

ControlPoint

Advanced Installation Guide

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Preface

This guide contains instructions for installing Metalogix ControlPoint, a Web-based application that offers a proactive, integrated solution for managing site collections within one or more SharePoint farms. The information in this guide applies specifically to farms running SharePoint 2010 or higher.

Details for installing ControlPoint in a SharePoint 2007 farm environment are covered in a separate document, the *ControlPoint Installation and Upgrade Guide for SharePoint 2007.*

System Requirements

Server Requirements

For a SharePoint 2016 Farm

- **Windows Server** 2012 R2 (64-bit), with IIS activated.
- **SharePoint 2016** web front-end.

  NOTE: To run ControlPoint Activity analyses in a SharePoint 2016 Server environment, SharePoint Usage must be enabled.
- **Microsoft SQL Server:** SQL Server 2014 SP1 (64 bit)

  NOTE: ControlPoint can use the same SQL Server instance as SharePoint, but it can also use a separate instance or separate server.
- **.NET framework version 4.6**

For a SharePoint 2013 Farm

- **Windows Server** 2008 or 2012 (64-bit), with IIS activated.
- **SharePoint 2013** (**Foundation** or **Server**) web front-end.

  NOTE: To run ControlPoint Activity analyses in a SharePoint 2013 Server environment, SharePoint Usage must be enabled.
- **Microsoft SQL Server:** SQL Server 2008 (64-bit), 2012, or 2014

  NOTE: ControlPoint can use the same SQL Server instance as SharePoint, but it can also use a separate instance or separate server.
- **.NET framework version 4.5**

  NOTE: For convenience, it is recommended that this be installed before you install ControlPoint. However, if it is not present, the ControlPoint installer will install it.

For a SharePoint 2010 Farm

- **Windows Server** 2008 64-bit, with IIS activated.
- **SharePoint 2010** (**Foundation** or **Server**) web front-end.

  NOTE: To run fully functional ControlPoint Activity analyses in a SharePoint 2010 Server environment, the Web Analytics service must be used by all Web applications in the farm.
- **Microsoft SQL Server:** SQL Server 2008 (64-bit), 2012, or 2014

  NOTE: ControlPoint can use the same SQL Server instance as SharePoint, but it can also use a separate instance or separate server.
- **.NET framework version 3.5, Service Pack 1 or higher**

  NOTE: For convenience, it is recommended that this be installed before you install ControlPoint. However, if it is not present, the ControlPoint installer will install it.

Additional Considerations for Multi-Farm Installations

When a multi-farm environment is being established, the first farm on which ControlPoint is installed will create the shared ControlPoint Service (xcAdmin) database and will record the shared license into the database for the sake of all subsequent farms. See also Using ControlPoint to Manage Multiple Farms.

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 database.

  NOTE: If `sysadmin` privileges cannot be granted, you will need to use an account that has the SQL server roles `securityadmin` and `dbcreator`, such as the server farm account (that is, the account under which Central Administration runs). If you do not use an account with `sysadmin` privileges to run the installer, you will be prompted to log in as the server farm account to complete the final step.

- 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
  - ideally, a Farm Administrator

    NOTE: If it is not possible for the account to be a Farm Administrator, you will be unable to set Site Collection Quotas in ControlPoint and an additional configuration step will be required.

  - 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 execution 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.

Compatible Browsers

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

- **For SharePoint 2013 or 2016:**
  - 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)
- **For SharePoint 2010**:
  - Microsoft Internet Explorer (IE) version 10 or later, running in Compatibility View

    NOTES:

    - With IE 10, 'AutoComplete User names and passwords on forms' option must be disabled.
    - When using Internet Explorer build 11.0.9600.18617, report results do not fill the entire results section.
  - Microsoft Edge
  - Microsoft Edge
  - Mozilla Firefox version 3 or later
  - Google Chrome

Using ControlPoint to Manage Multiple Farms

If you want to use ControlPoint to manage multiple farms, a copy of the ControlPoint application must be installed on a Web front-end server in each farm. Each farm has:

- its own Web application and ControlPoint Configuration site
- its own ControlPoint menus (including any customized menus), and
- its own ControlPoint security model, which determines administrators' access to ControlPoint menu items.

You have the option of installing ControlPoint either:

- as **separate, single-farm installations**, which means that each farm has:
  - its own ControlPoint Service (xcAdmin) databases, and
  - its own ControlPoint license activation code
- as a **multi-farm installation**, which means that farms share:
  - the same ControlPoint Service (xcAdmin) database, which allows ControlPoint users to navigate among and operate on other farms and makes it easier to switch from one farm to another from within the ControlPoint application interface, and
  - a common ControlPoint license activation code.

