



# **Content Matrix**

## Evaluation Guide

February 28, 2018

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# Contents

<b>Introduction .....</b>	<b>4</b>
<b>Prerequisites .....</b>	<b>5</b>
<b>Connecting to your SharePoint Source Environment .....</b>	<b>6</b>
Source Connection Confirmation .....	7
<b>Connecting to your SharePoint Target Environment .....</b>	<b>9</b>
Target Connection Confirmation .....	10
<b>Browsing and Previewing Lists, Folders and Documents .....</b>	<b>11</b>
Browsing and Previewing Confirmation .....	13
<b>Creating Sites, Lists, Libraries and Folder Destinations .....</b>	<b>14</b>
Creating a Site .....	14
Site Creation Confirmation .....	16
Creating a Document Library .....	16
Document Library Creation Confirmation .....	18
Creating a Folder .....	19
Folder Creation Confirmation .....	20
<b>Simplified vs. Advanced Mode .....</b>	<b>21</b>
<b>Copying and Pasting a Site or Site Collection .....</b>	<b>24</b>
Site Copy and Paste Confirmation .....	27
<b>Using Incremental Copy to Migrate Changes Since Last Migration .....</b>	<b>29</b>
Incremental Copy Confirmation .....	31
<b>Reorganizing Site Content From Within SharePoint Web Applications (On-Premises Only) .....</b>	<b>32</b>
Copy a Document Library .....	32
Document Library Copy Confirmation .....	35
Deleting a Document Library .....	35
Document Library Delete Confirmation .....	36

# 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 Quick Start Guide](#). Additional Content Matrix documentation can be found on the Metalogix website, on the [Content Matrix Documentation](#) page.

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

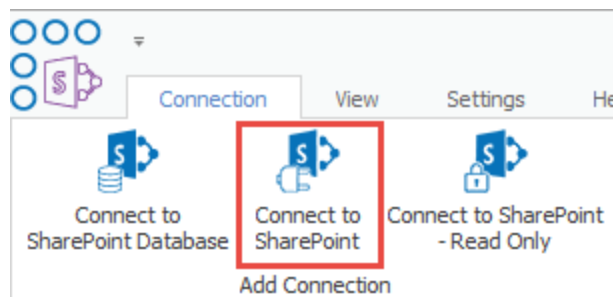
- A SharePoint environment that contains a site with sub-sites containing a library with documents.
- A source SharePoint farm and a target SharePoint farm for content migration.
- Content Matrix Console installed on the source, target or a third computer.
- Source of SharePoint 2007 or SharePoint 2010 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 Extension Web Services installed as well.
- Content Matrix Web Components installed.

# Connecting to your SharePoint Source Environment

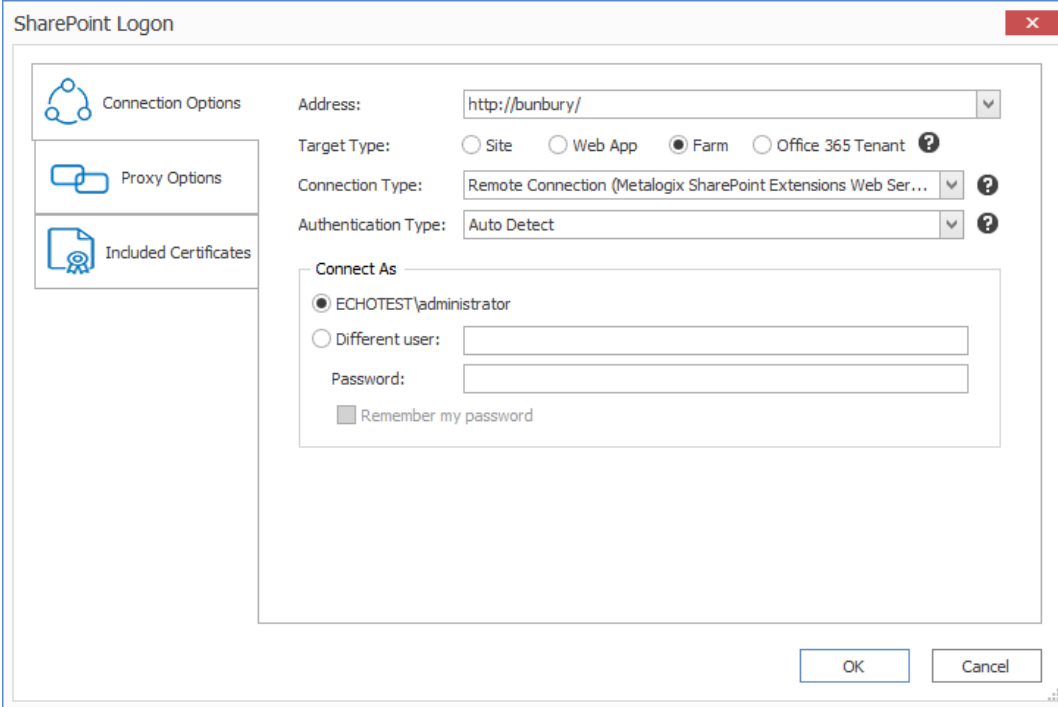
This scenario demonstrates how to create a connection to a SharePoint 2007 or 2010 farm as your source SharePoint farm.

**To connect to a SharePoint source environment:**

1. Start Content Matrix Console (SharePoint Edition).
2. From the **Connection** tab, select **Connect to SharePoint**.



3. In the **SharePoint Logon** window:
  - a) Specify the farm URL for the **Address** (example: http://bunbury).
  - b) Change **Target Type** to **Farm**.
  - c) Change the **Connection Type** to **Remote Connection (Metalogix SharePoint Web Extension Service)**.
  - d) If the current user is not the farm administrator, then under **Connect As**, enter the farm administrator's credentials into the **Different User** and **Password** fields.

The image shows a 'SharePoint Logon' dialog box with a sidebar on the left containing three icons: 'Connection Options' (a circular arrow), 'Proxy Options' (two overlapping rectangles), and 'Included Certificates' (a document with a lock). The main area is divided into several sections. The 'Address' field contains 'http://bunbury/'. The 'Target Type' section has four radio buttons: 'Site', 'Web App', 'Farm' (which is selected), and 'Office 365 Tenant'. The 'Connection Type' dropdown is set to 'Remote Connection (Metalogix SharePoint Extensions Web Ser...'. The 'Authentication Type' dropdown is set to 'Auto Detect'. Below these is a 'Connect As' section with a radio button for 'ECHOTEST\administrator' (selected), a 'Different user:' option with an empty text field, a 'Password:' field, and a 'Remember my password' checkbox. At the bottom right are 'OK' and 'Cancel' buttons.

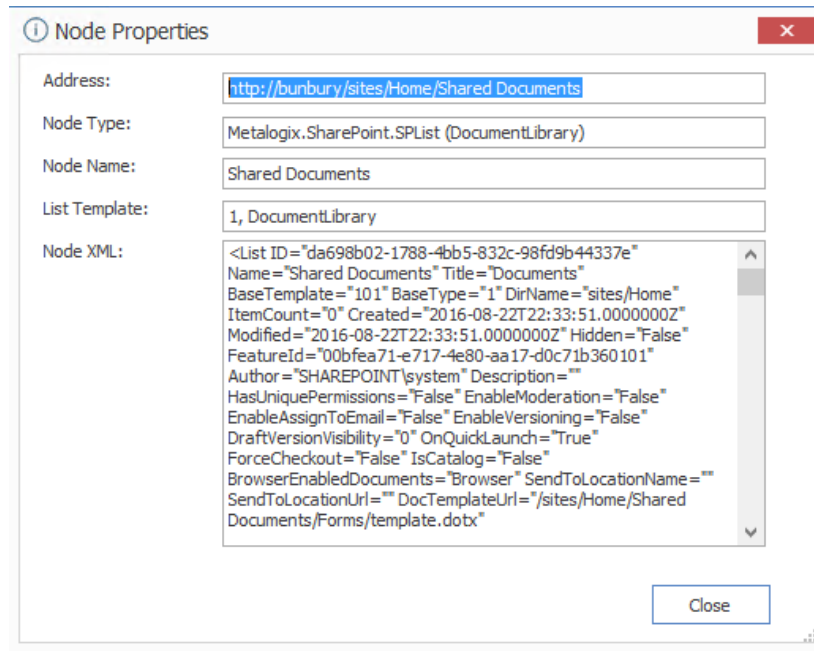
4. Click **[OK]** to create the connection.

## Source Connection Confirmation

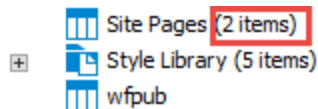
An item representing the root node of the farm shows up on the Explorer View panels.

**To view source connection structure and detail:**

1. Select **+** to expand and view the site collection, site, sub-site, list and library content in the farm.
2. Right click on a site collection, site, sub-site, list or list library and select Properties to see more information about that item.



- 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:

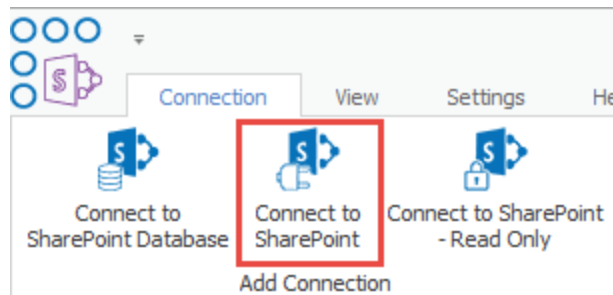
- ✓ Successfully created a connection to a SharePoint 2007 or 2010 farm with Content Matrix.
- ✓ Viewed farm structure by expanding tree control.
- ✓ Viewed properties specific to the node.



