

Content Matrix  
**Evaluation Guide**



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Quest Software Inc.  
Attn: LEGAL Dept.  
4 Polaris Way  
Aliso Viejo, CA 92656

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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 .....	6
<b>Connecting to your SharePoint Target Environment .....</b>	<b>8</b>
Target Connection Confirmation .....	8
<b>Browsing and Previewing Lists, Folders and Documents .....</b>	<b>10</b>
Browsing and Previewing Confirmation .....	11
<b>Creating Sites, Lists, Libraries and Folder Destinations .....</b>	<b>12</b>
Creating a Site .....	12
Site Creation Confirmation .....	12
Creating a Document Library .....	13
Document Library Creation Confirmation .....	13
Creating a Folder .....	14
Folder Creation Confirmation .....	14
<b>Copying and Pasting a Site or Site Collection .....</b>	<b>16</b>
Site Copy and Paste Confirmation .....	17
<b>Using Incremental Copy to Migrate Changes Since Last Migration .....</b>	<b>18</b>
Incremental Copy Confirmation .....	19
<b>About Us .....</b>	<b>20</b>
Contacting Quest .....	20
Technical Support Resources .....	20

# 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.

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## 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 Quest website, at <https://support.quest.com/content-matrix/technical-documents>.

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 on premises with Extensions Web Service installed.
- Target of the same or later version of SharePoint on premises or Microsoft 365.
- If the target is on premises then have Extensions 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 farm as your source SharePoint farm.

## To connect to a SharePoint source environment:

1. Start Content Matrix Console (SharePoint Edition).

NOTE: If you are launching Content Matrix for the first time, you will be prompted to choose a database to connect to. For evaluation purposes only, you can select Connect to New Job List (SQL Server Compact 4.0\* Required), but SQL CE 4.0 must be installed on the machine. You can download it from [Microsoft](#), install it, then restart the Console. For a production environment, it is recommended that you always use a full SQL database.

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 SharePointExtensions Web 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.



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.



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



In this scenario you:

- ✓ Successfully created a connection to a SharePoint 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 on premises farm or Microsoft 365 site as target.

1. From the Connection tab, select **Connect to SharePoint**.



2. In the **SharePoint Logon** window:
  - a) Specify the URL for the **Address**.
  - b) If your destination site is on Microsoft 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 Microsoft 365, change the **Connection Type** to Remote Connection (SharePoint Client Site Object Model O365). If your destination site is on premises, change the **Connection Type** to **Remote Connection (Metalogix SharePoint Extensions Web Service)**.
  - d) If the current user is not a Farm Administrator (for an on premises farm) **Connect As** enter the credentials of an account with sufficient permissions into the **Different User and Password** fields. For an Microsoft 365 site, enter the credentials of an Microsoft 365 account that has Site Collection Administrator permissions.



- 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 farm or Microsoft 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:

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



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



5. Click **[OK]**.

## 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.

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



- c) Select **New** from the right menu.
- d) 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.



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

## Site Copy and Paste Confirmation

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



3. You can also validate that the Site Paste has worked by opening it in your web browser. This can be done either by:
  - 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**.



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



7. 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.

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Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Microsoft 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit [www.quest.com](http://www.quest.com).

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- Sign up for product notifications
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- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product

