

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 / User Interface

Be sure you have "Enable "Set Audit Fields upon Record Creation" checked.

Be sure you have "Update Records with Inactive Owners" checked.

Setup / System Permissions

- Query All Files
- View All Data
- Modify All Data
- Customize Application
- Update With Inactive Owner
- Create Audit Fields

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 and ContentNote

Set up an External ID for ContentVersion and match by External ID. 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 you do not create multiple versions on the destination:

```
IsMajorVersion = true
```

Be careful moving gigantic ContentVersion and ContentNote records. Be sure to filter by ContentSize. Content over 37 MB should be moved via the Setup Menu. However, Snapshot will support binary transactions for ContentVersion, ContentNote, Attachment, and Document objects up to 1 GB. Be sure you have lots of RAM and a powerful workstation for this use case.

```
ContentSize < 37000000  
ContentSize < 100000000
```

You can also group ContentVersion and ContentNote records for migration by year and related object 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 first. 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)
```