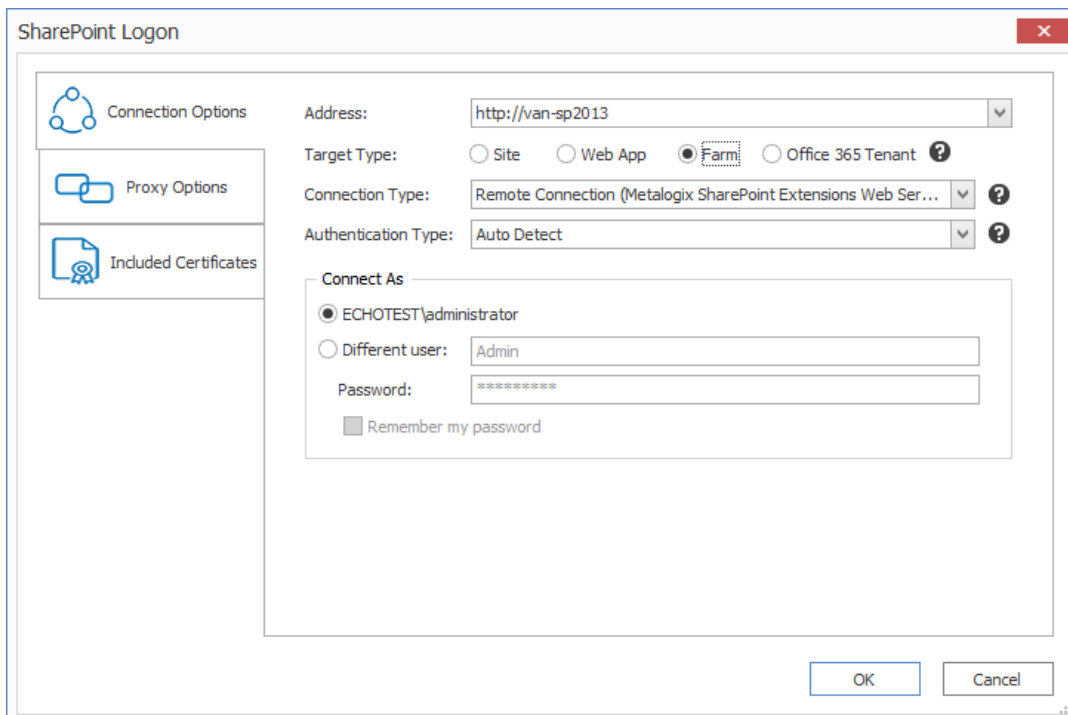
# Connecting to your SharePoint Target Environment

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 Connection tab, select **Connect to SharePoint**.



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, under **Connect As** enter the farm administrator's credentials into the **Different User** and **Password** fields.



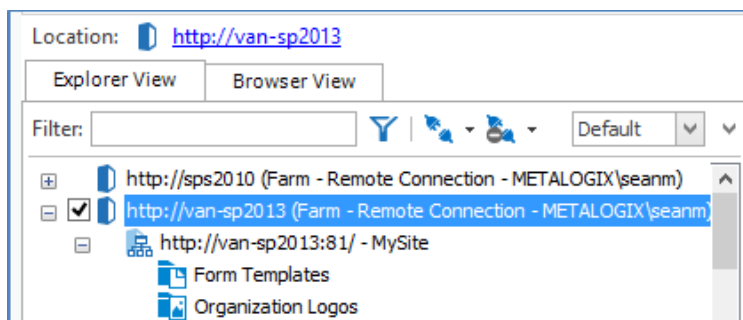
e) Click **[OK]** to create the connection.

## Target Connection Confirmation

An item for the farm shows up on the Explorer View panels.

**To view target connection structure and detail:**

1. Select '+' to expand and view the site collection, site, sub-site, list and library content in the farm.
2. 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:

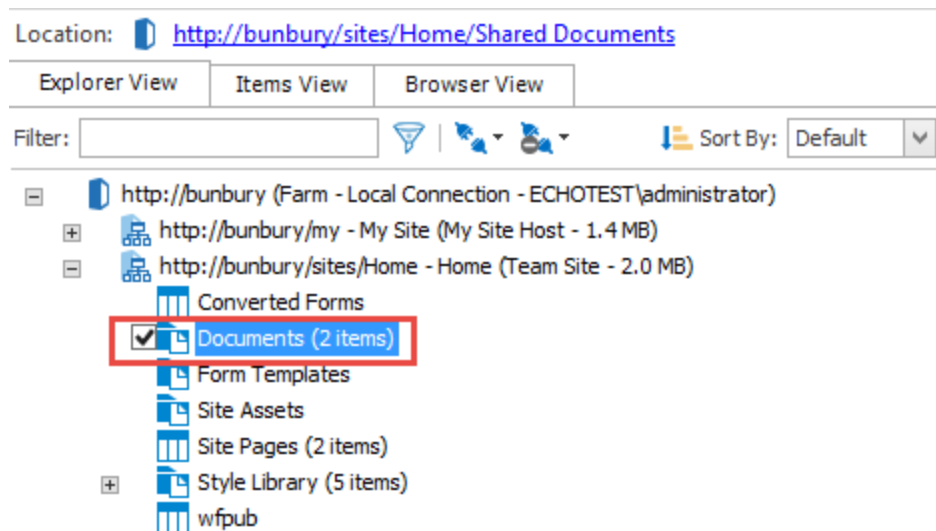
- ✓ Successfully created a connection to a SharePoint 2010, 2013, or 2016 farm or Office 365 site with Content Matrix.
- ✓ Viewed farm or site structure by expanding tree control.

# 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 contents and view their properties.

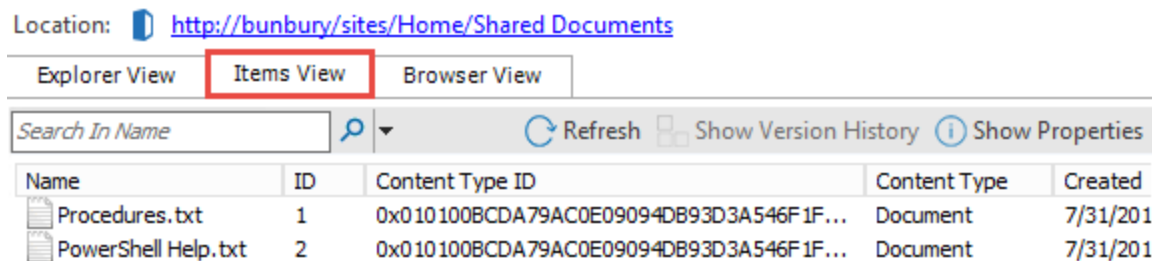
## To browse and preview lists, folders, and documents:

1. Expand the farm node by clicking on the + 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 + next to the root of your Site Collection to expand it.
4. Find and select a Document Library that you're familiar with and has content you have access to, and select that Document Library.

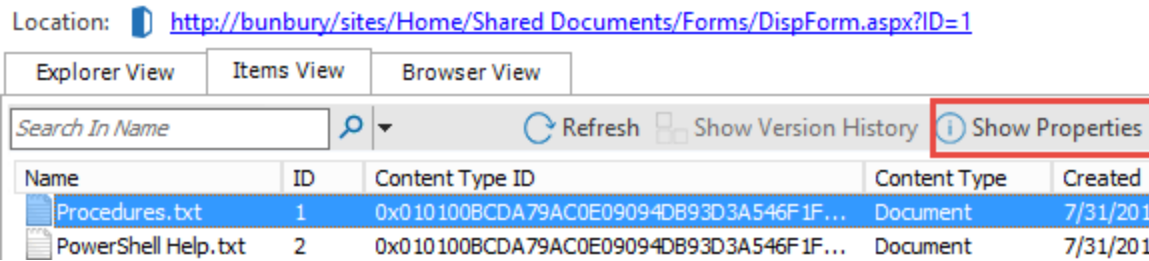


5. Select the **Items View** tab.

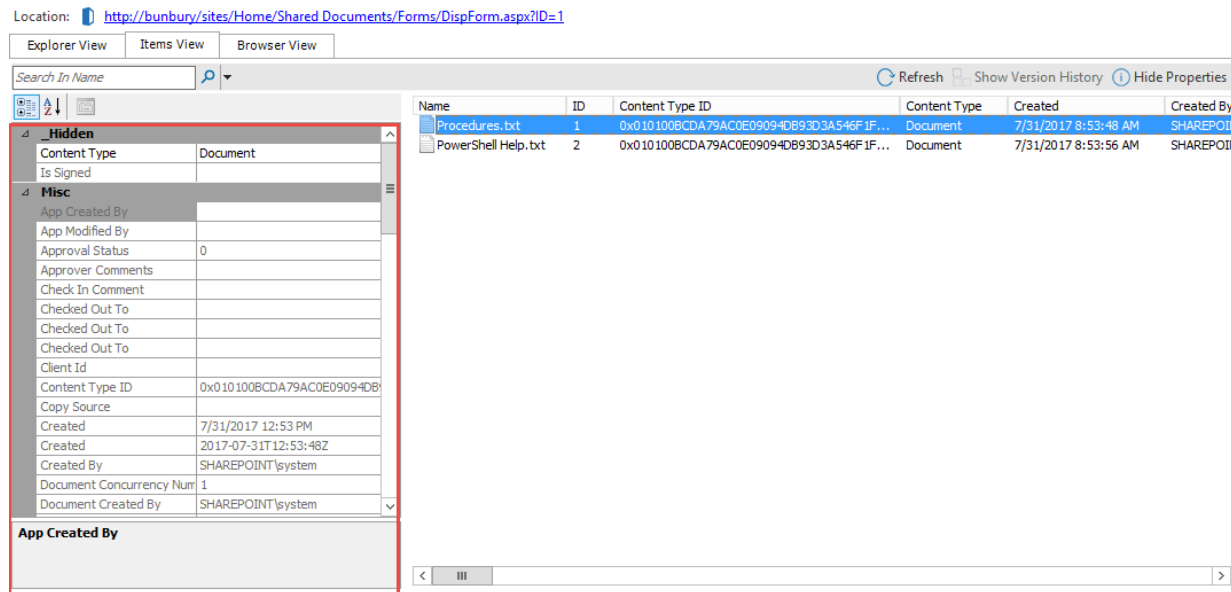
This will show you individual items in this document library, including folders. This is the view that you will use to copy individual or multiple items from this library.



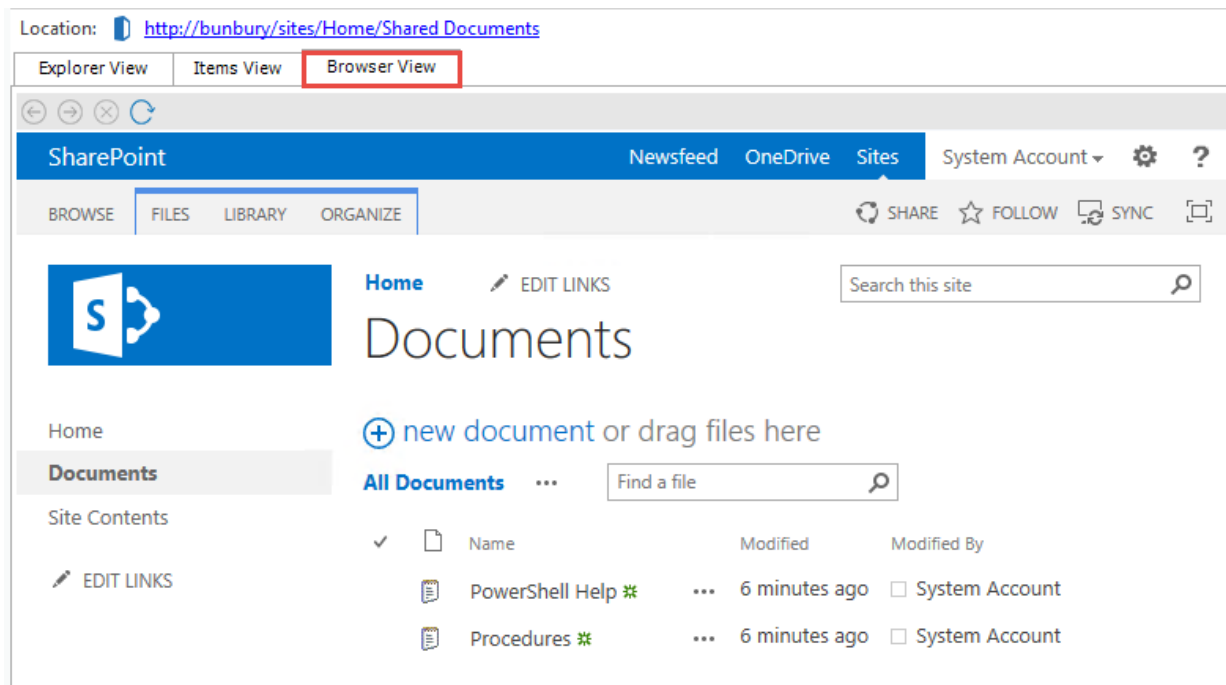
6. Select one or more items and then click **Show Properties**, found in the right corner of the item view pane.



