

Metalogix® StoragePoint 6.1

Evaluation Guide



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Legend

 **CAUTION:** A caution icon indicates potential damage to hardware or loss of data if instructions are not followed.

 **IMPORTANT, NOTE, TIP, MOBILE OR VIDEO:** An information icon indicates supporting information.

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Contents

Evaluation Guide	4
Introduction	4
Prerequisites	4
Upload and Download a File	4
Bulk Externalize Existing BLOBs	6
Large File Support	9
BLOB Migration	10
Configuring Archiving Rules	11
About Us	15
Contacting Quest	15
Technical Support Resources	15

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 Quest [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

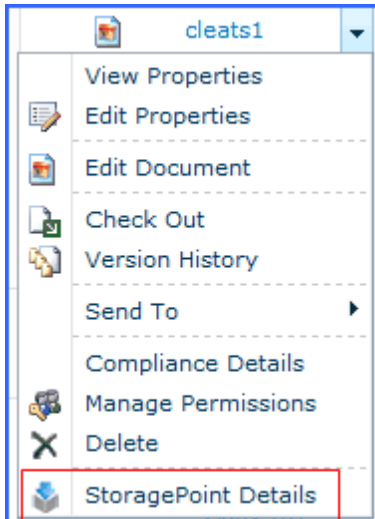
This scenario demonstrates the basic functionality of StoragePoint by uploading a document into SharePoint, confirming the location of the document, and confirming that it can be opened from SharePoint. Use a Microsoft Office document in this scenario as Office documents demonstrate that integration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

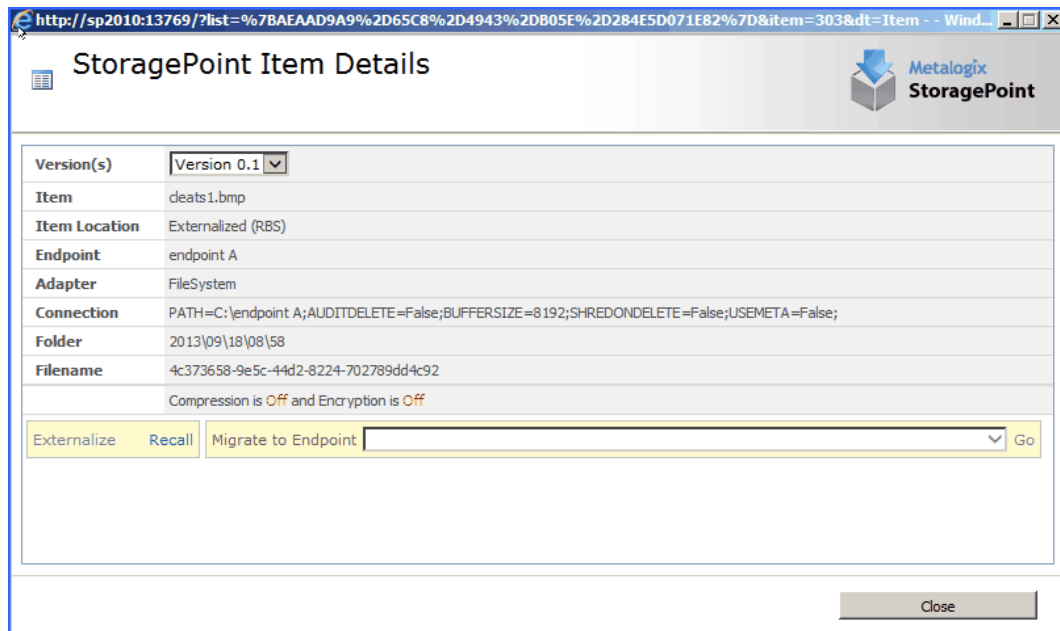
Confirmation

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:

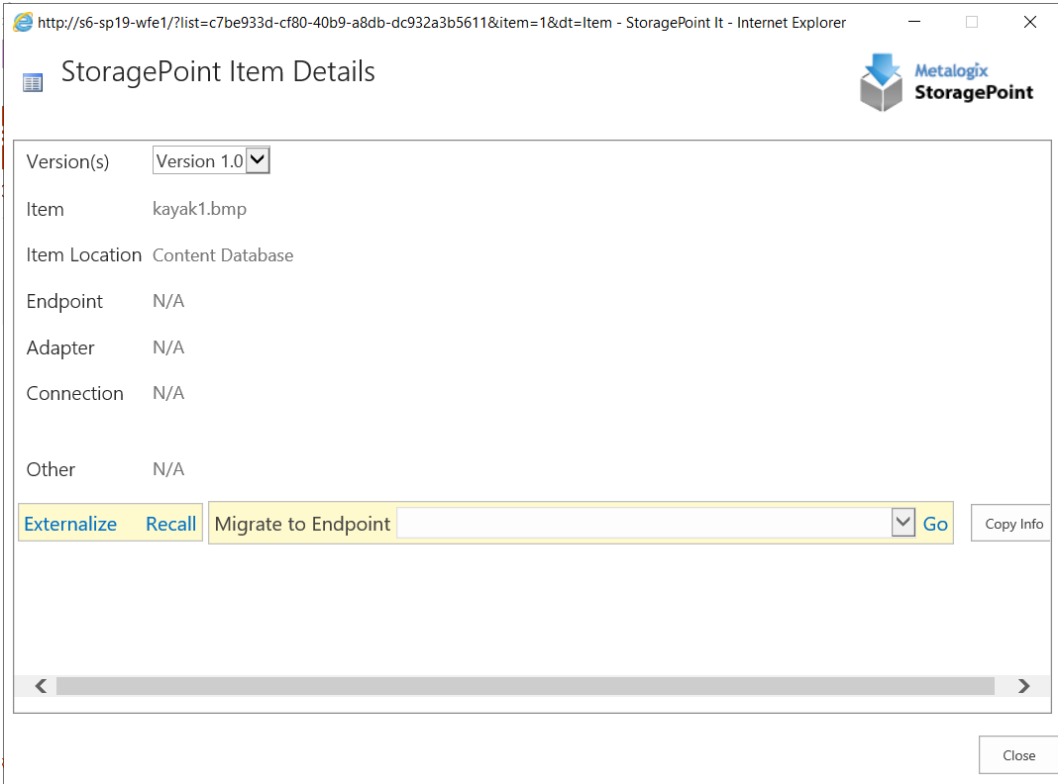
- ✓ Successfully uploaded a document to a SharePoint document library, found on a site where StoragePoint has been installed and configured.
- ✓ Checked to make sure that the BLOB for the uploaded file was successfully externalized, and the file opened without error after externalization.

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.



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

Storage Profiles ⓘ

Filter Results

Content Externalization
 (All)
 Activated (4)

Scope
 (All)
 Web Application (1)
 Content Database (3)

Profile Name
 (All)
 J-L (1)
 M-O (1)
 S-U (2)

Choose a Storage Profile to edit.

Profile Scope	Profile Name	Active	Advanced Configuration
ContentDb - East1	lib 3 - East_Profile	Yes	Jobs
ContentDb - south2	south 2	Yes	Jobs
ContentDb - South	South CDB	Yes	Jobs
WebApplication - Northwest	NW Web App	Yes	Jobs

▢ Create New Profile

Close

- 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:

12 AM 00

on Server


[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:

 12 AM 00

on Server

Advanced Job Settings *(Hide)*

with Processing Threads
If blank, will default to one thread per processor.

in Job Role

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

Send Completion Notice:
 Always Only when errors occur

To:
 Default notification contacts

Additional Contacts

Provide a semi-colon delimited list of e-mail addresses.

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

- 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.

Externalization job will run on 10/18/2021 at 7:31 PM
(Job Status)

Confirmation

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

In this scenario you:

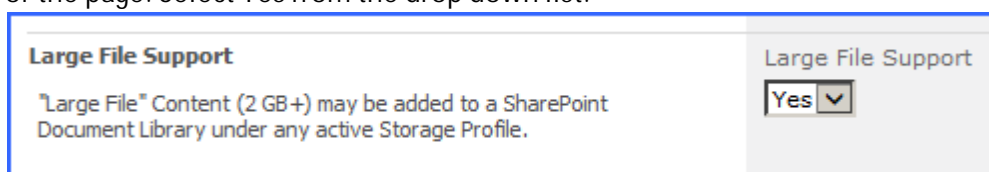
- ✓ Successfully ran the timer job to externalize BLOBs for the documents that existed on your web application prior to the installation and configuration of StoragePoint.

Large File Support

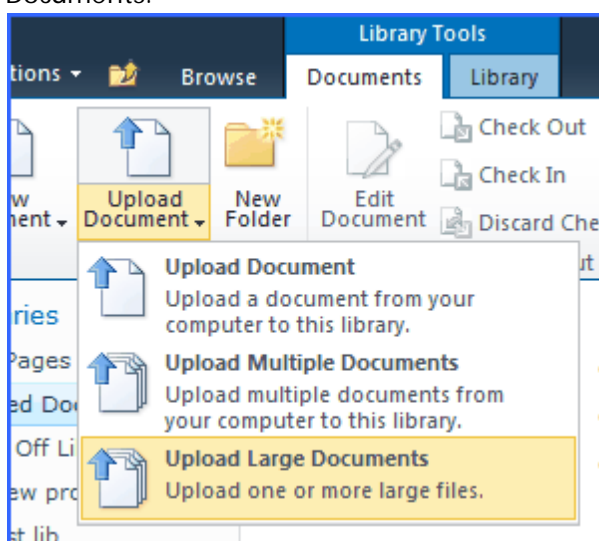
This scenario demonstrates StoragePoint's capability to upload and store files larger than the maximum upload size limit set for the web application, using Large File Support. In order to complete this scenario, you must have a file that is larger than the web application's upload size limit, to upload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

