

Metalogix® ControlPoint 8.7

## Quick Start Guide



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Metalogix® ControlPoint  
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# Preface

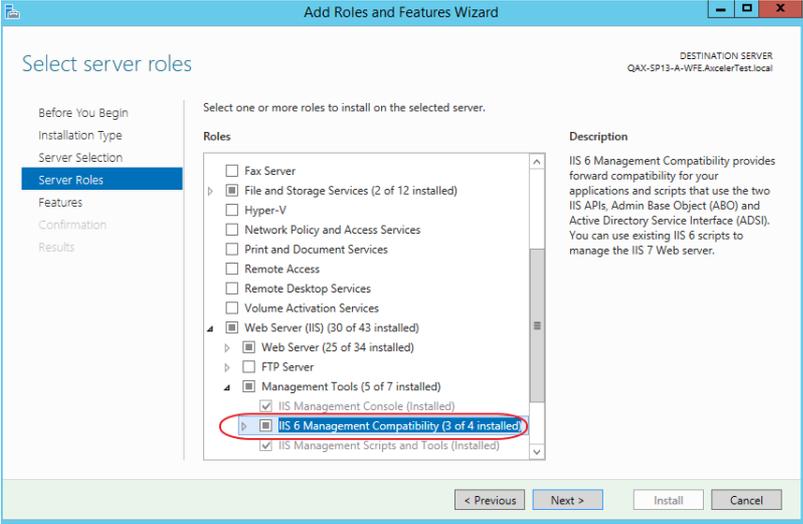
This Quick Start Guide will take you through the basic steps required for installation and configuration of Metalogix ControlPoint, a Web-based application that offers a proactive, integrated solution for SharePoint administration, security, and governance. Once you have completed all the steps in this guide, you will be able to evaluate the product with the use of our *Metalogix ControlPoint Evaluation Guide*.

NOTE: This guide applies specifically to the installation of ControlPoint for SharePoint on premises farms. If you are installing ControlPoint to manage SharePoint Online in an Office 365 tenant environment, refer to the *Metalogix ControlPoint for Office 365 Installation Guide*.

# System Requirements

## Server Requirements

The server requirements depend on your version of SharePoint, as described in the following table.

SharePoint Version	Requirements
SharePoint 2019	<ul style="list-style-type: none"> <li>• <b>Windows Server 2016 or 2019</b> with               <ul style="list-style-type: none"> <li>▪ IIS activated</li> </ul> </li> <li>AND</li> <li>▪ the Server Role <b>IIS 6 Management Compatibility</b> enabled.</li> </ul>  <ul style="list-style-type: none"> <li>• <b>SharePoint 2019</b> web front-end.</li> <li>• <b>Microsoft SQL Server:</b> SQL Server 2016               <p style="margin-left: 20px;">NOTE: ControlPoint can use the same SQL Server instance as SharePoint, but it can also use a separate instance or separate server.</p> </li> <li>• <b>.NET framework version 3.5</b> (for use by the installer), in addition to the .NET version required for SharePoint.</li> </ul>
SharePoint 2016	<ul style="list-style-type: none"> <li>• <b>Windows Server 2012 R2 (64-bit) or 2016</b> with IIS activated.</li> <li>• <b>SharePoint 2016</b> web front-end.</li> </ul>

SharePoint Version	Requirements
	<p>NOTE: To run ControlPoint Activity analyses in a SharePoint 2016 Server environment, SharePoint Usage must be enabled.</p> <ul style="list-style-type: none"> <li>• <b>Microsoft SQL Server:</b> SQL Server 2014 SP1 (64 bit) or 2016</li> </ul> <p>NOTE: ControlPoint can use the same SQL Server instance as SharePoint, but it can also use a separate instance or separate server.</p> <ul style="list-style-type: none"> <li>• <b>.NET framework version 3.5</b> (for use by the installer), in addition to the .NET version required for SharePoint.</li> </ul>
SharePoint 2013	<ul style="list-style-type: none"> <li>• <b>Windows Server 2012</b> (64-bit), with IIS activated.</li> <li>• <b>SharePoint 2013 (Foundation or Server)</b> web front-end.</li> </ul> <p>NOTE: To run ControlPoint Activity analyses in a SharePoint 2013 Server environment, SharePoint Usage must be enabled.</p> <ul style="list-style-type: none"> <li>• <b>Microsoft SQL Server:</b> SQL 2012, or 2014</li> </ul> <p>NOTE: ControlPoint can use the same SQL Server instance as SharePoint, but it can also use a separate instance or separate server.</p> <ul style="list-style-type: none"> <li>• <b>.NET framework version 3.5</b> (for use by the installer), in addition to the .NET version required for SharePoint.</li> </ul>

## Installation and Service Account Requirements

- **The account used to *install* ControlPoint:**
  - must be a member of the local Administrator's group on the machine where it is installed
  - must be a Farm Administrator, and
  - should be added to the security server role `sysadmin` in:
    - the SQL server(s) used for SharePoint content databases, and
    - the SQL server used for the ControlPoint Services (xcAdmin) database.
- **The account that will be used to *run* ControlPoint** (that is the Service Account of the Web Application that hosts the ControlPoint Configuration Site) must be:
  - a member of the local Administrator's group on all of the Web front-end machines in the farm.
  - a Farm Administrator.
  - a domain account if any database resides on a different server(s) from the server on which you will be installing ControlPoint.

### IMPORTANT NOTES:

- The account used to install ControlPoint and the ControlPoint Service Account must both be either local or domain accounts. This is necessary to enable the installer to verify the existence of the Service account. If the server on which you are installing ControlPoint is not your database server (that is, your databases reside on a different server), then the Service Account must be a domain account.
- In accordance with SharePoint Best Practices, the ControlPoint Service Account should not be the SharePoint Farm Account (that is, the account used to run Central Administration), as the performance of some ControlPoint operations may be negatively impacted.
- If you will be configuring ControlPoint Discovery and/or SCM Services, the Service Account must meet all of the requirements of the ControlPoint Service Account, as well as permission to **Log on as a Service**.

