
Metalogix
Connect for SharePoint

Connect for SharePoint User Guide

Version 2.2

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Table of Contents

Introduction	4
Starting Metalogix Connect	5
Managing your SharePoint Farms	6
Managing Connections	6
Adding Connections.....	6
Editing Connection Settings.....	7
Specifying the Preferred Connection	7
Refreshing Connections.....	8
Removing Connections	8
Exploring Connections	8
Viewing Web Applications.....	9
Using Explore Tree Shortcuts	10
Moving and Copying List Items.....	13
Using Snapshots.....	14
Comparing Web Applications.....	15
Visualizing your SharePoint Network.....	18
Creating a Connection Diagram.....	19
Saving Diagrams as Images.....	20
Reporting on SharePoint	21
Generating Reports.....	21
Viewing Reports	21
Snapshot Reports.....	21
Enabling Connect for Replicator	23

Introduction

Metalogix Connect for SharePoint gives SharePoint administrators tools they can use to monitor and visualize their SharePoint environment. Using these tools, administrators can:

- Visualize their SharePoint environment.
- Compare the structure and content of SharePoint web applications, site collections, web sites, and lists.
- Cut, copy, and paste list items to reorganize structure within a web application.
- Generate detailed reports about their SharePoint and replication environments.

Starting Metalogix Connect

To start Metalogix Connect, open the Windows **Start** menu and select **Connect**. If **Connect** does not appear directly under the Start menu, then open **All Programs**, **Metalogix**, **Connect**, and select **Connect**.

The first time you start **Connect** after installing it, a configuration wizard will open. For information on completing this wizard and other tasks you must perform the first time you use **Connect**, see the *Metalogix Connect Installation Guide*.

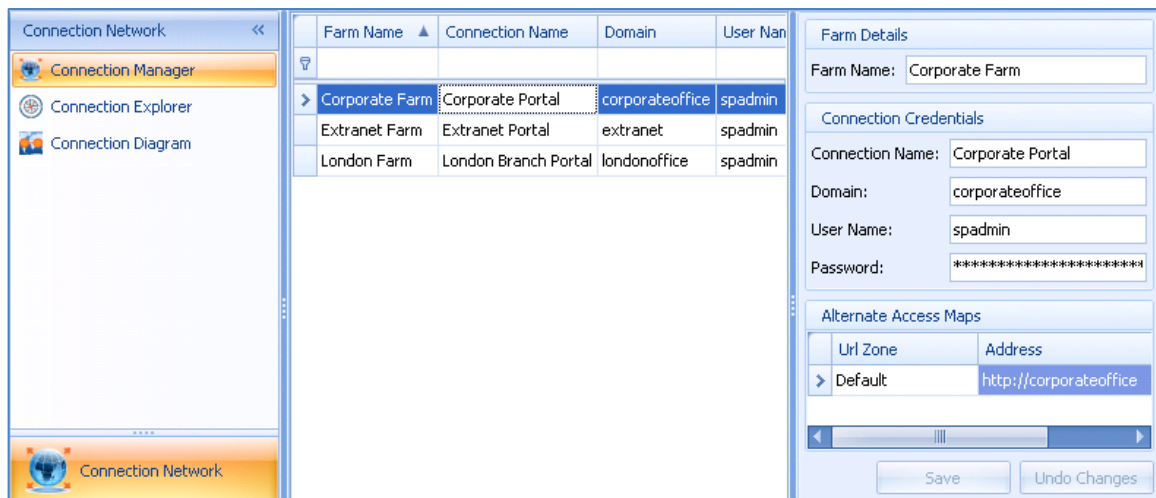
Managing your SharePoint Farms

The SharePoint farm management tools are listed under Connection Network in the Connect navigation pane. Using these tools you can:

- Add, refresh, and remove connections.
- Explore and compare your SharePoint farms.

Managing Connections

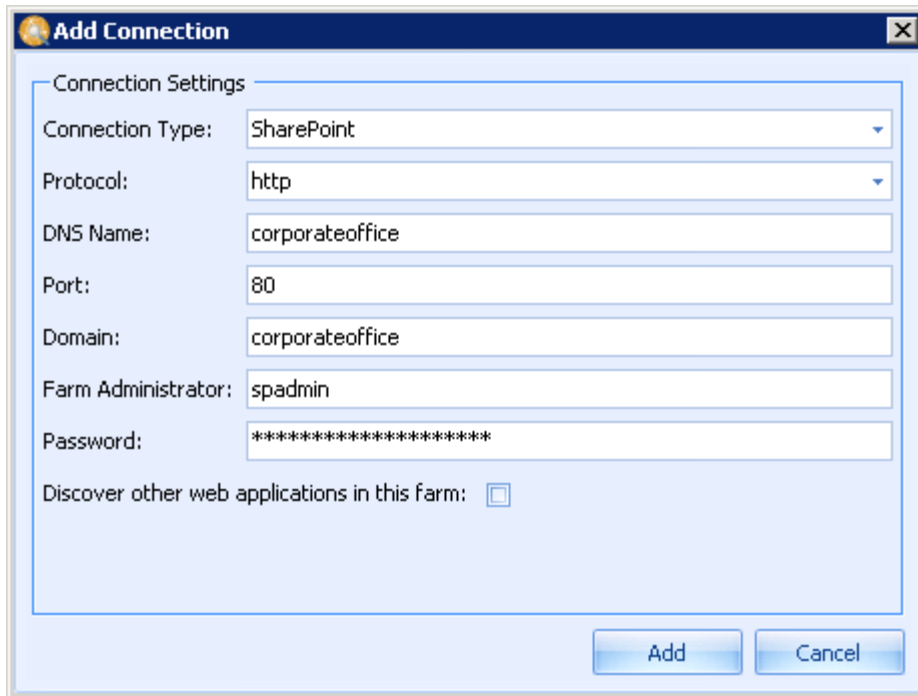
You can add connections to any SharePoint web application that has deployed the Connect solution. For information on deploying this solution to your SharePoint farms, see the *Metalogix Connect Installation Guide*.



