

ControlPoint for Office 365

Installation and Upgrade Guide

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Preface

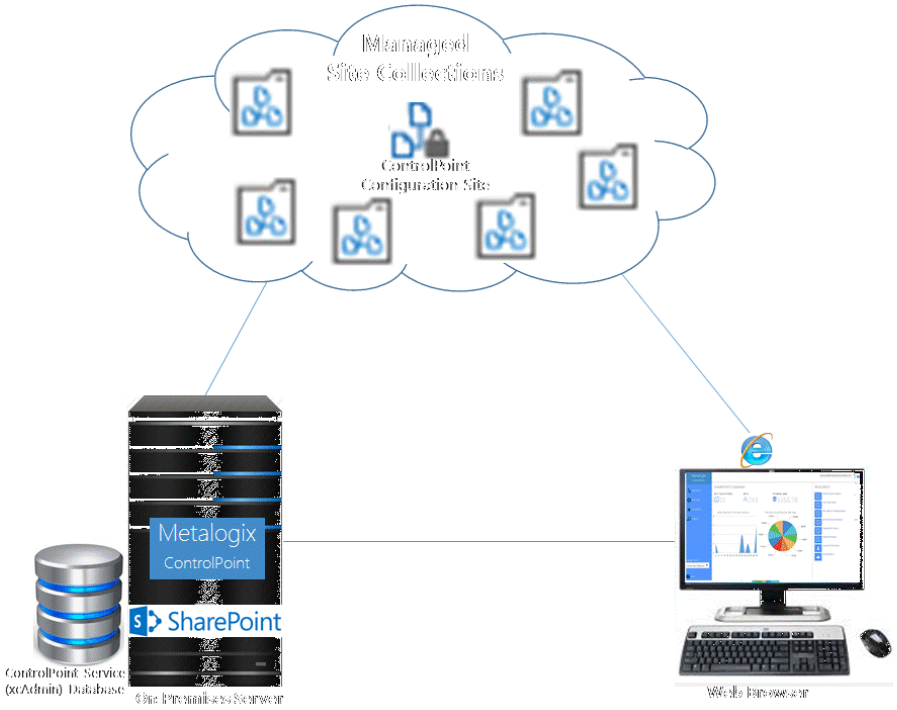
This guide contains instructions for installing and configuring Metalogix ControlPoint for Office365 SharePoint Administration (alternatively called ControlPoint Online) in a hybrid environment. ControlPoint Online is a Web-based application that offers a proactive, integrated solution for managing site collections within a hosted SharePoint environment.

ControlPoint for Office 365 SharePoint Administration (ControlPoint Online) Conceptual Overview

In a hybrid installation, the ControlPoint application is installed on premises, on a Windows server where SharePoint Foundation has been installed (although not necessarily configured). An on-premises SQL server hosts the ControlPoint Services (xcAdmin) database, which holds configuration information and analysis data.

After the ControlPoint application is installed, the ControlPoint Configuration site is created in the hosted environment (or updated if it already exists).

NOTE: Even though ControlPoint Online supports multiple languages, the ControlPoint Configuration site must be *created* in English.



System Requirements

Hosted Environment Requirements

The environment that hosts your SharePoint installation must be running **SharePoint Server 2013.**

On-Premises Server Requirements

You can install Metalogix ControlPoint for Office 365 SharePoint Administration (ControlPoint Online) on a server that meets the following requirements:

- **Windows Server 2008** or **2008 R2** or **2012 Service Pack 3**, 64-bit, with the IIS role configured.

  NOTE: The server can be either dedicated to ControlPoint Online or shared with other functions.

- **SharePoint 2013** (**Foundation** or **Server**) installed, but not necessarily configured.
- For the client Web application: Access to **Microsoft SQL Server 2008**, **2012 Service Pack 3**, or **2014** (to host the ControlPoint Service (xcAdmin) database).

  NOTE: The SQL server may be on the same physical server as the client Web application, or it may be on a different machine.

Account Requirements

- The **account used to** *install* **ControlPoint Online** must be:
  - a member of the local Administrator's group on the machine where ControlPoint Online is installed
  - added to the security server role sysadmin in the SQL server that will be hosting the ControlPoint Services database

  NOTE: If sysadmin privileges cannot be granted, you will need to use an account that has the SQL server roles securityadmin and dbcreator. as well as SharePoint_Shell_Access rights to the SharePoint Configuration database.

  - The account used to create the ControlPoint configuration site must be a Site Collection Administrator for the Site Collection where the site will be created.
- The **account that will be used to** *run* **ControlPoint** (that is the ControlPoint Service Account) must:
  - be a member of the local Administrator's group on the machine where ControlPoint Online is installed
  - have a valid **login** for the **SQL server** that will be hosting the ControlPoint Services database. (sysadim rights are not required for this account.)
  - be a **Site Collection Administrator** for each site collection to be managed using ControlPoint.

ControlPoint User Requirements

ControlPoint users must:

- be members of the Site Collection Administrators group in site collection that will host the ControlPoint Configuration site as well as in every Site Collection they will be managing using ControlPoint Online.

- use a compatible **Web browser**:
  - Microsoft Internet Explorer (IE) version 10 or later

    EXCEPTION: When using Internet Explorer build 11.0.9600.18617, report results do not fill the entire results section.
  - Microsoft Edge
  - Mozilla Firefox version 3 or later
  - Google Chrome (latest public release)

  Note that some browsers may have limitations.

Supported Authentication Methods

Authentication to hosted site collections can be based on either of the following methods:

- Separate accounts that are **managed within the hosted environment**

  When this method is used, credentials are passed to and must be verified in the hosted environment in order for ControlPoint to be accessed.

OR

- Using **Active Directory Federated Services** (**ADFS**)

  When this method is used, ControlPoint will authenticate with the local ADFS and use that identity to communicate with the hosted environment.

OR

- **Active Directory accounts** in the **client environment**

  This method assumes that these accounts are valid in the hosted environment.

First Time Installation and Configuration

Metalogix ControlPoint for Office 365 SharePoint Administration (ControlPoint Online) is installed and runs as a .NET application. During installation:

- a dedicated application pool is created in IIS for the primary ControlPoint Configuration site, which is installed under the root site of a hosted site collection

AND

- the ControlPoint Service database (xcAdmin) is created for configuration information and analysis data

Before You Begin

- The site collection that will host the ControlPoint configuration site must exist on the host and be in the English language.
- 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 if you want to be able to activate your ControlPoint license online.

Have the following information ready (you may wish to record it in the spaces provided):

- The URL for the site collection that will host the primary ControlPoint Configuration Site* and the URL of the SharePoint Administration site hosting the site collection.

  ControlPoint Configuration Site Collection URL: _____

  SharePoint Administration Site URL: _____

  *REMINDER: The ControlPoint Configuration Site must be created in an English-language site collection.

- The name and port number that you want IIS to use to manage the ControlPoint Configuration Site (The default port number is 2828, but you can set it to any available value.)

  Web Site Name:_____

  Port Number: _____

- The account under which you want the application pool for the ControlPoint Configuration Site to 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.)

  App Pool Service Account: _____

  Password: _____

- The email credentials that you want to use as the "from" account for correspondence sent on behalf of ControlPoint.

  Local SMTP Server: _____

  Email address: _____

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

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

  Database Server Name: _____

  Windows Authentication

  OR

  SQL Server ID _____ **Password** _____

- **The ControlPoint Online license activation code**: _____
- The Site Collection Administrator account that will be used to create the ControlPoint Configuration Site.

  Site Collection Administrator Account: _____

  Password: _____

NOTE: If you do not already have a license activation code, contact Metalogix to obtain one.

First Time Installation and Configuration Process

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

1 Installing the ControlPoint application and deploying ControlPoint features.

2 Activating your ControlPoint license.

3 Creating the ControlPoint Configuration site.

Installing and Deploying ControlPoint Online

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 the ControlPoint Online application:

REMINDER: If UAC is enabled, you must "Run as Administrator."