## Compatible Browsers

ControlPoint users must use a compatible **Web browser**:

- **Microsoft Internet Explorer (IE)** version 10 or later, running in Compatibility View

NOTES:

- With IE 10:
  - ControlPoint must be run with the 'AutoComplete User names and passwords on forms' option disabled.
  - When launching ControlPoint from a server, IE Enhanced Security Configuration (ESC) on that server must be off.
- When using Internet Explorer build 11.0.9600.18617, report results do not fill the entire results section.
- **Microsoft Edge**
- **Mozilla Firefox** (latest public release)
- **Google Chrome** (latest public release)

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# First Time Installation and Configuration

Within each farm being managed, Metalogix ControlPoint is installed and runs as a .NET application. Typically, it uses its own Web application (ControlPoint) which creates its own content database, but it can be installed into an existing Web application.

The ControlPoint installer also creates a separate Service database (xcAdmin) for configuration information and analysis data. This Service database may be installed either on the same database server as all other SharePoint databases or on a separate server.

## IMPORTANT: Using ControlPoint with Claims-Based Authentication

Even if your SharePoint farm uses Claims-based authentication, the ControlPoint Web application is created as a non-Claims-enabled application and should be left as a non-Claims-enabled application. If the ControlPoint Web application is Claims-enabled after installation, ControlPoint actions and analyses may fail to operate properly. In this scenario, you may want to use the option to install into an existing Web application (i.e., a Non-Standard installation). See the ControlPoint *Advanced Installation Guide* for details.

## Before You Begin

- The machine on which you are installing ControlPoint must meet [System Requirements](#).
- Make sure the machine on which you are installing ControlPoint has access to the Internet, which is necessary to permit activation of your ControlPoint license and to download the .NET framework, if necessary.
- Have the following information ready (you may wish to record it in the spaces provided):
  - The ControlPoint Service Account—that is, the account under which the ControlPoint Web application will run. (This is normally a domain account, but if you are running an evaluation version of the product—and the database is on the same machine as ControlPoint—you may use a local account.)  
**Account:** \_\_\_\_\_  
**Password:** \_\_\_\_\_
  - Depending on whether you want the installer to create a new Web application for the ControlPoint Configuration Site or create it in an existing Web application:

- For a new Web application, the port number that you want the ControlPoint Web application to use. (The default is 1818, but you can set it to any available value. It is strongly recommended that you *not* install ControlPoint on Port 80, as you may encounter complications during setup. If you are using host headers and want to redirect ControlPoint to a port that is currently in use (including Port 80), you can do so after installing the application.)

**Port Number:** \_\_\_\_\_

**The SharePoint Content Database Server Name:**

\_\_\_\_\_

(This is where the content database for the ControlPoint Web application will reside.)

OR

- The name of the existing Web application that you want to use to host the ControlPoint Configuration Site.

**Web Application Name:** \_\_\_\_\_

- The user name and (optionally) email address of the primary ControlPoint Application Administrator. (This individual will be set as the initial Site Collection Administrator in the ControlPoint site collection).

**ControlPoint Application Administrator Account Name:**

\_\_\_\_\_

- The Name of the SQL server that will host the ControlPoint Service database, as well as the authentication method to be used:

**Database Server Name:** \_\_\_\_\_

**Windows Authentication**

OR

**SQL Server ID** \_\_\_\_\_ **Password** \_\_\_\_\_

- **The ControlPoint license activation code:**

\_\_\_\_\_  
NOTE: If you do not already have a license activation code, [contact Quest](#) to obtain one.

## First Time Installation and Configuration Process

The ControlPoint first time installation and configuration process consists of the following stages:

- [Install the ControlPoint files.](#)
- [Configure the ControlPoint application and deploy SharePoint solutions.](#)
- Optionally, configure ControlPoint Services.

NOTE: If you are using ControlPoint to manage multiple farms, you must complete the entire installation and configuration process for each farm.

## Installing ControlPoint Files

It is recommended that you temporarily disable virus checkers on all Web front end servers in the farm as they can slow the solution deployment enough to trigger timeout errors.

### To install ControlPoint Files:

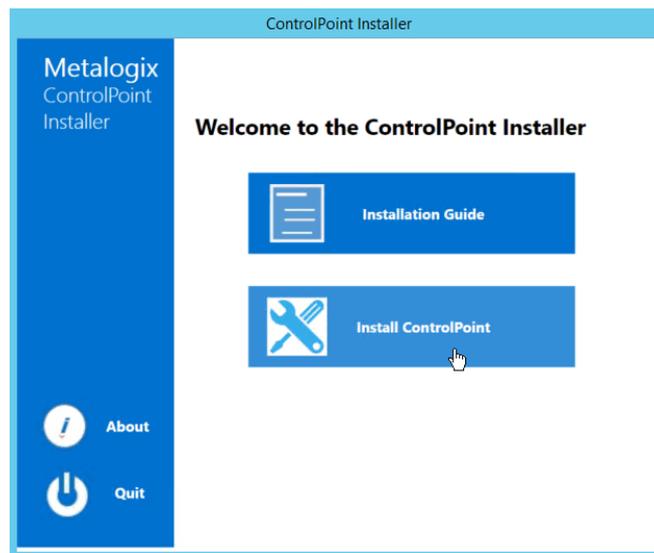
REMINDER: If UAC enabled on your server, you may have to "Run as Administrator."

- 1 Unzip the downloaded zip file then launch the installer (**Metalogix ControlPoint Installer.exe**).

NOTE: Make sure you keep the entire downloaded folder intact as there are files that are required by the installer.

A splash screen displays, followed by the ControlPoint Installer Welcome screen.

- 2 Click **Install ControlPoint**.