You can manage farms running different versions of SharePoint in a multi-farm installation. You cannot, however, copy/move site collections, sites, lists, or list items between farms with different SharePoint versions. Metalogix offers a tool that can help you migrate between SharePoint versions. Contact Metalogix for more information.

Factors to Consider When Choosing the Appropriate Installation Type for your SharePoint Environment

The optimal installation type depends on a number of factors, including how your SharePoint environment is configured, the size of your farms, and whether there is connectivity between them.

Single-farm installations are preferable if

- farms are in different domains that do not have a two-way trust relationship
- farms are on different WANs or network segments where bandwidth is limited or connectivity between farms is not maintained
- SQL server resources are limited and scalability of the xcAdmin database is a concern, and/or
- different groups of people are responsible for managing different farms.

If you choose this approach, you will need to bookmark each of the farms if you want to easily switch between them. You will still be able to copy and move sites across farms, but you will have to enter the destination site's url instead of selecting it from a list.

Consider a multi-farm installation if:

- you want to be able to:
  - navigate through and operate on more than one farm using a single application interface
  - run ControlPoint actions and analyses on more than one farm in a single operation, and/or
  - quickly switch between farms from the ControlPoint application interface
- farms are in the same domain or in domains with at least a two-way trust relationship
- farms are on the same WAN or network segment (that is, bandwidth is adequate and connectivity between farms is maintained)
- your SQL server is robust enough that scalability of the xcAdmin database is not an issue
- the same group of people is responsible for managing all farms.

For farms that utilize a common instance of SQL server, you will *need to* perform a multi-farm installation. When installing ControlPoint in this circumstance, be sure to provide a unique name for the content database used by the Web application that hosts the ControlPoint Configuration Site collection for each farm.

You can of course use different installation types to suit the needs of different farms. For example, you may want to use a multi-farm installation for QA and development farms and single farm installations for production farms.

Installation Guidelines

Installation Type	Guidelines
single-farm installations	• Contact Metalogix Technical Support to obtain a license activation code for each additional farm. • For each farm, complete the entire installation process, which includes: ▪ specifying the location where you want to create the ControlPoint Service (xcAdmin) database for the farm, and ▪ activating a separate ControlPoint license for each farm.
a multi-farm installation	• Install ControlPoint in the first farm, which includes: ▪ specifying the location where you want to create the ControlPoint Service (xcAdmin) database that will be shared by all farms, and ▪ activating your ControlPoint license. • For additional farms, perform a complete installation and when you specify the location of the xcAdmin database, be certain to specify the server on which you created the database for the first farm. You will not be required to enter a license activation code, as this step is only necessary for the first farm.

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, and it 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.

NOTE: You can install ControlPoint on any Web front-end server machine in your farm. It is recommended, however, that you install ControlPoint on the machine on which you want to run the most resource-intensive ControlPoint processes. The machine name of the server on which you install ControlPoint is the name that ControlPoint will use by default as the farm name in the ControlPoint application interface. You can, however, change the display name of the farm at a later time. By default, the machine on which you install ControlPoint will be used for background processes such as Discovery and scheduled reports and actions.

If you are upgrading from a previous version of ControlPoint, follow the instructions for Upgrading from a Previous Version of ControlPoint.

IMPORTANT: Using ControlPoint with Claims-Based Authentication

For SharePoint 2010, 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.

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: _____
  - 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.)

- 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 Metalogix to obtain one.

First Time Installation and Configuration Process

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

1 Installing the ControlPoint application and deploying ControlPoint features (see Installing ControlPoint File).

2 Activating ControlPoint.

3 Configuring the ControlPoint Application Environment (see Configuring the Environment in Which ControlPoint Will Run).

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:

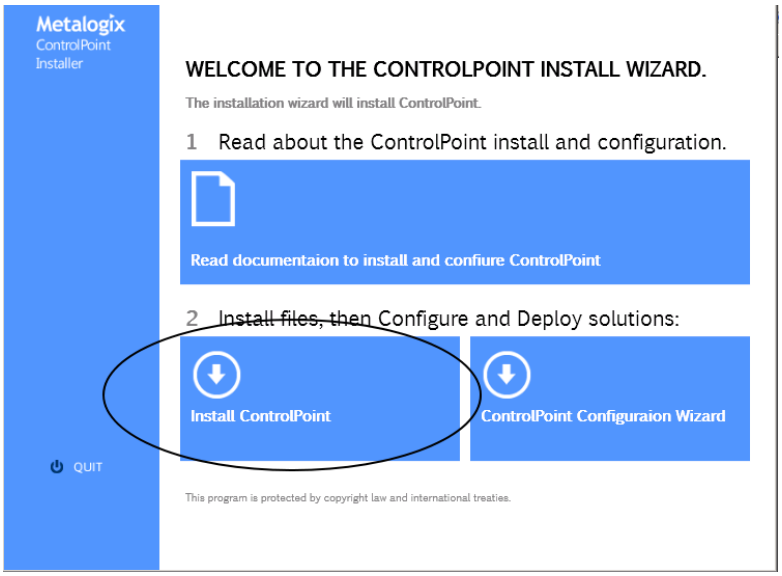
REMINDER: If you are installing ControlPoint on a Windows 2008 server with UAC enabled, you must "Run as Administrator."

