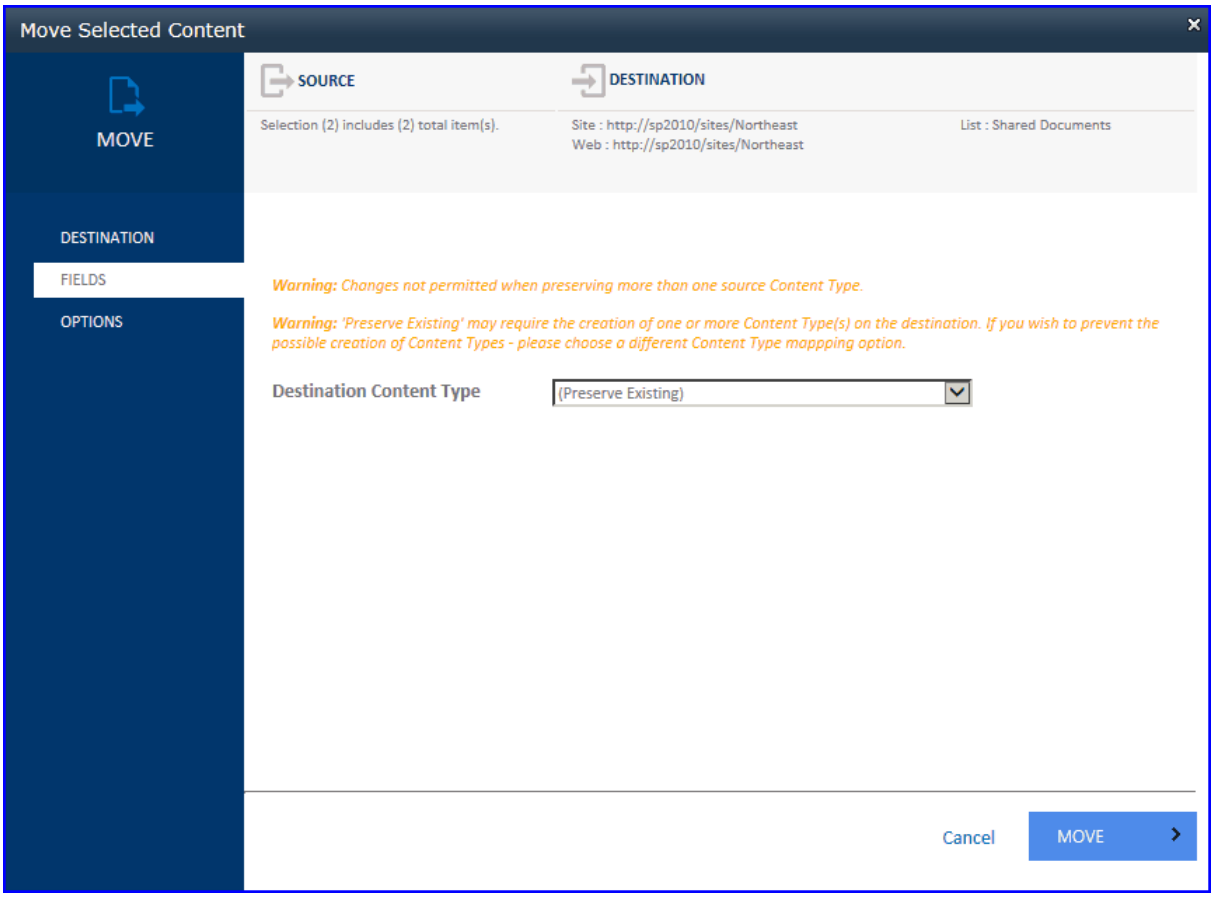

Destination fields are on the left, and Source fields are in the dropdowns.

Mapping Fields allows the reuse of existing metadata in corresponding fields of the new content type, if one is selected. For example, the source content type has a dropdown field labeled 'Iteration'. The destination content type has a field labeled 'Step'. You could choose to maintain the content type, and keep 'Iteration' or you could use the destination content type and map the metadata from 'Iteration' into the field called 'Step'. In the first case you would select (Preserve Existing) from the Destination Content Type dropdown, and no mapping is needed. In the second scenario, you would select the content type that is used on the destination from the Destination Content type dropdown, and select Iteration from the dropdown to the right of Step.

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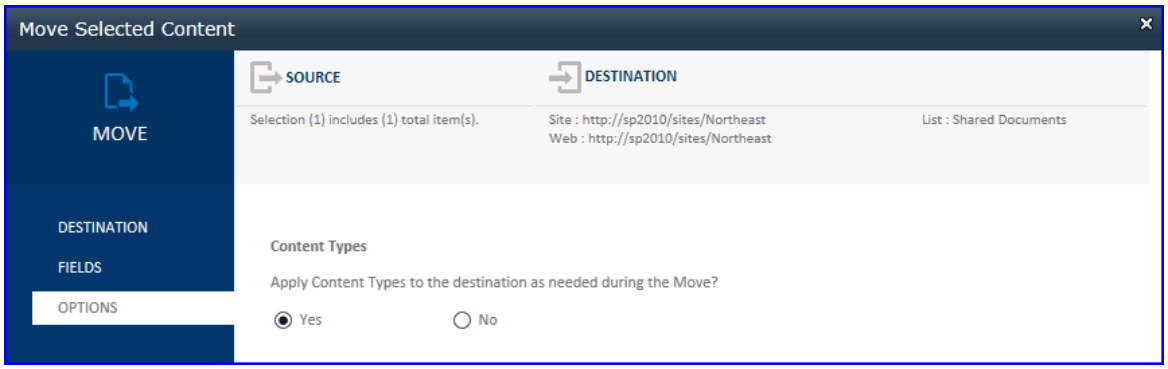
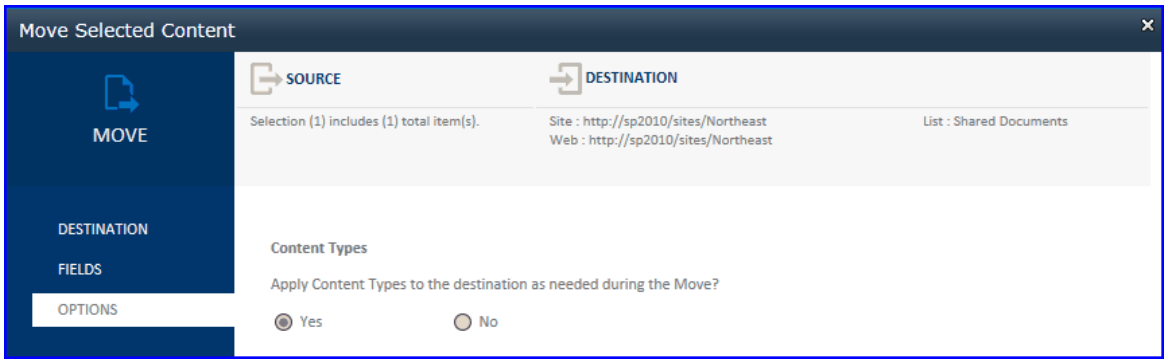
5. Click the Options tab to select whether to apply the content type to the destination.



Apply Content Types may be greyed out if you've chosen to Preserve Existing on the Fields tab, and that requires that the content type be applied to the destination.



6. Click MOVE at the bottom of the page to complete the Move.

Apply Metadata to Items

Applying Metadata to (formerly known as Classifying) items allows the user to select a new content type and edit metadata that corresponds with the new content type.

For example, there are multiple types of documents in your project folder from emails, to project plans. Your team leader has created content types to better manage these. Apply Metadata allows the option of applying these new content types to existing data. You can also map current metadata to custom fields that the team leader has added for each new

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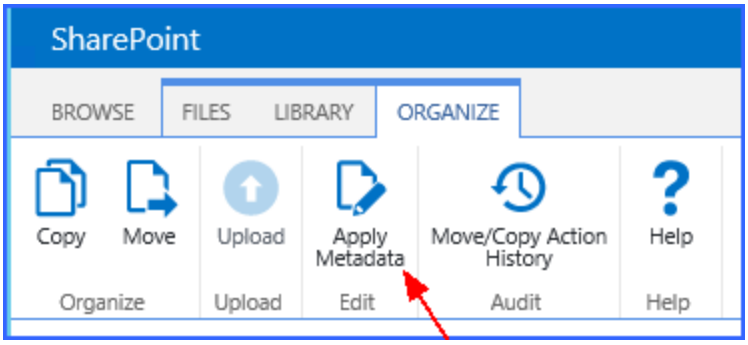
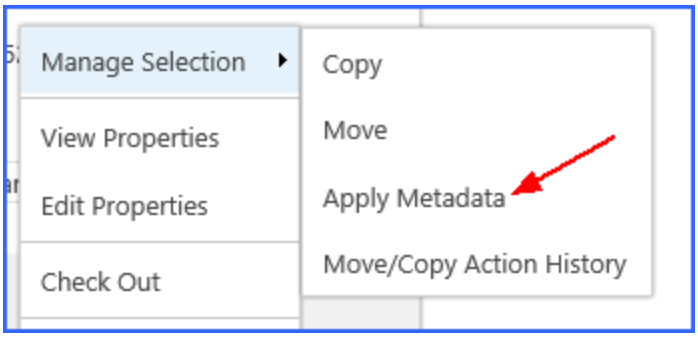
content type so that reentering the information is not necessary, and no valuable information is lost.