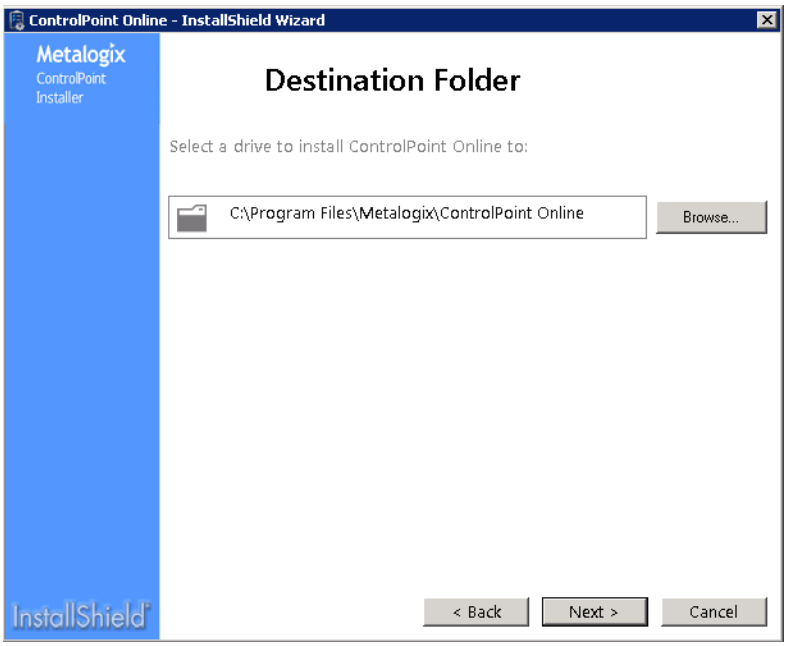
1 Unzip the downloaded zip file then launch the installer (**ControlPointOnline.exe**).

A splash screen displays, followed by the InstallShield Wizard Welcome dialog.

2 Click [**Next**] to display the **License Agreement** dialog.

3 Read the license agreement. Select **I accept the terms of this license agreement**.

4 Click [**Next**] to display the **Destination Folder** dialog.



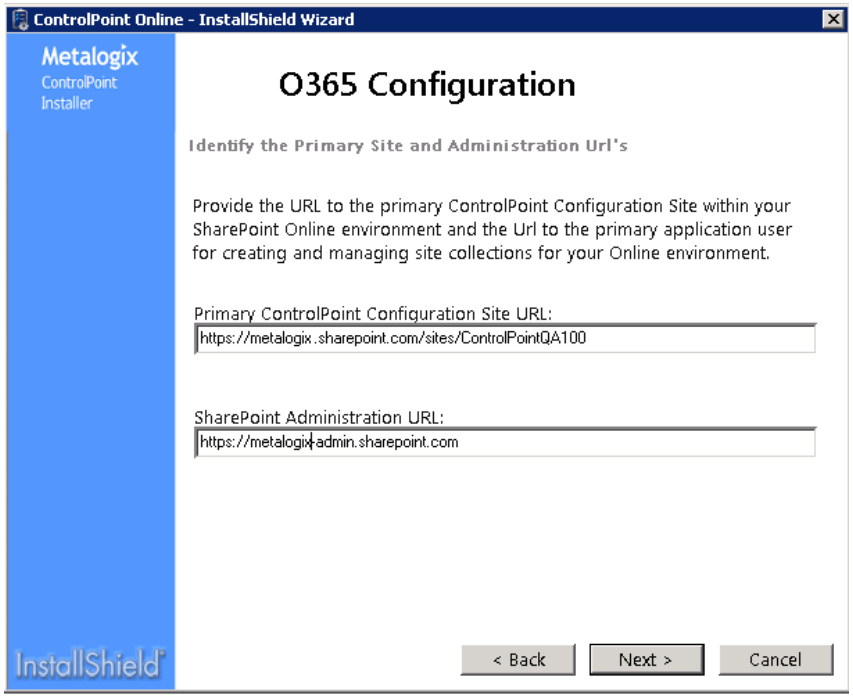
The InstallShield Wizard specifies a default install directory (**C:\Program Files\Metalogix\ControlPoint Online**), but you can click [**Browse**] and select a different one.

NOTE: This directory is where the installer will place the files needed to complete the installation.

5 Click **[Next]** to display the **O365 Configuration** dialog.

6 Enter the following urls:

- For **Primary ControlPoint Configuration Site URL**, the url of the hosted site collection in which the ControlPoint Configuration site will be created.
- For **SharePoint Administration URL**, the url of the primary page for configuring the hosted SharePoint environment.



7 Click **[Next]** to display the **IIS Configuration** dialog.

8 Complete the dialog as follows:

a) For **Web Site Name**, if different from the default (ControlPoint Online), enter the name that you want IIS to use to manage the site.

NOTE: The name that is entered in this field is for IIS purposes only. The name of the site will appear in SharePoint and ControlPoint under the name ControlPoint Configuration Site.

b) For **Port number**, either:

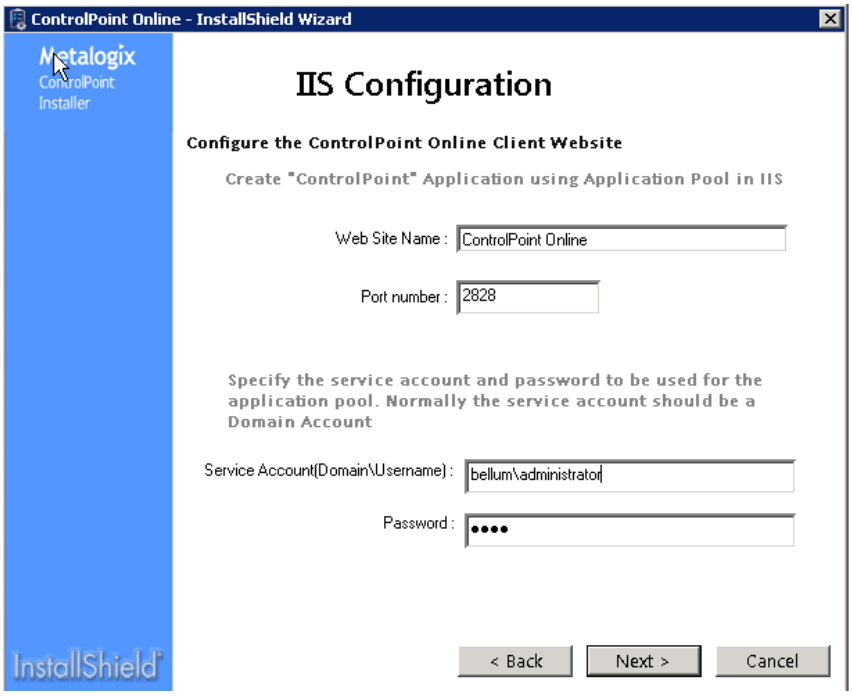
- accept the default value (2828)

OR

- enter a different, unused Port number.

9 If different than the default (the account that is logged into the server), enter the name and password of the **Service Account** under which you want the application pool that will host the ControlPoint Configuration Site to run.

REMINDER: If your databases reside on a different server, then the Service Account must be a domain account.



10 Click [**Next**] to display the **ControlPoint Service Database Server** dialog.

11 For the **Database Server** where you want to place the ControlPoint Service (xcAdmin) database:

a) Do one of the following:

