

# Content Migration Notes

This document covers the migration of Salesforce Content from the source to a destination org using the Metazoa Snapshot data migration tools.

## Required Permissions

First, get every possible permission for the source and destination orgs. They can be found in multiple places. These permissions impact visibility on the source org, so you must have them before building datasets.

## Setup / User

Be sure you have "Salesforce CRM Content User" checked.

## Setup / System Permissions

- Modify All Data
- Manage Applications
- Query All Files
- View All Data

## Setup / Content Permissions

Be sure there is an administrative permission available that has every possible user privilege. Remember the name of that permission. Then navigate to Salesforce Classic Files. Make yourself a member of every Content Workspace. Assign the permission created above to your User. Do this for every Content Workspace on the source and destination orgs. You might be able to do this with the API by using the ContentWorkspaceMember object.

## Migrate ContentVersion

When you migrate ContentVersion records they automatically create a ContentDocument. You cannot migrate ContentDocument directly. You should filter the ContentVersion by IsMajorVersion to guarantee that they do not create multiple versions on the destination:

```
IsMajorVersion = true AND ContentSize < 40000000
```

You can group ContentVersions by year and related objects like this:

```
FirstPublishLocationId IN (SELECT Id FROM Account) AND  
CALENDAR_YEAR(CreatedDate) = 2023
```

## Migrate ContentWorkspace

You need to migrate ContentWorkspace and every other polymorphic object that has Content. That way, when the ContentDocumentLink and ContentWorkspaceDoc are migrated, all the required objects will be available by name.

## Migrate ContentWorkspaceDoc

This is a simple junction object between ContentDocument and ContentWorkspace. These junctions add documents to libraries. When a file is published to a library, Salesforce will create a ContentDocumentLink to the ContentWorkspace and a ContentWorkspaceDoc.

## Migrate ContentDocumentLink

This is a simple junction object between the ContentDocument and a polymorphic LinkedEntity that could be any User, Record, or Workspace. The ContentDocument must be matched by Title. You might try to match by ContentSize or CreatedDate to avoid duplicates. The LinkedEntity could be matched by External ID with special handling. Both of these fields are required to create the ContentDocumentLink. There are SOQL restrictions on this object. Here is an advanced SOQL query that will work for ContentDocumentLink:

```
LinkedEntityId IN (SELECT Id FROM Account)
```