Adding Connections

To add a connection to a SharePoint web application:

1. In Connect, under the **Home** tab, click **Connection Network**.
2. From the Connection Network menu, select **Connection Manager**.
3. Click **Add Connection** in the ribbon. This opens the Add Connection dialog.
4. Enter the connection details for a web application and click **Add**. The account you specify must be in the Central Administration Farm Administrators group.



The web application is now in the Connection Manager table. If you chose to discover other web applications, then you will also see all of the web applications in this farm where the Connect Solution is deployed.

Editing Connection Settings

To edit details for a connection:

1. Select the connection in the Connection Manager table.
2. In the right-hand pane, edit the settings for this connection under Farm Details and Connection Credentials. Changes made under Farm Details will affect all connections in that farm.
3. Click **Save** to save your changes.

Specifying the Preferred Connection

If you are connecting to a web application that has been extended in SharePoint with alternate access maps, then you can specify the preferred URL for Connect to use. This indicates the first URL Connect will use to retrieve information about the web application.

If you are connecting to a web application that uses forms-based authentication, then you must specify a preferred URL that uses Windows authentication.

To specify a preferred URL:

1. Select the connection in the Connection Manager table.
2. In the bottom-right corner of the window, select the preferred map from the list of alternate access maps.

Alternate Access Maps		
Preferred	Url Zone	Address
<input type="radio"/>	Default	http://extranett
<input checked="" type="radio"/>	Intranet	http://extranett:2222

3. Click **Save** to save your changes.

Refreshing Connections

After changing your web applications in Central Administration or enabling new Connect products, you must refresh your Connect connections. This includes changing Replication Groups, Replication Connections, and Replication Map Families.

To refresh a connection:

1. Select the connection in the Connection Manager table.
2. Click **Refresh Connection** in the ribbon.

Removing Connections

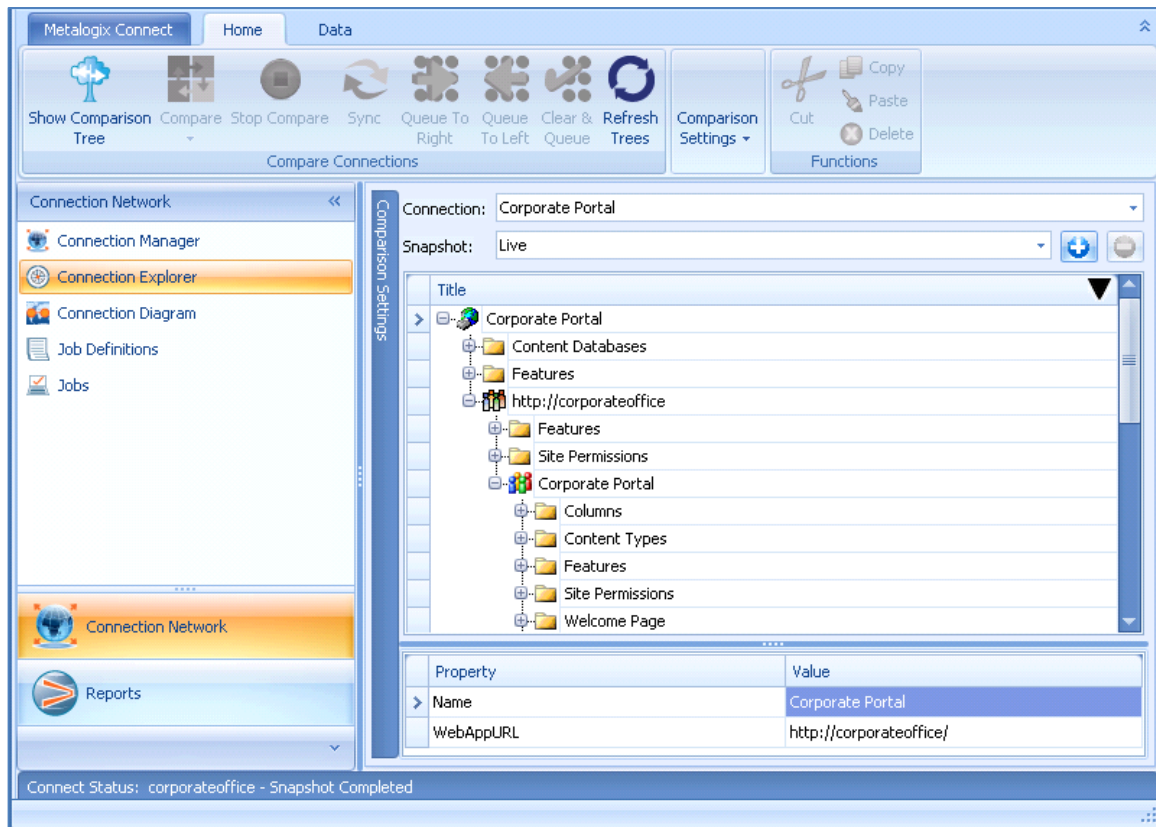
To remove a connection from Connect:

1. Select the connection in the Connection Manager table.
2. Click **Remove Connection** in the ribbon.

The connection will be removed from Connect. This has no effect on web applications and Replication Connections in your Replication Network. This action only removes the web application from being monitored in Connect.