- select a server from the drop-down

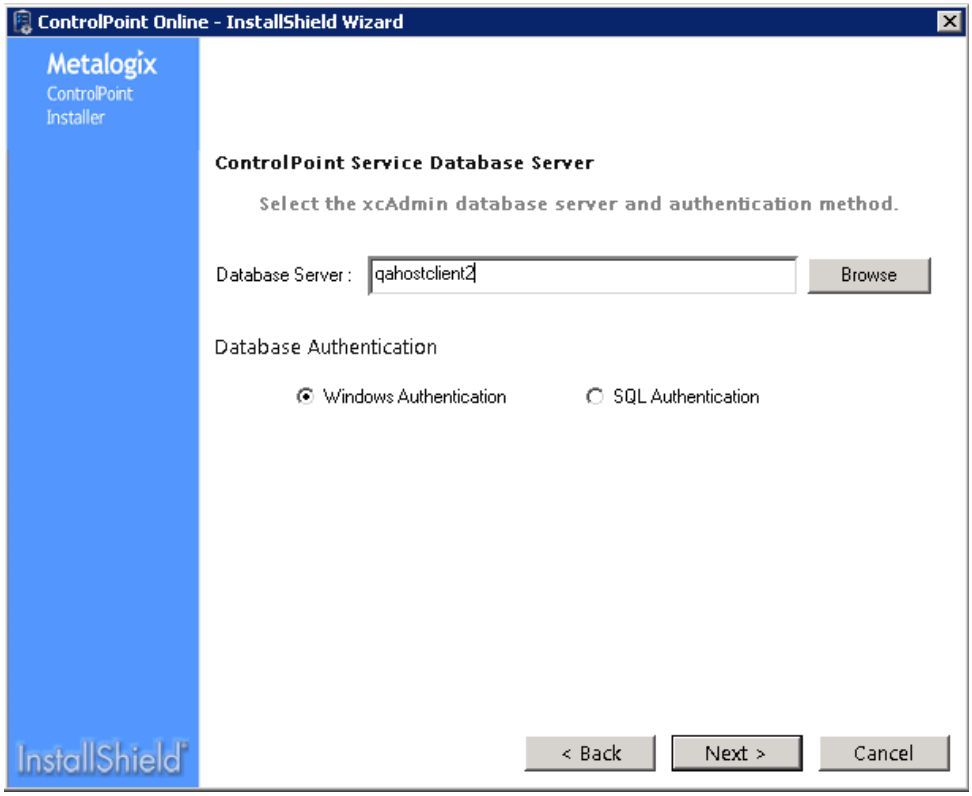
OR

- click **[Browse]** to choose a different database server

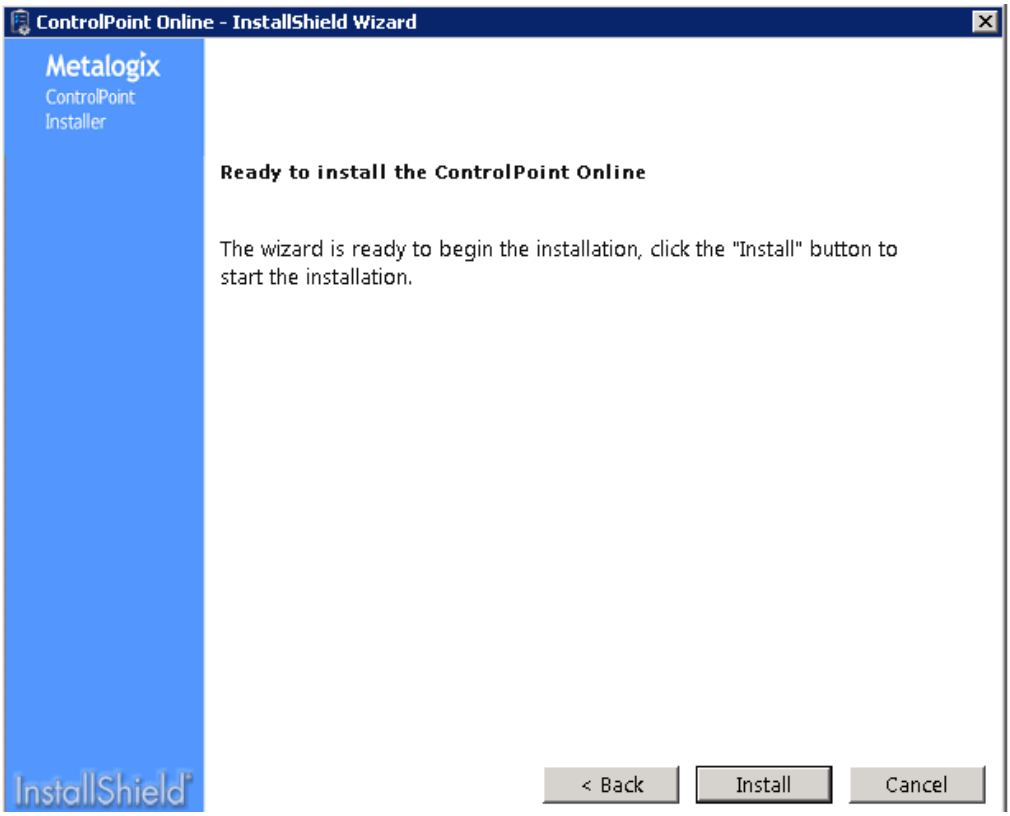
OR

- enter the server name.

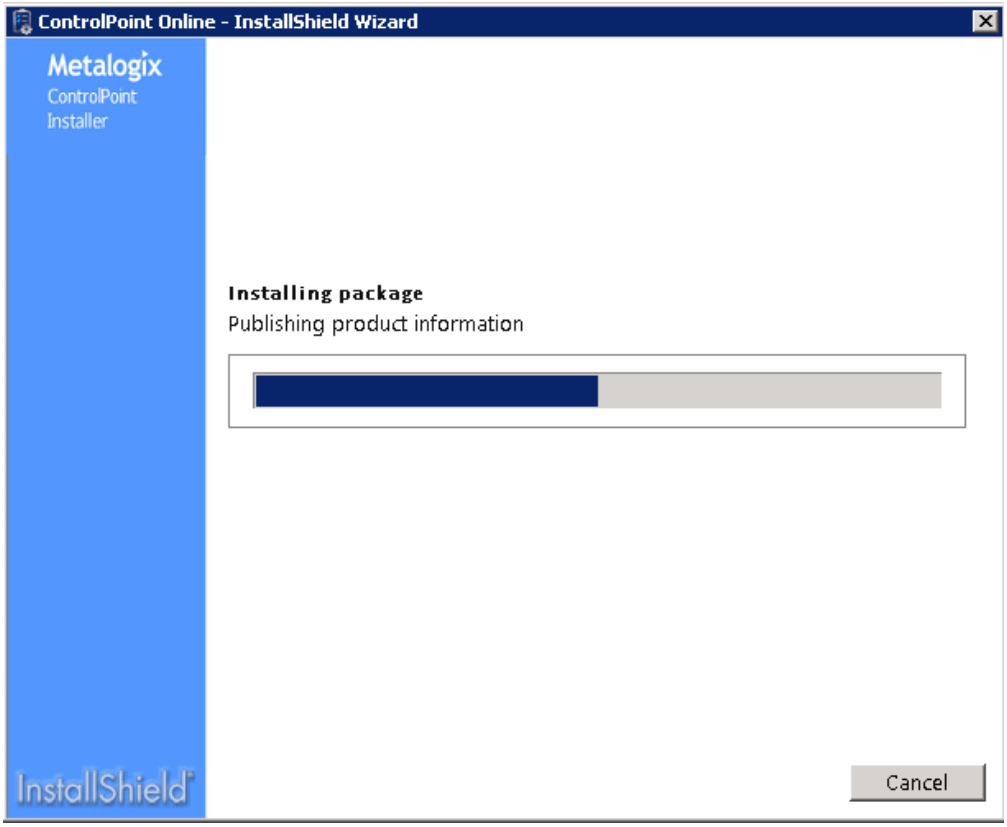
b) Specify the authentication method you want to use. (If you select SQL Server authentication, you will be prompted to enter the **Login ID** and **Password**.)



12 Click [**Next**] to display the **Ready to install the ControlPoint Online** dialog.



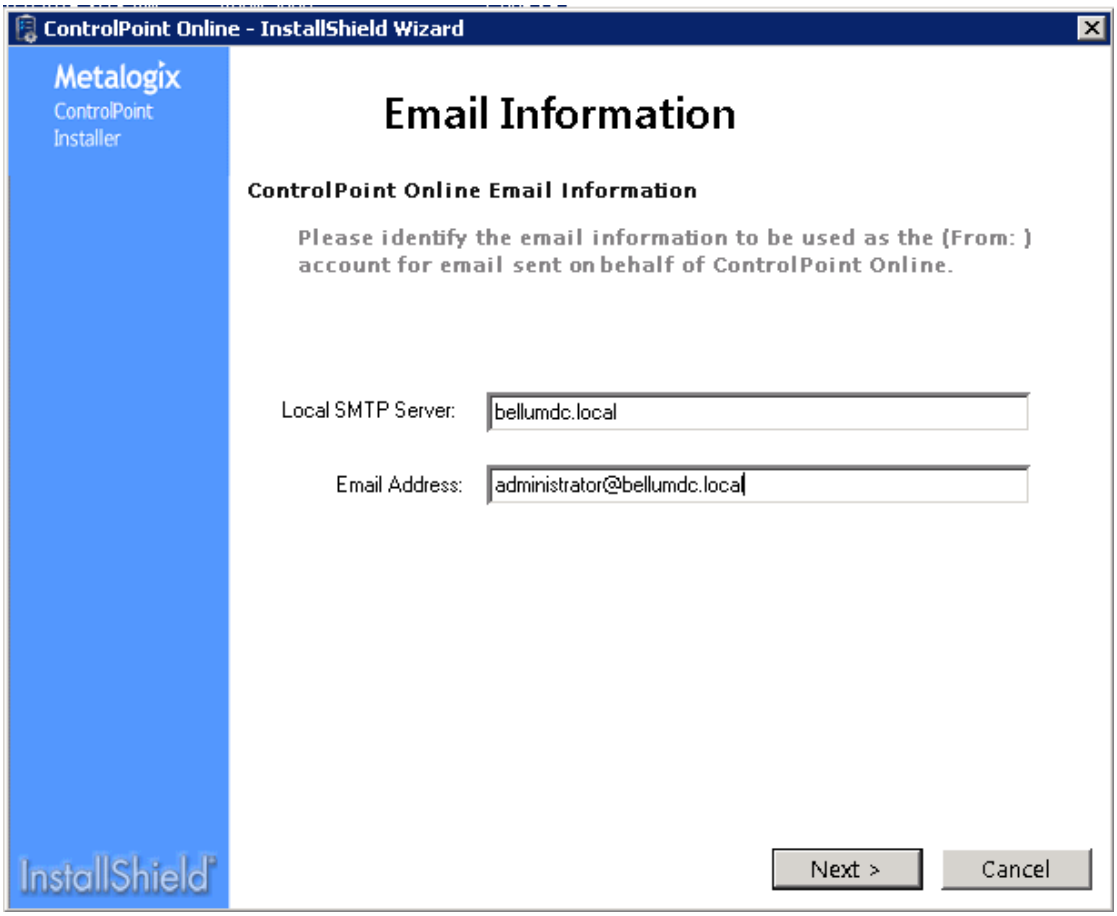
13 Click **[Install]**.



