

Metalogix® StoragePoint 5.9.1

## Evaluation Guide



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Metalogix® StoragePoint

Updated February 2020

Version 5.9

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# Evaluation Guide

## Introduction

This document provides new StoragePoint users with the opportunity to evaluate StoragePoint within their own SharePoint environment. It will lead users through a variety of common StoragePoint uses such as uploading and downloading a file, bulk externalization of BLOBs, and Single Instance Storage.

## Prerequisites

In order to perform the evaluation scenarios for StoragePoint, outlined in this document, you must first install and configure StoragePoint. See the *Metalogix StoragePoint Reference Guide* for detailed instructions about the installation and configuration of StoragePoint. It is available on the Metalogix [website](#).

The scenarios in this document require your environment to contain the following:

- A doc library containing documents
- System Cache
- Two Primary Endpoints
- An Archive Endpoint
- Storage profile that has a Web Application scope

## Upload and Download a File

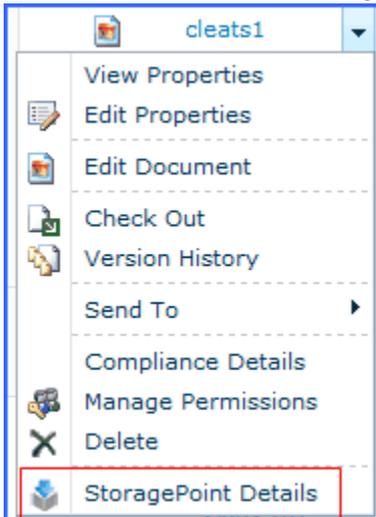
This scenario demonstrates the basic functionality of StoragePoint by uploading a document into SharePoint, confirming the location of the document, and confirming that it can be opened from SharePoint. Use a Microsoft Office document in this scenario as Office documents demonstrate that integration with Microsoft Office continues to function properly.

1. Navigate to a document library within the SharePoint site on which you have configured StoragePoint to externalize BLOBs. If your site does not have a document library, create one now.
2. Upload a document to the Document Library.

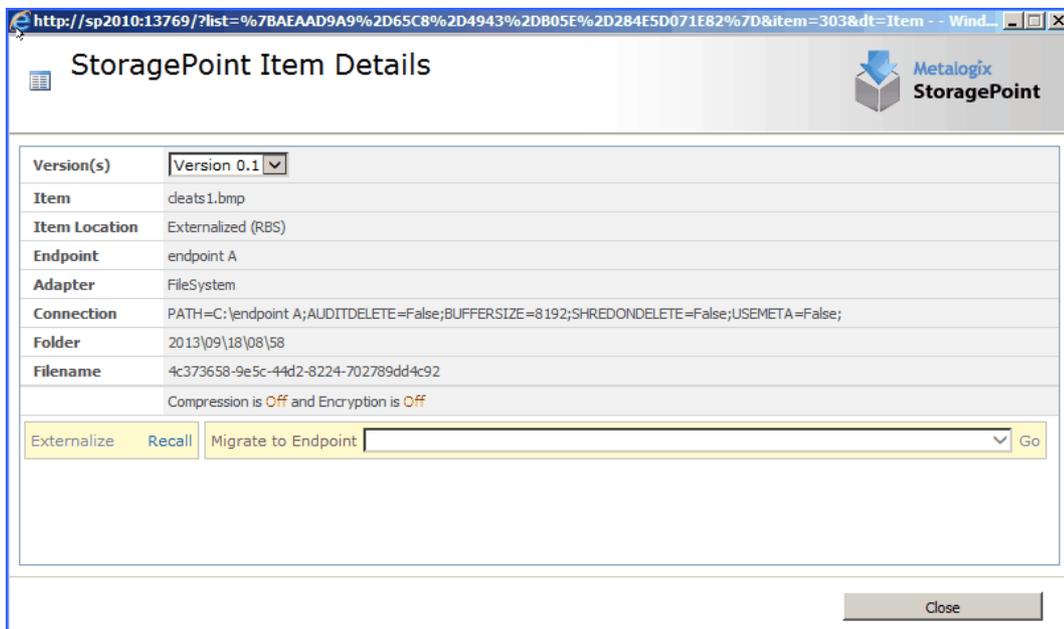
### Confirmation

1. Confirm that the document has been offloaded by accessing the Document Context menu and selecting StoragePoint Details. You will need to be logged in as the farm administrator

to be able to access the StoragePoint Details Panel.