Exploring Connections

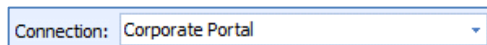
From the Connection Explorer page, you can view the structure and content of any web application you have a connection for.



Viewing Web Applications

To view the structure and content of a web application:

1. In Connect, under the **Home** tab, click **Connection Network**.
2. From the Connection Network menu, select **Connection Explorer**.
3. Below the ribbon, in the **Connection** list, select the web application you want to view. This opens a tree view of the web application.



4. Expand the tree. You can select items in the tree and view their properties in the table below the tree.

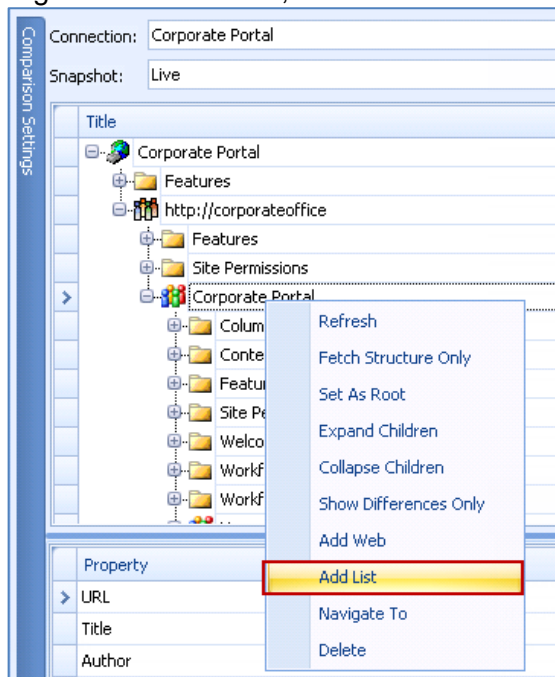
Using Explore Tree Shortcuts

While exploring your connections in Connect there are several shortcuts available. These shortcuts can be accessed when you right-click in the explorer tree. They allow you to alter certain components of your SharePoint directly through Connect, without having to access the SharePoint site.

Add List

This function allows you to add a list, such as a task list or document library, to a SharePoint site via Connect for SharePoint.

1. In Connect, under the **Home** tab, click **Connection Network**.
2. Right-click a web site, select **Add List**.



3. The Add List wizard will pop up, follow the instructions.
4. The Add List Wizard opens. In the List Details window, configure the new list and click create list.

List Details

Name: Fundraiser Announcements

Description: Announcements for Fundraisers

Template: Announcements

On Quick Launch:

Enable Versioning:

Minor Versions:

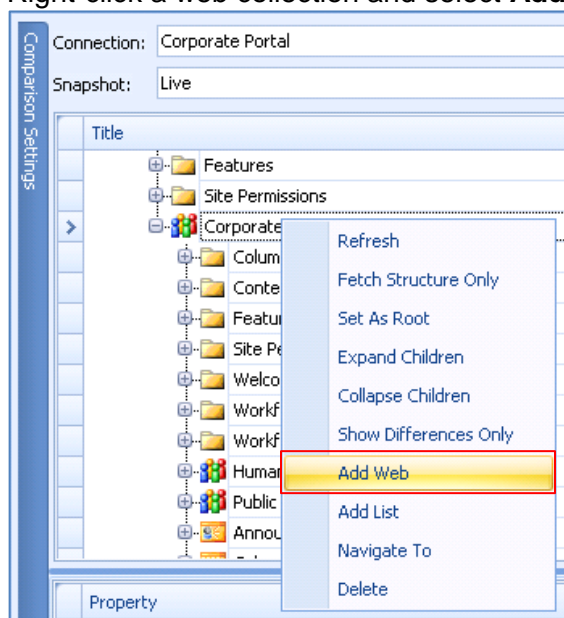
Create List Cancel

5. Refresh your tree and check to see if the list was created.

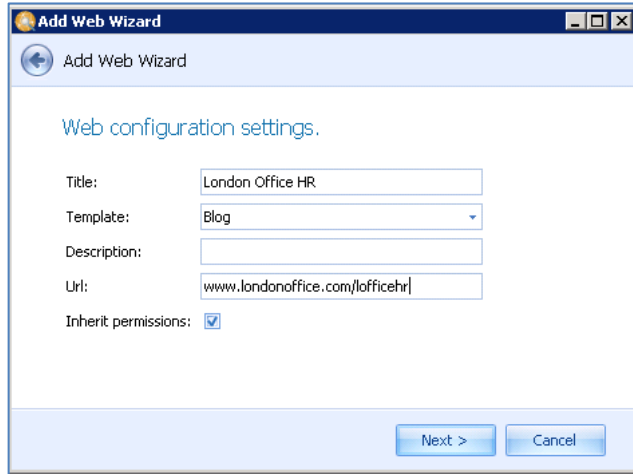
Add Web

This function allows you to add a web site, such as a team site or blank site, to a SharePoint web application via Connect for SharePoint.