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



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



## Browsing and Previewing Confirmation

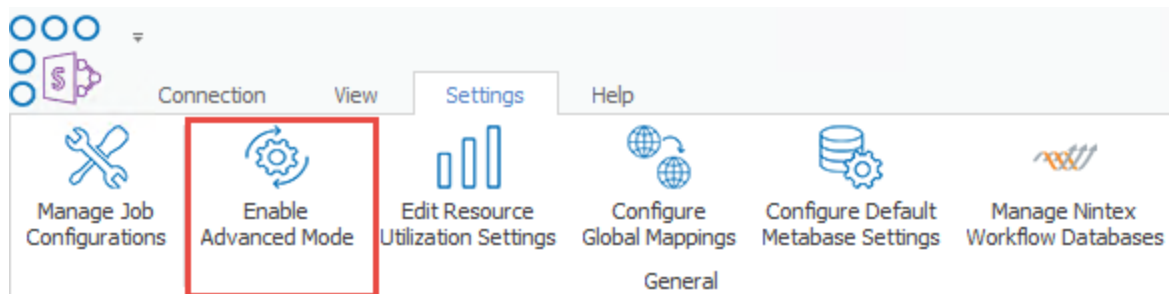
In this scenario you:

- ✓ 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.

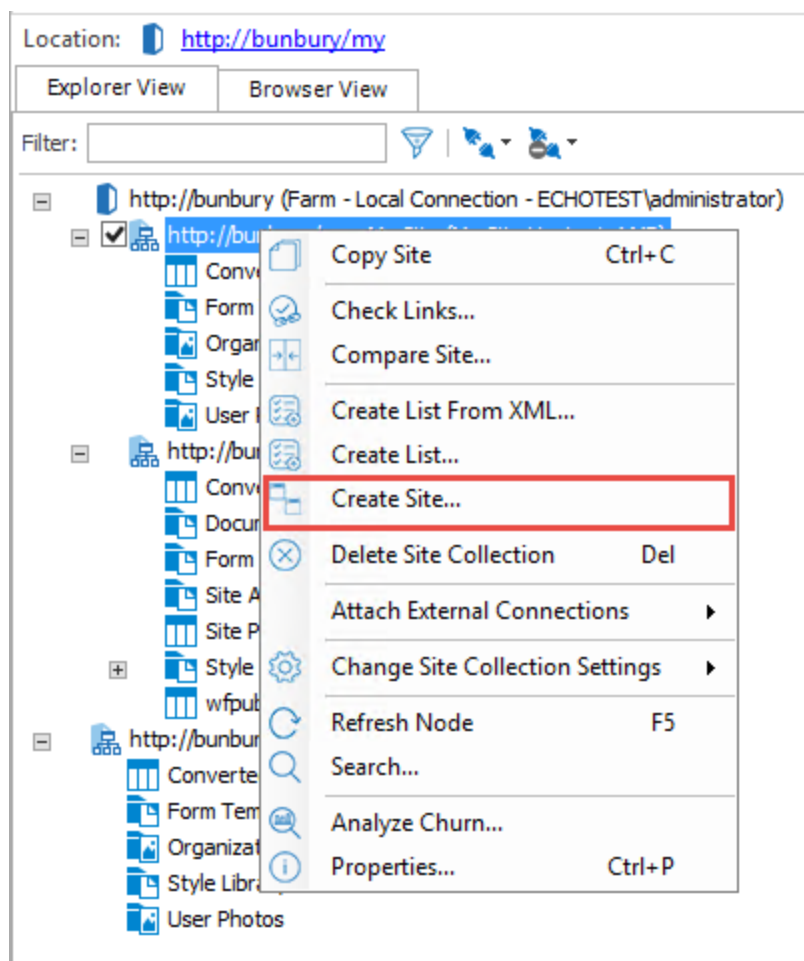
In order to run through the following scenarios, you will need to go into the Settings tab, and select **Enable Advanced Mode**. This will give you advanced right click options, which will allow you to create sites, lists, libraries, and folders through the Content Matrix Console.



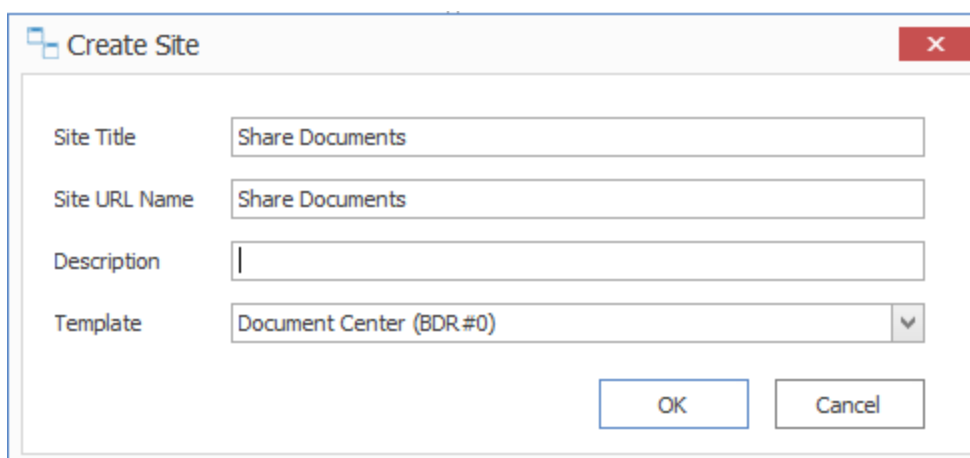
## Creating a Site

To create a site:

1. In the **Explorer View**, select a website node.
2. Right-click and choose Create Site.



3. Enter your preferred **Site Title**, **Site URL Name**, and **Description**. Note down the name and URL of the site you created for later scenarios.
4. Select your preferred site **Template**.

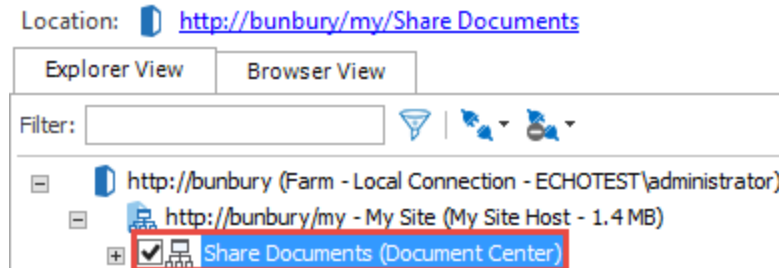


5. Click **[OK]**.

## Site Creation Confirmation

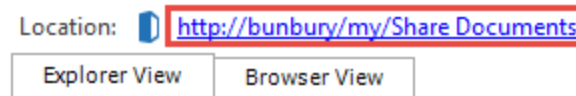
### To confirm creation of the site:

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



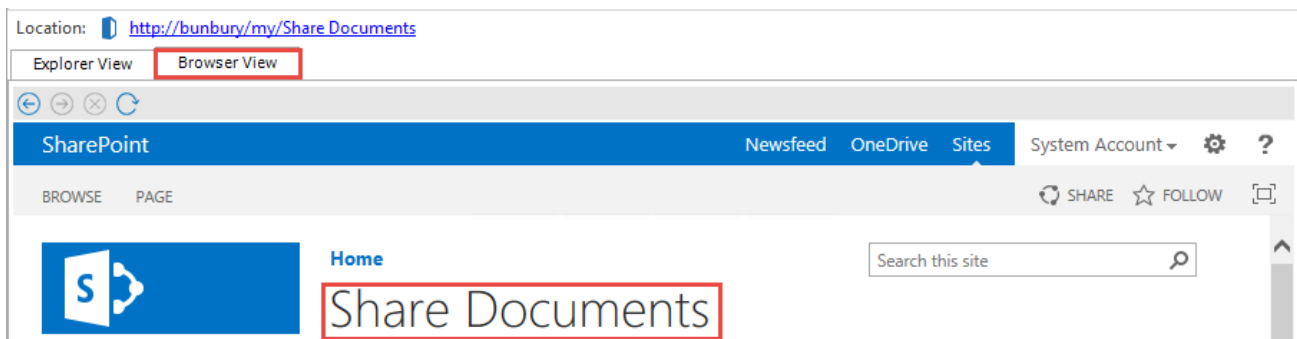
You can also confirm the site's creation by opening the site in a browser. Either:

- Select the site you created in the tree view and click on the link found above the tree view titled **Location** to view the site in a browser window.



OR

- Select the site you created in the tree view and choose the **Browser View** tab.



In this scenario you:

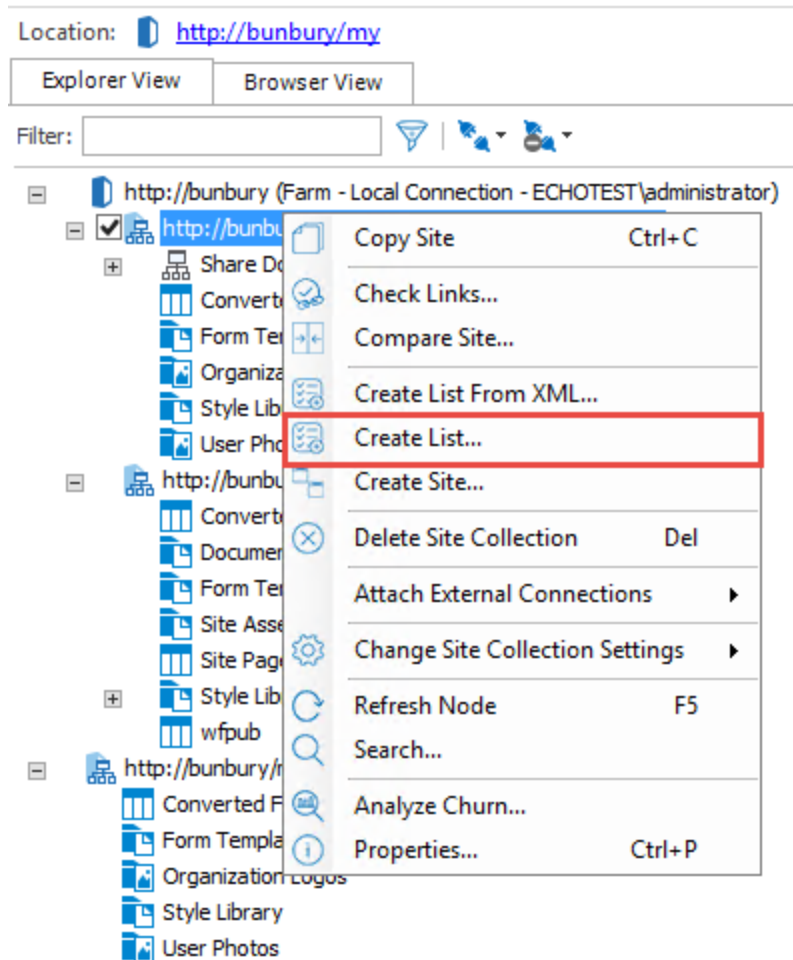
- ✓ Created a site using Content Matrix Console.