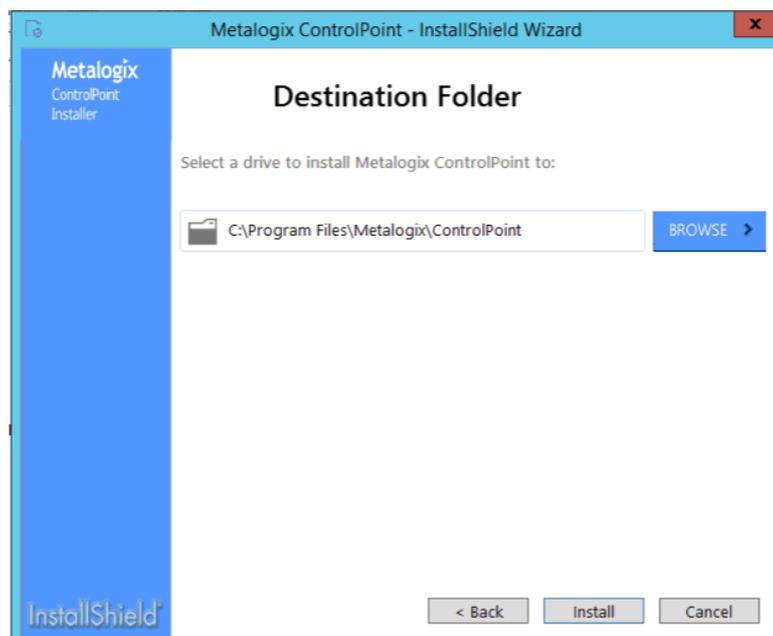


The License Agreement dialog displays.

- 3 Read the license agreement. Click **I accept the terms of the license agreement**, then click **[Next]**.
- 4 Click **Install ControlPoint On-premises**.



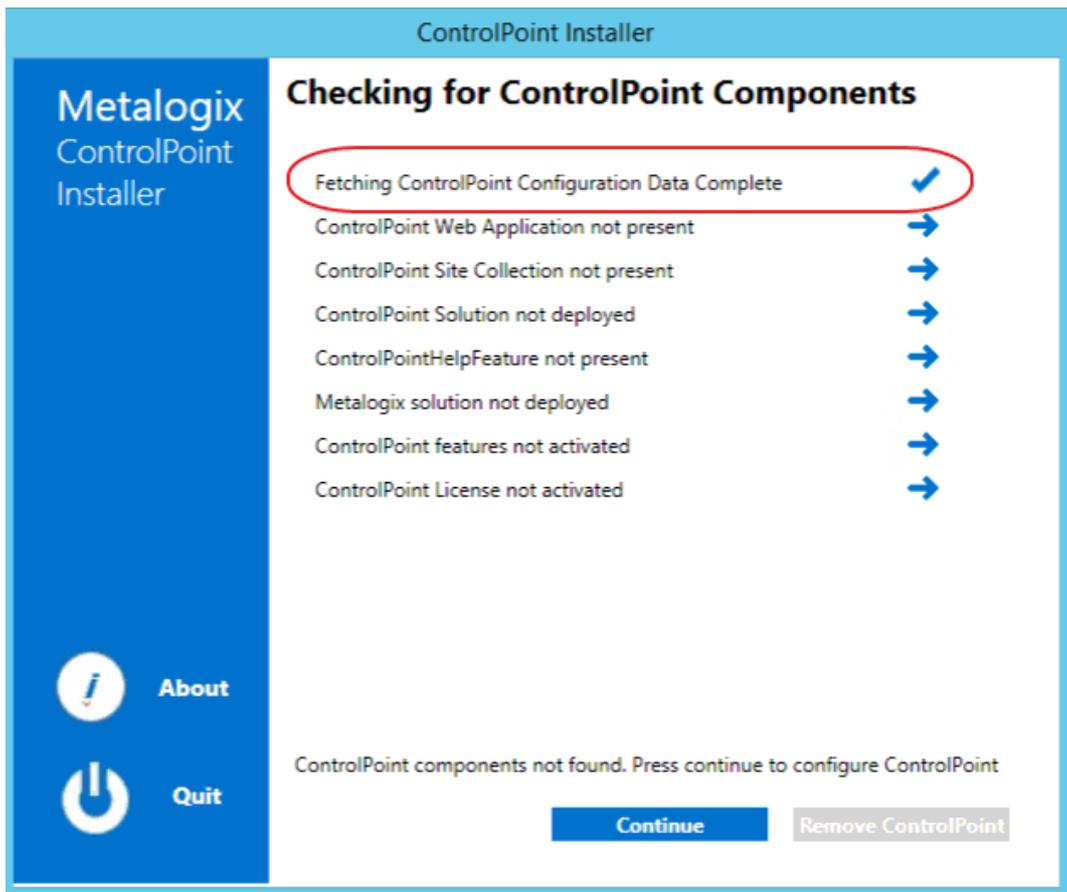
- When the Metalogix ControlPoint InstallShield Welcome dialog displays, click **[Next]**. The InstallShield Wizard specifies a default install directory (**C:\Program Files\Metalogix\ControlPoint**), but you can click **[BROWSE]** and select a different one.



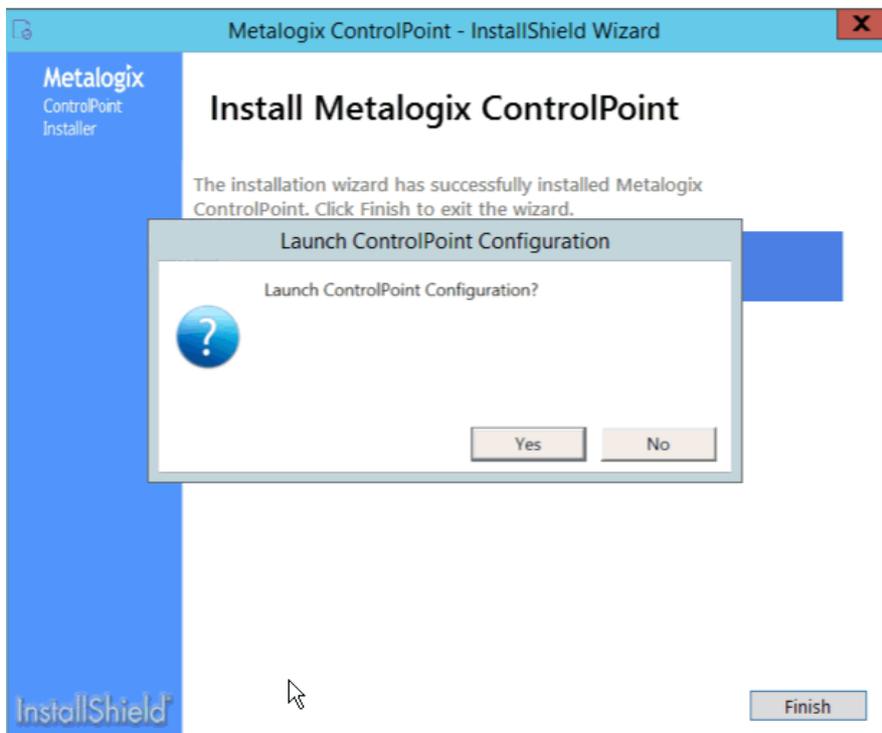
**NOTE:** This directory is where the installer will place the files needed to complete the installation. If you choose to change the default directory, you should *not* use the SharePoint hive.