14 Click **[Next]** to display the **ControlPoint Online Email Information** dialog.

15 Enter the email information that will be used as the “from” account for any correspondence sent on behalf of ControlPoint:

- For **Local SMTP Server**, the NETBIOS name of the SMTP server, and
- the **EMail from address** of the ControlPoint Online "from" account.

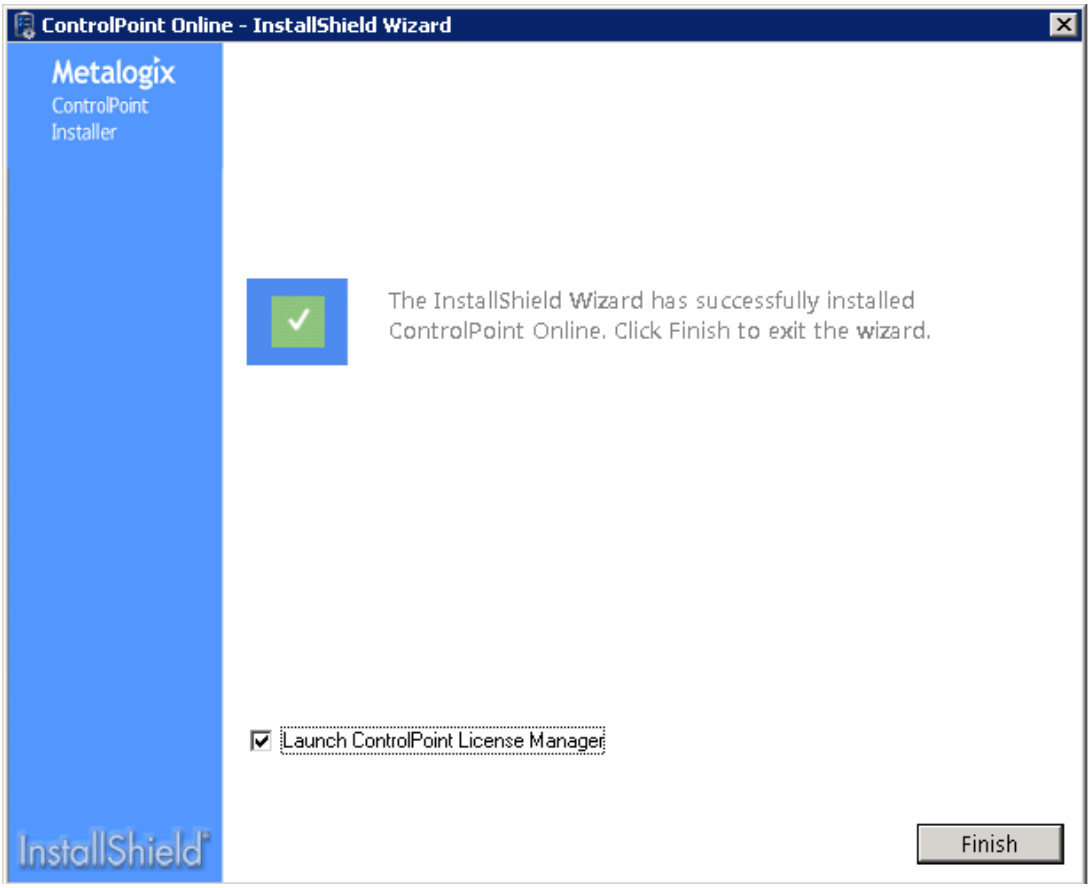


16 Click **[Next]**.

17 The ControlPoint Online installer carries out the following

- Installs the ControlPoint Online application components.
- Creates the ControlPoint Service (xcAdmin) database on the SQL server specified in Step 11.
- Creates the ControlPoint FullDiscovery and Scheduler Jobs tasks in the Windows Task Scheduler (using the credentials of the ControlPoint Service Account specified in Step 9).

18 When the installler has finished running and the **All operations successfully completed** message displays, click [**Finish**].



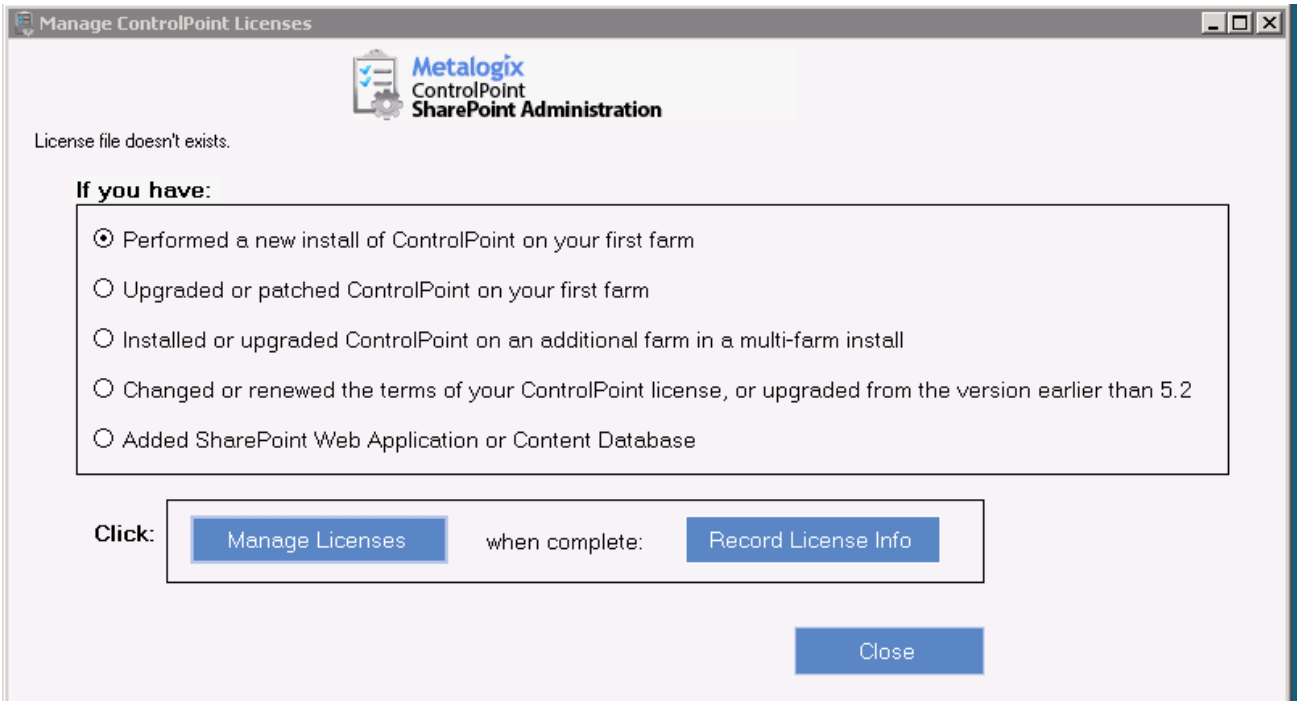
The **Activate ControlPoint Licenses** dialog displays.

Continue with Activating Your ControlPoint Online License.

NOTE: If you want to activate the application at a later time, uncheck the Launch ControlPoint License Manager box before clicking **[Finish]**. When you are ready to activate ControlPoint, you can invoke this dialog from the desktop or Windows Start menu on the machine where the application was installed. Be aware, however, that until you activate ControlPoint you will be unable to use it.

Activating Your ControlPoint Online License

The **Manage ControlPoint Licenses** dialog automatically displays at the conclusion of the installation and deployment process.



If you chose not to activate ControlPoint Online immediately, you can invoke this dialog from the Windows Start menu of the server on which the application was installed by choosing Start > All Programs > Axceler > ControlPoint_Online > Manage ControlPoint Online Licenses.