1. In Connect, under the **Home** tab, click **Connection Network**.
2. Right-click a web collection and select **Add Web**.



3. The Add Web Wizard opens. In the Add Web window, configure the new list and click create list.

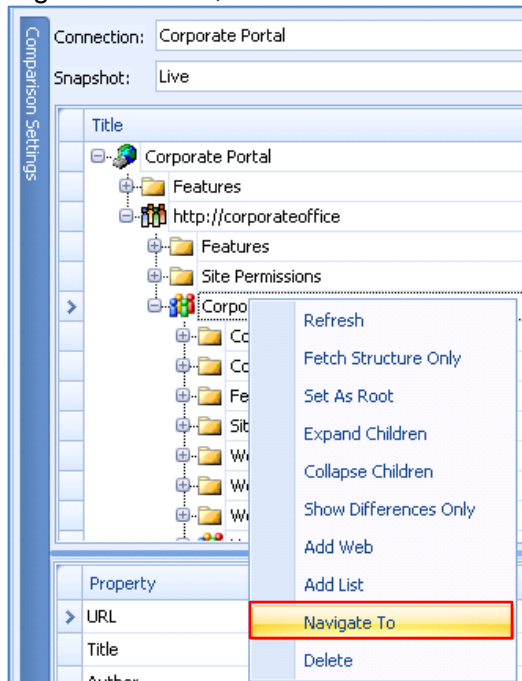


4. Refresh your tree and check to see if the web site was created.

Navigate To

This function navigates you directly to the website view of the list within your SharePoint environment.

1. In Connect, under the **Home** tab, click **Connection Network**
2. Right Click a list, website or site collection, select **Navigate To**.

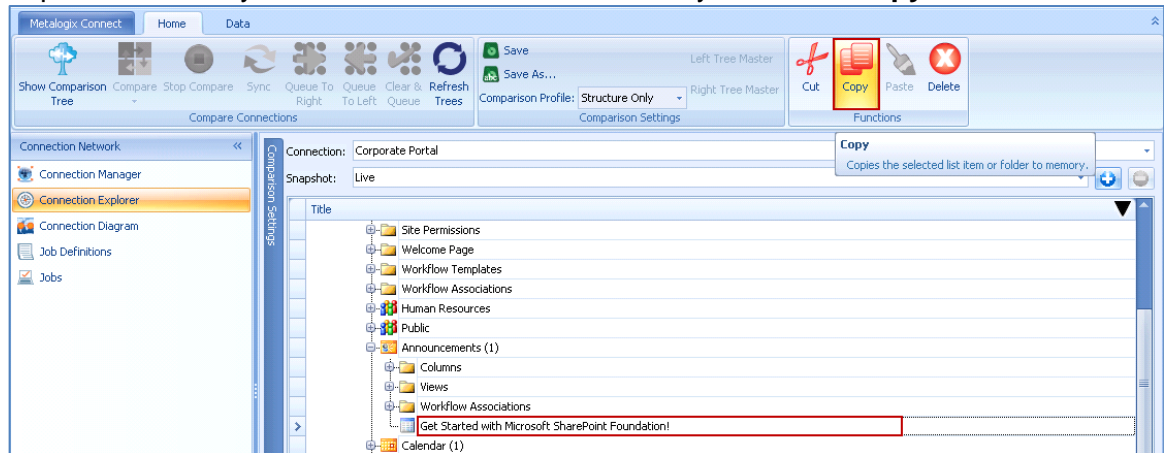


3. This opens a browser window showing the selected content.

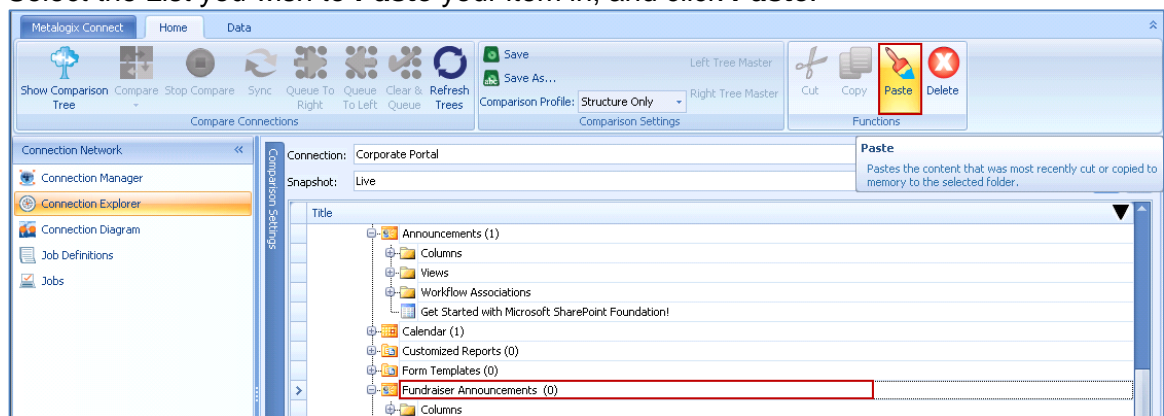
Moving and Copying List Items

This function allows you to replicate content within a tree between multiple lists quickly and efficiently, without having to re-enter the information multiple times within multiple lists. This is done by Cutting or Copying the list item, and pasting it into another list of the same kind within the same tree.

