

Metalogix® Replicator 7.4

September 2023

Replicating Managed Metadata

Managed Metadata is a hierarchical collection of centrally managed terms and keywords that you can define, and then use as attributes for items. It includes terms and term sets, which are specific collections of terms used to differentiate lists. The following article briefly reviews how Replicator functions with regards to the SharePoint Managed Metadata service.

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Replicating and Managed Metadata

The following is a summary of the items that Replicator does and does not replicate, with regards to Managed Metadata:

- Replicator **does** replicate list items that use Managed Metadata terms or keywords.
- Replicator **does** add missing terms to the target term store when replicating list items that use terms.
- Replicator **does** replicate renames of term sets and terms, but only if the term sets and terms were created at the target by Replicator. If they were not replicated then SharePoint sets the ID and replicator cannot find it, as it has been assigned a new name.
- Replicator **does** replicate term groups.
- Replicator **does not** replicate renaming of term groups. A new item will always be created at the target.
- Replicator **does not** replicate additions to managed metadata terms in site settings.
- Replicator **does** replicate farm term stores.
- Replicator **does** replicate Navigation terms as long as the site collection settings for navigation have already been set up on the source and target.

We first try to match term store items by GUID. If we can't find a match by GUID, then we try to match by the text itself. If both of these matches fail, then we will insert the term into the target term store.

If the term stores are not the same on both the source and the target web applications, when replicating list items that have managed metadata column types, Replicator will add the item's term store value to the target term store. Replicator will **not**, however, replicate the entire term store.

It is also important to note that in order for Replicator to find the term store on the target, the names must match, otherwise we will default to the term store set as the default store. To have Replicator insert new terms into the target term store, the account running the Metalogix Replicator service must be a member of the Term Store Administrators group in SharePoint.

Queuing the Term Store

Users can schedule their term stores by queuing the ManagedMetadataAdd event (Event ID: 6000), using the Schedule-ReplicatorMap (previously queue-replicatormap) Powershell command.

PowerShell Code Example:

```
Schedule-ReplicatorMap -Url "http://localwebapplication" -MapFamily  
"MapFamilyName" -Type Webapplication -IncludeEvents 6000
```

This code example is similar to scheduling immediate replication (or run now).

Queuing the Navigation Term Event

Users can queue the Navigation terms by queuing the NavigationTermStoreAdd event (Event ID: 6010), using the Schedule-ReplicatorMap (previously queue-replicatormap) Powershell command.

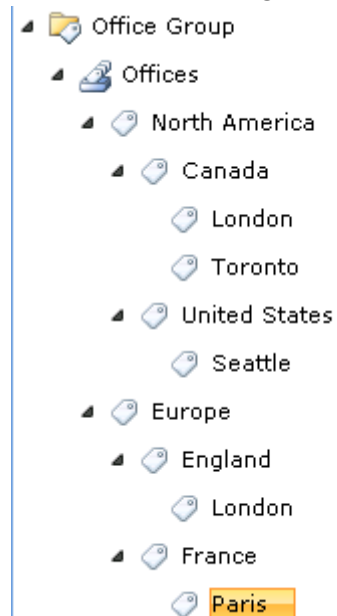
PowerShell Code Examples:

```
Schedule-ReplicatorMap -URL "http://localwebapplication" -MapFamily  
"MapFamilyName" -IncludeEvents 6000 -JobName "Europe to USA" -ScheduleType  
Weekly -Day "Saturday" -Hour 23 -Minute 45
```

This example will schedule a recurring queuing event which will happen on a weekly basis at the specified time.

Managed Metadata Rule

Consider the following Managed Metadata Term Set:



Administrators can configure rules to use the hierarchy by separating levels in the hierarchy with a colon.

Replicator allows you to use rules to match Managed Metadata columns with single values as follows:

- "Office equals Toronto" only matches the Toronto term.
- "Office equals London" matches both London terms.
- "Office equals Europe:England:London" only matches the London term under England.
- "Office equals Canada" only matches the Canada term, not any of its children.
- "Office contains Canada" matches the Canada, London, and Toronto terms.
- "Office begins with Europe" matches the Europe, England, London, France, and Paris terms.
- "Office begins with Europe:England" matches the England and London terms.
- "Office begins with England" matches no terms, since it's not a root level term.
- "Office ends with s" matches the United States and Paris terms.
- The "not equals", "does not contain", "does not begin with", and "does not end with" operators match all values not matched in the respective examples above.
- The "is less than", "is less than or equal to", "is greater than", and "is greater than or equal to" operators are ignored and do not match any columns.

Note: The full hierarchical path for terms is used when matching managed metadata values, regardless of the display format set for the column.

List Items with Multiple Managed Metadata Values

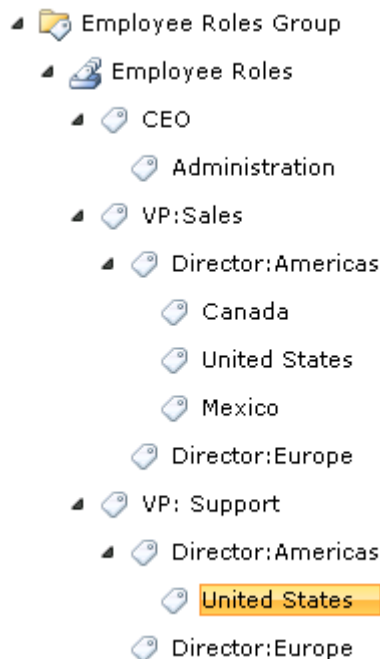
For Managed Metadata columns with multiple values, Replicator will iterate over each selected managed metadata value for the list item. If any metadata value for the item matches a rule condition, then we will match the entire item. To be more selective, you can add multiple rule conditions. Unrelated to managed metadata, all rule conditions must match a list item before the rules actions are processed.

