

Metalogix® StoragePoint 6.3

Quick Start 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

Planning the Metalogix StoragePoint Implementation	4
Minimum Server Software Requirements	4
Metalogix StoragePoint Database Sizing	7
Quick Start Guide	8
Setting up Metalogix StoragePoint	8
1.Configure the Metalogix StoragePoint System Cache	8
2.Configure the Storage and Backup Endpoints	9
3.Create one or more Storage Profiles.	10
About Us	13
Contacting Quest	13
Technical Support Resources	13

Planning the Metalogix StoragePoint Implementation

Preparation

Metalogix StoragePoint is installed as a SharePoint solution on a single SharePoint web front-end (WFE), making for simple installation and deployment to the SharePoint farm. This section will outline the necessary software and security prerequisites needed to install Metalogix StoragePoint.

Minimum Server Software Requirements

SharePoint (pick one)

SharePoint Server Subscription Edition	
Operating System	Windows Server 2019 Standard or Datacenter Windows Server 2022 Standard or Datacenter
SharePoint Server	SharePoint Server Subscription Edition
Other Server Software	SQL Server 2019 Enterprise Edition with Cumulative Update (CU5) or later

SharePoint Server 2019	
Operating System	Windows Server 2016 Standard or Datacenter Windows Server 2019 Standard or Datacenter
SharePoint Server	SharePoint Server 2019
Other Server Software	Microsoft SQL Server 2016 Enterprise Editions, Microsoft SQL Server 2017 Enterprise Editions for Windows

SharePoint Server 2016	
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Operating System	Windows Server 2012 R2 or Windows Server 2016
SharePoint Server	SharePoint Server 2016
Other Server Software	SQL Server 2014 SP1, 64 bit Enterprise Edition, SQL Server 2016 RTM Enterprise Edition or SQL Server 2017

[SharePoint Server 2013](#) and SharePoint Foundation 2013

Operating System	Windows 2012 Server
SharePoint Server	SharePoint Server 2013 or SharePoint Foundation 2013
Other Server Software	SQL Server 2012 Enterprise Edition, or SQL Server 2014 Enterprise Edition

Server Hardware Requirements

Metalogix StoragePoint does not have any hardware requirements beyond what is prescribed by Microsoft SharePoint. For reference, those can be reviewed here:

Subscription Edition - <https://learn.microsoft.com/en-us/sharepoint/install/system-requirements-for-sharepoint-subscription-edition>

2019 - <https://docs.microsoft.com/en-us/sharepoint/install/hardware-and-software-requirements-2019>

2016 - [https://technet.microsoft.com/en-us/library/cc262485\(v=office.16\).aspx](https://technet.microsoft.com/en-us/library/cc262485(v=office.16).aspx)

2013 - <https://docs.microsoft.com/en-us/sharepoint/install/hardware-software-requirements-2013>

Security Requirements

The User Account used to perform the install must be a SharePoint Farm Administrator.

Also review FileShare and Content Database Rights in the StoragePoint Reference Guide>Managing Storage Profiles, when a profile is created.

Screen Resolution Requirements

Metalogix StoragePoint requires a minimum screen resolution of 1024 x 768 for optimizing the user interface on the StoragePoint pages that are linked from the main menu on Application Administration in Central Administration.

Internet Browser Requirements

Microsoft Edge is the recommended browser for use with StoragePoint interface. Other browsers may work, but are not verified as supported for all functions.

.NET Framework Requirements

StoragePoint for SharePoint 2013, 2016, 2019, and Subscription Edition requires .NET Framework 4.8.

Temporary Storage Requirements

The amount of temporary storage needed to support the timer jobs depends on the number of threads being used for the timer job. It is recommended that 10GB per thread, for each timer job running concurrently, be available on the server running the timer job. Most timer jobs can use a Controller/Worker configuration to spread this over multiple servers. The temporary storage location can be configured on General Settings or during installation to use something other than the default (AppData/Local/Temp).

SharePoint 2019/SharePoint SE Modern UI considerations

SharePoint 2019 and SharePoint Server Subscription Edition (SharePoint SE) have an updated look and feel for the user interface. StoragePoint links will work on this new user interface, but some additional configuration is necessary.

A Site Collection Feature will be deployed to SharePoint 2019 farms as of the 5.9.1 release, and for SharePoint SE as of the 6.2 release. This feature should be enabled on the site collection for full StoragePoint user interface functionality.

Before activating the Site Collection Feature, an App Catalog must be configured for the web application, as well as an App Management service application.




Please reference the following articles for provisioning these resources.

<https://docs.microsoft.com/en-us/sharepoint/administration/configure-an-environment-for-apps-for-sharepoint#configure-the-subscription-settings-and-app-management-service-applications>

<https://docs.microsoft.com/en-us/sharepoint/administration/manage-the-app-catalog>

There are some PowerShell script examples in the PowerShell and API Guide for provisioning these resources.