1. This function is performed in Connect, under the **Home** tab, in **Connection Network, Connection Explorer** under the web application of your choice.
2. Expand the list of your choice and select the list item you wish to **Copy** or **Cut**.



3. Click **Copy** if you wish to copy the item and have it remain in the current list as well. Click **Cut** if you wish to remove the item from its current list and place it into a different list.
4. Select the List you wish to **Paste** your item in, and click **Paste**.




5. Click **Refresh Trees** to see the pasted item.

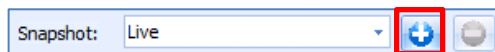
Using Snapshots

Snapshots create an image of your web applications and store them in the Connect database. You can use these snapshots to compare changes in your web application over time and also in some reports.

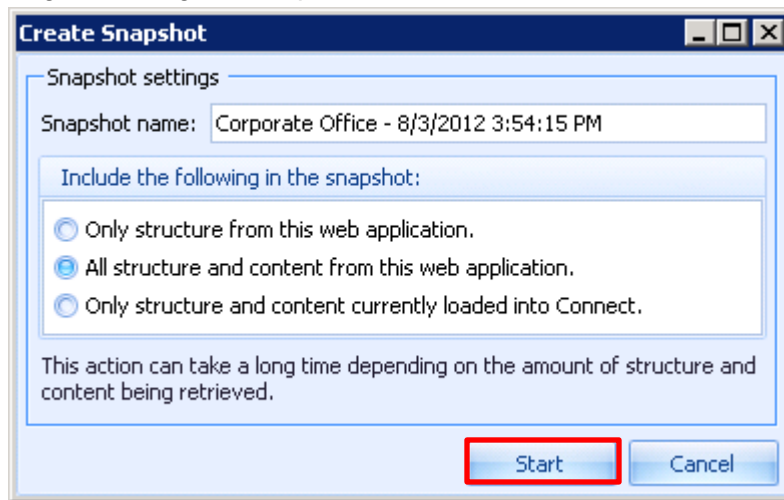
Creating Snapshots

To create a snapshot of a web application do the following:

1. On the Connection Explorer page, click  to the right of the snapshot list. This opens the Create Snapshot dialog.



2. In the dialog, enter a name for the snapshot and select what you want to include in the snapshot. Select what to include in the snapshot based on how you intend to use the snapshot. The more information you include in a snapshot, the longer it will take Connect to retrieve that information from SharePoint. Click **Start** to begin creating the snapshot.



Connect creates the snapshot in the background and you will be able to continue working with Connect as the snapshot is being created.

Note: It is important to note that the amount of time that it takes a snapshot to complete is directly related to the size and complexity of your environment. Taking a snapshot of the structure first can help you see the size and complexity of your environment. Creating a full snapshot including content can take at least ten times longer than creating a snapshot with only structure, for a local SharePoint farm. Remote farms can take longer as network bandwidth will also be a factor.

Viewing Snapshots

To view an existing snapshot, on the Connection Explorer page, select the connection and then the snapshot from the snapshot list.


Reporting on Snapshot Data

Connect includes a variety of built-in reports that can be run on snapshots. These reports can help SharePoint administrators better understand the structure, features, and usage of various SharePoint web applications across their global network. For more information, see "Reporting on SharePoint" on page 21.

Note: Reports rely upon the data from snapshots. Snapshots that contain only structure or data that was previously loaded into Connect can only report on information included in the snapshot.

Removing Snapshots

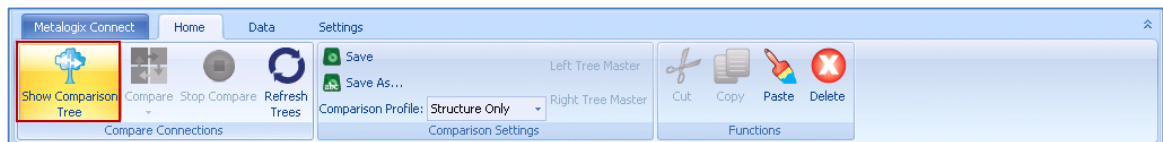
To remove an existing snapshot:

1. Select the snapshot from the snapshot list.
2. Click  to the right of the snapshot's name.

This removes the snapshot from the Connect database.

Comparing Web Applications

1. Click **Show Comparison Tree** in the ribbon. This splits the main screen into two areas for viewing web applications.

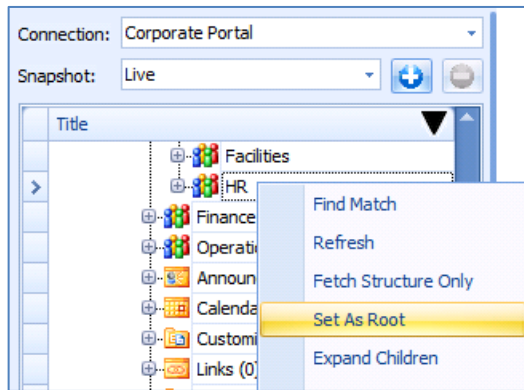


2. Below the ribbon, in the **Connection** list, in the left panel, select the first web application you want to compare. This opens a tree view of the web application. Do the same in the right panel as well for the second web application.