## Creating a Document Library

### To create a Document Library:

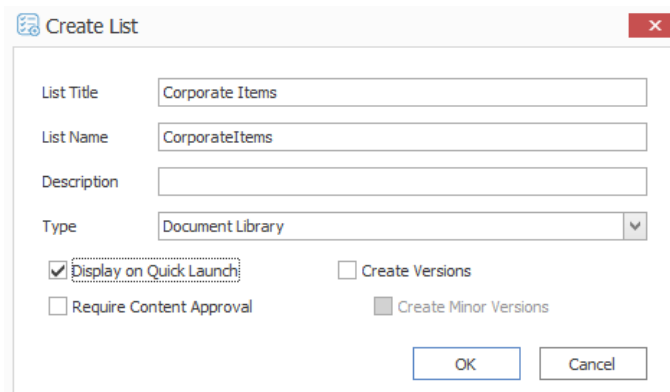
- In the **Explorer view**, right click on a site node and choose Create List.





2.

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.



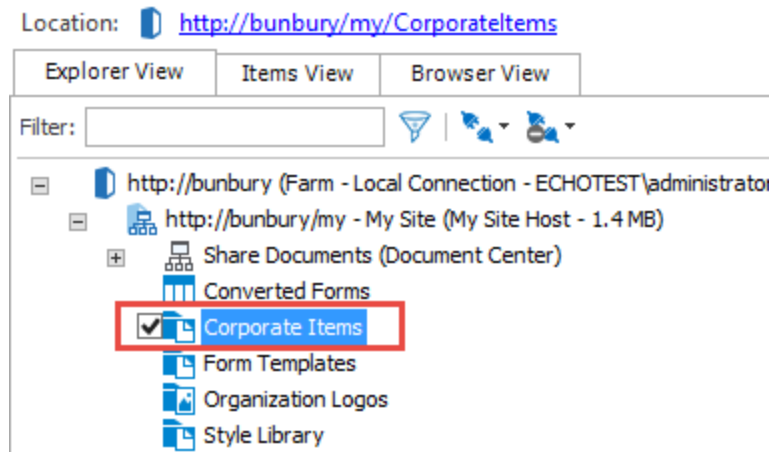
3.

5. Click **[OK]**.

## Document Library Creation Confirmation

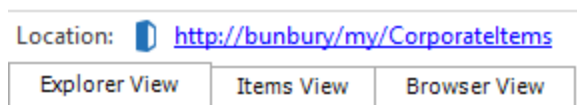
### To confirm the creation of a document library:

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



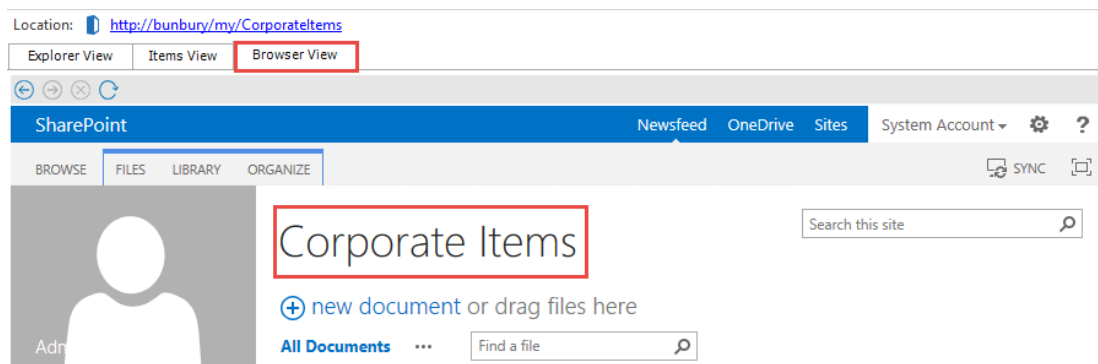
You can also validate the library's creation by opening it in a browser. This can be done either by:

- 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



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.



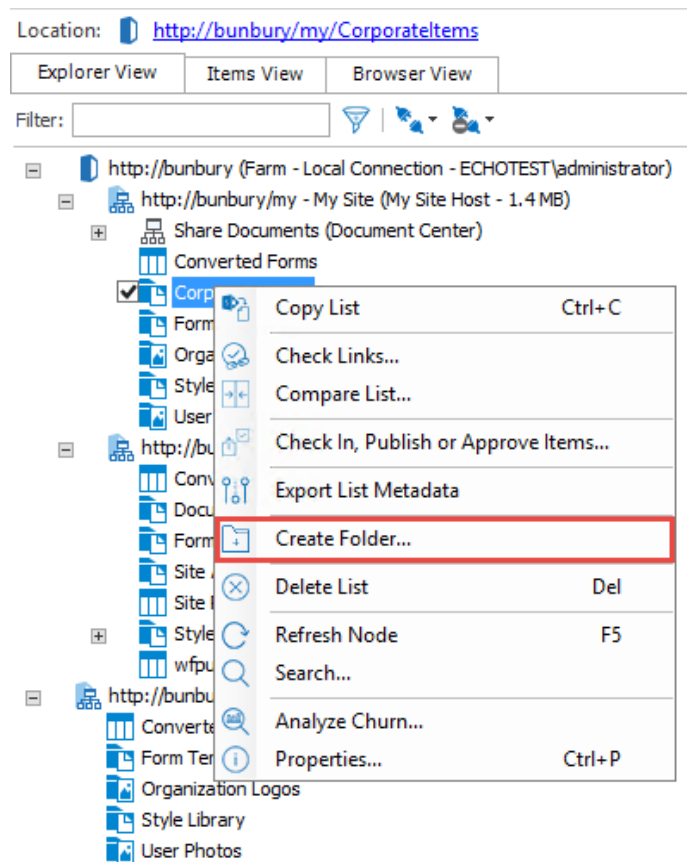
In this scenario you:

- ✓ Created a library using Content Matrix Console.

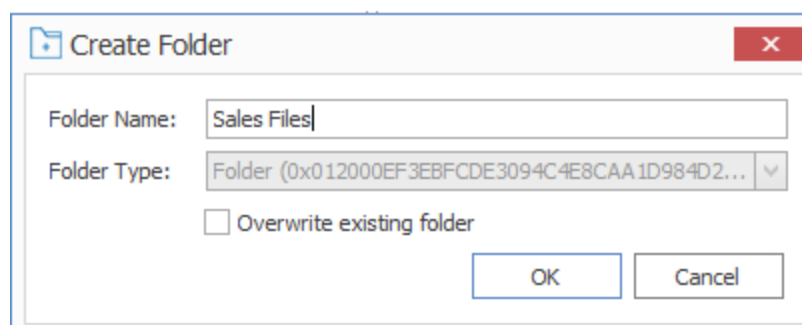
## Creating a Folder

To create a folder:

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



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

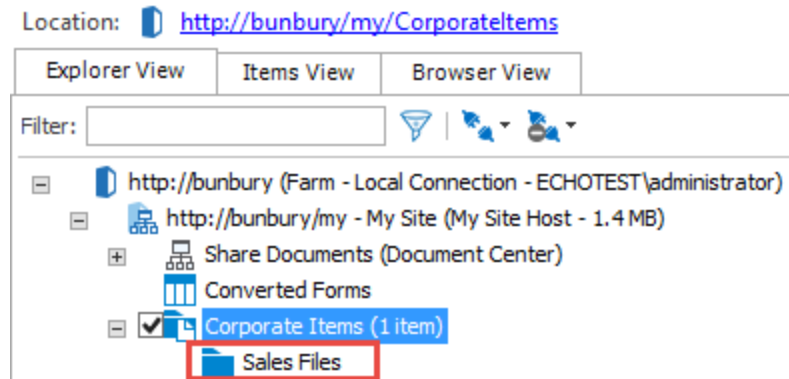


4. Click **[OK]**.

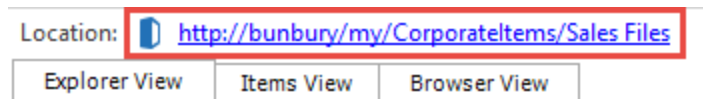
## Folder Creation Confirmation

### To confirm the creation of a folder:

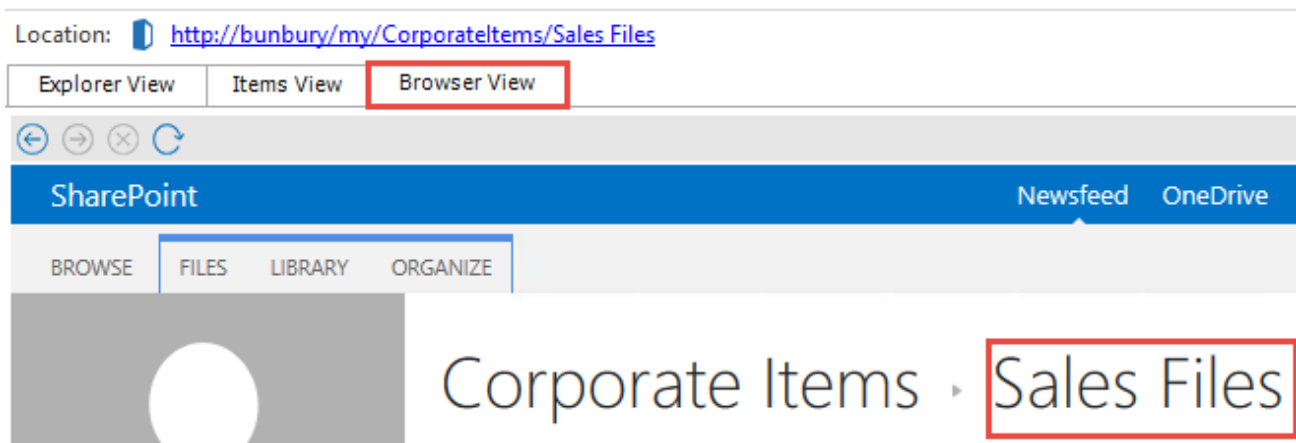
1. Check whether the folder has been created in Explorer View by pressing the '+' for the node where you created the folder, this will expand the node.