1. Navigate to the library where the content is and select the folders and/or items. Click the Content Matrix tab at the top of the page. Click the **Apply Metadata** button.



The context menu can also be used, even with multiple items selected, as long as the context menu used is from one of the selected items.



2. A new window opens. If items of more than one content type were selected, there will be an option to process each content type incrementally. Click the Process Items &

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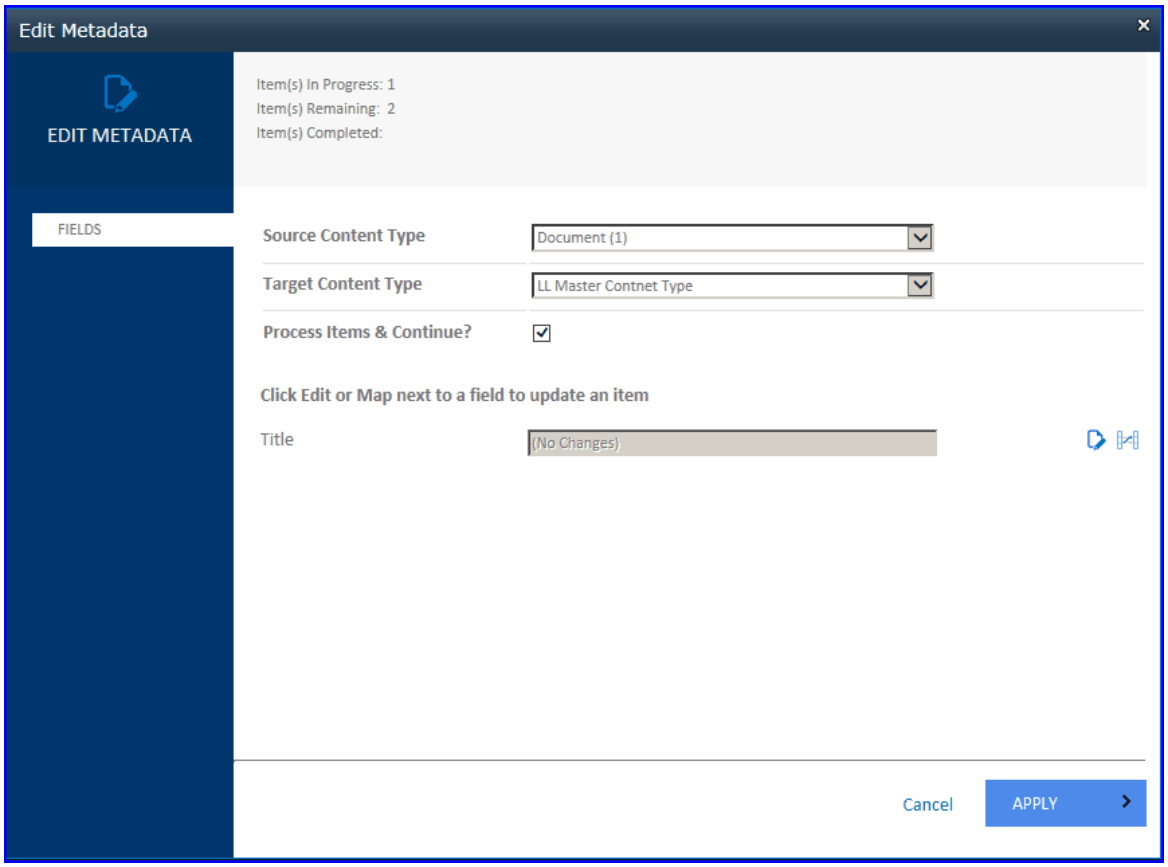
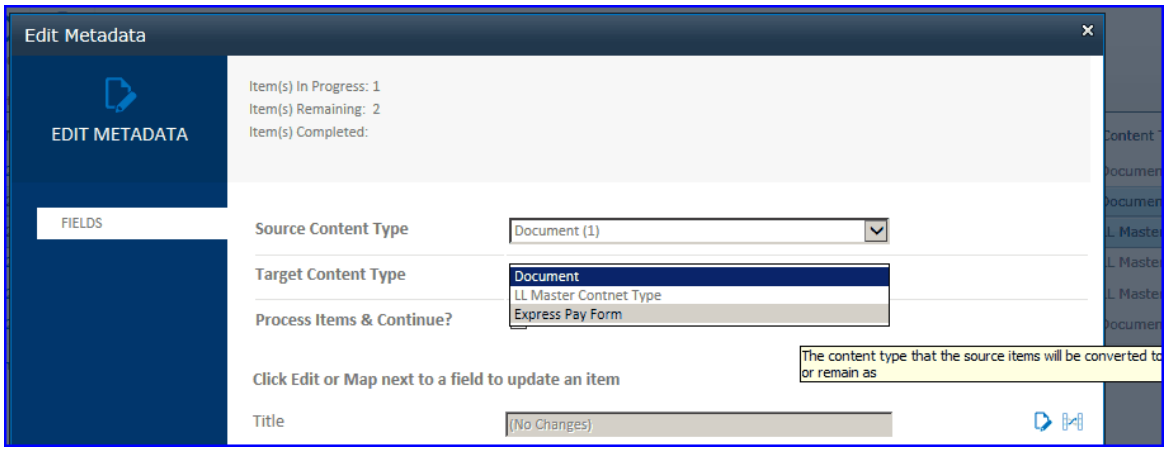
Continue checkbox and enter the changes to the first content type group.



NOTE: The number beside the Source Content Type represents the number of items selected. The window in the upper right corner will show the progress of the items selected.

3. Select the Target Content Type.



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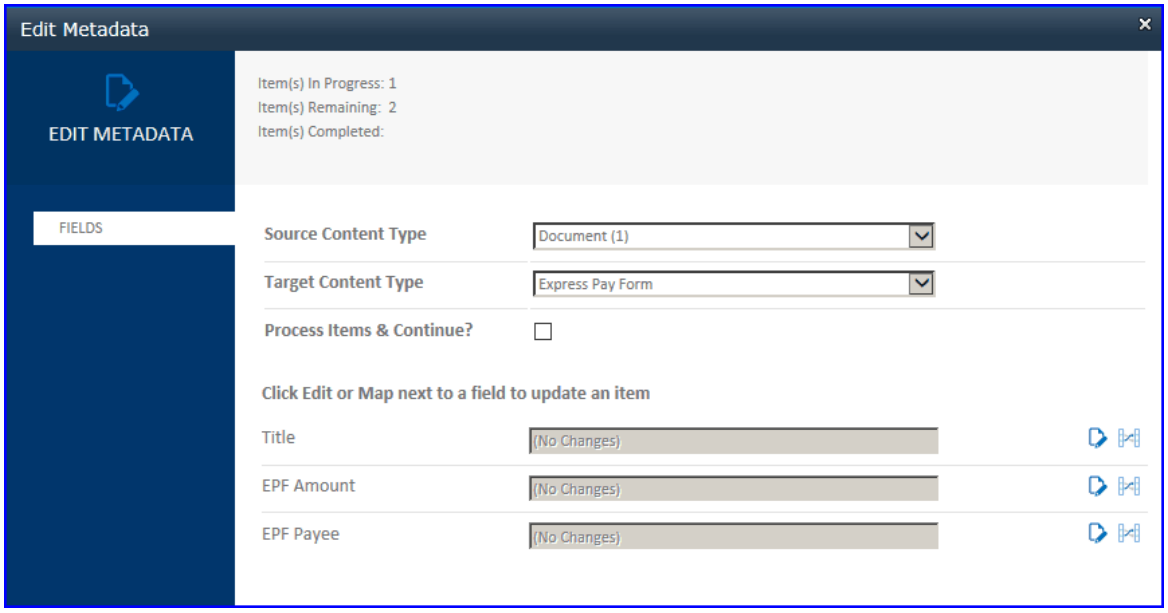
4. The metadata fields will update according to the content type selected. It is optional to edit these.