NOTE: You may need to "Run as Administrator" to invoke the dialog.

If you do not complete the activation process, the following message will display in the ControlPoint application header: License Not Yet Recorded.

To initiate license activation:

From the Manage ControlPoint Licenses dialog, select **Performed a new install of ControlPoint Online**, then click **[Manage Licenses]**.

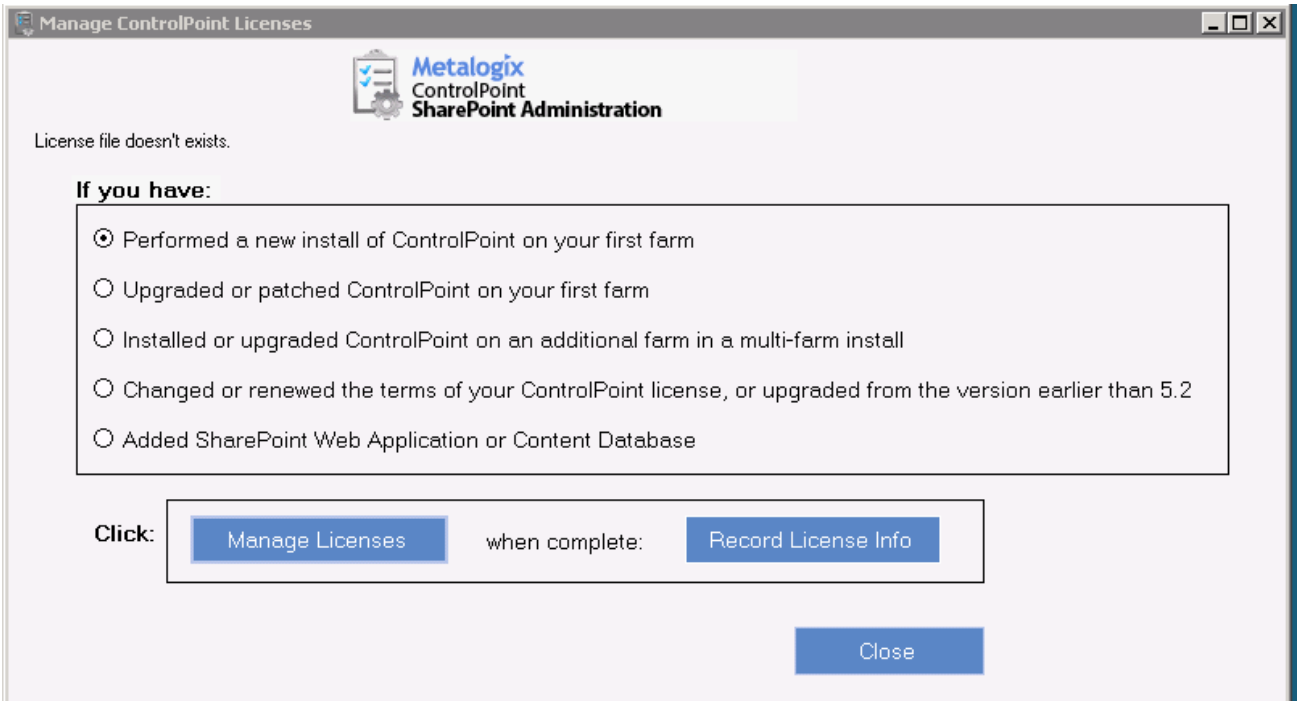
The conventional way to activate ControlPoint is over the Internet, using the procedure for Activating Your License Over the Internet.

If the machine on which ControlPoint is installed does not have Internet access, you will need to request a license file from Metalogix. Continue with the procedure for Activating Your License Without Internet Access.

Activating Your License Online

To activate your ControlPoint license online:

1 On the Manage ControlPoint Licenses dialog, select the appropriate radio button.



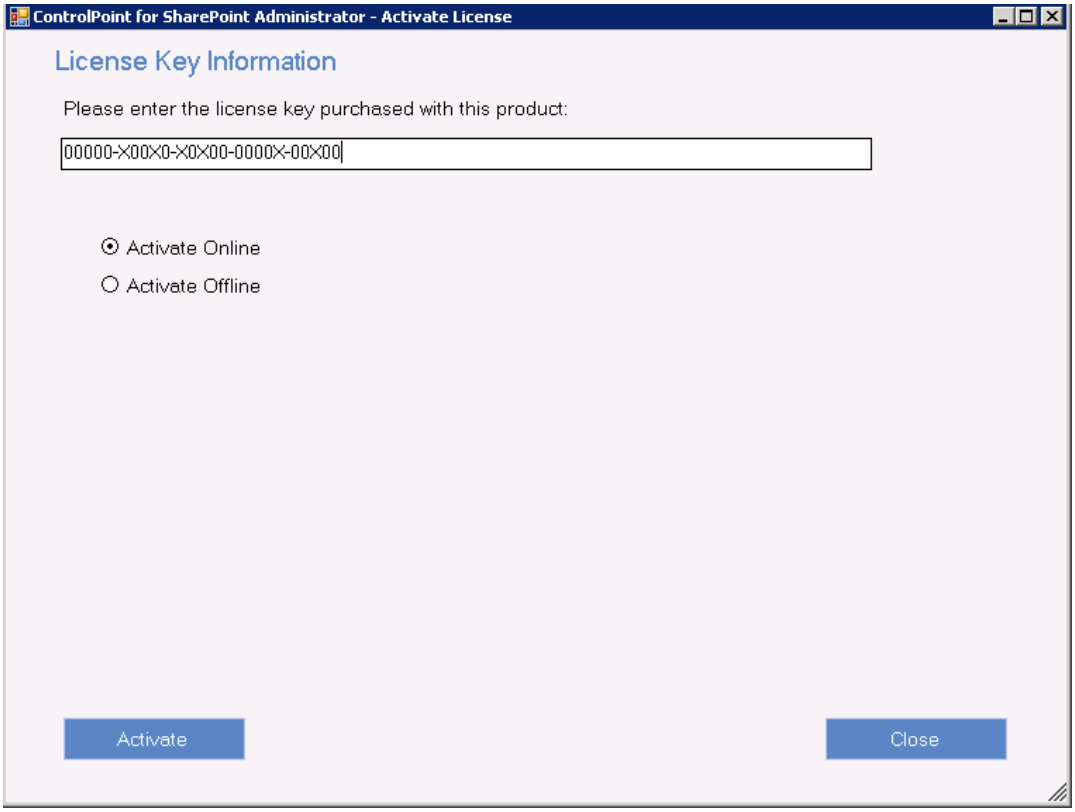
2 Click [Manage Licenses] to display the **Activate License** dialog.

3 Make sure **Activate Online** is selected.

REMINDER: If the server on which ControlPoint is installed does not have internet access, use the procedure for Activating Your License Offline.