- Click **[Install]**.

The installer checks for ControlPoint Components. Note that, for a first time installation, only **Fetching ControlPoint Configuration Data** will display a check mark. All other options will display a right-pointing arrow.



The Configuration Wizard installs the ControlPoint files to the specified Destination Folder. When completed, a pop-up displays asking whether you want to configure ControlPoint.



NOTE: If you want to configure the ControlPoint application at a later time, click **[No]**. You can launch the ControlPoint Configuration Wizard from the Start menu or a Desktop shortcut.

7 Click **[Finish]**.

## Next Steps

It is strongly recommended that you perform a [pre-installation validation check](#) before [Configuring the ControlPoint Application and Deploying SharePoint Solutions](#).

# Performing a Pre-Installation Validation Check

After installing ControlPoint files, but before configuring ControlPoint for the first time, it is strongly recommended that you run the ControlPoint Install Check, which is located in the following folder: **C:\Program Files\Metalogix\ControlPoint\Support\PreinstallValidation**. When you run this utility (by double-clicking ControlPointInstallCheck.exe), you are prompted to enter the following information:

- ControlPoint Service Account name and password
- SharePoint Content Database Server name
- ControlPoint Service Database Server name.

NOTE: If UAC is enabled, it may be necessary to Run as Administrator.

**ControlPoint Install Check**

This application does not install or change settings required for ControlPoint.

**ControlPoint Service Account**

Specify the ControlPoint Service Account and Password. Normally, the Service Account is a Domain Account.

Service Account: (Domain\username)

Service Account Password:

Content Database Server:

**ControlPoint Service Database**

Specify the Database Server that will hold the ControlPoint Service Database which is the database that will hold ControlPoint administrative information, cache and historical data for analysis.

Database Server:

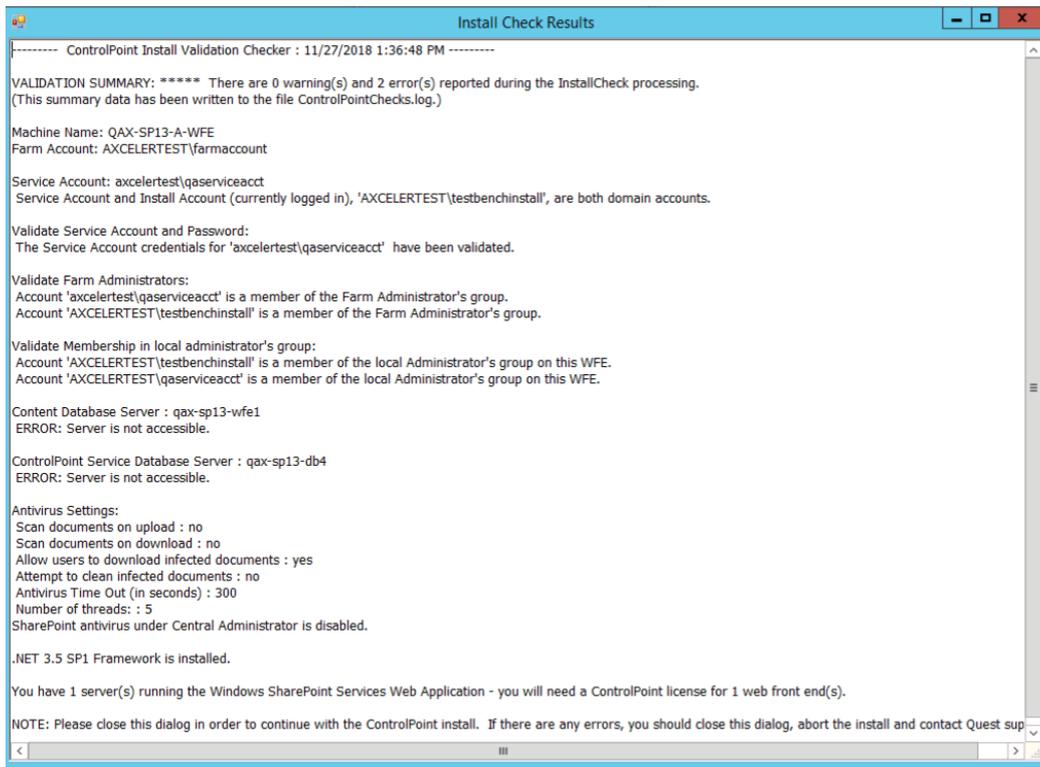
Windows authentication

SQL Server authentication using the Login ID and Password below

SQL Userid:

SQL Password:

When you click **[Perform Install Validation]**, the utility verifies that key system requirements are met. At the conclusion of the verification check, a summary of results displays.



If any errors are reported in the Validation Summary, you can correct them before attempting to configure ControlPoint.

## Configuring the ControlPoint Application and Deploying SharePoint Solutions

After ControlPoint file are installed the application must be configured.

### Summary of ControlPoint Configuration Process

The ControlPoint Configuration Wizard carries out the following tasks:

- A. **Validates License:** Checks the validity of the license key you enter as well as the terms of the license.
- B. **Creates ControlPoint Service database:** Creates the ControlPoint Service database (xcAdmin) on the selected database server. This database is where administrative information and cached data used for analysis and reporting is collected. (Note that in a multi-farm installation, this database is shared among farms.)
- C. **Creates ControlPoint Web application (if applicable):** If you choose to have the installer create a new Web application to host the ControlPoint Configuration site collection, installs the

ControlPoint Web application within SharePoint, which includes the creation of a content database for the Web application.

- D. **Creates ControlPoint Site Collection:** Creates the ControlPoint Configuration Site Collection within the ControlPoint Web application or an existing Web application (depending on the option you choose), and assigns an initial Site Collection Administrator.