To enter the data for the fields, click the Edit button to the right of the field.

To clear a field and go back to the non-editing mode, click the Undo button to the right of the field.

To map fields, click the Map button to the far right of the field. From the drop down, select the column name that you would like mapped to field name on the left.

For example, in the screenshot above, Title is the name of the field on your destination. You can select from the dropdown, one of the source fields you would like mapped to the field column on the destination.

Mapping fields is a way to preserve current metadata when utilizing a new content type for the document.

5. Click APPLY when all edits are completed.

6. If more than one content type was selected, repeat steps 2-4 as necessary.

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Move-Copy Action History

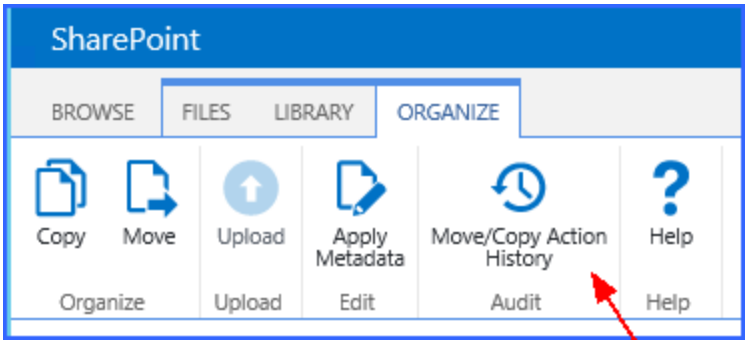
You will find a link on the ribbon to display the Content Matrix history for an item.

The History shows how Content Matrix has been used to change the item. Each time an item has metadata applied, it will show in the history for that item.

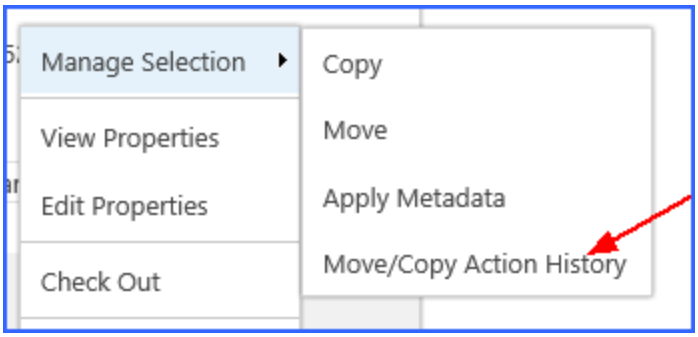
The history is managed per SharePoint item. This means that if an item is copied, the copy is new, and therefore the history for that item will start after the copy. The source item will record that the copy was performed.

1. To view the history, select the item(s).

   Click the Move/Copy Action History button.



   The context menu can also be used, even with multiple items selected, as long as the context menu used is from one of the selected items.



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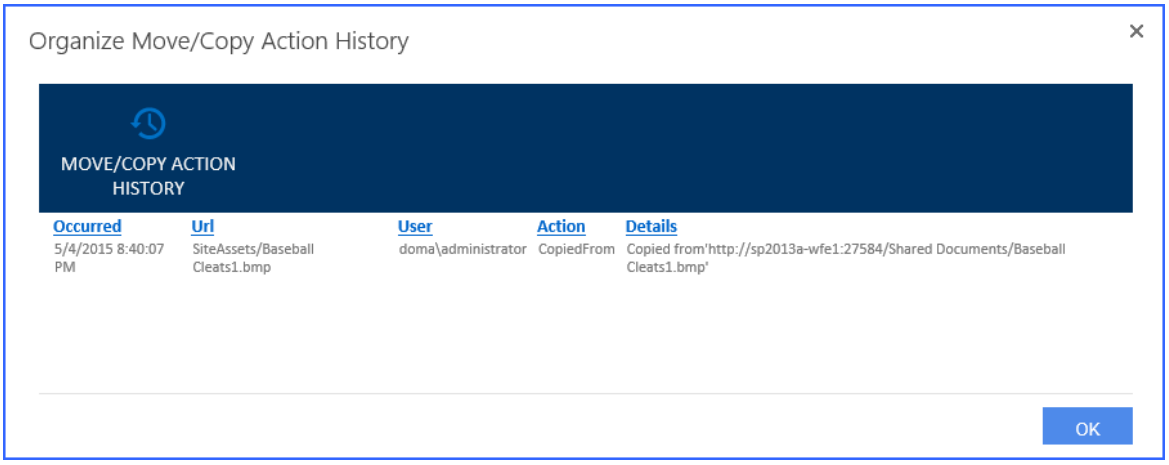
2. A new window opens that will show when and how an item was managed with Content Matrix. If you selected multiple items, you will see all the history in the same window.



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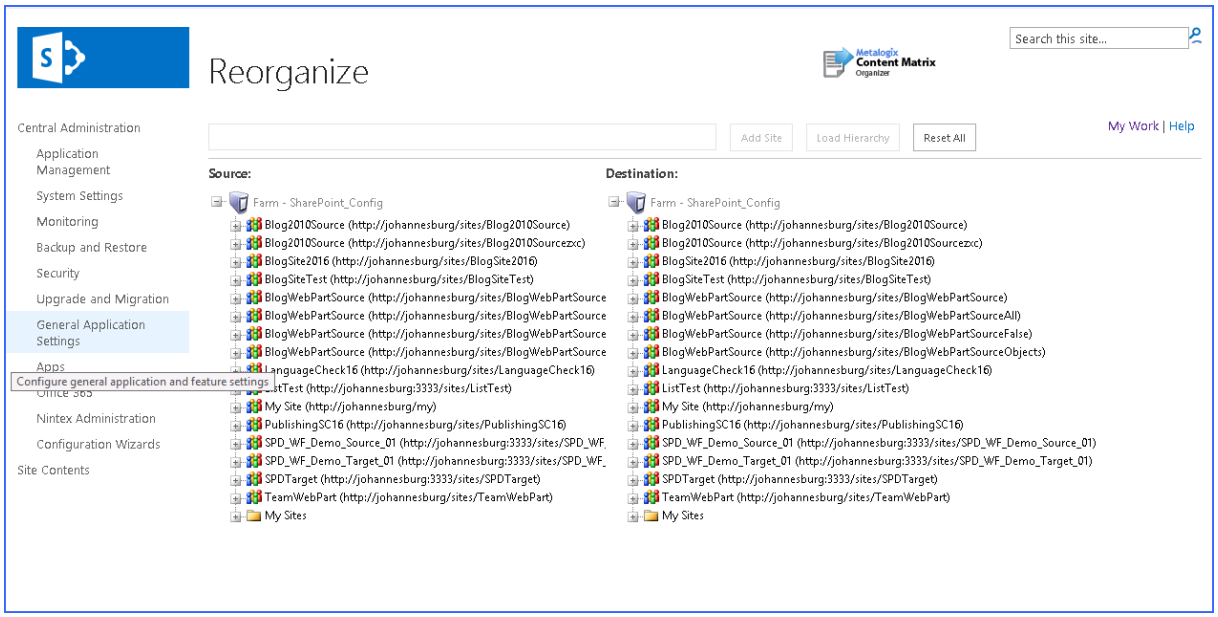
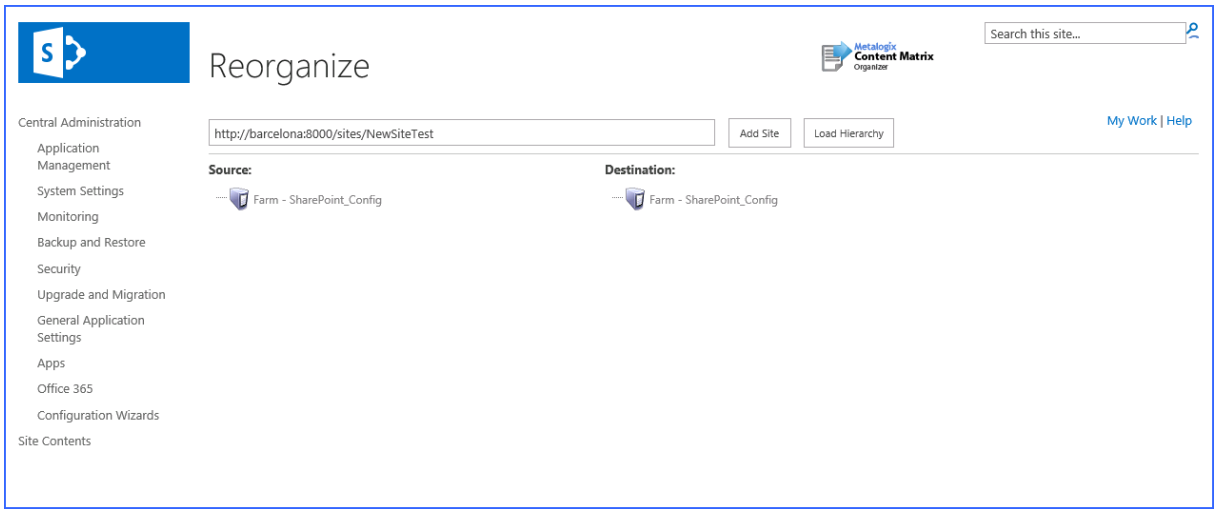
To load the entire farm hierarchy, click the Load Hierarchy button. A prompt will be displayed to confirm this action. Expand the selections until the content that is to be moved or copied is found.