2. The StoragePoint Item Details window should indicate that the BLOB has been externalized.



3. Open/download the file from the SharePoint Document Library to confirm that the file is accessible.
4. The file should be accessible and open without error.

In this scenario you:

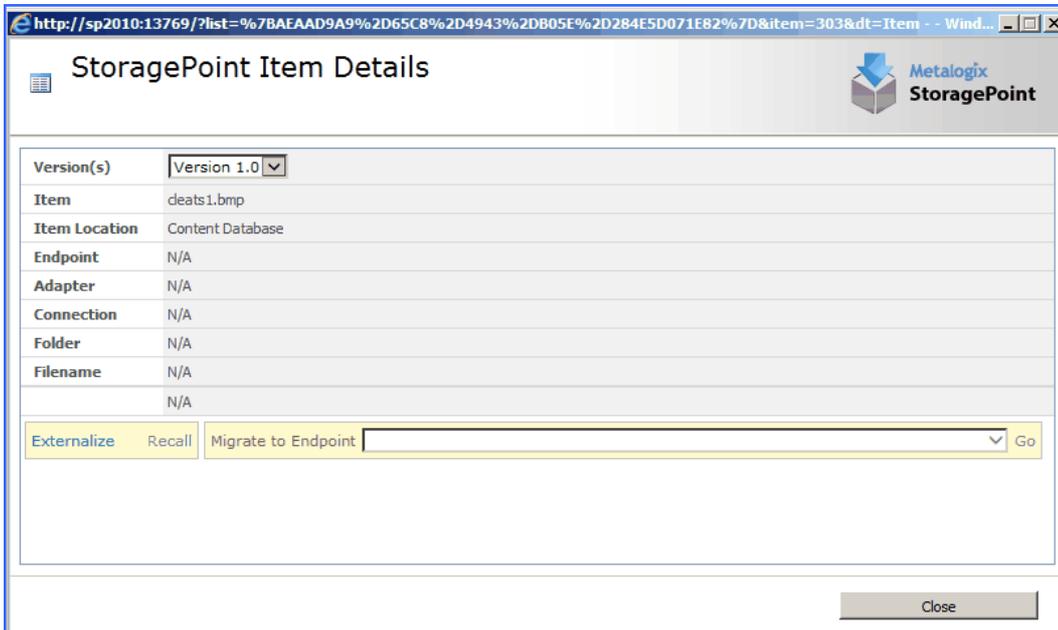
- ✓ Successfully uploaded a document to a SharePoint document library, found on a site where StoragePoint has been installed and configured.
- ✓ Checked to make sure that the BLOB for the uploaded file was successfully externalized, and the file opened without error after externalization.

## Bulk Externalize Existing BLOBs

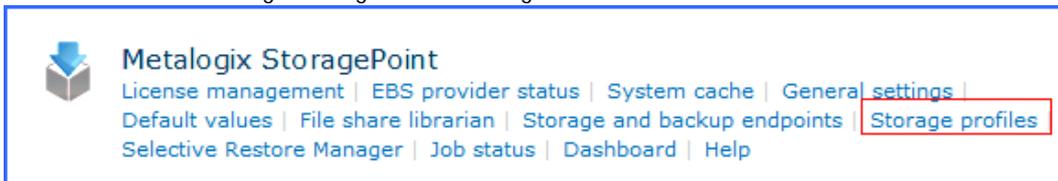
This scenario demonstrates how to configure the BLOB Externalization job, which will externalize existing BLOBs previously stored within the SharePoint Content Database, prior to installation and configuration of StoragePoint. Externalizing existing BLOBs from the SharePoint Content Database will allow you to shrink your SQL database and reclaim storage previously occupied by large content databases.

To run through this scenario you must have a site that contained docs before a StoragePoint profile was configured.