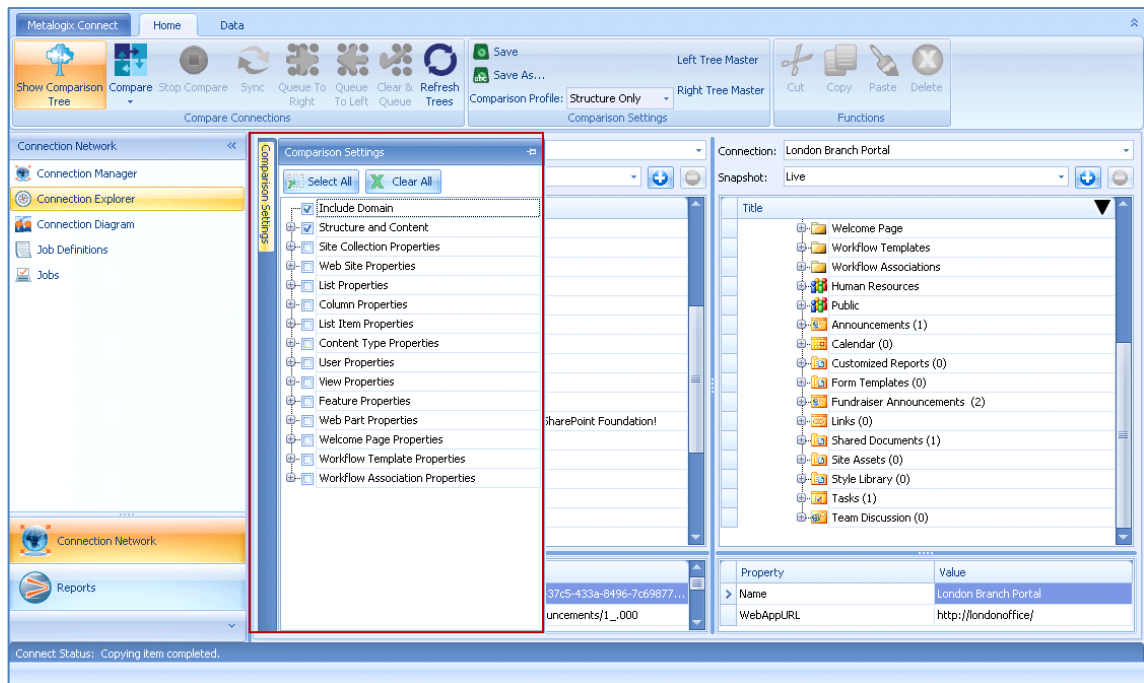


3. Select the snapshots you want to use for the comparison in the **Snapshot** lists.
4. On the left tree, right-click on the web site or folder you want to compare and select **Set As Root**. This allows you to specify the top-most item in the SharePoint hierarchy to use for the comparison. It can also be used to compare

items at different levels of the SharePoint hierarchy, such as comparing a root web site to a sub-site.

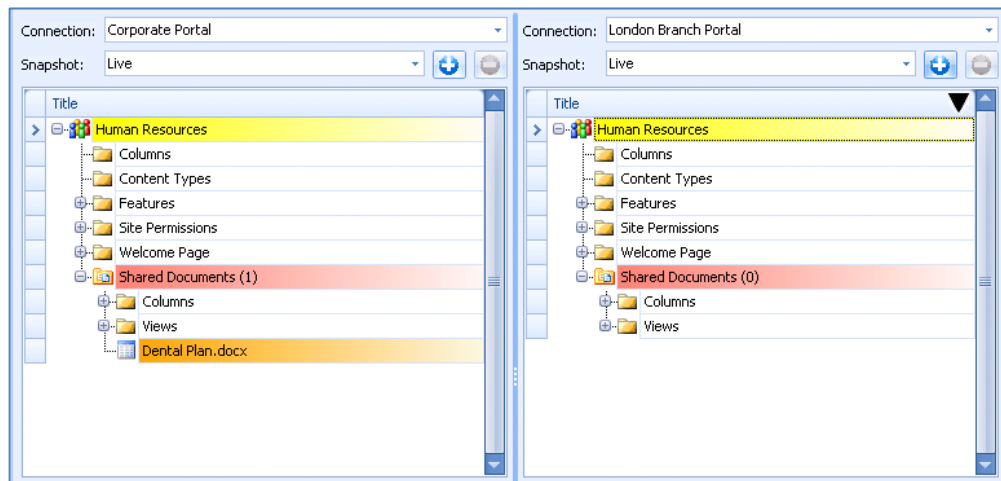


5. On the right tree, right-click the web site or folder you want to compare and select **Set As Root**.
6. On the left hand side of the tree, select the Comparison Settings tab. It will expand into a pane with comparison options, which you can select to specify what you would like to compare.



7. Click outside the Comparison Settings pane to hide the list.
8. If one web application is authoritative, then click **Left Tree Master** or **Right Tree Master** to indicate the authoritative web application. Doing this changes how the comparison results are shown, but does not affect the comparison.