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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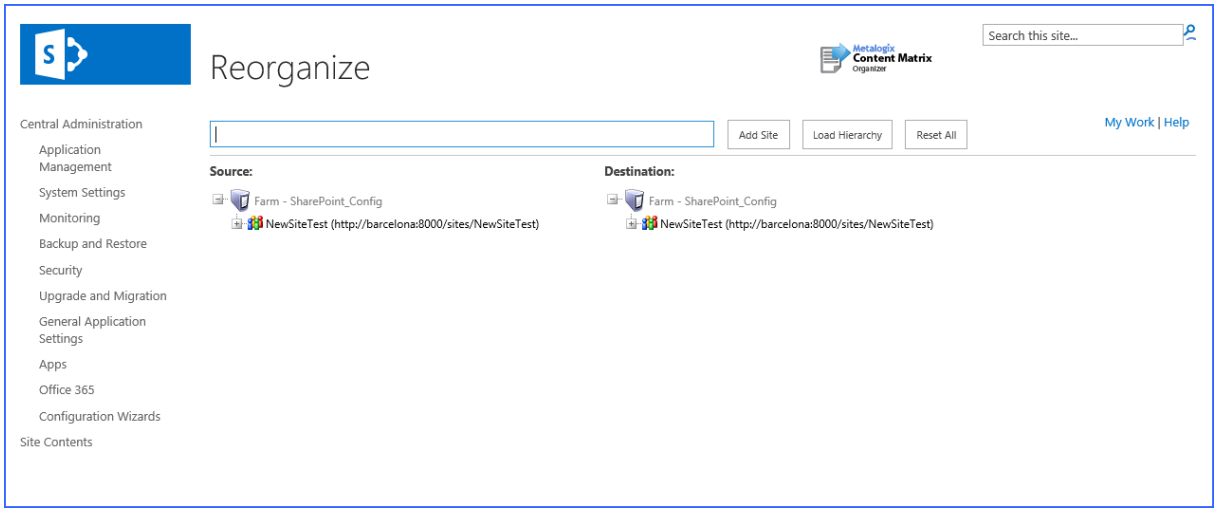

Click Reset All to clear the screen.

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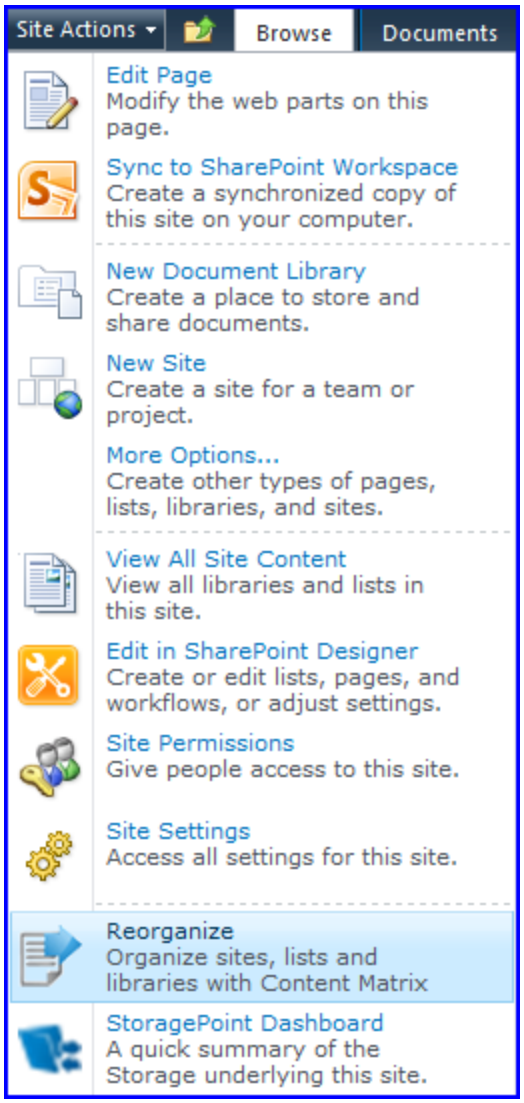
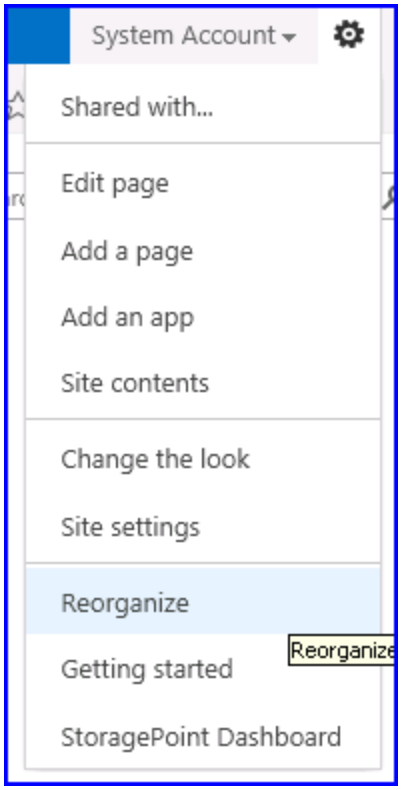
Access

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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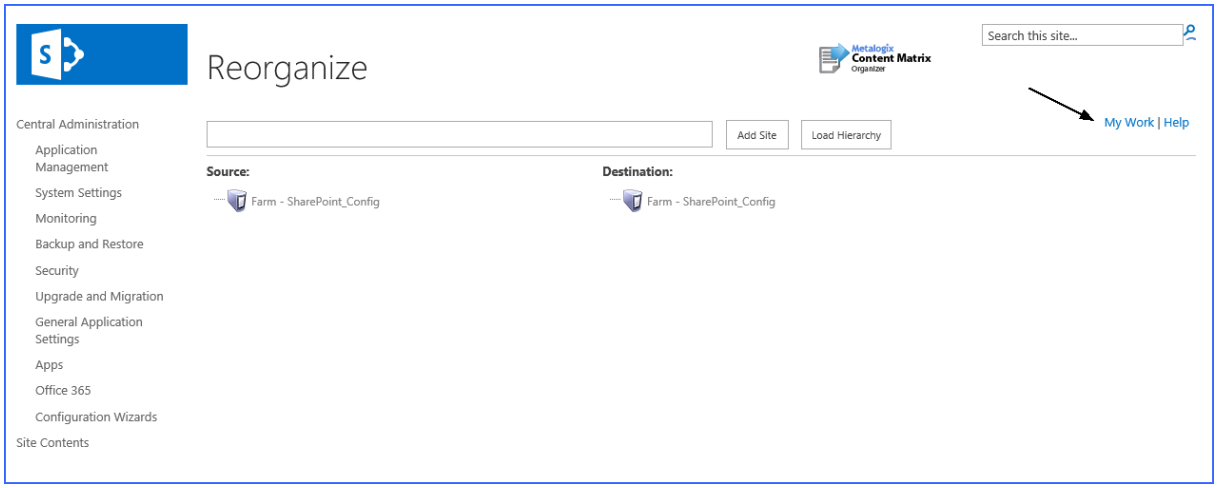

The **Help** link on the Reorganize page opens the User Guide.