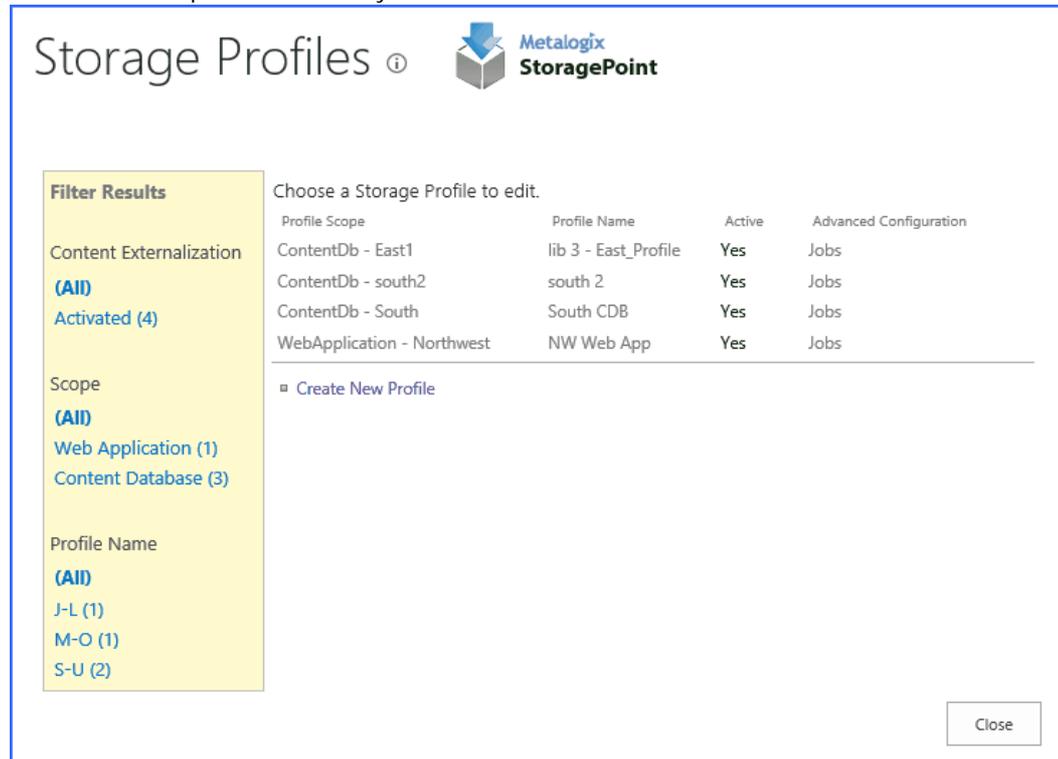
1. Check StoragePoint Item Details for your existing Documents. The item's location should be Content Database.



2. Open Central Administration and navigate to Application Management and then Storage Profiles, found under the Metalogix StoragePoint heading.



3. Click Jobs for the profile for which you wish to externalize BLOBs.



- On the Job Configuration page, scroll down to the StoragePoint BLOB Externalization section and from the “on Server” dropdown list, select the web front end server on which you wish to run the job.

**StoragePoint BLOB Externalization**  
Provide StoragePoint BLOB Externalization timer job settings in this section. This timer job will externalize the content BLOBs for existing items in SharePoint.

Schedule this process to run: [Calendar icon] 12 AM [Dropdown] 00 [Dropdown]

on Server **sp2010** [Dropdown]

**Advanced Job Settings** (Show)

Clear Analyze & Estimate Externalize Now

- Click the “Show” link next to “Advanced Job Settings” in order to set up notifications. Enter the number of processing threads to use during job execution. It will default to one thread per processor core if no value is supplied.

Schedule this process to run: [Calendar icon] 12 AM [Dropdown] 00 [Dropdown]

on Server **sp2010** [Dropdown]

**Advanced Job Settings** (Hide)

with [Input] Processing Threads  
*If blank, will default to one thread per processor.*

in Job Role **Standalone** [Dropdown]  
*Standalone is the default and will process all work in a single Job. Master will coordinate work across one or more worker WFE's.*

Send Completion Notice:  
 Always  Only when errors occur

To:  
 Default notification contacts

Additional Contacts  
[Text area]  
*Provide a semi-colon delimited list of e-mail addresses.*

Clear Analyze & Estimate Externalize Now

- Click the Analyze and Estimate button to display an estimate of the space savings that will result from running the externalize job.

Clear Analyze & Estimate Externalize Now

- Click the Externalize Content Now button in order to run the job immediately. Once you click this, you will see a time stamp for your externalization job, and a link to open the Job Status page if you want to watch the job complete.

Clear Analyze & Estimate Externalize Now

Externalization job will run 19/09/2013 @ 22:48  
(Job Status)

## Confirmation

Check StoragePoint details for pre-existing documents, the item's location will now be “Externalized (RBS).”