4 Enter the license activation key provided by Metalogix.

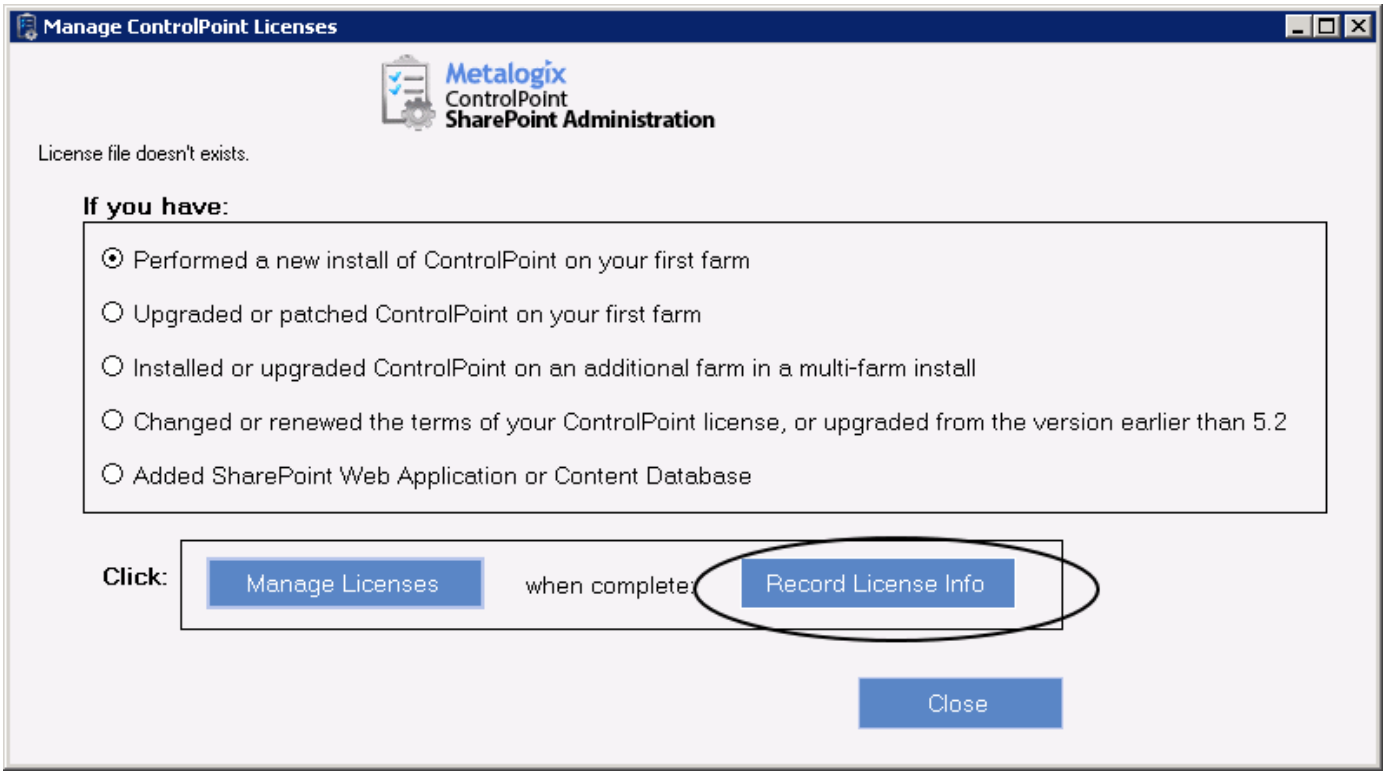
NOTE: If you are upgrading from a version earlier than 5.2, the license key field will already be populated with your current ControlPoint license.



5 Click **[Activate]**.

6 When the *License activation succeeded* message displays in the lower-left corner of the dialog, click **[Close]** to return to the Manage ControlPoint Licenses dialog.

7 Click **[Record License Info]**.



The message *Processing License* displays in the lower left corner of the dialog as license information is made available to additional Web front-end servers in your environment. When processing is completed, it is replaced by the message *ControlPoint has been activated and License recorded.*

When you record your ControlPoint license, the following actions are carried out:

- ControlPoint license makes license information available to additional Web front end servers.
- The polices on all existing Web applications are set to grant the ControlPoint Service Account Full Control permissions.
- The ControlPoint Service Account is granted the `db_owner` role in all existing content databases:
- Final setup on the ControlPoint Configuration site is performed.

NOTE: If you do not complete the activation process, the following message will display in the ControlPoint application header: *License file does not exist*.

Continue with Creating or Updating the ControlPoint Online Configuration Site.

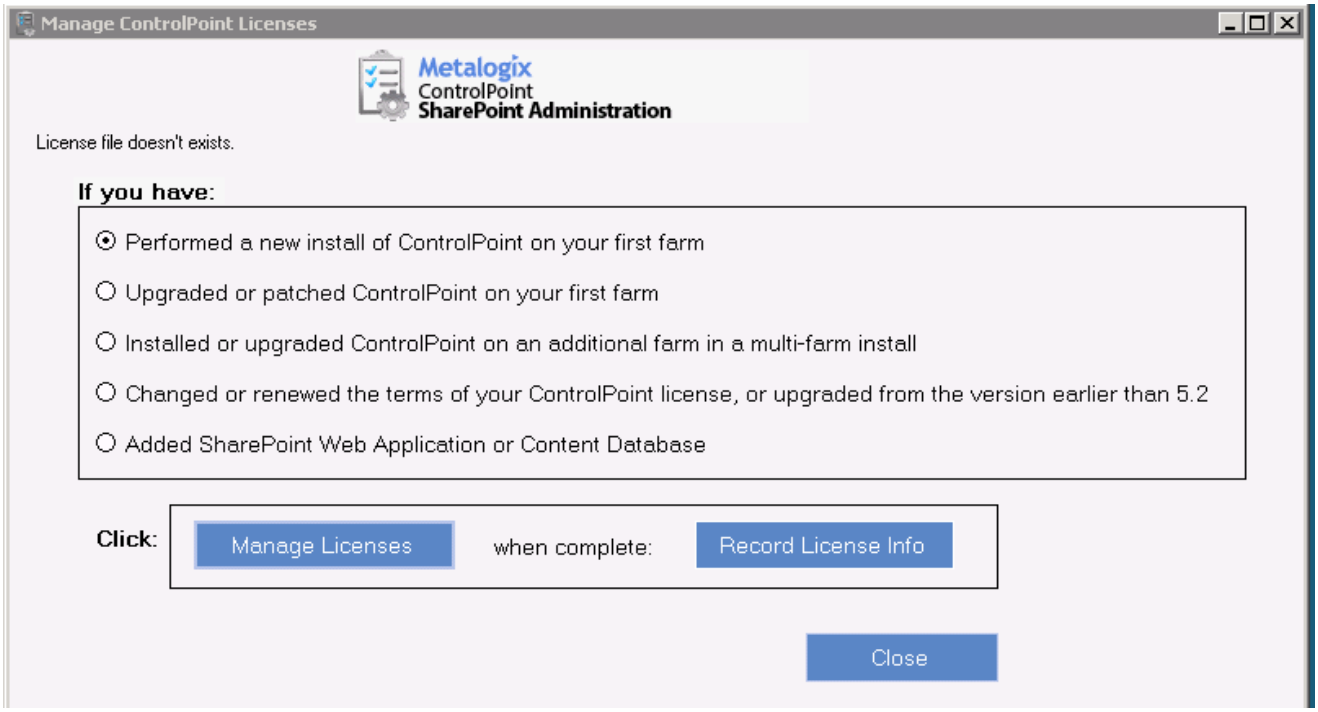
Activating Your License Without Internet Access

You can activate your ControlPoint license offline by requesting an activation key file from Metalogix. This file can then be used to activate your ControlPoint license.

NOTE: Because the request for the activation key file must be submitted via the Metalogix website the request must be *submitted* from a machine that has internet access.

To activate your ControlPoint license offline:

1 On the Manage ControlPoint Licenses dialog, select the appropriate radio button.

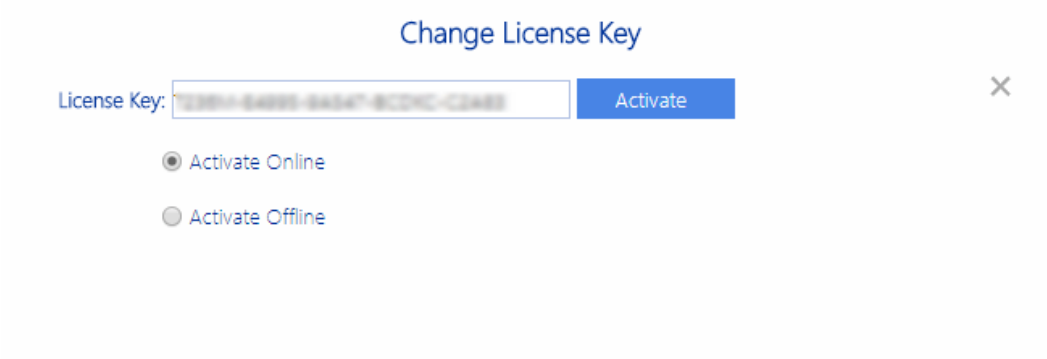


2 Click [Manage Licenses] to display the **Activate License** dialog.

3 Enter the license activation key provided by Metalogix,

NOTE: If you are upgrading from a version earlier than 5.2, the license key field will already be populated with your current ControlPoint license.

4 Select **Activate Offline**.



5 Follow the instructions that display in the dialog to complete the activation process:

a) **Collect the Activation Data**. You have the option to either **Copy Activation Data to Clipboard** or **Save Activation Data to** (text) **File**.

b) **Submit collected data to Metalogix**. Go to http://www.metalogix.com/Support/OfflineActivation.aspx and follow the instructions for submitting your activation data.