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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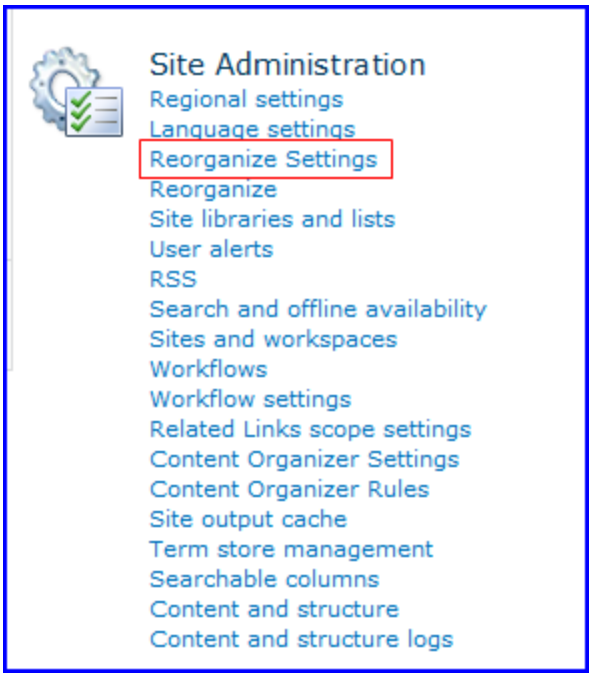

Grant Site Owners Access to Reorganize Feature

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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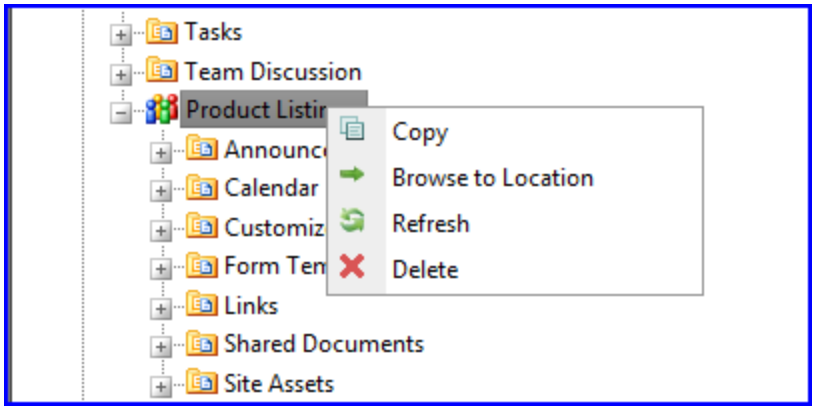
Browse to Location

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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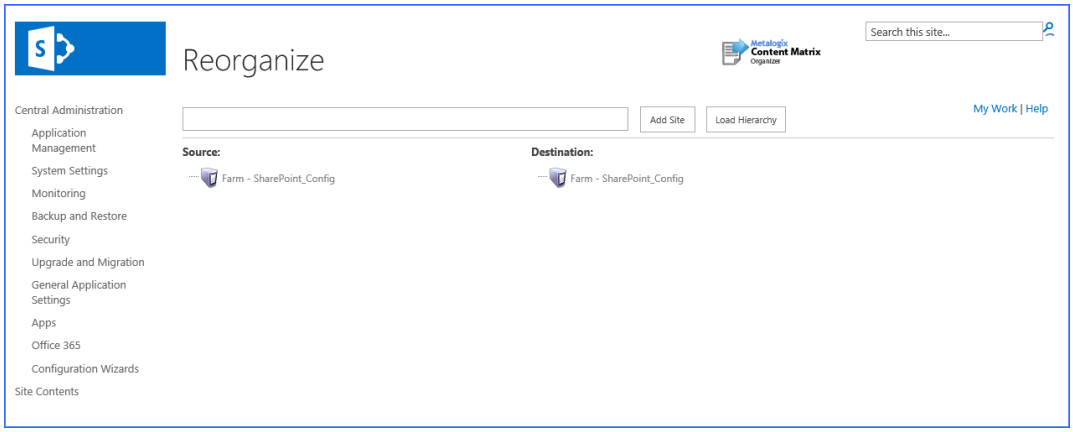
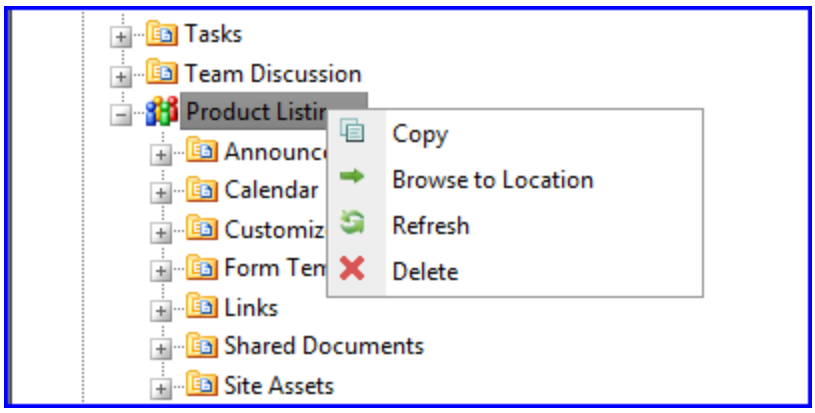
Reorganize - Copy

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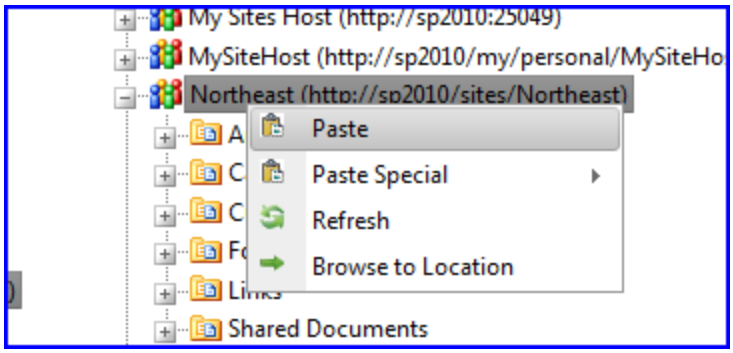
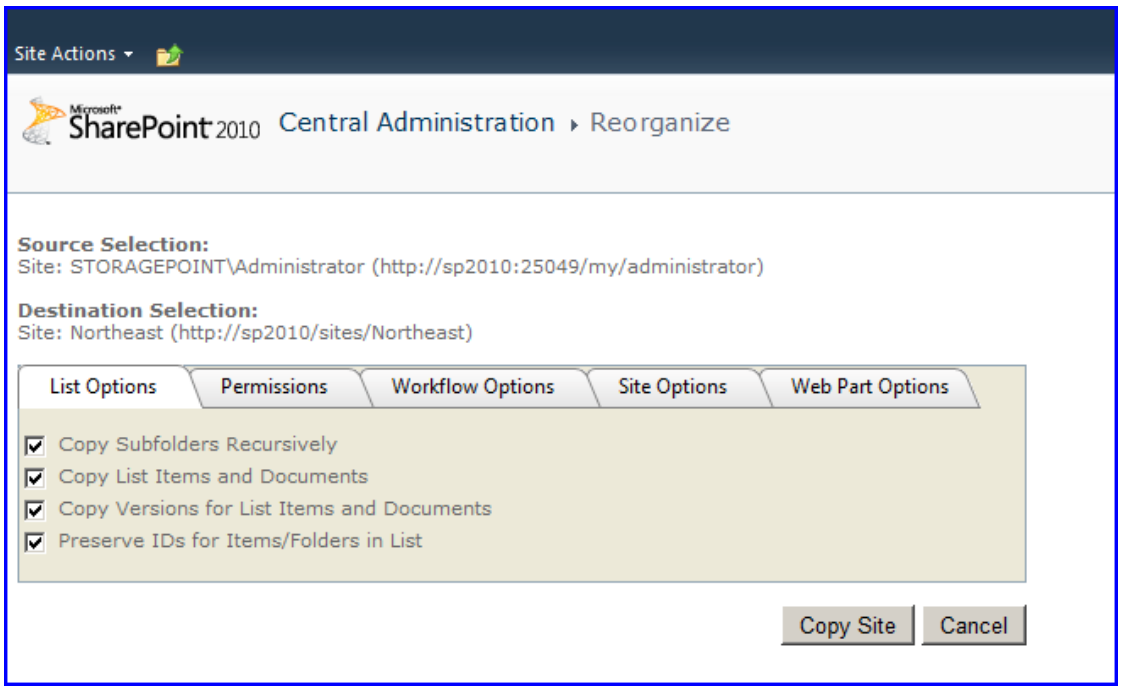
5. Right click on the destination object, and select **Paste**.