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.

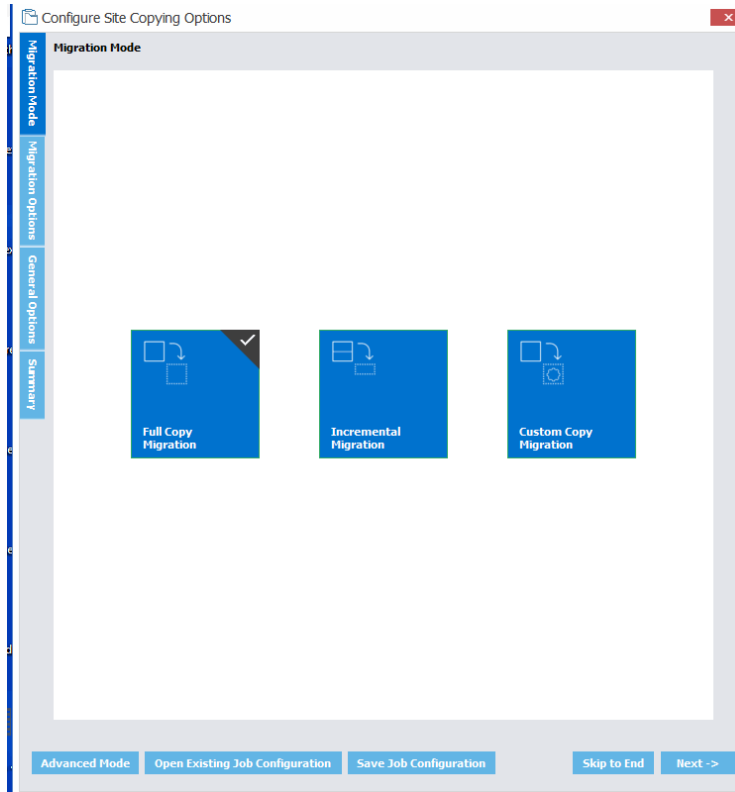


In this scenario you:

- ✓ Created a folder using Content Matrix Console.

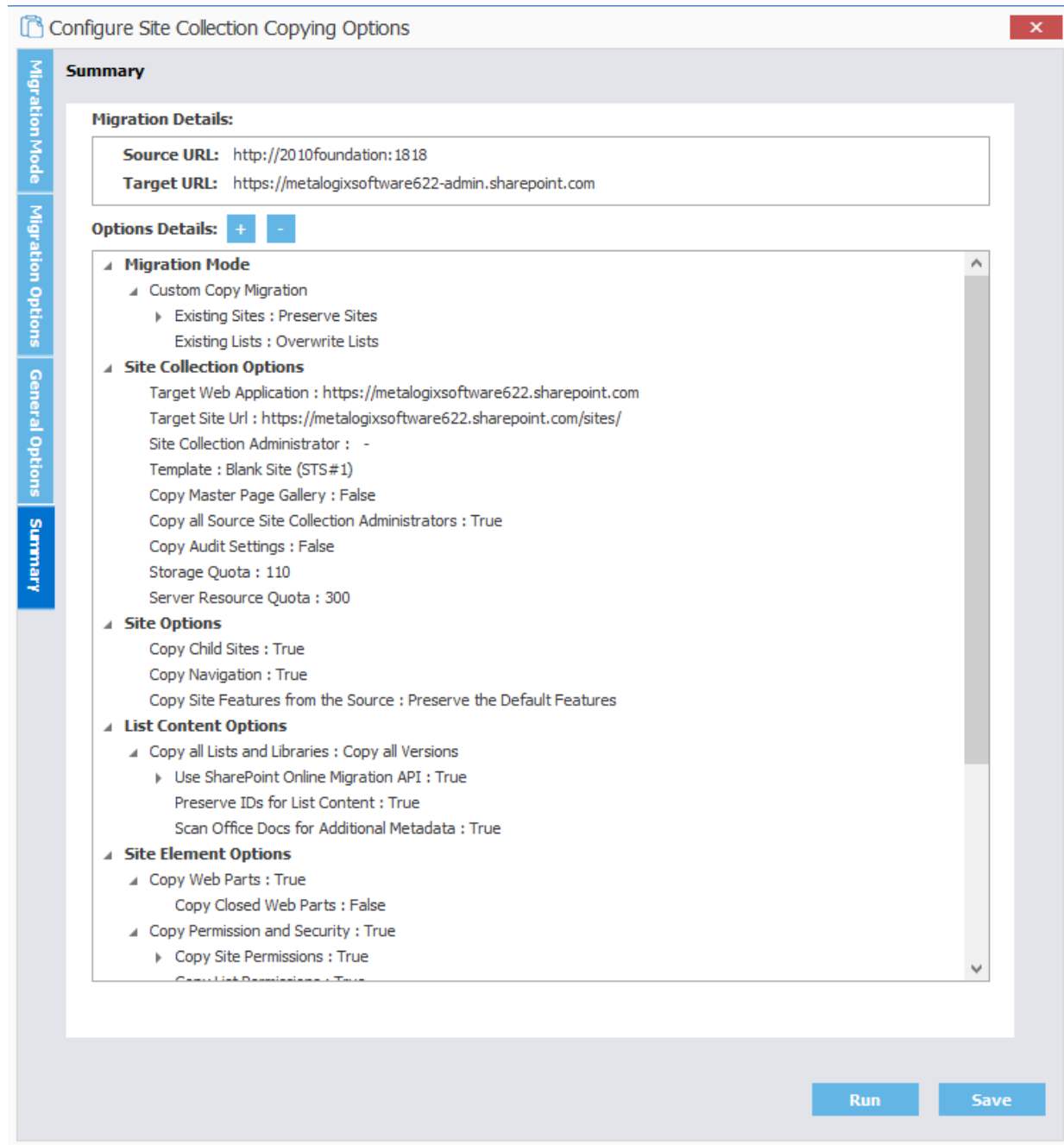
## Simplified vs. Advanced Mode

Unless Advanced Mode is enabled, when you initiate a migration, a simplified **Configure Copy Options** dialog displays which allows you to configure a migration using modern, streamlined controls and some of the most popular migration options preset by default.



You can:

- select a specific tab on the left side of the dialog
- OR
- click **[Next]** to navigate through tabs in order
- OR
- click **[Skip to End]** to view the **Summary** tab, which displays a list of currently-configured options.



If you want to configure options that require Advanced Mode and/or change default options, click the **[Advanced Mode]** button, which will both enable Advanced Mode and display the "advanced" interface, allowing you to configure additional options.

**Configure Site Copying Options**

**Migration Mode**

☒ Full Copy (Overwrite existing objects)

☐ Incremental Copy (Update existing objects)

☐ Custom Copy ?

**Existing Sites**

☒ Overwrite Sites

☐ Preserve Sites ☐ Update Sites ...

**Existing Lists**

☒ Overwrite Lists

☐ Preserve Lists ☐ Update Lists ... ?

☒ Check modified dates for Lists

**Existing Items / Documents**

☒ Overwrite Items

☐ Preserve Items ☐ Update Items ... ?

☒ Check modified dates for Items/Documents

**Other Options**

Simplified Mode Open Existing Job Configuration Save Job Configuration Run Save Cancel

You can switch back to simplified Mode at any time by clicking the **[Simplified Mode]** button.

For most of the remaining scenarios in this guide, you can use either Simplified Mode or Advanced Mode, depending on your preference.

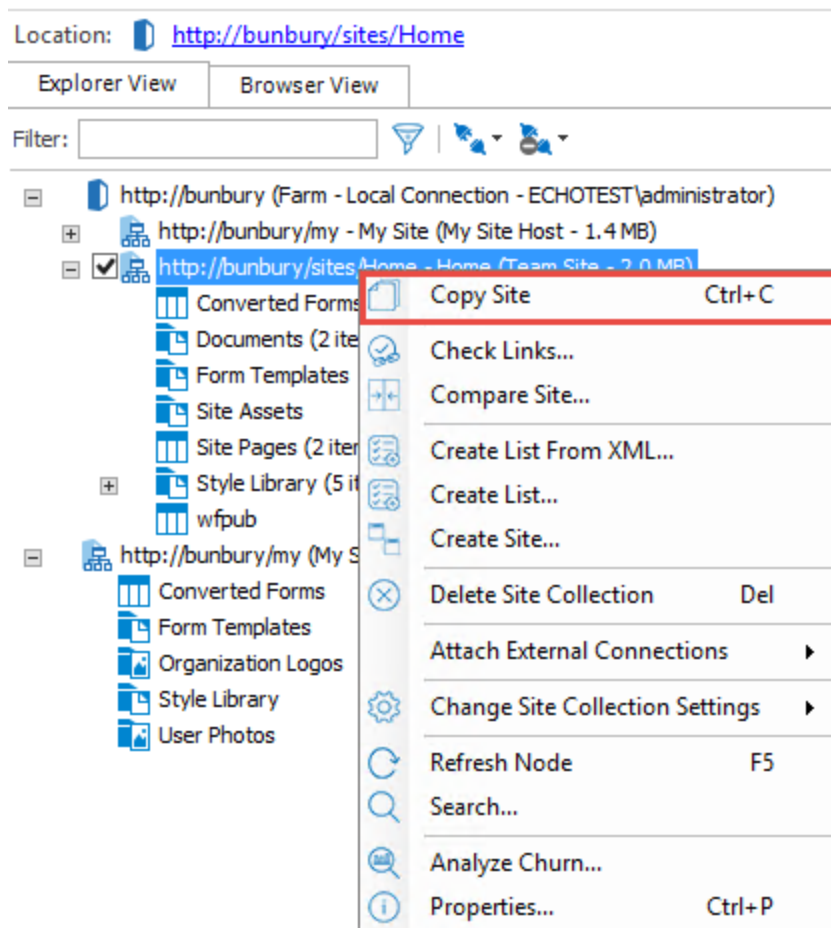
# Copying and Pasting a Site or Site Collection

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 than 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.