In this scenario you:

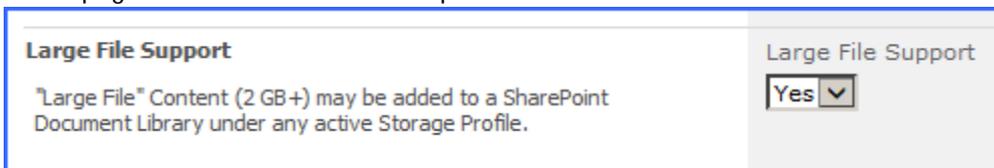
- ✓ Successfully ran the timer job to externalize BLOBs for the documents that existed on your web application prior to the installation and configuration of StoragePoint.

# Large File Support

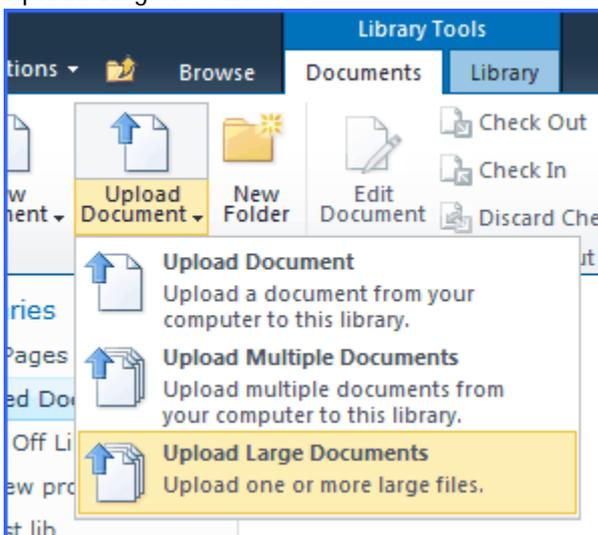
This scenario demonstrates StoragePoint's capability to upload and store files larger than the maximum upload size limit set for the web application, using Large File Support. In order to complete this scenario, you must have a file that is larger than the web application's upload size limit, to upload to your document library.

If Large File Support is enabled, the Unused BLOB Cleanup job scans all content for orphaned BLOBs. If a Site Collection has recently been deleted, SharePoint doesn't delete it until the Gradual Site Delete timer job has been run. The Unused BLOB Cleanup job may return errors until the deleted site collection is removed by SharePoint. It is recommended that you run the Gradual Site Delete timer job manually, after deleting a Site Collection.

1. Navigate to SharePoint Central Administration.
2. Navigate to Application Management and then to General Settings found under Metalogix StoragePoint.
3. Scroll down on the General Settings page. "Large File Support" is located closer to the end of the page. Select Yes from the drop down list.