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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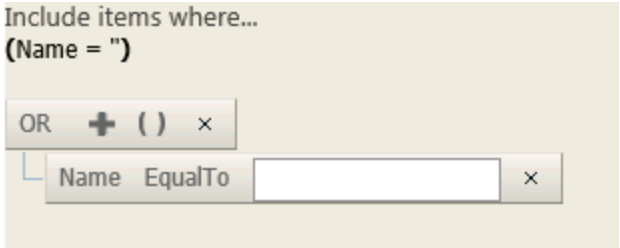
• Preserve IDs for Items/Folders in list	✓	When selected, this option will preserve IDs for any folders and items in SharePoint Lists, so each item and folder will have the same ID on the target as the item does on the source. If this option is not selected then SharePoint will assign an item ID automatically.
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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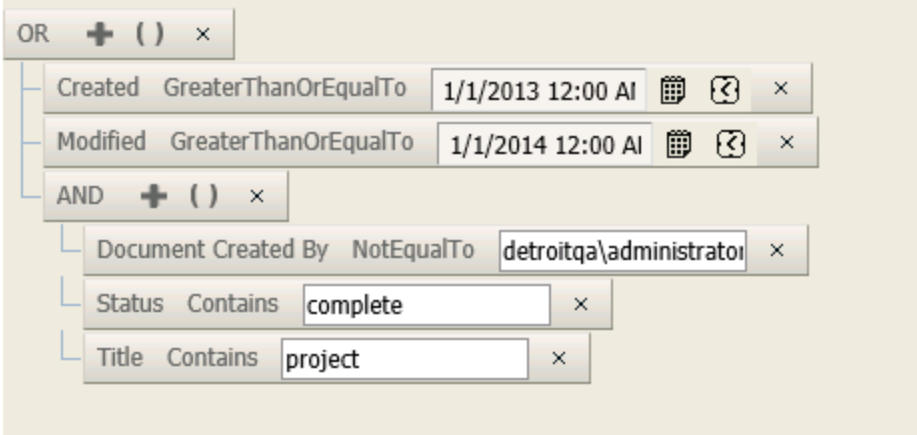
		(for example, "Created") then users can select the desired date/time value from a calendar view. If a field was selected that can only have number values (for example, "ItemID"), then only number values can be entered in the **Value** column. *Default = Blank*

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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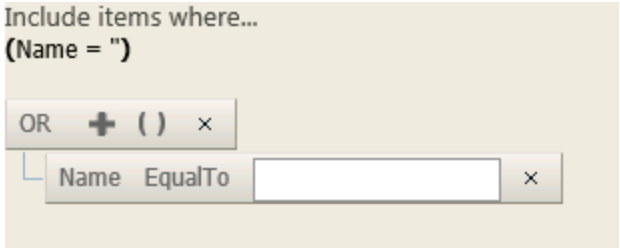
Filtering  		
• 		Use the + (plus sign) to add conditions to the filter or group of filters. Use the () (parenthesis) button to add a filter group. Use the x to delete a condition or group.
• Grouping		Use the parenthesis to create groups of filters. This allows for multiple conditions to be analyzed, 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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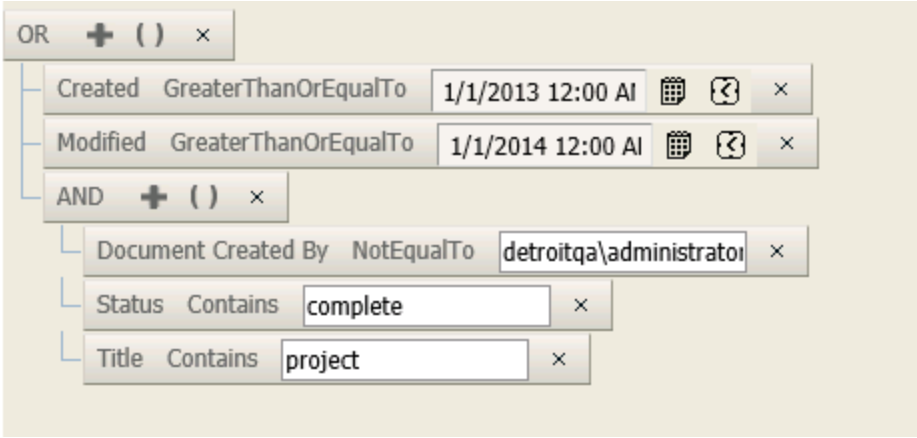
		can only have number values (for example, "ItemID"), then only number values can be entered in the **Value** column. *Default = Blank*

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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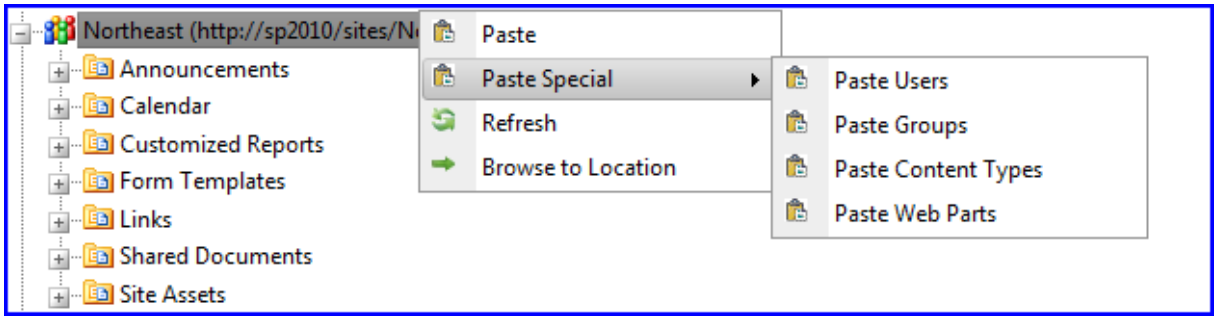
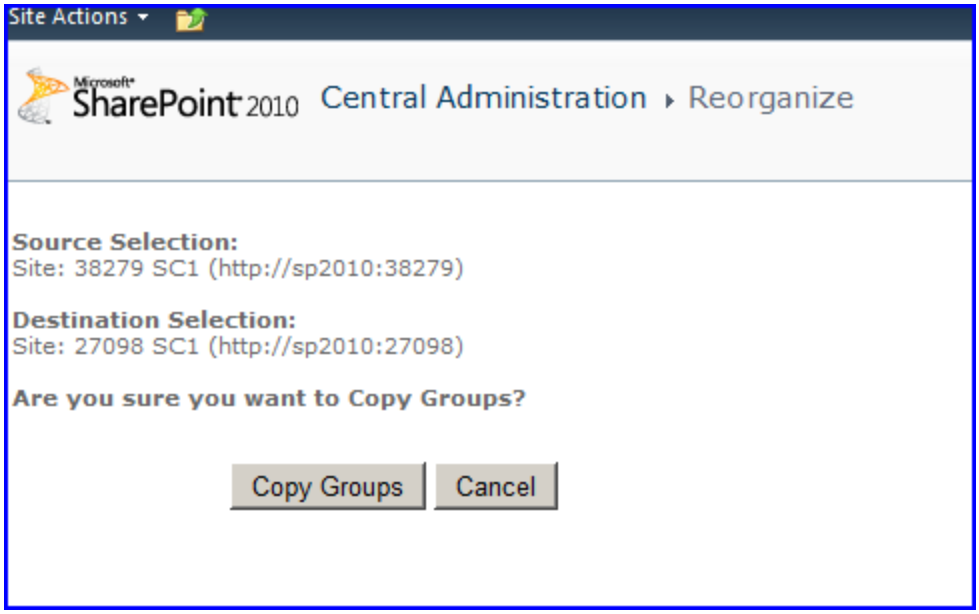
Reorganize - Paste Special

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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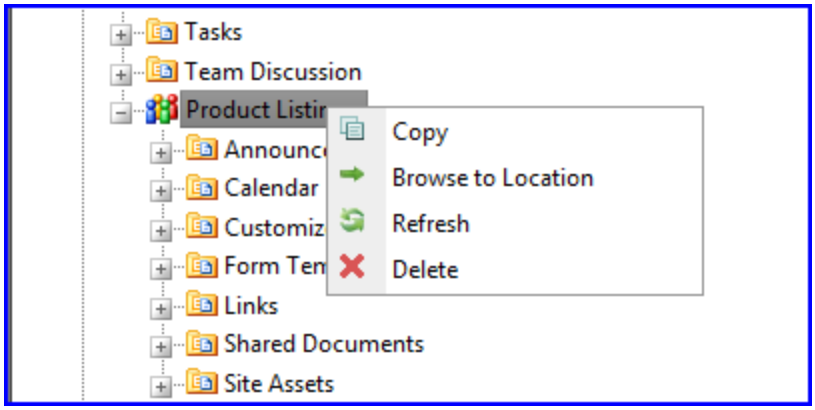
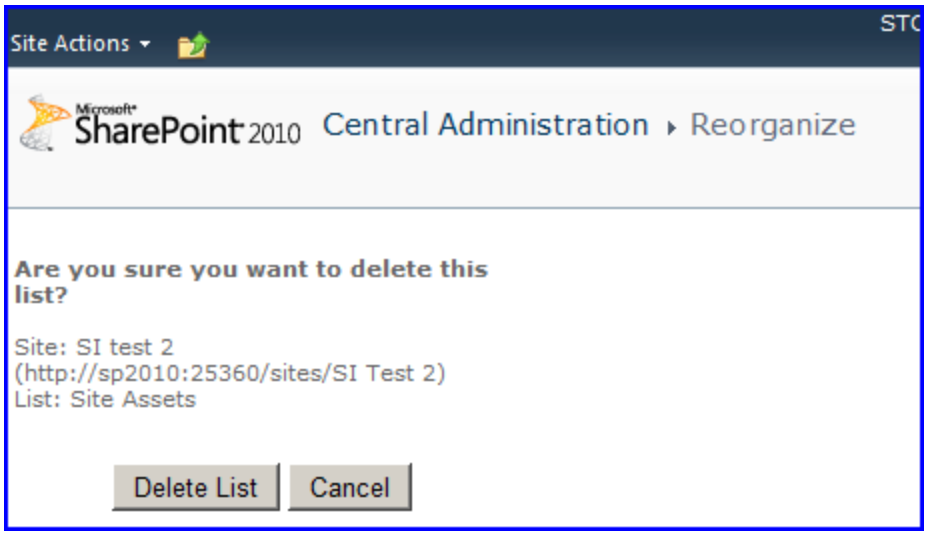
Reorganize - Delete