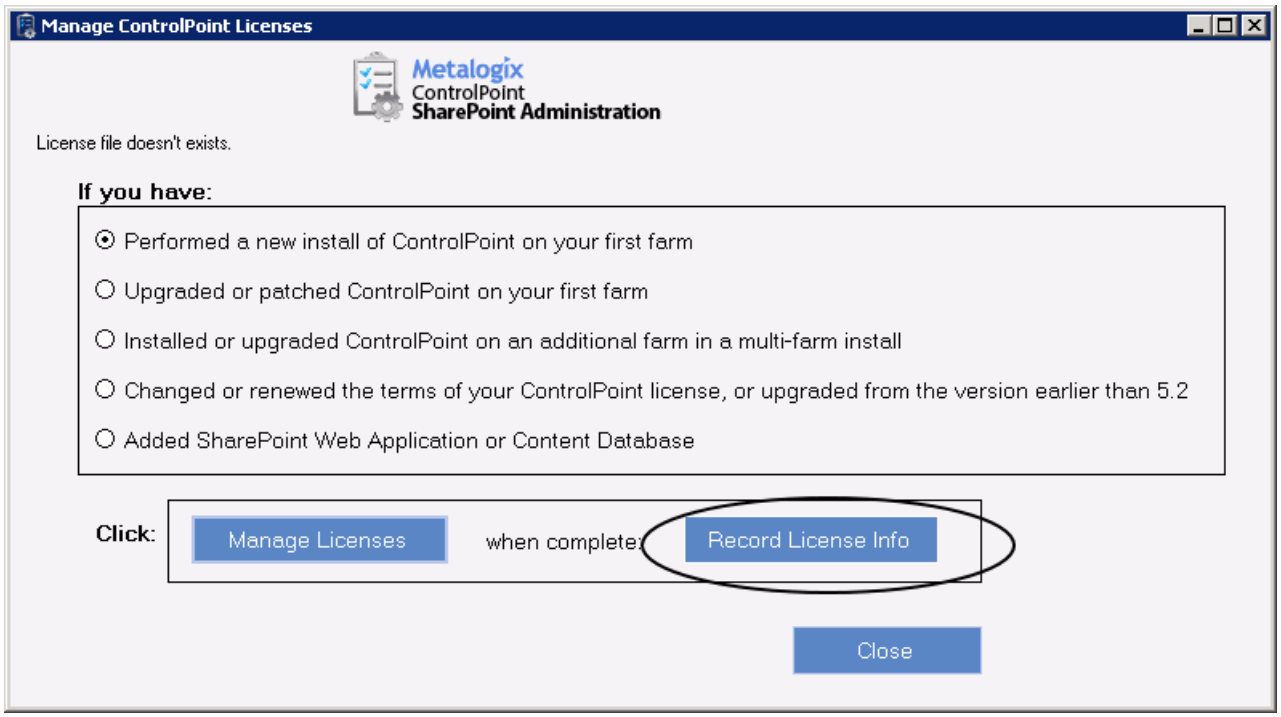
When your activation key is returned, you have the option of copying it to the clipboard or saving it to a data file. Make sure that you choose the option to save to a data file as it is the only method that Activate License dialog allows.

c) **Upload Activation Key File** obtained from Metalogix to the Activate License dialog.

d) Click **[Activate]**.

When the *License activation succeeded* message displays in the lower-left corner of the dialog, click **[Close]** to return to the Manage ControlPoint Licenses dialog.

6 Click **[Record License Info]**.



The message *Processing License* displays in the lower left corner of the dialog as license information is made available to additional Web front-end servers in your environment. When processing is completed, it is replaced by the message *ControlPoint has been activated and License recorded.*

Continue with Creating or Updating the ControlPoint Online Configuration Site.

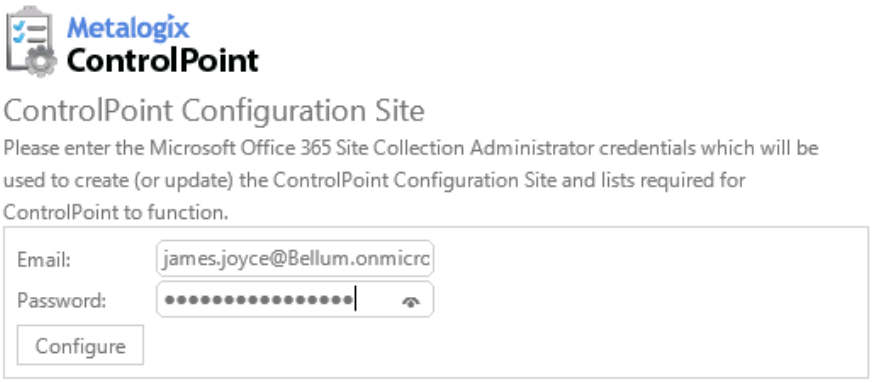
Creating or Updating the ControlPoint Online Configuration Site

Once you have finished activating your ControlPoint Online license, you will be prompted to create (or update) the ControlPoint Online Configuration site.

NOTE: If you choose to dismiss the ControlPoint Online Configuration dialog and create/update the ControlPoint Configuration Site at a later time you will need to invoke the ControlPoint Online Manage Licenses dialog and click **[Record License Info]** to invoke it again. You will not be able to use the ControlPoint application until this step is carried out.

To create or update the ControlPoint Online Configuration Site:

1 Complete the dialog with the **User Name** and **Password** of the Microsoft Office 365 Site Collection Administrator account for the site collection where the ControlPoint Online Configuration Site will reside



2 Click **[Configure]**

3 When the message ControlPoint lists were successfully created. displays, click **[Go to ControlPoint]** to launch the application.

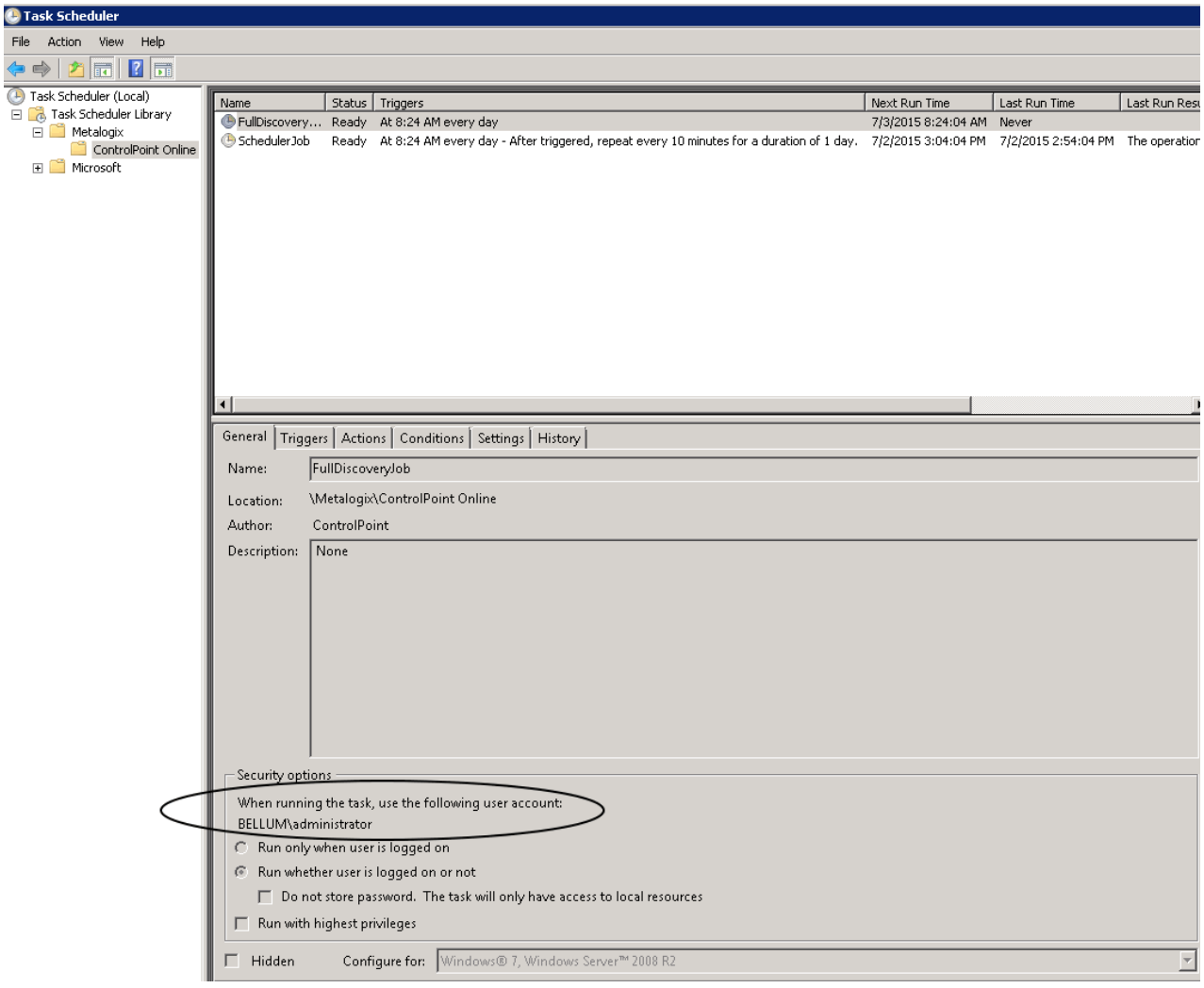
4 Click **[Close]** to dismiss the License Manager.