NOTE: If you change the host name, the Configuration Wizard will also create the bindings in IIS, create alternate access mappings in Central Administration, and update the ControlPoint Setting 'Inbound ControlPoint Url' to use the host header.

- E. **Deploys ControlPoint WSPs to your SharePoint farm:** Installs the ControlPoint application features, which includes:

- installation of ControlPoint menus and the ControlPoint Settings list into the ControlPoint Configuration Site, and
- creation of the IIS Virtual Directory on the Web front-end server.

NOTE: As is the case with other SharePoint Solution deployments, upon completion all running application pools will be recycled.

- F. **Activates License:** Activates your ControlPoint license.

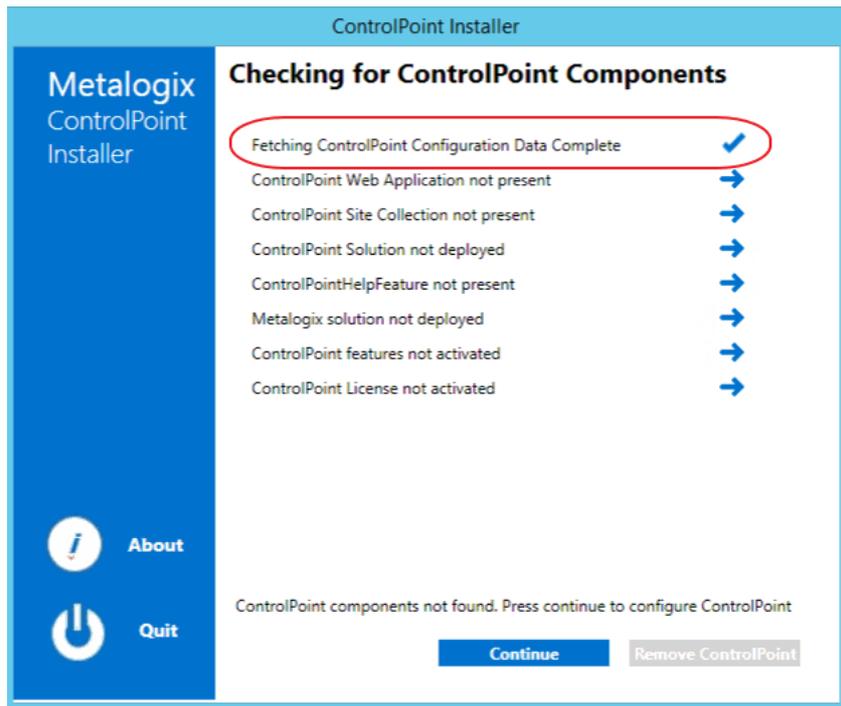
## To configure the ControlPoint application:

- 1 Use the information in the following table to determine the appropriate action to take.

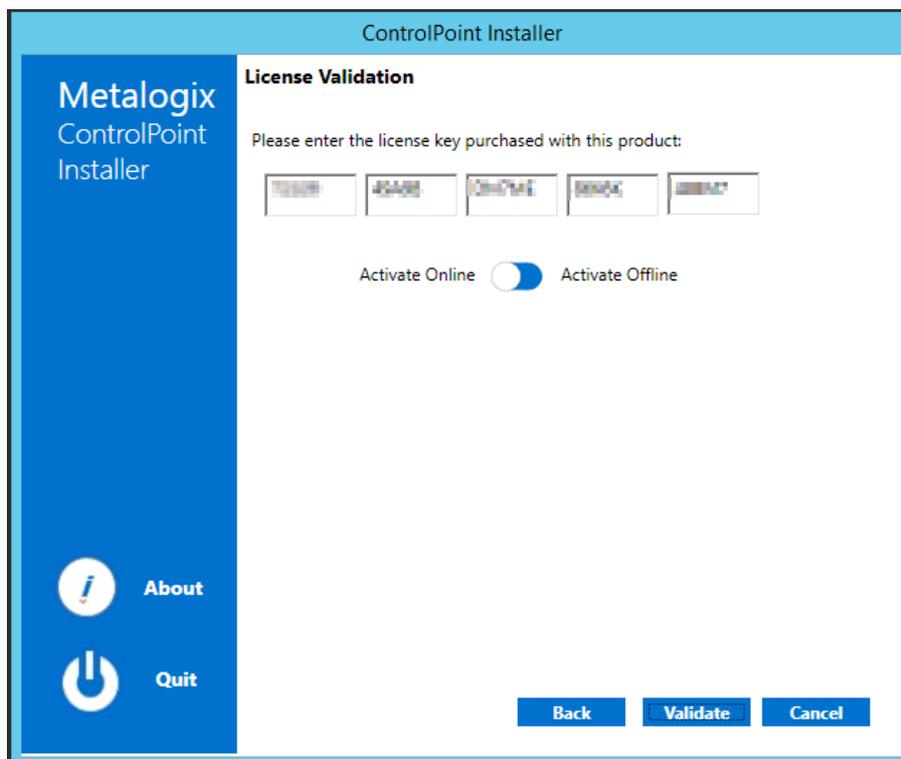
If ...	Then ...
you are starting directly from the ControlPoint installer (that is, after performing the install you chose to <b>Launch ControlPoint Configuration</b>	go to the next step.
after installing ControlPoint you chose to configure at a later time (that is, after performing the install you chose not to <b>Launch ControlPoint Configuration</b> ).	double-click the ControlPoint Configuration desktop icon.

The installer checks your environment for the presence of installed components.