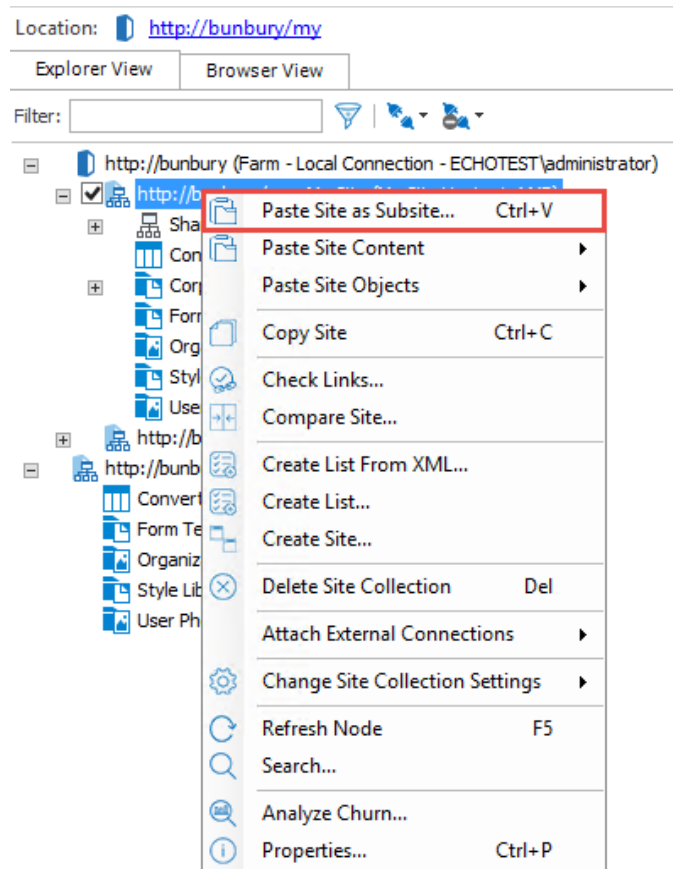
## To copy and past a site or site collection:

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 document library with several documents in it. Choose Copy Site.

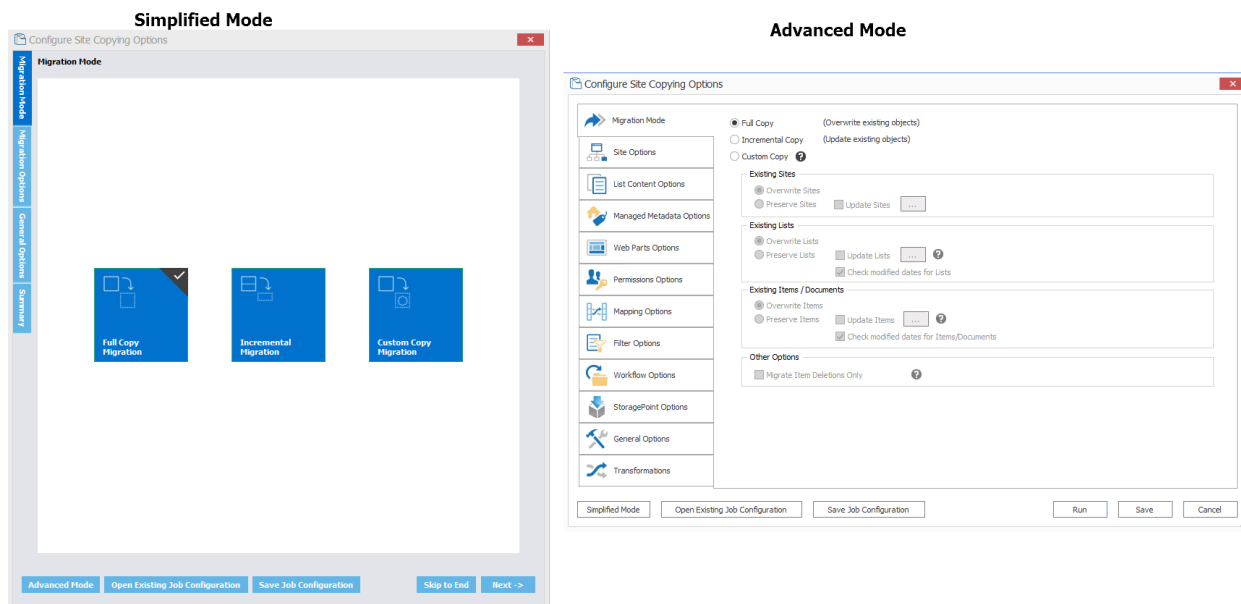


2. Expand the target connection tree and right click on the target site node.
3. Choose Paste Site as Subsite.



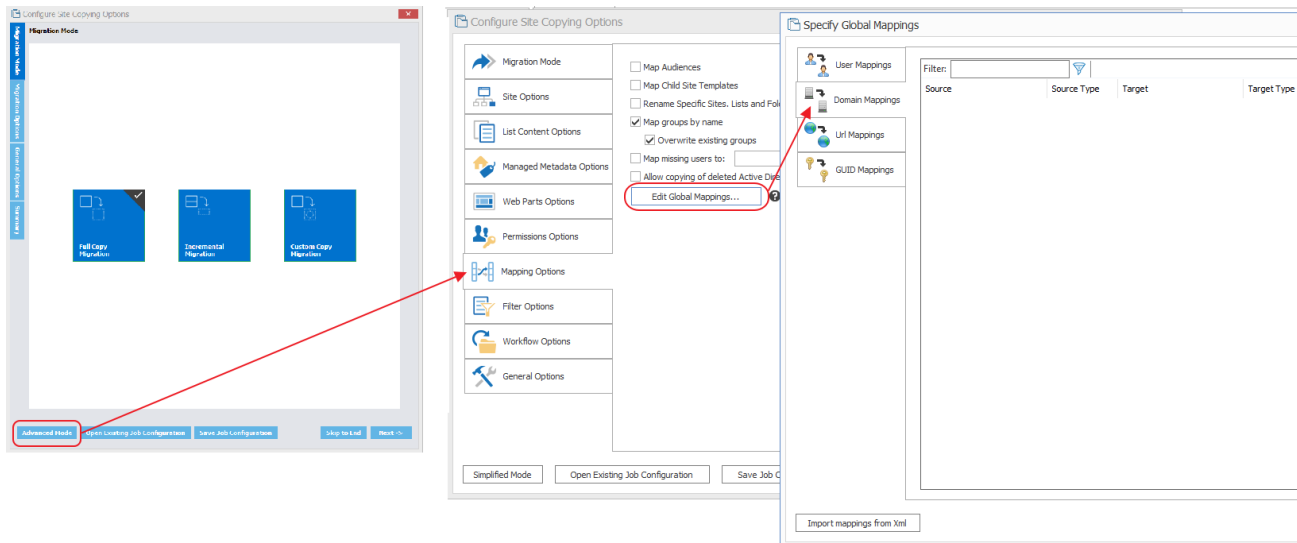


4. The **Configure Site Copy Options** window will open where you can configure the options for copying the site over.



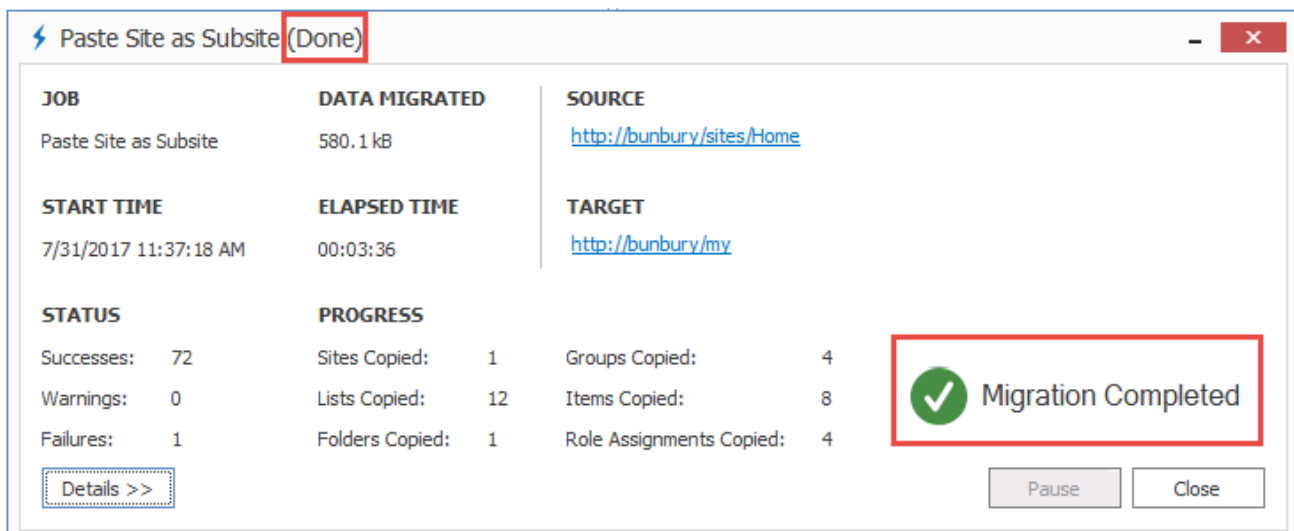
5. To configure Site Copying options if your source and destination are in different domains:
- Make sure you are using **Advanced Mode**.

- b) If your domains are not the same, select the **Mapping Options** tab, and then click **[Edit Global Mappings]**.
- c) Select **Domain Mappings** from the left hand menu.



- d) Select **New** from the right menu.
- e) 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.
6. Click **[OK]** to close the Global Mappings screen, now you may also select the check box **Map Missing Users to:** and enter the domain and user name of a user on the destination environment.
7. Click **[Run]**.

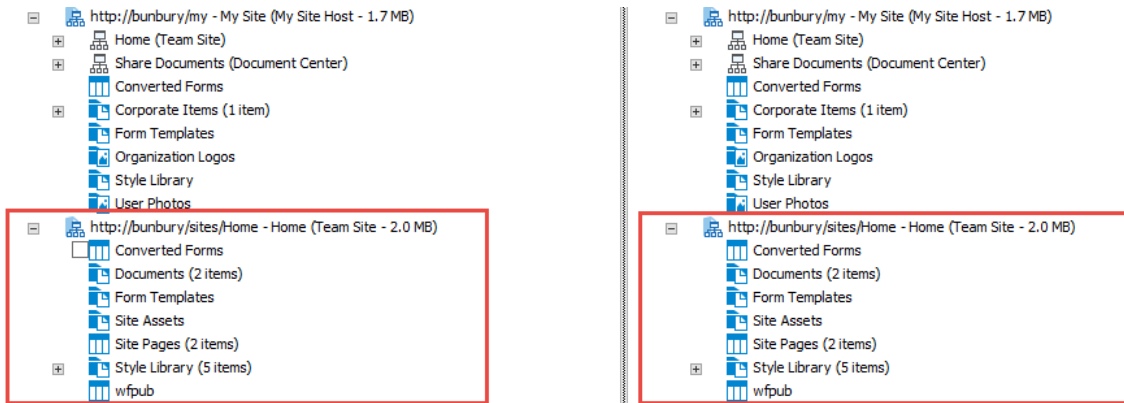
The site creation is complete when the Paste Site progress window title says **Done**. You can press **Details** to watch the process of the site paste.



- Click **[Close]** to dismiss this window once the job is done.

## Site Copy and Paste Confirmation

- In **Explorer View** check to see that the Site node for the copied site is shown in the target connection tree.
- 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.