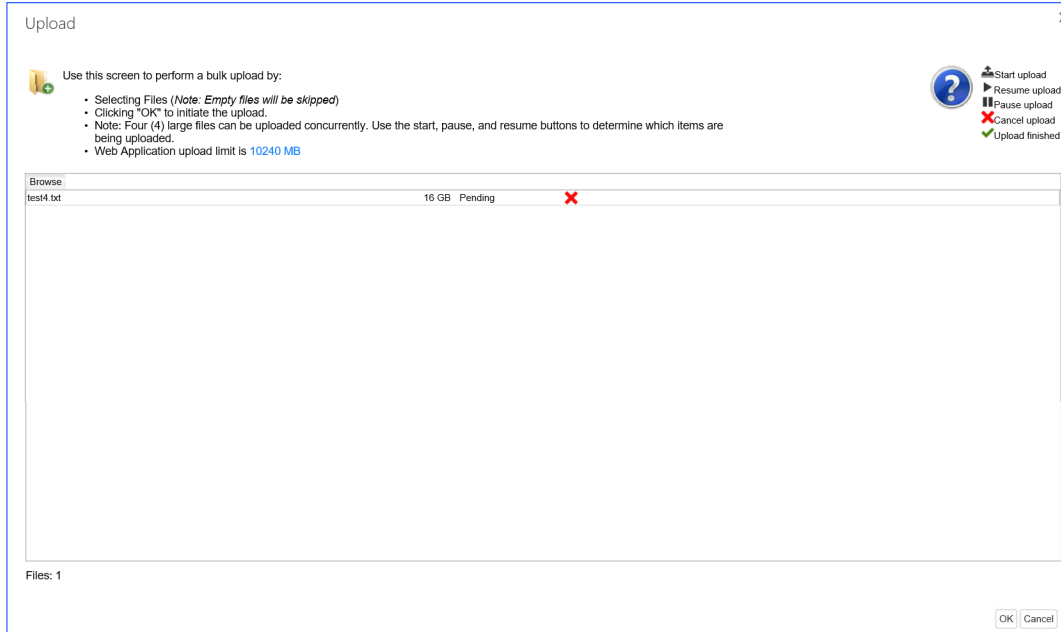


4. Click Save to save your setting changes.
5. Navigate to a SharePoint Document Library where you have access to upload files.
6. A user who has access to upload files in a Document Library will see an option to upload large files with a different type of interface. This tool is only available in the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



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

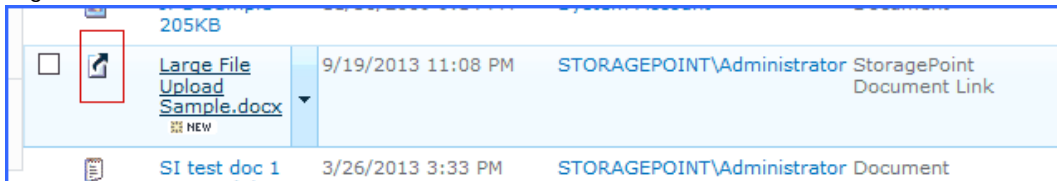
- A new window opens. Drag files from the Windows Explorer onto this page and click OK.



Your file will now be uploaded.

Confirmation

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



- Click the name of the file and you will then be prompted to open the document or save it.
- 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.

- Navigate to Central Administration, Application Management.
- Navigate to Storage Profiles under the Metalogix StoragePoint section.
- Click Jobs for the profile for which you wish to configure BLOB migration.
- 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

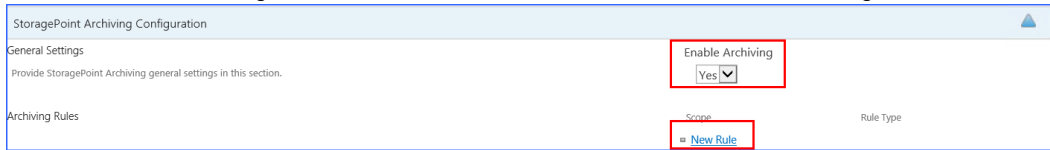
This scenario demonstrates the configuration of Archiving rules.