NOTE: For a first time installation, once the components check is complete only the Fetching ControlPoint Configuration Data box should be checked (✓). All other options will appear with a right-facing arrow. (→)



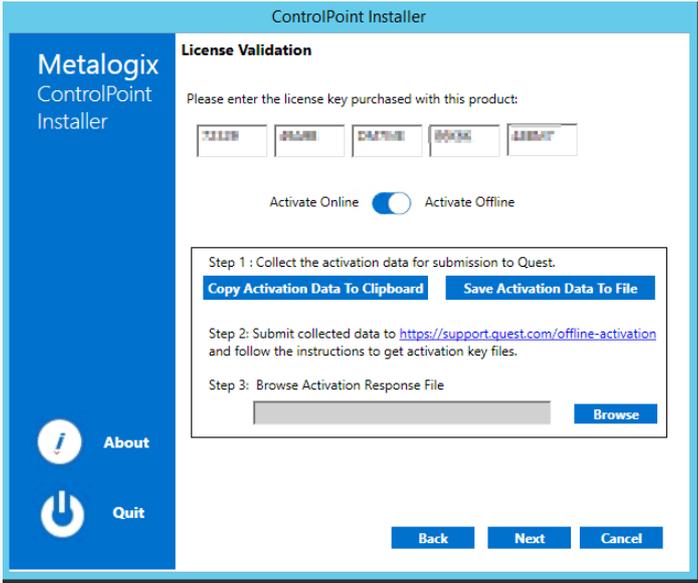
- 2 Click **[Continue]**.
- 3 Enter the license key provided by Quest.



- 4 Use the information in the following to determine the appropriate **License Validation** option to select.

NOTE: Most systems can use the Online activation method as long as the system has internet access. If you are unable to use the online activation method due to security settings or lack of internet access, the Offline activation option can be used. This option will still require some

internet access, but allows for the authentication to be done from another machine that is not as restricted by security or has a connection to the internet.

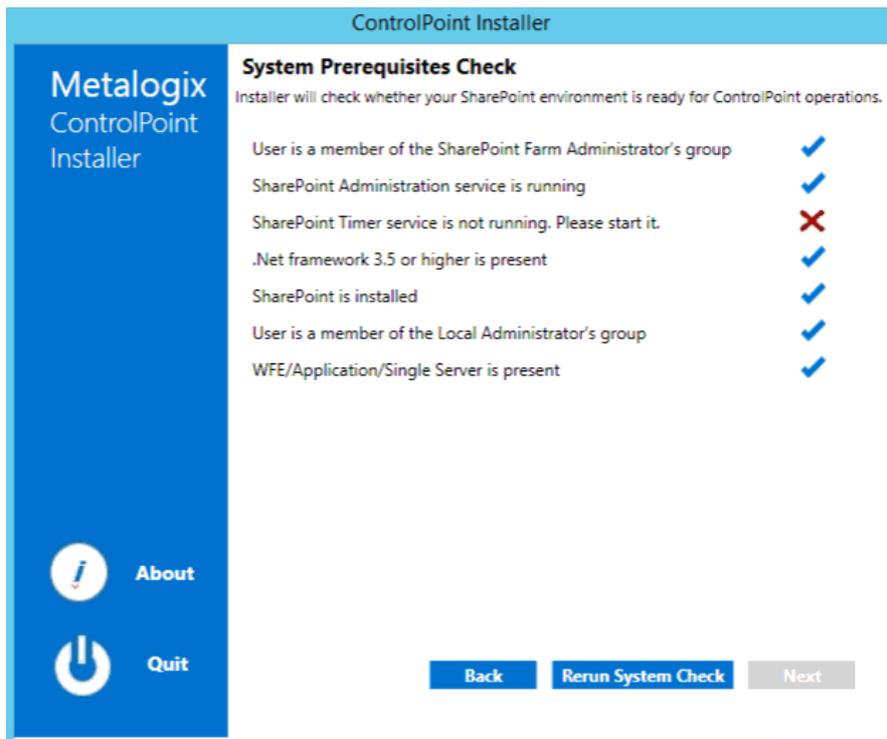
If you want to validate the license...	Then ...
online	accept the default option ( <b>Activate Online</b> ).
offline	<p>a) Select <b>Activate Offline</b>.</p>  <p>The <b>Offline Activation</b> window displays. You can either <b>Copy Activation Data To Clipboard</b> or use the <b>Save Activation Data To File</b> option to save the key into a text file (in case it needs to be copied to another machine).</p> <p>b) From a machine that has internet access, go to <a href="https://support.quest.com/offline-activation">https://support.quest.com/offline-activation</a>.</p> <p>c) Follow the instructions on the Offline Activation web page to activate your license, using the <b>Upload activation data</b> option.</p> <p>NOTE: Remember to save the Activation File to a location that is accessible by the machine on which you are installing ControlPoint.</p> <p>d) Return to the ControlPoint Installer License Validation dialog.</p> <p>e) Use the <b>Step 3: Browser Activation Response File</b> option to select the file returned by Quest.</p>

5 Click **[Validate]**.

If the license is validated successfully a License Validation pop-up displays the terms and current status of the license.

6 Dismiss the pop-up and click **[Next]**.

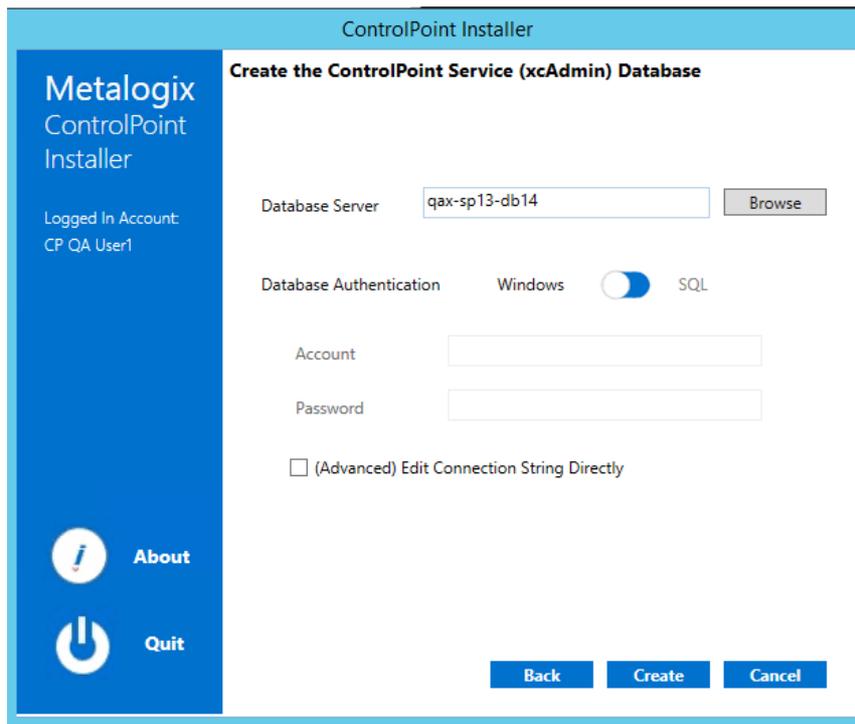
The System Prerequisite check begins. Any item that fails the check is identified by a red X.