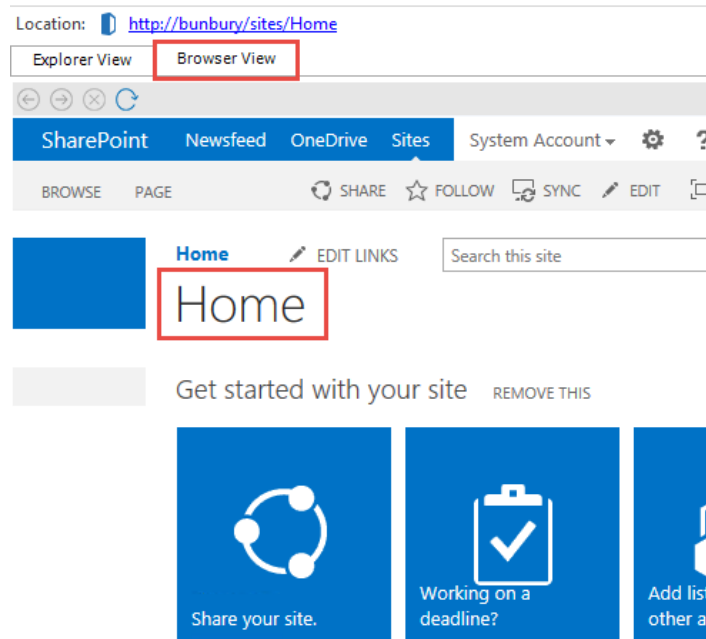


- You can also validate that the Site Paste has worked by opening it in your web browser. This can be done either by:
  - Selecting the pasted site in the tree view and clicking on the link found above the tree view titled **Location:** to open the copied site in a browser window.



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:

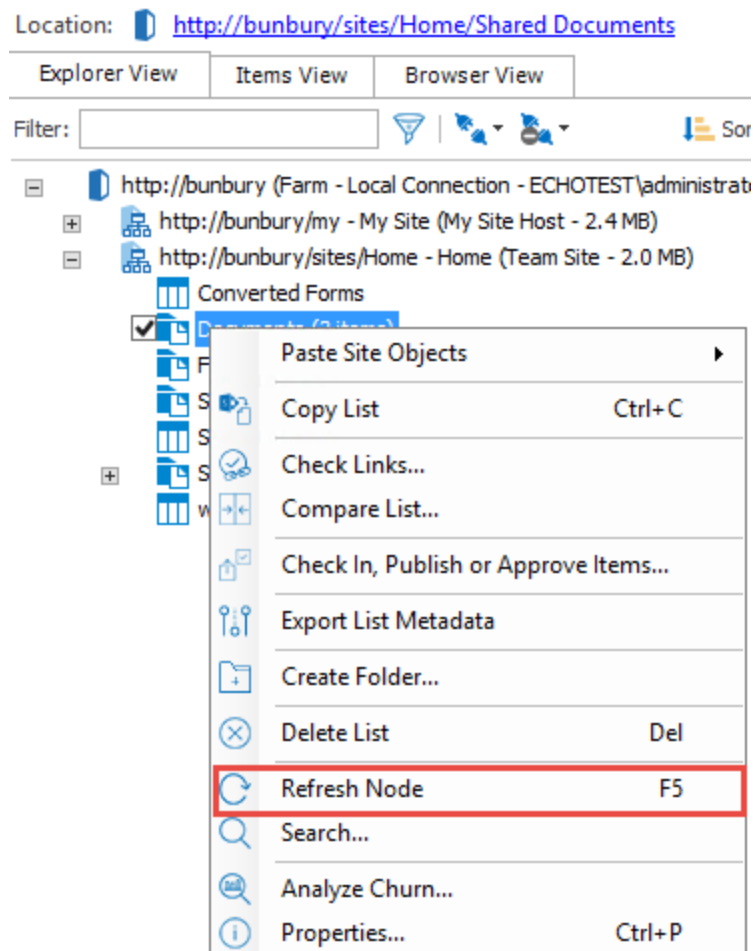
- ✓ Copied a site using Content Matrix Console.
- ✓ Configured paste settings and pasted a site using Content Matrix Console.

# Using Incremental Copy to Migrate Changes Since Last Migration

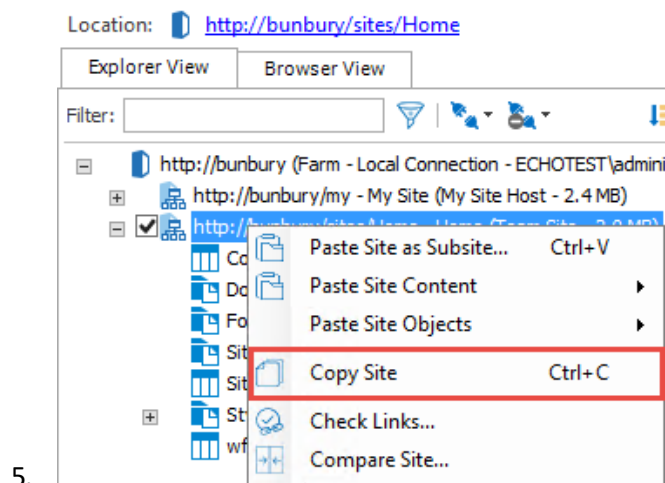
For this scenario you will need a library with documents that exists on both the source and target. You can use the site or site collection from the previous Copy Site scenario that contained a document library with a number of documents.

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

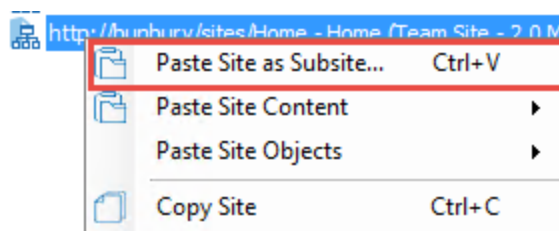


4. Right click on the site node once again and choose Copy Site.

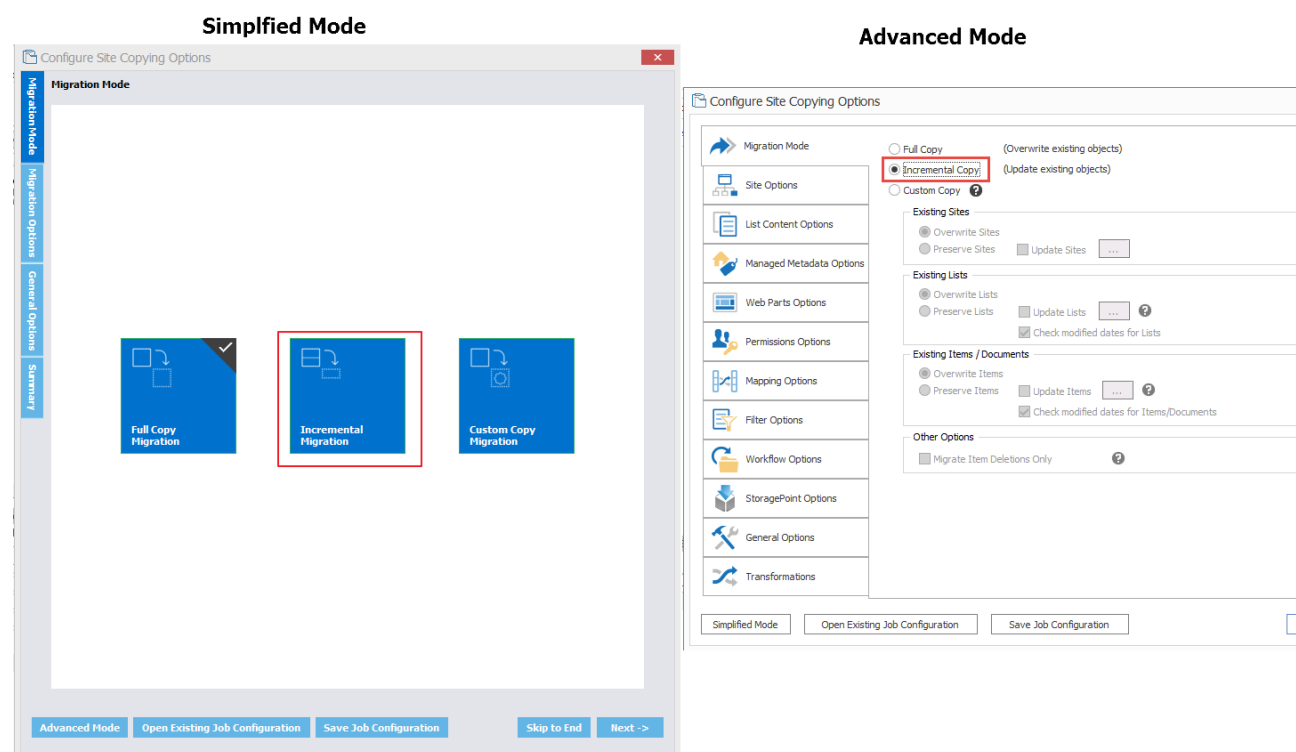


5.

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

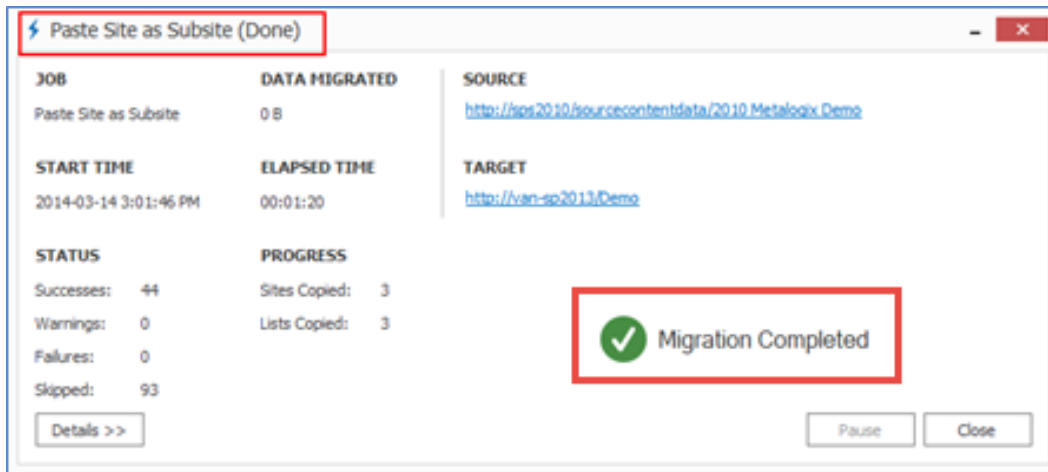


- In the Configure Site Copying Options dialog box, select Incremental Copy.