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

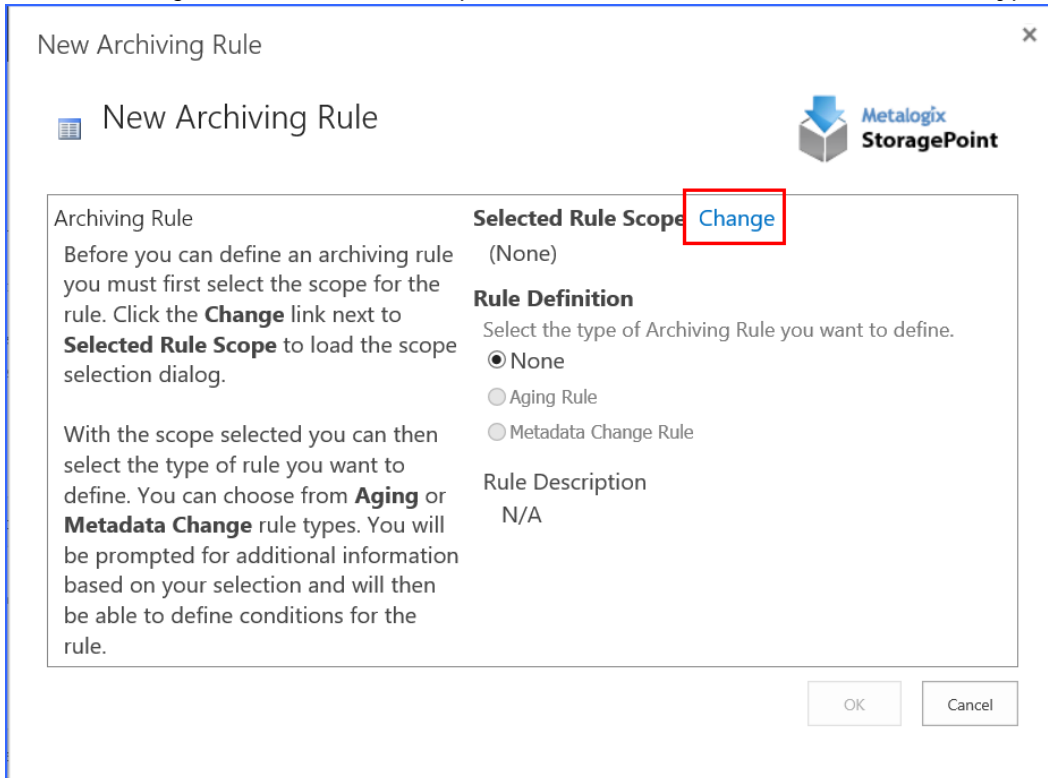
You must have a second endpoint in order to complete this scenario.

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. Click New Rule to create a new archiving rule.



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



7. Drill down in the hierarchy to select the scope, and click OK. Your selection will be displayed under the Selected Rule Scope option.
8. 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.

New Archiving Rule

New Archiving Rule

Archiving Rule

Before you can define an archiving rule you must first select the scope for the rule. Click the **Change** link next to **Selected Rule Scope** to load the scope selection dialog.

With the scope selected you can then select the type of rule you want to define. You can choose from **Aging** or **Metadata Change** rule types. You will be prompted for additional information based on your selection and will then be able to define conditions for the rule.

Selected Rule Scope [Change](#)

Web Application = SharePoint - 80
Content Database = places
Site = http://s6-sp19-wfe1/sites/Michigan
Web = http://s6-sp19-wfe1/sites/Michigan

Rule Definition

Select the type of Archiving Rule you want to define.

None
 Aging Rule
 Metadata Change Rule

Rule Description

This rule captures changes in an item's metadata and triggers the content to be moved to different storage endpoint(s).

Define your metadata change rule conditions(s)

Condition	Endpoint
New Condition	

OK Cancel

9. 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.
10. 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.
11. Select your archive endpoint from the Destination Endpoint dropdown.

12. Click OK to finish setting up the rule.

New Metadata Change Rule Condition

New Metadata Change Rule Condition

Definition

Select a Property

Title

Select an Operator and Enter/Select a Value

Contains Archived

Operation

Select the Destination Endpoint

EP1 (FileSystem) Edit New

Specify what destination endpoint content will be moved to if this condition is met.

OK Cancel

13. Click Save on the Profile page.
14. Click Ok when the Process Existing screen pops up.
15. Change the title of an existing document in a document library within the rule's scope, adding "Archived" to the title.
16. Navigate to General Settings in Central Administration, Application Management, in the Metalogix StoragePoint section.
17. 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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- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product