9. In the ribbon, click **Compare** to start comparing the sites.



Connect will start to compare the contents of both trees. Depending on the amount of content in each tree, this can take a while. As Connect finishes comparing branches in the trees, it displays the comparison results. The results are shaded as follows:

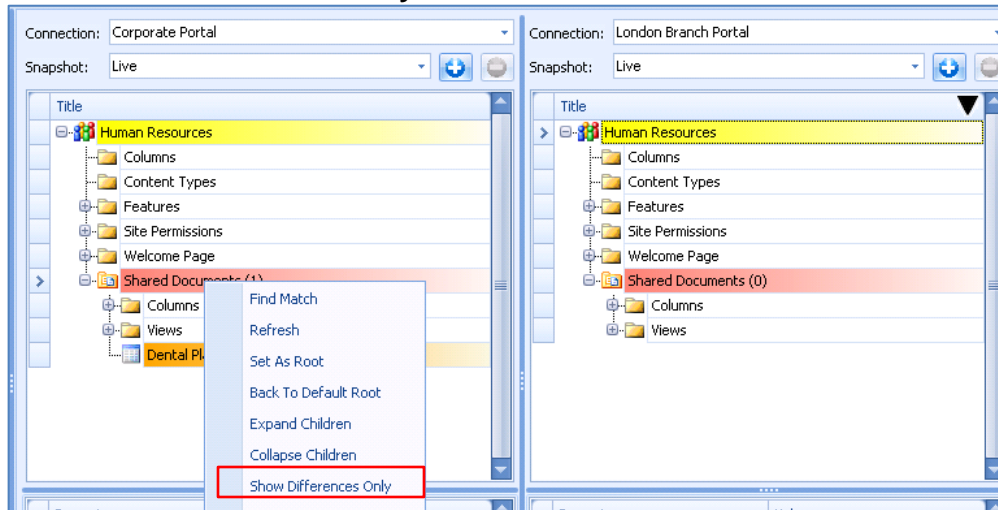
- Yellow: Content under this folder is different.
- Orange: This content does not exist on the other tree.
- Red: Properties for this item are different. Select the item to see its properties.
- Gray: This content does not exist on the master tree.

Viewing Only the Differences

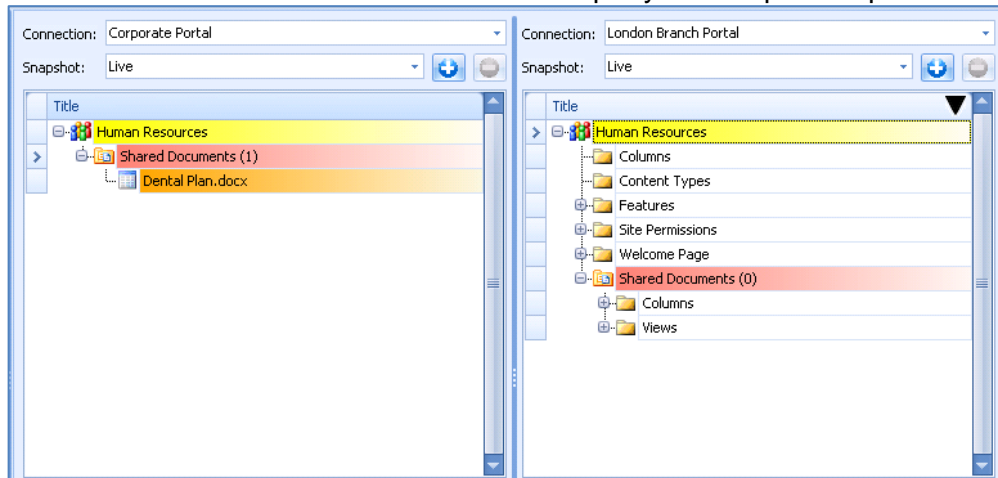
This feature provides you with an easier view of differences in your tree comparisons by hiding the items that are the same.