NOTE: If you fix the problem immediately, you can then **Rerun the System Check**. If you choose to **Quit** and fix the problem at a later time, the next time you launch the ControlPoint Configuration Wizard, it will start from the beginning.

- 7 When all system prerequisites checks have completed successfully, click [**Next**] to display the **Create the ControlPoint Service (xcAdmin) Database** dialog.
- 8 Specify the **Database Server** where you want to place the ControlPoint Service (xcAdmin) database:
  - enter the server nameOR
  - click [**Browse**] to choose a different database server

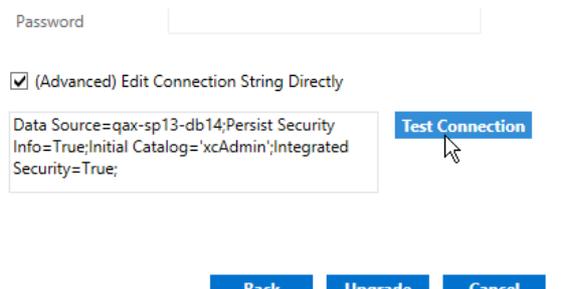
If you are installing on an additional farm in a multi-farm installation, make sure you specify the server on which the xcAdmin database has been created for the first farm. (If the database you specified has already been created, you will be asked whether you want to use it.)



NOTE: If you are using SQL Express for development or evaluation purposes, the Database Server instance name is typically entered as <server\_machine\_name>\SQLEXPRESS.

- 9 Specify the authentication method you want to use. (If you select SQL Server authentication, you will be prompted to enter the **Account** and **Password**.)
- 10 If you want to view, update, and/or test the xcAdmin database connection string:
  - a) Click the **(Advanced) Edit Connection String Directly** box.

NOTE: If you are choosing to reuse an existing xcAdmin database, you will be unable to *update* the connection string and the field will be disabled. If you need to update the connection string after completing the installation, do so via the ControlPoint Setting **SQL Server Connection String for xcAdmin Database**. Refer to the *ControlPoint Administration Guide* for details.

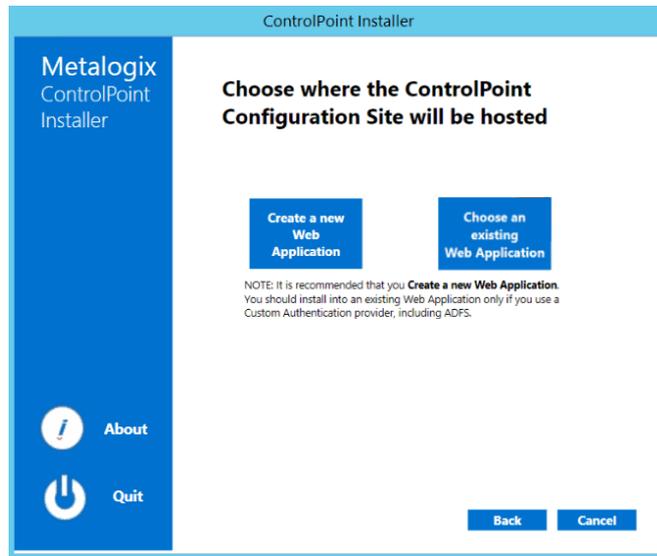


**IMPORTANT:** Update the connection string *only* if your SQL connection requires the addition of one or more custom keywords. For example, if you are using authentication with encryption and a self-signed server certificate, you would need to add **Encrypt=yes;TrustServerCertificate** to the string. Refer to the Microsoft article [Using Connection String Keywords with SQL Server Native Client](#) for more information.

- b) Click **[Test Connection]**.

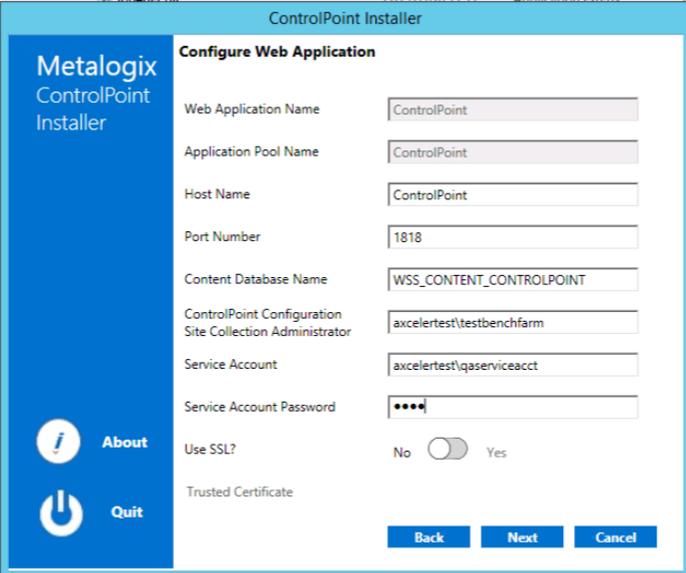
Note that, if the connection is not successful, the parameter that caused it to fail will be identified.