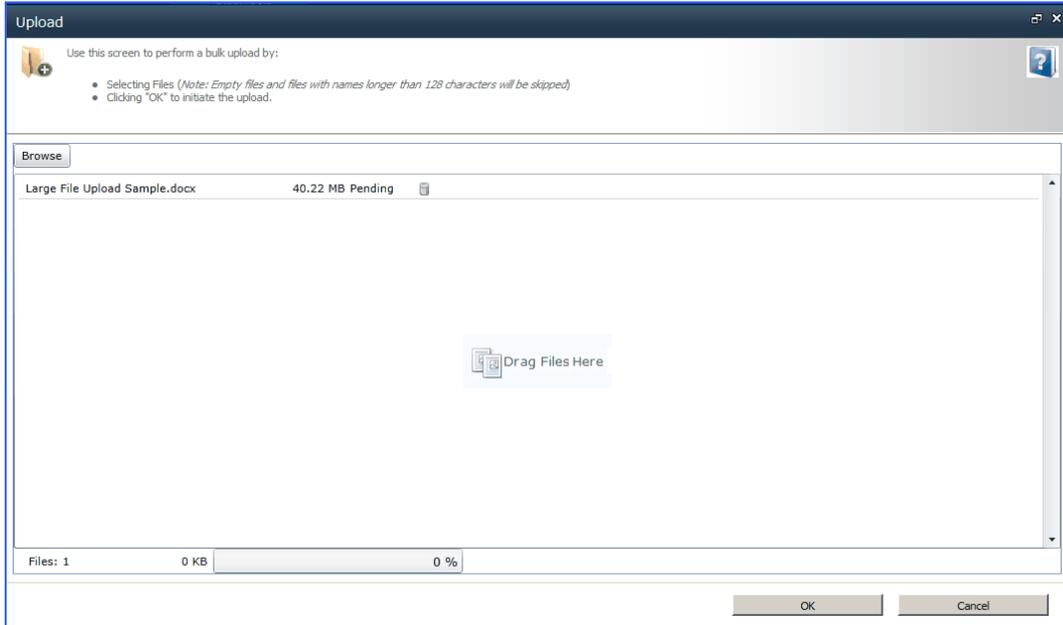


4. Click Save to save your setting changes.
5. Navigate to a SharePoint Document Library where you have access to upload files.
6. A user who has access to upload files in a Document Library will see an option to upload large files with a different type of interface. This tool is only available in the SharePoint Document Libraries.
7. On SharePoint 2010, from the Documents tab, in the Upload Document dropdown, click Upload Large Documents.



On SharePoint 2013, in the Files tab, click Upload Large Documents.

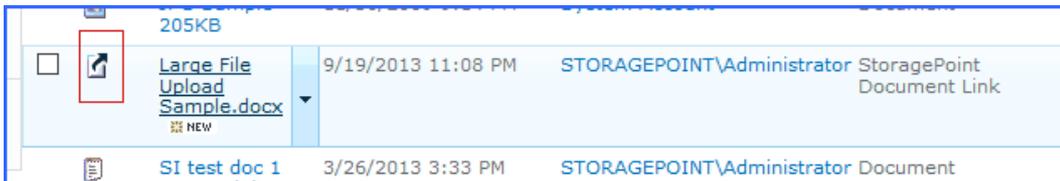
8. A new window opens. Drag files from the Windows Explorer onto this page and click OK.



Your file will now be uploaded.

## Confirmation

1. In the document library, you will see an entry in the library; an aspx file linking to the large file.



2. Click the name of the file and you will then be prompted to open the document or save it.
3. Select Open or Save to verify that the large document is the one you uploaded.

In this scenario you:

- ✓ Enabled uploading for large documents.
- ✓ Uploaded a large document to ensure that the feature does in fact upload the document.

## BLOB Migration

This scenario demonstrates the configuration and execution of a BLOB Migration job. The BLOB Migration job moves the BLOBs from one or more Source Endpoints associated with the storage profile to a single Destination Endpoint. Even though all storage endpoints are available, only BLOBs associated with the storage profile will be migrated.

This scenario requires that you have another storage endpoint set up to use as a destination for migration.

1. Navigate to Central Administration, Application Management.
2. Navigate to Storage Profiles under the Metalogix StoragePoint section.
3. Click Jobs for the profile for which you wish to configure BLOB migration.
4. Note the Timer Job Scope (at the top of the page) of the Storage Profile selected.

5. "StoragePoint BLOB Migrate" is located approximately half way down the Job Configuration page.

6. Select the Source Endpoint (where the BLOBs are moving FROM) from the dropdown.

7. Select a Destination Endpoint (where the BLOBs are moving TO) from the dropdown.

8. Click the Run Now button to run the bulk migration job immediately.

## Confirmation

1. Check your Destination Endpoint in windows explorer to see whether the BLOBs from the Source Endpoint have been migrated.
2. Go to the documents of the site collection to verify the current location of the BLOB from the StoragePoint details menu.

In this scenario you:

- ✓ Configured a BLOB migration job and successfully migrated BLOBs over from a source endpoint to a destination endpoint.

## Configuring Archiving Rules

This scenario demonstrates the configuration of Archiving rules.

Only one rule can be created per scope. The archiving scope cannot be broader than the profile scope.

You must have a second endpoint in order to complete this scenario.

1. Navigate to Central Administration, Application Management.
2. Navigate to Storage Profiles, found under the Metalogix StoragePoint section.
3. Click on the link to open the profile.
4. Scroll down to the Archiving Configuration section and expand.