To require a list item to have multiple Managed Metadata values, enter distinct rule conditions. For example, to match only list items marked for both Toronto and Seattle, enter the following rule conditions:

- Rule Condition 1: Office equals Toronto
- Rule Condition 2: Office equals Seattle

Terms with Embedded Colons

Any terms that include a colon must be surrounded with double quotes in the rule condition. For example, consider the following term set:



To match the Administration term under CEO explicitly, enter the following rule condition:

- Role equals CEO:Administration

To match the Canada term under VP: Sales explicitly, enter the following rule condition:

- Role equals "VP: Sales":"Director: Americas":Canada

Scheduling Synchronization of Managed Metadata



NOTE: Scheduling or Queuing of Managed Metadata is only available for Web Application scope map families.

In order to schedule a job for the synchronization of your managed metadata, do the following:

1. On the Central Administration page, under "Metalogix Replicator", click **Manage Map Families**.



Metalogix Replicator
[Configure web application](#) | [Manage replication groups](#) | [Manage replication connections](#) | [Manage classifications](#) | [Manage map families](#) |
[Monitor Replicator](#) | [About Replicator](#)

- Manage Map Families ⓘ

Manage Map Family: Portal Map Family ①/

- ## Configure Content Synchronization Job

5. Under the Replication Events section, select the **Show All Queueable** events checkbox. Under Managed Metadata, select "all events" or click **Advanced** if you would like to see the Managed Metadata events available for synchronization. Be sure to select the "Managed Metadata Add" event.

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scheduled to occur repeatedly - daily, weekly, or monthly.

Content Synchronization Job Schedule

Set the schedule you wish to use for this job.

Select "Immediately" to run this job now.

Select the "At set date and time" option to schedule the job to run once at a future date and time.

Select either the "At set time interval", "Daily", "Weekly", or "Monthly" options to run the job on a repeating schedule at a set time interval.

Schedule Job:

- ☒ Immediately
- ☐ At set date and time
- ☐ Daily
- ☐ Weekly
- ☐ Monthly

Enable this scheduled Queue Map Job:

- ☒ Yes
- ☐ No

7. Click **Ok** to finish scheduling the job.

Monitoring Content Sync Jobs

Do the following in order to Monitor current Content Sync Jobs.

1. On the Central Administration page, under "Metalogix Replicator", click **Manage Map Families**.



2. To view all Content Sync Jobs for all map families, select **Manage Content Sync Jobs** button available on the Manage Map Family page.

Manage Map Families

Metalogix Replicator										
Add Map Family Remove Selected Map Families Replicate Now Reset Customized Maps Manage Content Sync Jobs Web Application: http://corporateoffice/										
<input type="checkbox"/> Map Family	Status	Customized Maps	Queue Map Jobs	Scope	Root Replication Map URL	Schedule	Replication Group	Replication Mode	Modified Date (UTC)	Actions
<input type="checkbox"/> Portal Map Family	Enabled	0	0	SiteCollection	/	Immediately	Worldwide Connections	Direct	6/27/2019 2:50:09 PM	View Maps
				WebApplication	/	Immediately	Worldwide Connections	Direct	6/20/2019 2:02:45 PM	View Maps

- o To view the content sync jobs for a specific map family, select View Maps for that map family, and then select **Manage Content Sync Jobs**.

Manage Map Family: Portal Map Family

Metalogix Replicator		Web Application: http://corporateoffice/	
Manage Content Sync Jobs			
Map Family Name: Portal Map Family		Root Replication Map URL: /	
Find Maps			
Map URL: <input type="text"/>		<input type="button" value="Search"/> <input type="button" value="Reset"/>	
<input type="checkbox"/> Corporate Portal - Web Application Map ...		<input type="checkbox"/> Corporate Portal - Web Application Map ...	

3. The Manage Content Synchronization Jobs page allows users to manage scheduled queue jobs. This page is accessed by selecting **Manage Content Sync Jobs** on the Manage Map Family page.

Manage Content Synchronization Jobs

Metalogix Replicator							
Run Selected Job Now Remove Selected Map Job Web Application: http://corporateoffice/							
Job Name	Map Family Name	Map Name	Status	Schedule	Next Scheduled (UTC)	Last Run (UTC)	Actions
<input type="checkbox"/> corporate office sync	Portal Map Family	Portal Map Family - / - Web Application	Enabled	Daily	4/3/2019 4:00:00 PM	N/A	Edit Job

Refer to the following table for information about the Manage Content Synchronization Jobs screen.

Parameter	Description
Web Application	Displaying jobs for the selected web application.
Run Selected Job Now	Prompts the selected synchronization job to run immediately.
Remove Selected Map Job	Removes the selected synchronization job.
Job Name	The Synchronization Job's name.
Map Family Name	The parent map family name for which this job is being applied.
Map Name	The map name for which this job is being applied.
Status	The current status of the Synchronization Job.
Schedule	The type of schedule that has been configured for this synchronization job.
Next Scheduled	The date when the job is set to run next. Time shown in UTC.
Last Run	The last time the job was run. Time shown in UTC.
Actions	Selection Edit Job will open the Configure Content Synchronization Job page for this specific job, allowing users to edit the job.