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 in the Setup subfolder that are required by the installer.

A splash screen displays, followed by the ControlPoint Install Wizard options dialog.

2 Choose Install ControlPoint.



The ControlPoint InstallShield Wizard Welcome dialog displays.

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

4 Read the license agreement. Select I accept the terms of this license agreement.

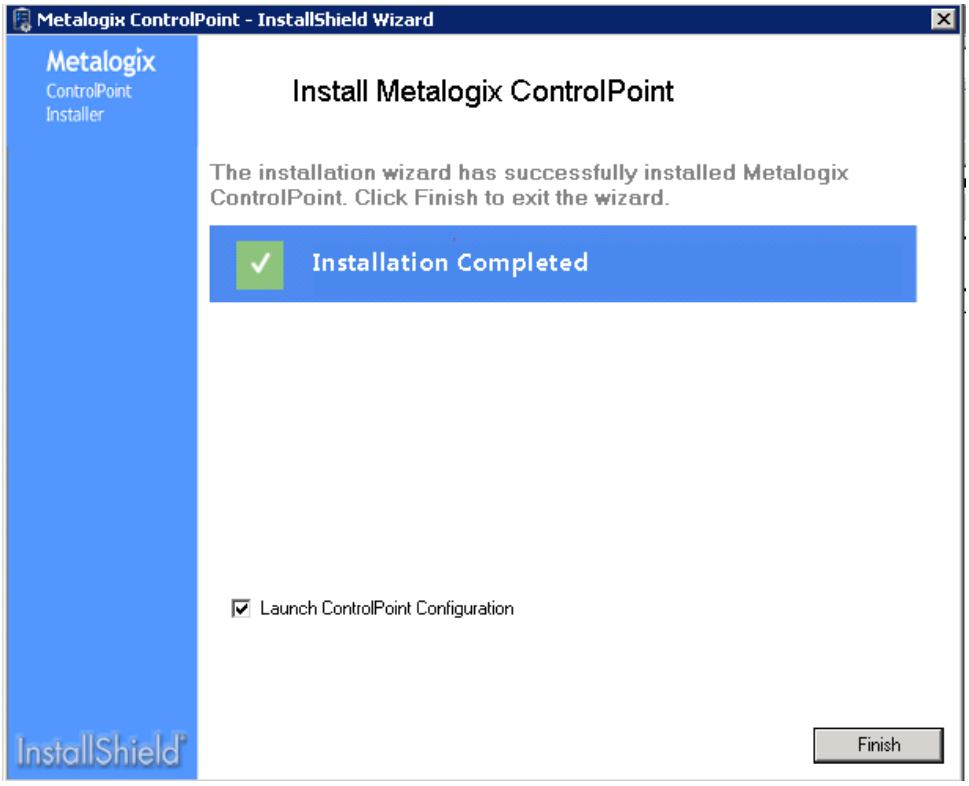
5 Click **[Next]** to display the Destination Folder dialog.

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.

6 Click **[Install]**.

The installation Wizard installs the ControlPoint files to the specified Destination Folder. When completed, an **Installation Completed** message displays.



NOTE: If you want to configure the ControlPoint application at a later time, uncheck **Launch ControlPoint Configuration**.