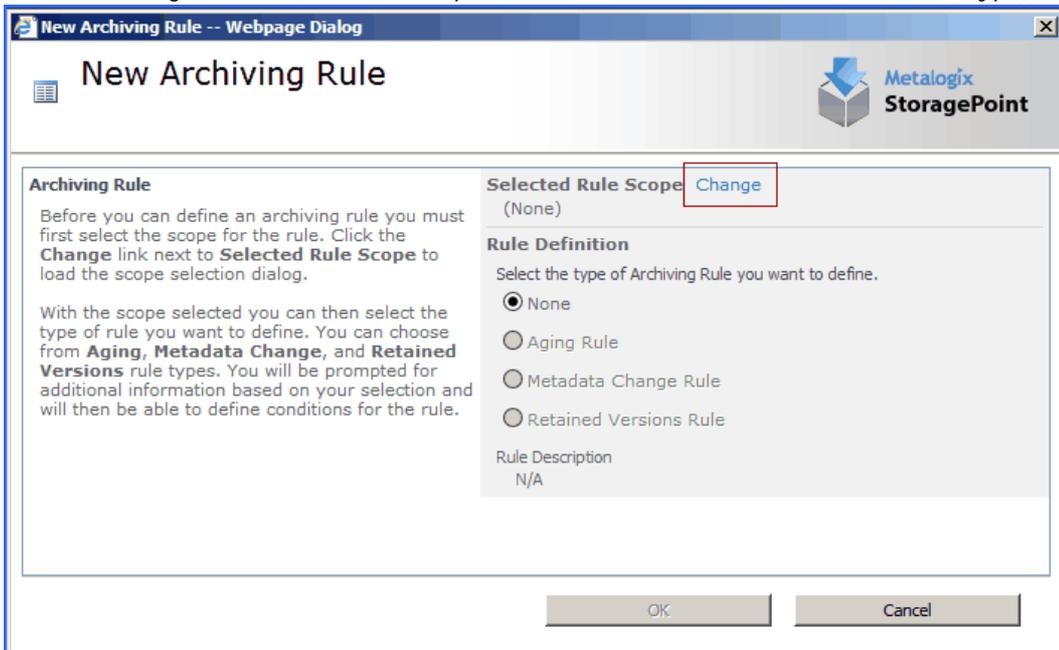
5. Set "Enable Archiving" to Yes.