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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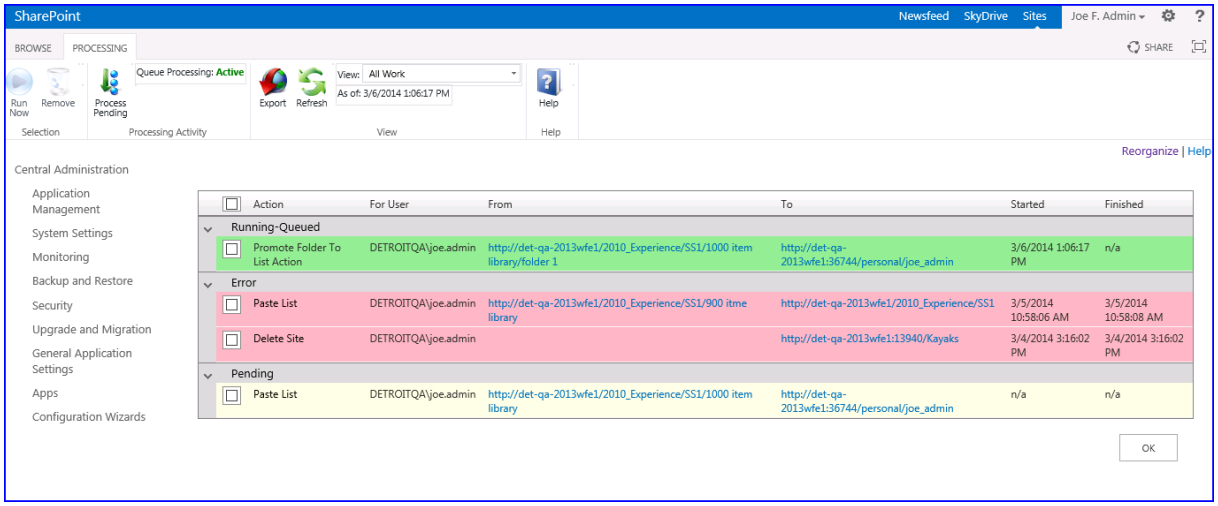
Processing Page

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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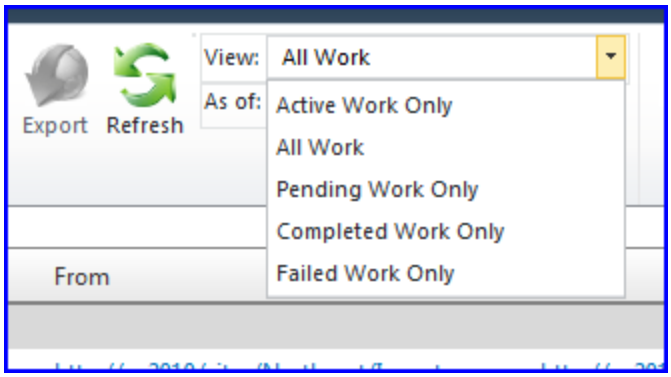
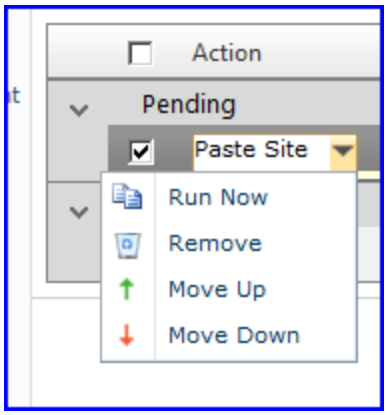


If the timer job was set to Continuous in General Settings, the jobs will be picked up automatically. If it is scheduled, it will be completed the next time that the timer job runs. The Farm Administrator has the option to run the request immediately.
To run a Pending job immediately, you can click the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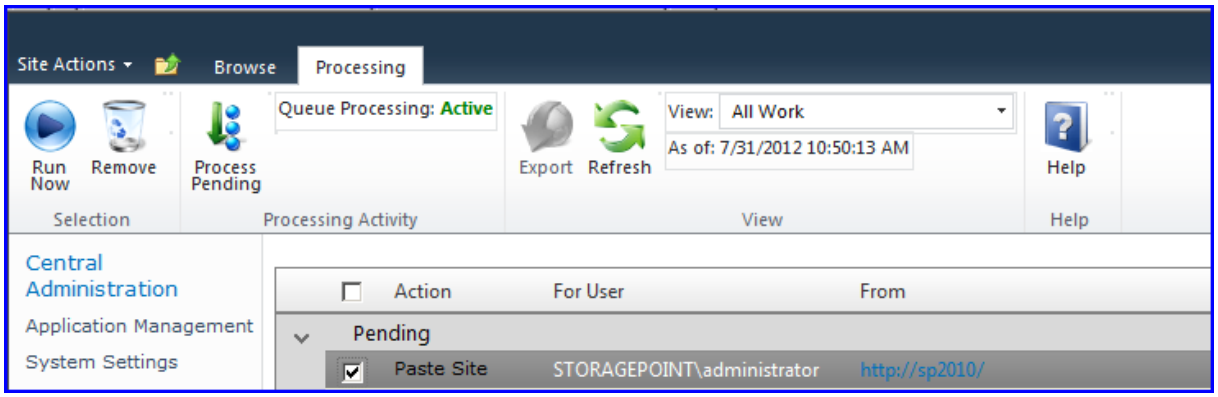
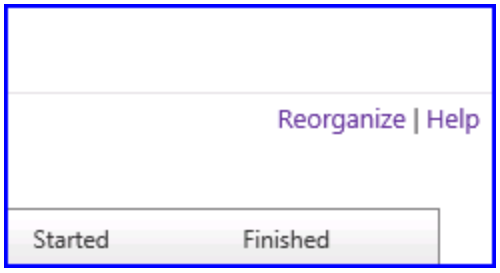


NOTE: The Process Pending and Run Now buttons will not be available if the Processing page was accessed from the Site Actions Menu of a Site Collection. They are only visible on the farm-wide Processing page that shows all Content Matrix Reorganize jobs.

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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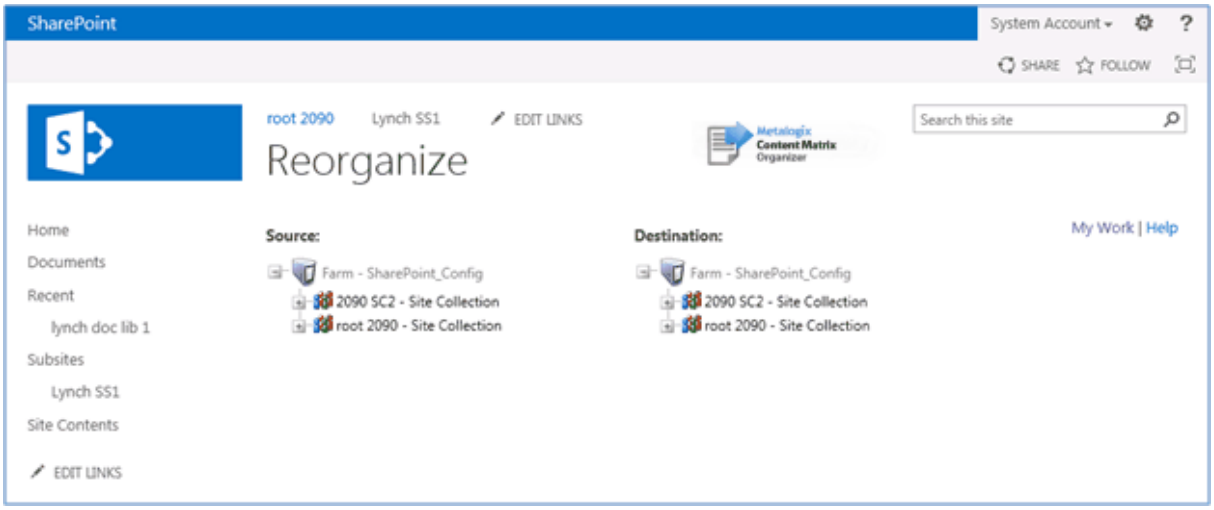
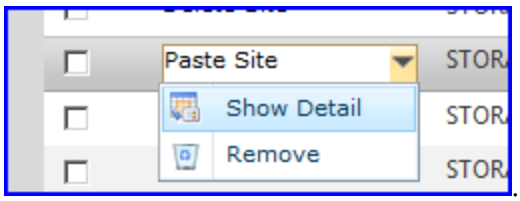