When these steps are done, open the Site Collection Features (Gear Icon>Site Info>View All Site Settings), scroll to StoragePoint Custom Actions and SPFx Extension and click Activate.

	Site Policy Allows site collection administrators to define retention schedules that apply to a site and all its content.	Activate
	StoragePoint Custom Actions and SPFx Extension Deploys custom actions and SPFx extension to site(s) associated with StoragePoint profile.	Activate
	Three-state workflow Use this workflow to track items in a list.	Deactivate Active

Metalogix StoragePoint Database Sizing

Metalogix StoragePoint database is used to track RBS provider activities in a SharePoint farm. This means that Metalogix StoragePoint database will grow at a rate proportional to the number of documents added to the content databases. The Unused BLOB Cleanup timer job (found on the Profile Timer job page) is critical for keeping StoragePoint database size to a minimum.

Sizing the Metalogix StoragePoint database can be based on the following estimations:

- Synchronous profiles: average increase on the StoragePoint database size is approximately 16 MB per 1 GB in the RBS store.
- Asynchronous profiles: average increase on the StoragePoint database size is approximately 26 MB per 1 GB in the RBS store.



NOTE: The estimation was tested and carried out under the following conditions:

- StoragePoint database on SQL 2019 instance (cumulative update 20), operating in compatibility mode with SQL Server 2019 (150)
- Autogrow/MaxSize: 64 MB/Unlimited
- FileSystem adapter: no encryption and no compression used
- Used files: .txt, .zip, .pdf, Office (.docx, .xlsx, .pptx)

Additionally, Microsoft has restrictions on content database sizing that must be [followed](#).

Quick Start Guide

Introduction

The Quick Start Guide is designed to get Metalogix StoragePoint installed and configured on the SharePoint farm, so that evaluation can begin as quickly as possible.

Setting up Metalogix StoragePoint

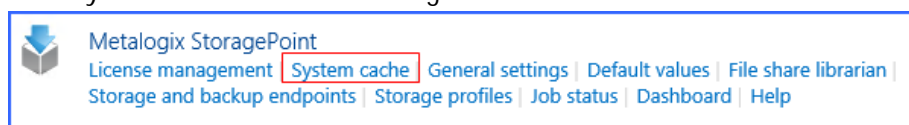
Metalogix StoragePoint is entirely managed within *SharePoint Central Administration* on the *Application Management* page. Once there, the farm-wide storage profile defaults can be configured, and storage profile(s) can be managed.

The general high-level steps to follow when setting up Metalogix StoragePoint to run within the SharePoint farm are as follows:

1. Configure the Metalogix StoragePoint System Cache



This step will establish the temporary location for BLOBs during Asynchronous operations. If a cloud-based storage platform is being used or any of the additional capabilities associated with asynchronous operations, then this is a required step.

- a. Click System Cache from the StoragePoint menu.



- b. Use the chart below to enter the minimum configuration settings for system cache.

Setting	Value/Options
Endpoint Name	Read-only field for the name of the storage endpoint.

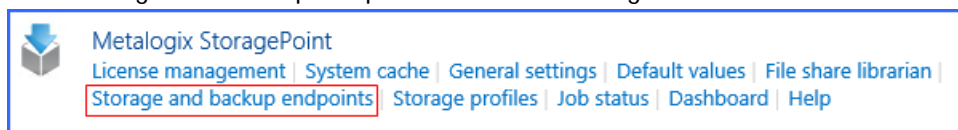
	<p>Select FileSystem unless you are confident that another storage device is available for configuration.</p>
	<p>Enter an adapter-specific connection string in this box; a UNC path to a folder available on the network.</p>

- c. Click Save at the bottom of the screen.

2. Configure the Storage and Backup Endpoints

This step will create the storage location(s) (endpoints) to which content will be externalized.

- a. Click Storage and backup endpoints from the StoragePoint menu.



- b. Click the Create New Endpoint link.
- c. Use the chart below to enter the minimum configuration settings for the endpoint.

Setting	Value/Options
Name	Enter the unique name of the Storage or Backup Endpoint.
Type	<p><i>Primary</i>– this endpoint will be available for externalization when creating storage profiles.</p> <p><i>Backup</i>– this endpoint will be in the Backup Services dropdown on the profile page.</p> <p>The selection is locked down when saving.</p>

<p>Adapter <input type="text" value="FileSystem"/> ?</p>	<p>Select FileSystem unless you are confident that another storage device is available for configuration.</p>
<p>Adapter Settings <input type="checkbox"/> Show Connection String</p> <p>Path <input type="text"/></p> <p>Advanced Adapter Settings <i>(Show)</i></p>	<p>Enter an adapter-specific connection string in this box; a UNC path to a folder available on the network.</p>

New Storage Endpoint ⓘ

EndPoint Information
 Provide basic information about the EndPoint in this section.