6. Click New Rule to create a new archiving rule.

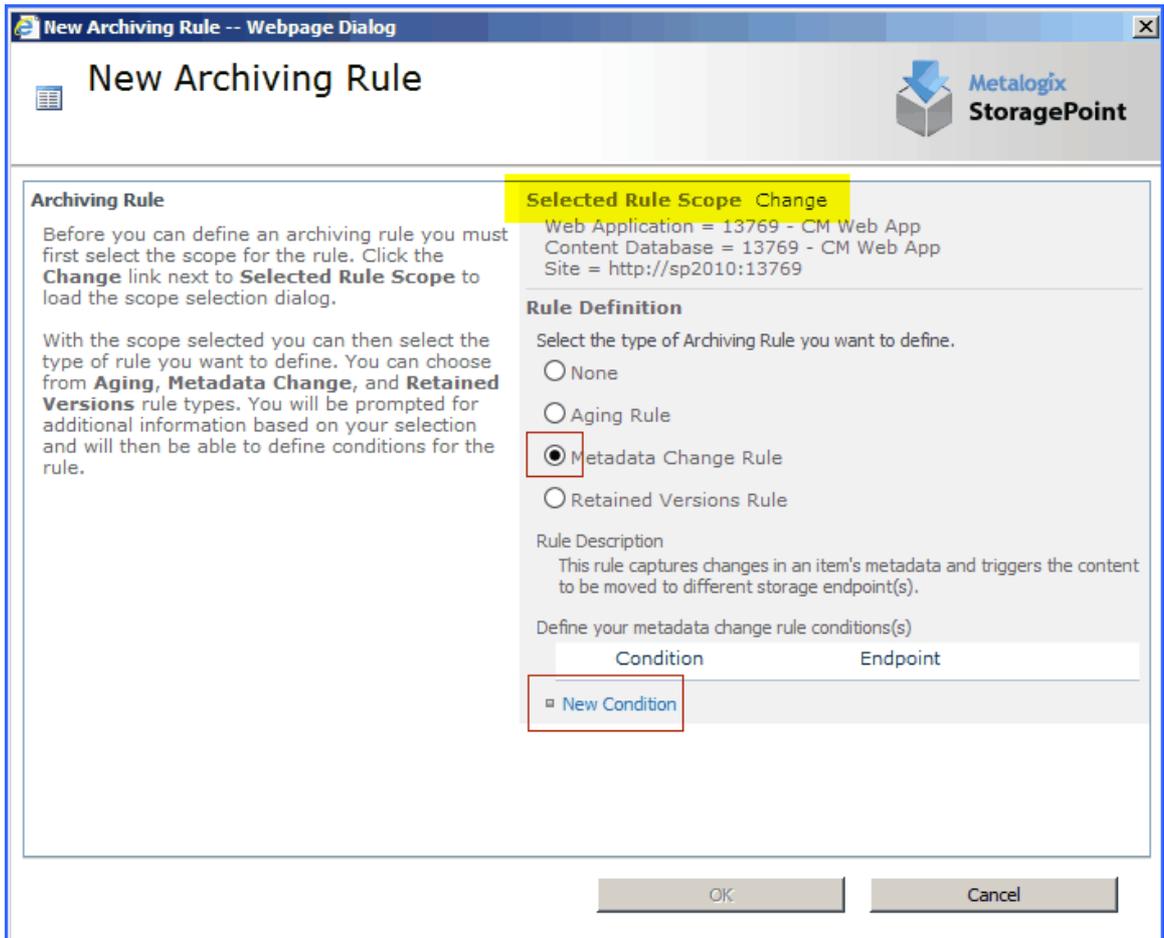


7. Click the Change link to select the scope (i.e. site collection, site, list, or content type).



8. Drill down in the hierarchy to select the scope, and click OK. Your selection will be displayed under the Selected Rule Scope option.
9. Select the type of Rule Definition, Metadata Change Rule. This rule captures changes in an item's metadata and triggers the content to be moved to different storage endpoint(s).

Click the New Condition link.



10. From the "Select a Property" dropdown, choose the Title property. The selections in this dropdown list will change based on the scope selection made on the Archiving Rule dialog.
11. The "Select an Operator and Enter/Select a Value" fields will update accordingly. Make your operator Contains and then enter "Archived" in the text field.
12. Select your archive endpoint from the Destination Endpoint dropdown.

13. Click OK to finish setting up the rule.

The screenshot shows a dialog box titled "New Metadata Change Rule Condition -- Webpage Dialog" with the Metalogix StoragePoint logo in the top right. The dialog is divided into two main sections: "Definition" and "Operation".

- Definition:** A "Select a Property" dropdown menu is set to "Title". Below it, a "Select an Operator and Enter/Select a Value" section has a dropdown menu set to "Contains" and a text input field containing "Archived".
- Operation:** A "Specify what destination endpoint content will be moved to if this condition is met." section. It includes a "Select the Destination Endpoint" dropdown menu set to "Amazon Archive (AmazonS3)" with an "Edit" link and a "New" link below it. Underneath, "Include Version Options" are checked for both "Major" and "Minor".

At the bottom of the dialog, there are "OK" and "Cancel" buttons.

14. Click Save on the Profile page.
15. Click Ok when the Process Existing screen pops up.
16. Change the title of an existing document in a document library within the rule's scope, adding "Archived" to the title.
17. Navigate to General Settings in Central Administration, Application Management, in the Metalogix StoragePoint section.
18. Navigate to the "Content Migrator" section and run the job by pressing Process Queued Content Now.

## Confirmation

Check StoragePoint Details for the document you just added to make sure that the rule was processed and the document was sent to your specified endpoint.

In this scenario you:

- ✓ Enabled Archiving and configured an Archiving Rule.
- ✓ Tested the Archiving rule by making a change to a document that met the conditions of the Metadata Archiving rule and confirmed that the BLOB is stored in a different endpoint.

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### We are more than just a name

We are on a quest to make your information technology work harder for you. That is why we build community-driven software solutions that help you spend less time on IT administration and more time on business innovation. We help you modernize your data center, get you to the cloud quicker and provide the expertise, security and accessibility you need to grow your data-driven business. Combined with Quest's invitation to the global community to be a part of its innovation, and our firm commitment to ensuring customer satisfaction, we continue to deliver solutions that have a real impact on our customers today and leave a legacy we are proud of. We are challenging the status quo by transforming into a new software company. And as your partner, we work tirelessly to make sure your information technology is designed for you and by you. This is our mission, and we are in this together. Welcome to a new Quest. You are invited to Join the Innovation™.

### Our brand, our vision. Together.

Our logo reflects our story: innovation, community and support. An important part of this story begins with the letter Q. It is a perfect circle, representing our commitment to technological precision and strength. The space in the Q itself symbolizes our need to add the missing piece — you — to the community, to the new Quest.

### Contacting Quest

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- Submit and manage a Service Request
- View Knowledge Base articles

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