ControlPoint Full Discovery and Scheduler Jobs

As part of the initial configuration of ControlPoint Online, the following tasks are created in the Windows Task Scheduler on the server where ControlPoint Online is installed, in the folder Task Scheduler Library > Metalogix > ControlPoint Online:

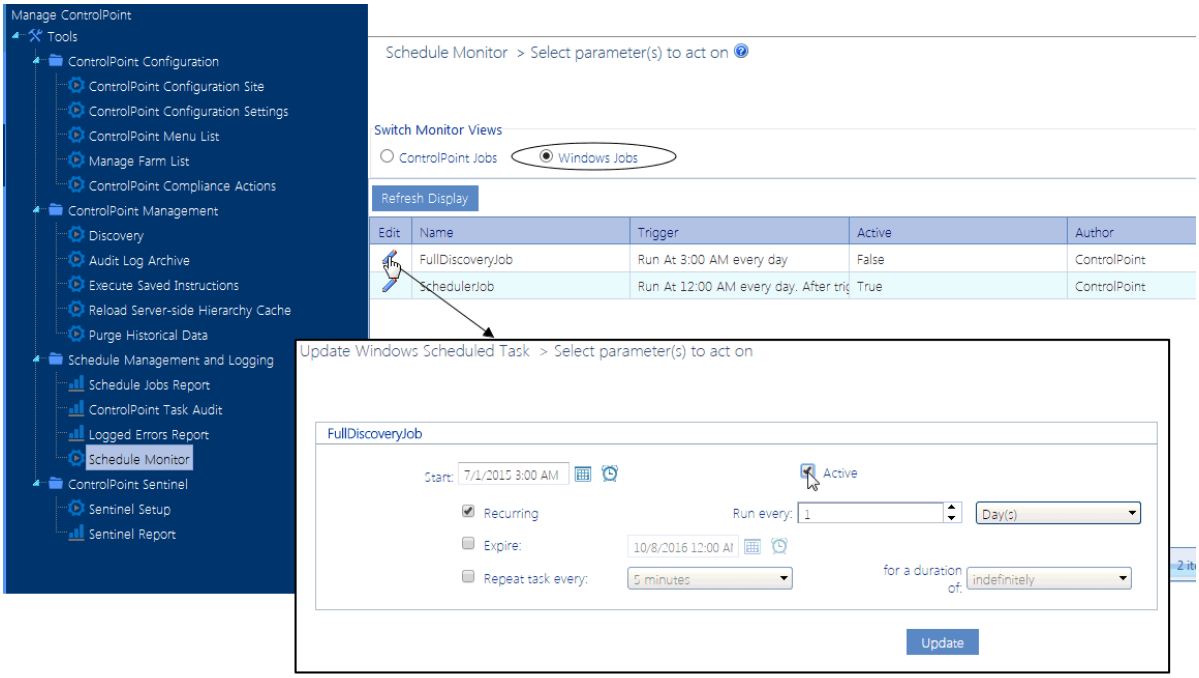
- the **ControlPoint FullDiscovery job**, scheduled by default to run once a day to populate the ControlPoint data cache.
- the **ControlPoint Scheduler Job**, scheduled to run by default ever 10 minutes to check for and initiate the execution of operations scheduled via the ControlPoint Scheduler.

These tasks are configured to run using the credentials of the ControlPoint Service Account.



NOTE: Although the Scheduler Job specifies an initial Start Date and Time, the task is actually triggered for the first time when the first scheduled job is submitted via the ControlPoint application interface.

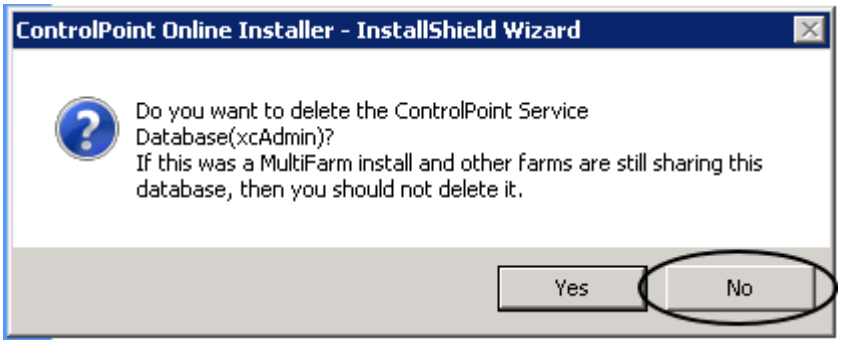
If you want to change the scheduled run time or frequency of either of these tasks, you can do so directly in the Windows Task Scheduler or via the ControlPoint Schedule Monitor.


Manage ControlPoint
Tools
ControlPoint Configuration
ControlPoint Configuration Site
ControlPoint Configuration Settings
ControlPoint Menu List
Manage Farm List
ControlPoint Compliance Actions
ControlPoint Management
Discovery
Audit Log Archive
Execute Saved Instructions
Reload Server-side Hierarchy Cache
Purge Historical Data
Schedule Management and Logging
Schedule Jobs Report
ControlPoint Task Audit
Logged Errors Report
Schedule Monitor
ControlPoint Sentinel
Sentinel Setup
Sentinel Report
Schedule Monitor > Select parameter(s) to act on
Switch Monitor Views
ControlPoint Jobs
Windows Jobs
Refresh Display
Edit
Name
Trigger
Active
Author
FullDiscoveryJob
Run At 3:00 AM every day
False
ControlPoint
SchedulerJob
Run At 12:00 AM every day. After trig
True
ControlPoint
Update Windows Scheduled Task > Select parameter(s) to act on
FullDiscoveryJob
Start: 7/1/2015 3:00 AM
Active
Recurring
Run every: 1
Day(s)
Expire:
10/8/2016 12:00 AI
Repeat task every:
5 minutes
for a duration of:
indefinitely
Update

Upgrading from a Previous Version of ControlPoint Online

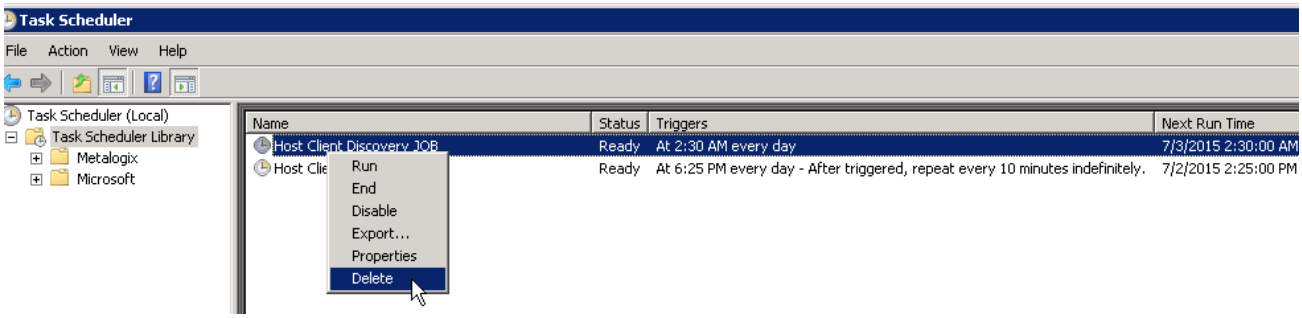
f ControlPoint Online was originally installed prior to version 6.2, it must be uninstalled (using the Programs and Features option on the Windows Control Panel) before the new version can be installed (using the procedures for First Time Installation and Configuration.)

When asked by the installer if you want to remove the Controlpoint Service Database(xcAdmin), remember to click **[No]** to avoid losing historical data collected by ControlPoint Online.



Important Note About Full Discovery and Scheduler Job Tasks

As part of the installation, new ControlPoint FullDiscovery and Scheduler Jobs tasks are created in the Windows Task Scheduler, in the folder Metalogix > ControlPoint Online, and using the credentials of the ControlPoint Service Account specified during the installation. These task are *replacements* for the Host Client Discovery JOB and the Host Client Scheduler JOB, which can be deleted from the Task Scheduler.



If you want to change the default scheduled times and frequency of these jobs (for example, to coincide with those of the original jobs), you can do so directly in the Task Scheduler or via the ControlPoint application interface.

See ControlPoint Full Discovery and Scheduler Jobs for complete details.