The Name identifies the endpoint on the StoragePoint configuration pages. Type can be Primary for general use endpoints and Backup for endpoints used only for Backup and Restore. Status can be Online to allow reads and writes to the endpoint or Offline to allow only reads of content (i.e. no new content allowed).

Storage Settings
 Please provide storage device settings in this section.

Name:

Type: Primary Backup

Status:

Adapter: ?

Adapter Settings: Show Connection String

Path:

Advanced Adapter Settings *(Show)*

d. Click Save at the bottom of the screen.

3. Create one or more Storage Profiles.

This step will create the storage profile(s) that will dictate how BLOBs are externalized. Profiles can be scoped by web application, content database, and/or site collection (EBS Only).

a. Click Storage Profiles from the StoragePoint menu.

Metalogix StoragePoint

[License management](#) |
 [System cache](#) |
 [General settings](#) |
 [Default values](#) |
 [File share librarian](#) |
 [Storage and backup endpoints](#) |
 Storage profiles |
 [Job status](#) |
 [Dashboard](#) |
 [Help](#)

b. Enter a unique Name for the Storage Profile.

- c. In the Profile Scope section of the page, select the scope of the storage profile – Web Application.

Profile Name

Profile Scope
Choose **Web Application** and then select a Web Application to create, update, or delete a Web Application-specific storage profile.

Web Application [Change](#)
No Selection

Content Database
No Selection

- d. Click the Change link next to your scope selection.
- e. Web Application you will be presented with a web application selection dialog.
- f. Click the name of the web application for which you want to create a storage profile. You will return to the profile page.
- g. Use the charts below to enter the minimum configuration settings for the profile.

Storage Endpoints

The **Endpoint Selection Mode** option determines if Endpoint selection is made immediately (Synchronous) or if it happens after the SharePoint list item has been created (Asynchronous). Making this operation asynchronous allows you to select additional filters on the Profile Endpoint configuration dialog. You cannot set this option to **Asynchronous** if the System Cache has not been configured.

Select the endpoint(s) that this profile will write its content to in this section.

Externalize content BLOBs

Endpoint Selection Mode

Storage Endpoints

#	Endpoint	Online?	Filter
Add Endpoint			

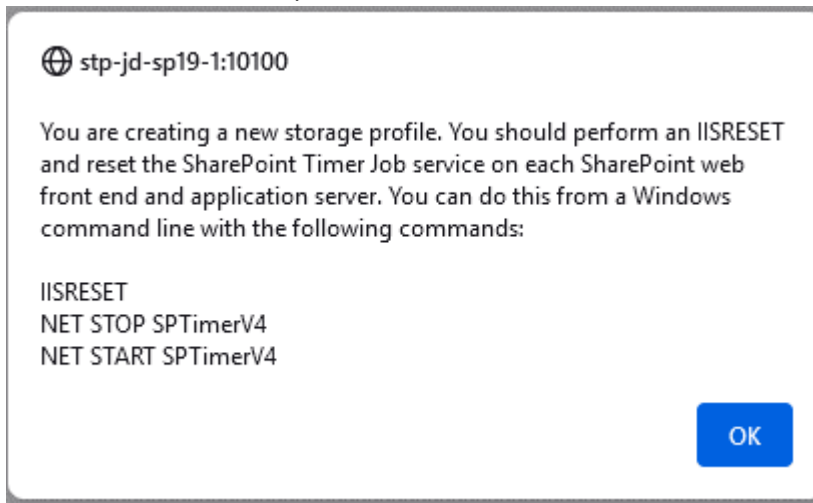
Storage Setting	Value/Options
Endpoint Selection Mode <input type="text" value="Synchronous"/>	Asynchronous for greater endpoint filtering options.

- h. Click Add Endpoint to select an existing endpoint.

Endpoint	Select the endpoint that was created in task 2.
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- i. Click OK to complete the Endpoint configuration for this profile.
- j. Click the Save button to save the storage profile.

- k. You will see a window about performing an IISRESET when creating a new storage profile. Click OK and be sure to perform the commands shown, after the save is complete.



The page will be locked until the operation is complete. This operation can take several minutes. There may also be a page for entering the database master key encryption, and a page may display showing service accounts that should be checked for permissions, if a FileSystem endpoint was used. You will be returned to the Storage Profiles page with the newly-created storage profile showing up in the list.

It is recommended that you also go through the Evaluation Guide to better understand how StoragePoint can be further configured and best utilized.

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- 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