1. After you have compared two trees, right click the root you have compared or one of its children.

2. Select **Show Differences Only**.

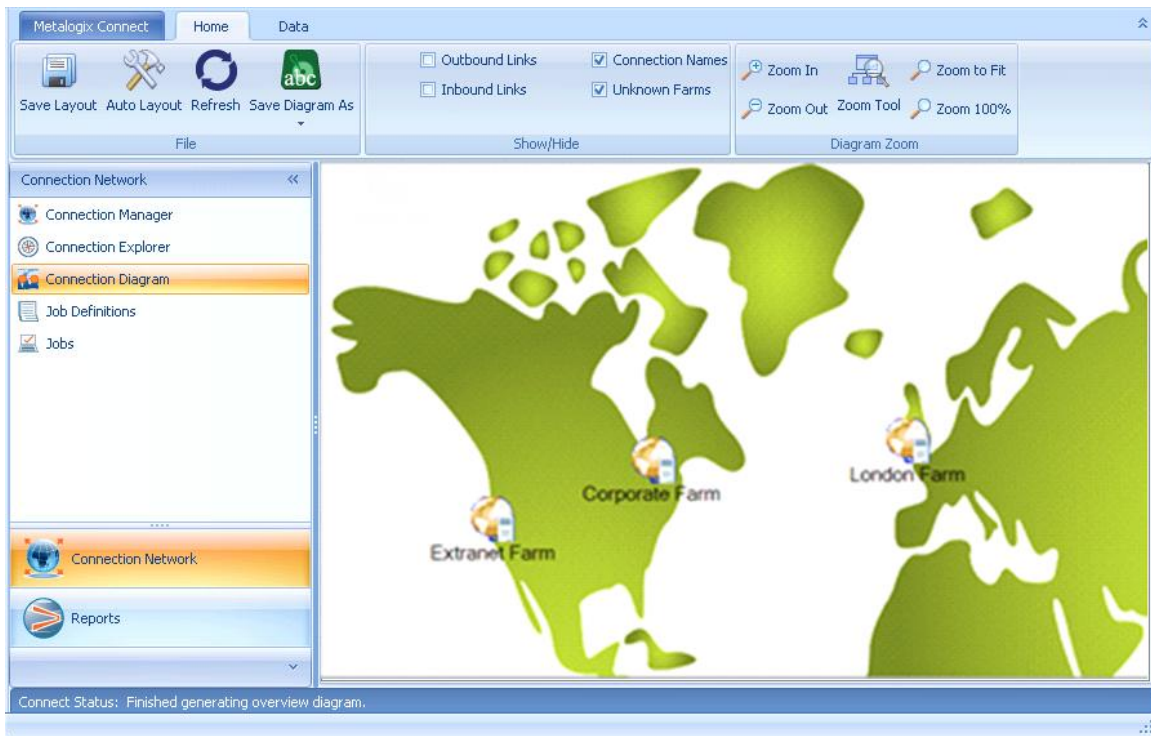


3. This can be selected on one or both trees as per your comparison preferences.



Visualizing your SharePoint Network

The Connection Diagram page allows you to visualize your SharePoint farms.



Creating a Connection Diagram

To create a connection diagram:

1. In Connect, under the **Home** tab, click **Connection Network**.
2. From the Connection Network menu, select **Connection Diagram**.
3. If you want to add a background image, or later change your background image, then right-click on the main area and select **Add Background Image**. Select a background image to use for the diagram. For your convenience, several images are included in `<ConnectFolder>\Images`, where `<ConnectFolder>` is where you installed Connect.
4. Drag each farm to move them in the diagram.
5. Right-click each farm to change how that farm appears in the diagram.
6. Use the **Show/Hide** and **Diagram Zoom** controls in the ribbon to customize the diagram.
7. Click **Save Layout** in the ribbon to save this diagram. After saving the layout, this will be the default connection diagram the next time you open the page.

Saving Diagrams as Images

Connect can save the current connection diagram as an image file. To do this:

1. On the Connection Diagram page, click **Save Diagram As** in the ribbon.
2. Select the image type that you want to save the diagram as.
3. Select the location where you want to save the image and enter a file name.
4. Click **Save** to save the image.

Reporting on SharePoint


Connect includes several built-in reports that summarize your SharePoint environment.

Generating Reports

1. In Connect, under the **Home** tab, click **Reports**.
2. From the Reports menu, select the report you want to view.

Viewing Reports

There are various ways in which to sort and filter your reports.

- Sort reports by clicking on the column heading you want to sort by.
- Filter reports by clicking the filter icon in the top-right corner of any column heading.

- Filter rows dynamically by right-clicking the heading row and selecting **Show Auto Filter Row**. This adds a row between the report and the column headings where you can enter filter criteria for each column.
- Search for values in the report by right-clicking the heading row and selecting **Show Find Panel**. In the panel, enter the phrase to search for.

Snapshot Reports

The SharePoint Snapshot reports show information about your SharePoint environment that is useful to SharePoint administrators looking for a high-level summary of how SharePoint is being used. These reports are generated based on existing snapshots taken in Connect and are not based on the current, live, state of SharePoint. See "Using Snapshots" on page 14 for more information.

Snapshot reports include the following kinds of reports:

Report Name	Contents
SharePoint Snapshot Summary	Provides an overview of your SharePoint environment. Including number of site collections, websites, lists, folders.
Features by Farm	Provides an overview of your SharePoint

Report Name	Contents
	features activated by farm. You can search your scope according to web application, site collection, or web site.
Site Collection by Farm	Provides an overview of your site collection by farm. This report details the owner of the site collection, and content database information for the site collection.
Websites by Farm	Provides an overview of the website located within a farm. This includes the website author, list item file sizes, and url details.
Lists by Farm	Provides an overview of all lists within a farm. This includes lists by site, items checked out by list/site, the number of lists over a variable amount of items, and document library item count and size by site.
Content Databases by Farm	Provides an overview of content databases on a farm. This includes the statuses of content databases and site collection counts.

When reading snapshot reports, note that:

- Snapshot reports only show values for data that is included in the snapshot. If you create a snapshot using only structure, then you will not be able to see list item details, such as the number of checked out items in a list or the total size of library items.
- Some snapshot reports show an approximate size of SharePoint web sites and lists. These are calculated using individual list items in the snapshot and do not include recycled items or older versions of library items. The calculated sizes may not exactly match the size of content stored in the SharePoint database.
- Snapshots taken with earlier releases of Connect may not display information for all of the values in a report.

Enabling Connect for Replicator

Metalogix Connect for SharePoint allows you to enable Connect for Replicator. This product requires that you install some edition of Metalogix Replicator on your SharePoint farms.

If you decide to evaluate or purchase this product, then you can activate it on the About Connect page. To do this:

1. In Connect, under the **Metalogix Connect** tab, click **About**.
2. In the **Connect for Replicator** row, check the box in the **Enabled** column.
3. Refresh any existing connections using the steps described in "Refreshing Connections" section.

After enabling the product, you will see new options under the **Home** tab. For more information on using this product, see its respective user guide.