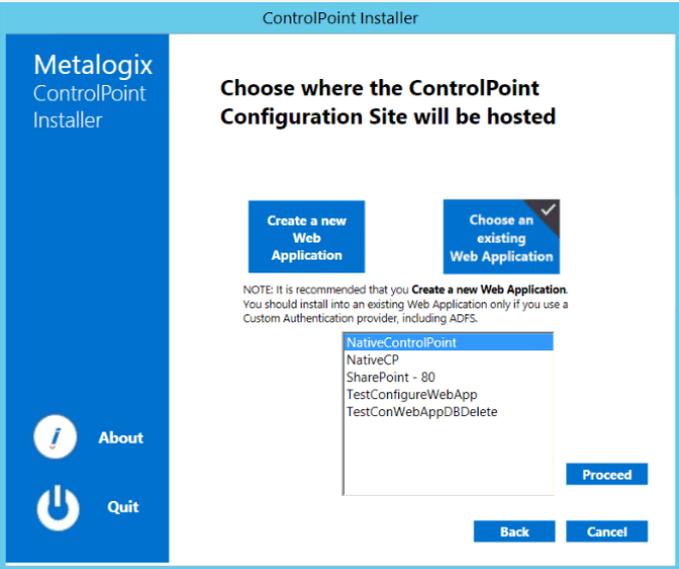
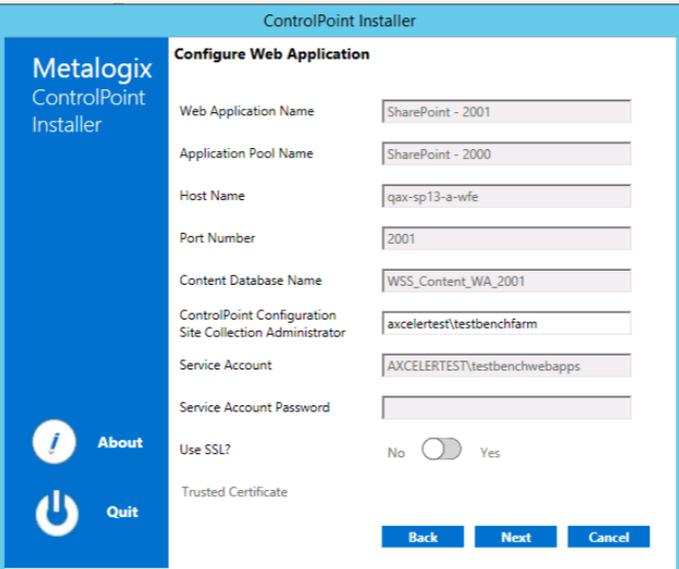
- 11 Click **[Create]**.
- 12 After the installer has created the new database, click **[Next]**.
- 13 Use the information in the following table to determine the appropriate action to take to **Choose where the ControlPoint Configuration Site will be hosted**.



NOTE: It is recommended that you *always* Create a new Web Application, unless special circumstances apply.

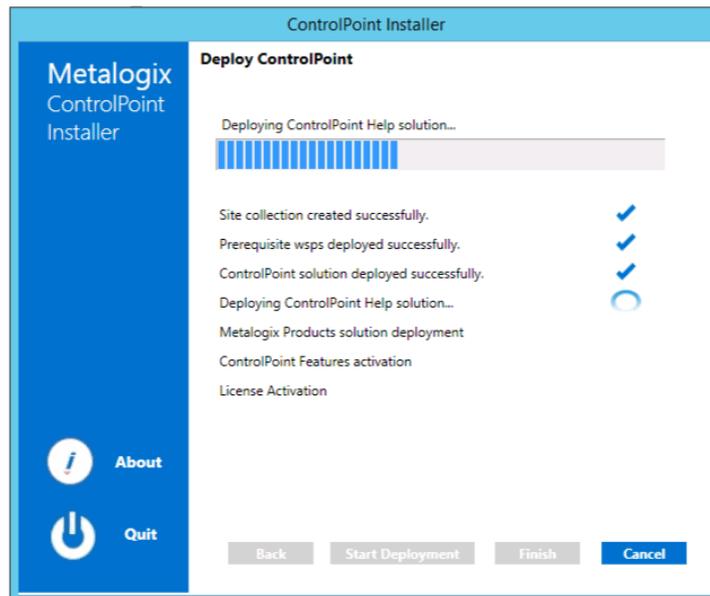
If you want to ...	Then ...
create a new Web application to host the ControlPoint Configuration Site Collection	<p>a) Select <b>Create a new Web Application</b>.</p> <p>b) For <b>Host Name</b>, if different from the default (the machine name), enter the host header (alias) that will be used.            NOTE: If a host header is entered, the installer will create both the alternate access mappings in Central Administration and bindings in IIS.</p> <p>c) For <b>Port</b>, either</p> <ul style="list-style-type: none"> <li>▪ accept the default value (1818)</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>▪ enter a different, unused Port number. (It is strongly recommended that you <i>not</i> install ControlPoint on Port 80, as you will encounter complications during setup. If you are using host headers and want to redirect ControlPoint to a port that is</li> </ul>

If you want to ...	Then ...
	<p>currently in use (including Port 80), you can do so after completing the installation.</p> <p>d) If different than the default (the currently logged in account), specify the <b>Service Account</b> under which you want the ControlPoint Web application to run.</p> <p>REMINDER: If your databases reside on a different server, then the Service Account must be a domain account.</p> <p>e) For <b>Content Database Name</b>, either</p> <ul style="list-style-type: none"> <li>▪ accept the default value (WSS_CONTENT_CONTROLPOINT)</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>▪ enter a different content database name</li> </ul> <p>f) Specify a <b>ControlPoint Configuration Site Collection Administrator</b> account and <b>Service Account</b>, and enter the <b>Service Account Password</b>.</p> <p>g) If the server is configured for SSL and you want it to be used to access ControlPoint, for <b>Use SSL?</b> select <b>Yes</b>, then select a <b>Trusted Certificate</b>.</p> 
<p>create the ControlPoint Configuration Site Collection in an existing Web application</p>	<p>a) Select <b>Choose an existing Web Application</b>.</p> <p>b) Select an existing Web application from the list, then click <b>[Proceed]</b>.</p>

If you want to ...	Then ...
	 <p>The Configure Web Application dialog is populated with the configuration settings for the selected server. (Note that ControlPoint uses the selected Web application's Application Pool identity account as the Service Account).</p> <p>c) Specify a <b>ControlPoint Configuration Site Collection Administrator</b> account.</p> <p>d) If the server is configured for SSL and you want it to be used to access ControlPoint, for <b>Use SSL?</b> select <b>Yes</b>, then select a <b>Trusted Certificate</b>.</p> 

14 Click **[Next]**.

15 Click **[Start Deployment]**.



- 16 When the deployment has completed, click **[Finish]**.

The Configure Services dialog displays, asking if you want to configure services.

- 18 Click **[No]**, as It is not necessary to configure services for evaluation purposes. (Details for configuring ControlPoint Services can be found in the *Metalogix ControlPoint Advanced Installation Guide*.)

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## Technical Support Resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <https://support.quest.com>

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- 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