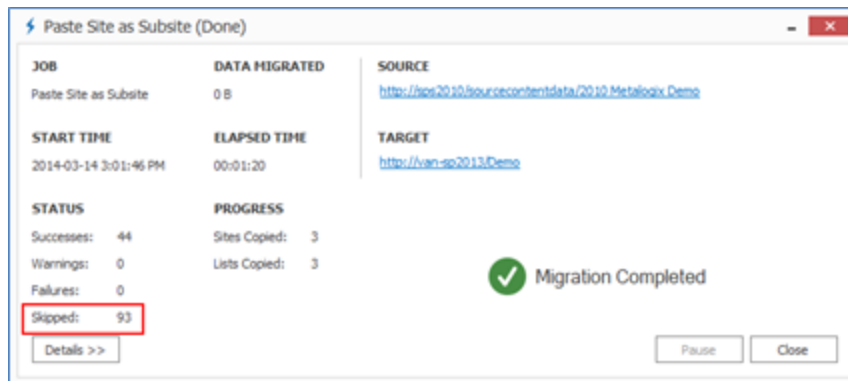
- If you are using Simplified Mode, click **[Skip to End]** to view the summary page.

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

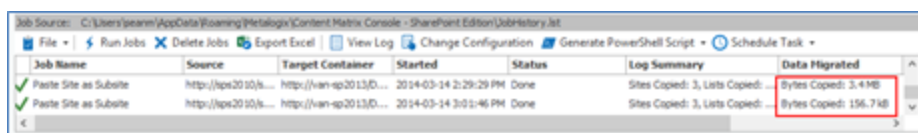


## Incremental Copy Confirmation

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.



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)

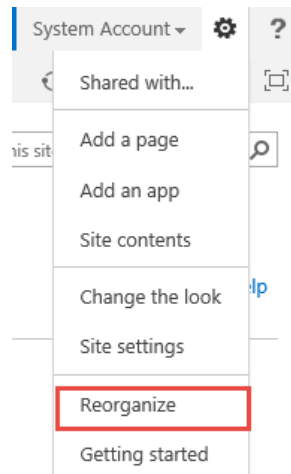
This scenario demonstrates how to copy and paste document libraries in SharePoint from within your browser, using Content Matrix Organizer. Users can reorganize SharePoint content using the user interface available from within the SharePoint website. This scenario can only be performed if source and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

Content Matrix Organizer 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 Content Matrix Organizer on your destination server (on-premises only). For instructions on how to install Content Matrix Organizer, please see the [Content Matrix Quick Start Guide](#).

## Copy a Document Library

### To copy a document library:

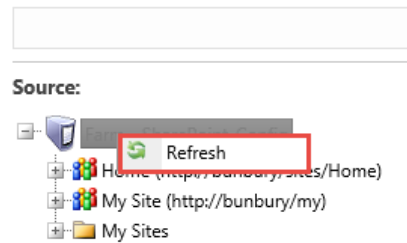
1. If you did not complete the “Creating Sites, Document Libraries and Folder destinations” and “Copy and Paste a Site or Site Collection” scenarios above, complete each of them so that you have two sites to work with on your destination environment.
2. From a web browser open your SharePoint site using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



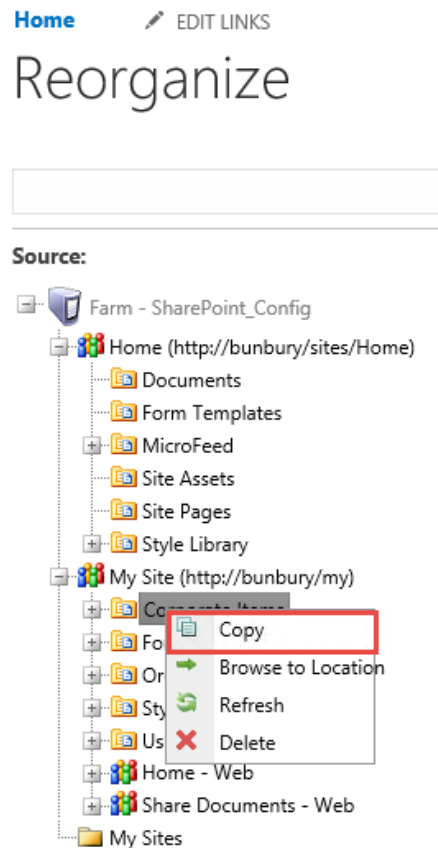
4. Right click on the farm on the left hand side of the tree and choose Refresh.



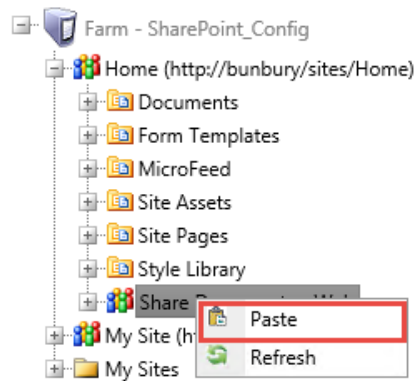
# Reorganize



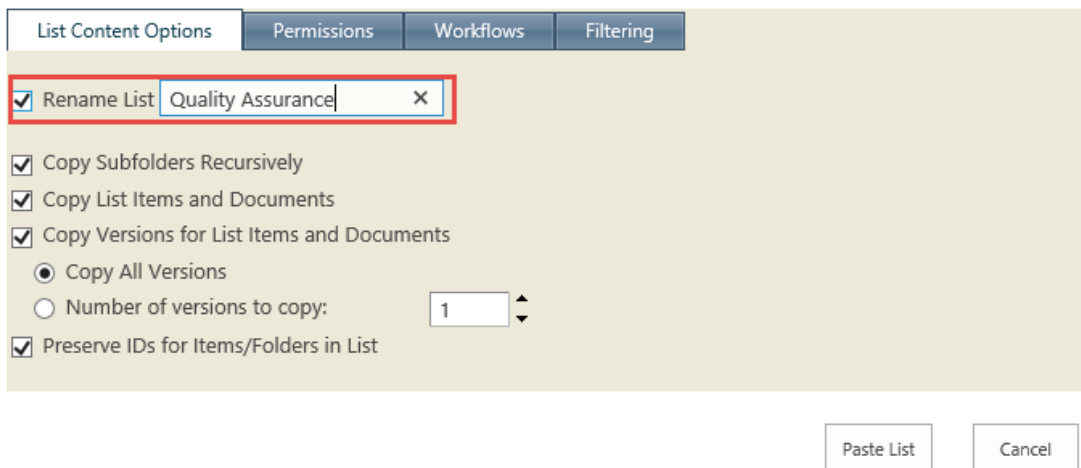
- Expand the Farm node on the left hand side tree until you see the site you created in the [Copy and Paste a Site or Site Collection](#) scenario . Right click on any Document Library you have in this Site and choose Copy.



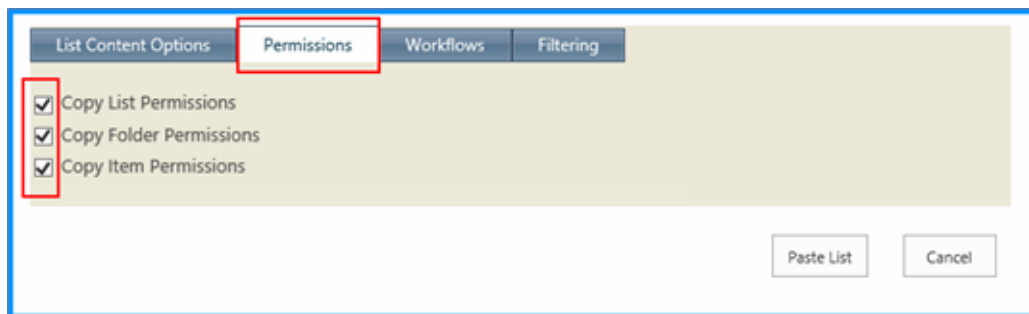
- On the right hand side tree, expand the tree until you find the site you created in the [Creating Sites, Document Libraries and Folder Destinations](#) scenario. Right click on the site and choose Paste.

**Destination:**

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 check boxes to copy list, folder, and item permissions

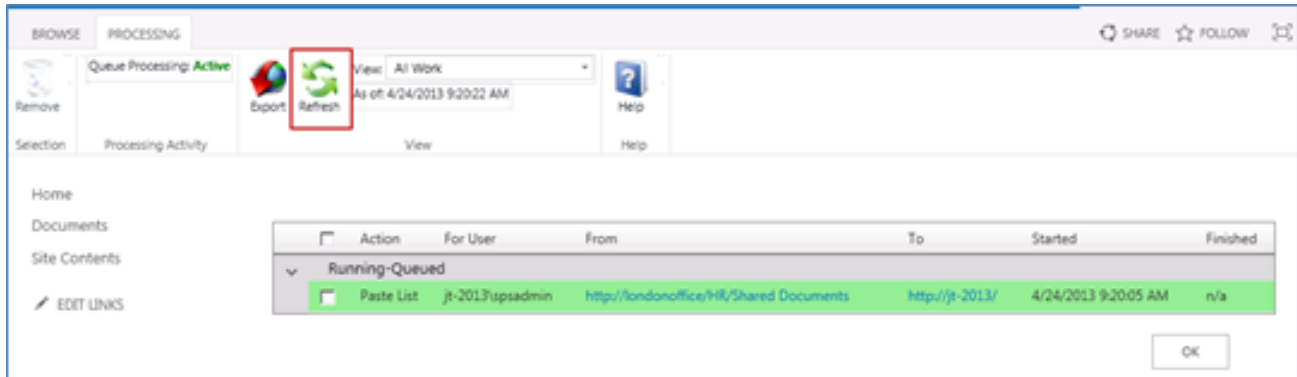


9. Click **[Paste List]**. This will take you to the Processing Queue screen that shows a list of jobs that you are running.

## Document Library Copy Confirmation

To confirm the copying of a document library:

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



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

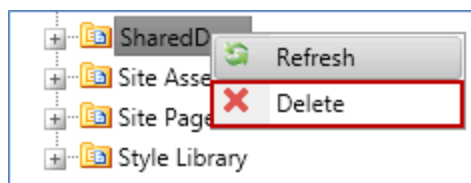
In this scenario you:

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

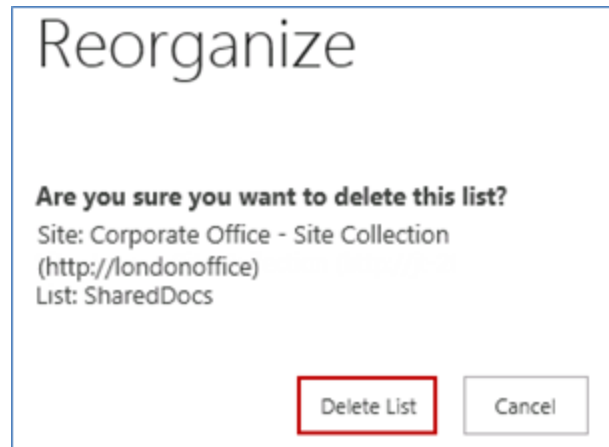
## Deleting a Document Library

To 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 [Copying and Pasting a Site or Site Collection](#) scenario (on the destination tree), right click on the document library you just copied (on the source tree), and choose Delete.



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



## Document Library Delete Confirmation

**To confirm the deletion of a document library:**

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 Organizer.