Job Summaries

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



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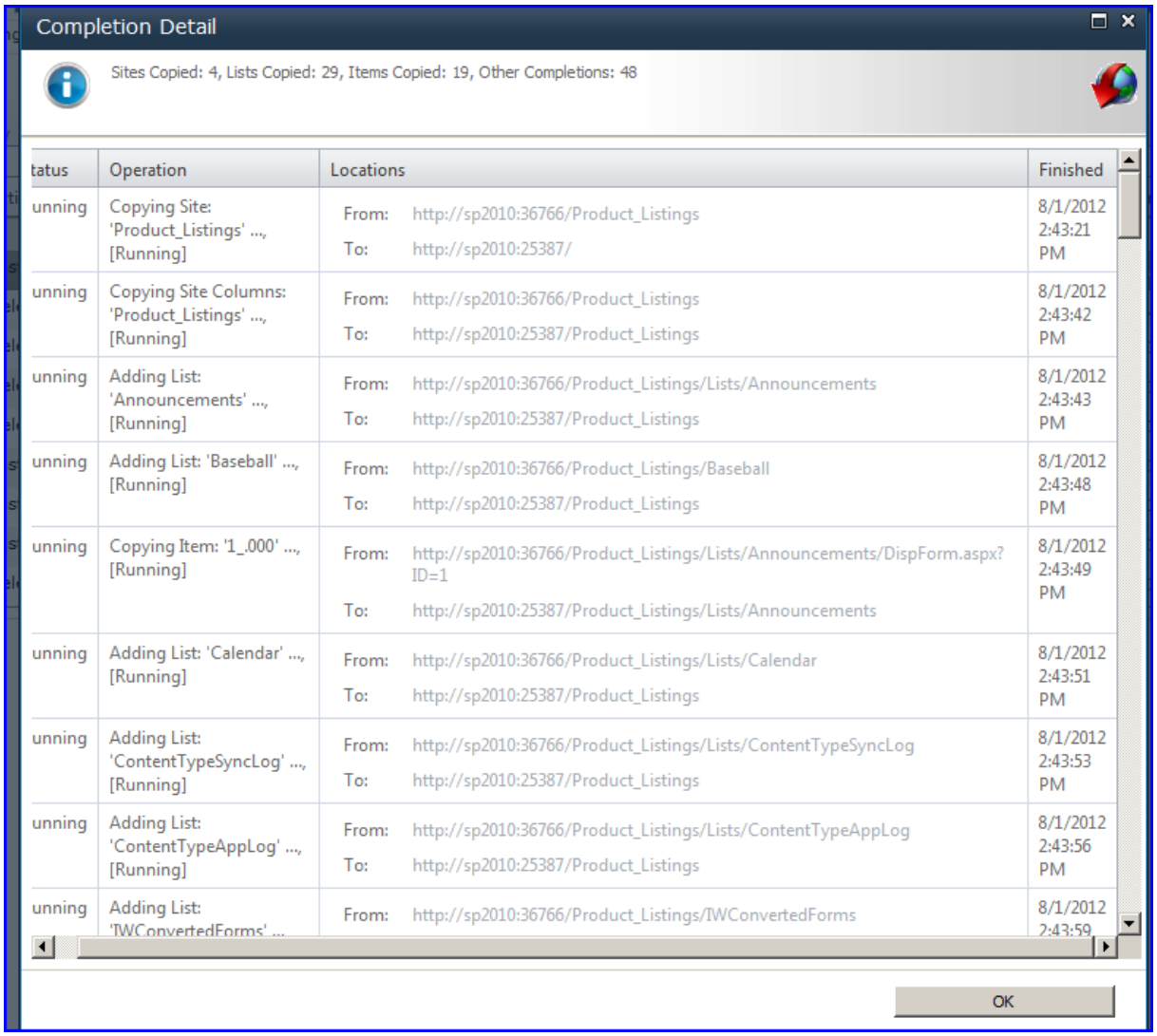

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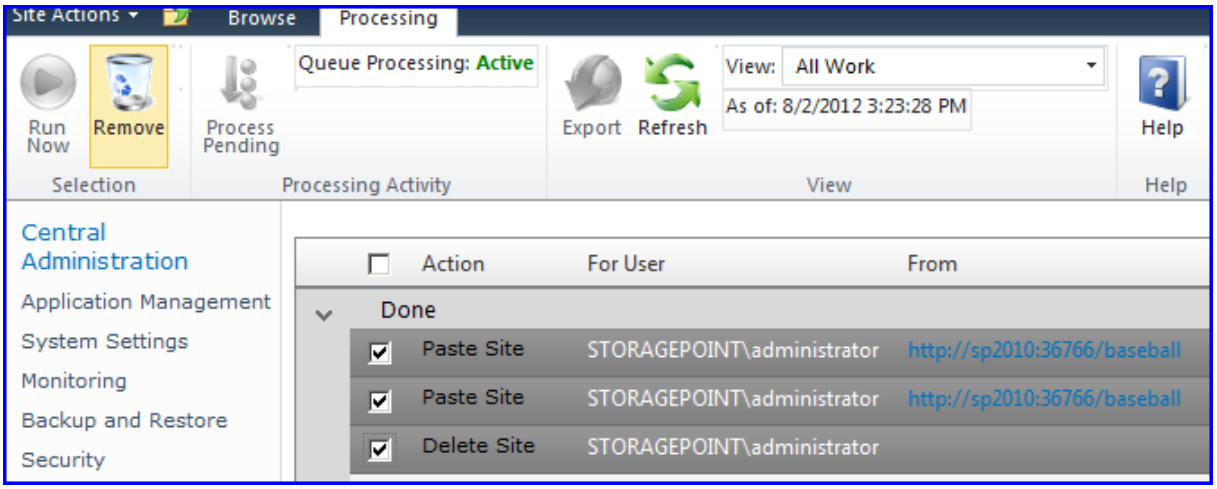
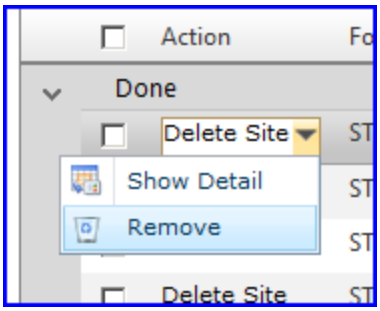
Removing Job Summaries

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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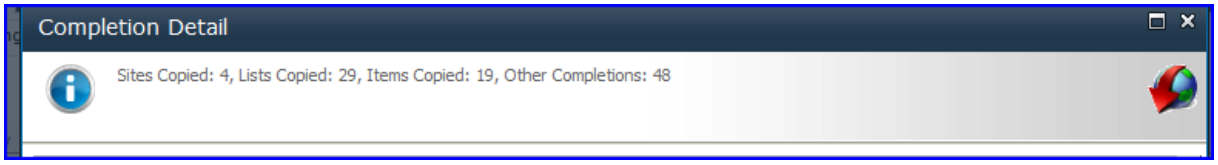
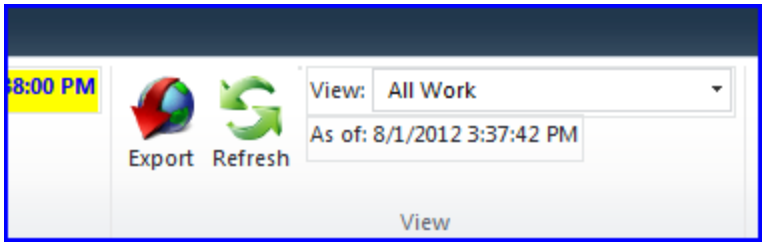
Exporting Job Summaries

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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