7 Click **[Finish]**.

Next Steps

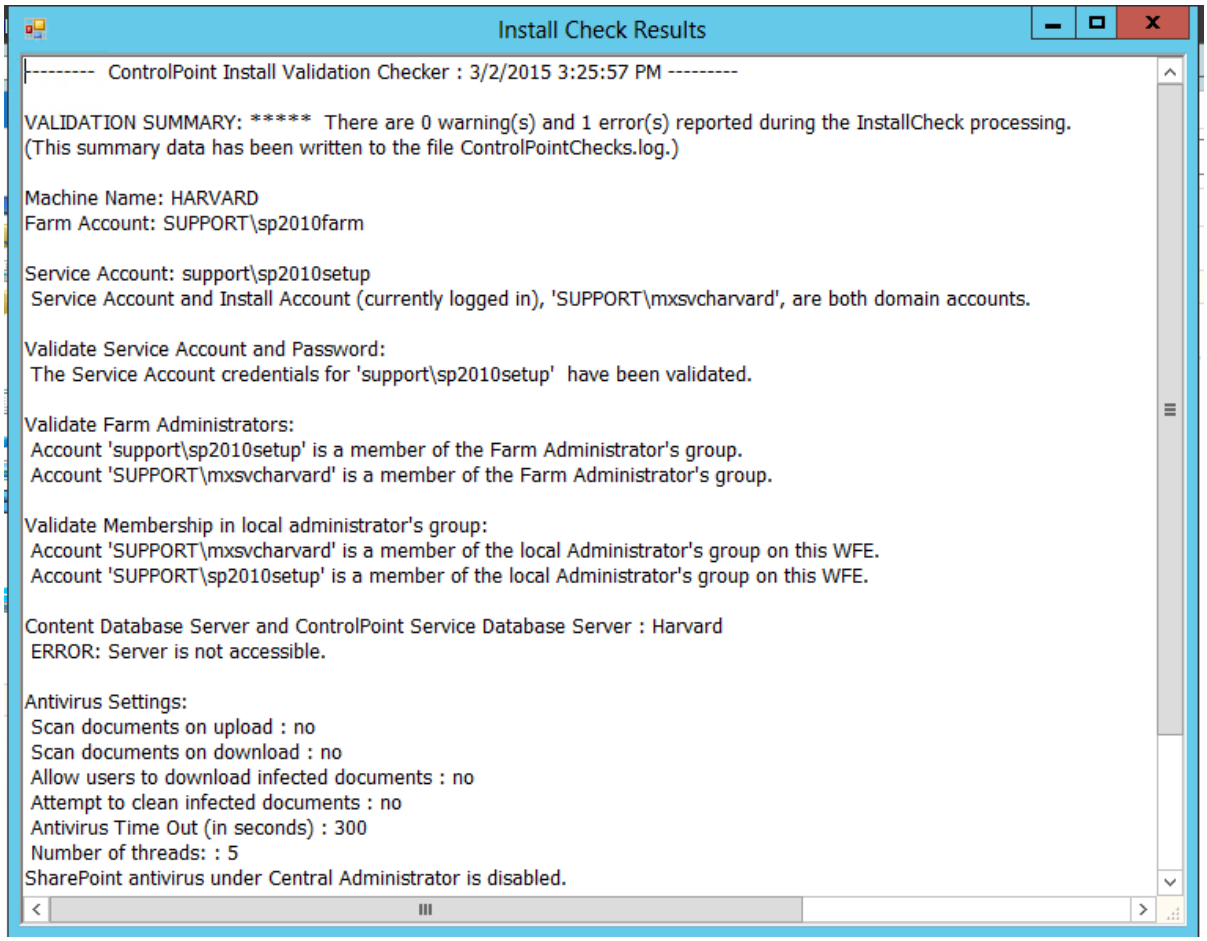
If you...	Continue with ...
are installing ControlPoint for the first time	Configuring the ControlPoint Application and Deploying SharePoint Solutions. NOTE: Before configuring ControlPoint as part of a first-time installation, it is strongly recommended that you perform a pre-installation validation check.
are upgrading from a version earlier than 5.3	Step 2 of the procedure for Upgrading from a Previous Version of ControlPoint.

Performing a Pre-Installation Validation Check

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:

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

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.

(The install check also runs automatically as part of the configuration process. However, by running the utility prior to configuraton, you may be able to identify and address certain key issues in advance, and thus avoid having to abort the configuration in progress.)

Configuring the ControlPoint Application and Deploying SharePoint Solutions

After ControlPoint is installed the application must be configured. The ControlPoint Configuration Wizard carries out the following tasks:

Install .NET Framework (if applicable): If it is not already on the server, installs (or prompts you to install) the appropriate version of the .NET Framework.

REMINDER: If the machine on which you are installing ControlPoint does not have Internet access, you can install the .NET Framework by downloading and installing the full package, which is accessible via the Metalogix website. For more detail, see "Before You Begin" earlier in this section. (if applicable): If not currently installed on the system:

Create 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.)

Create ControlPoint Web Application: Installs the ControlPoint Web application within SharePoint, which includes the creation of a content database for the Web application

Create ControlPoint site collection: Creates the site collection called ControlPoint Configuration Site within the ControlPoint Web application, and assigns an initial Site Collection Administrator.

Deploy 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.

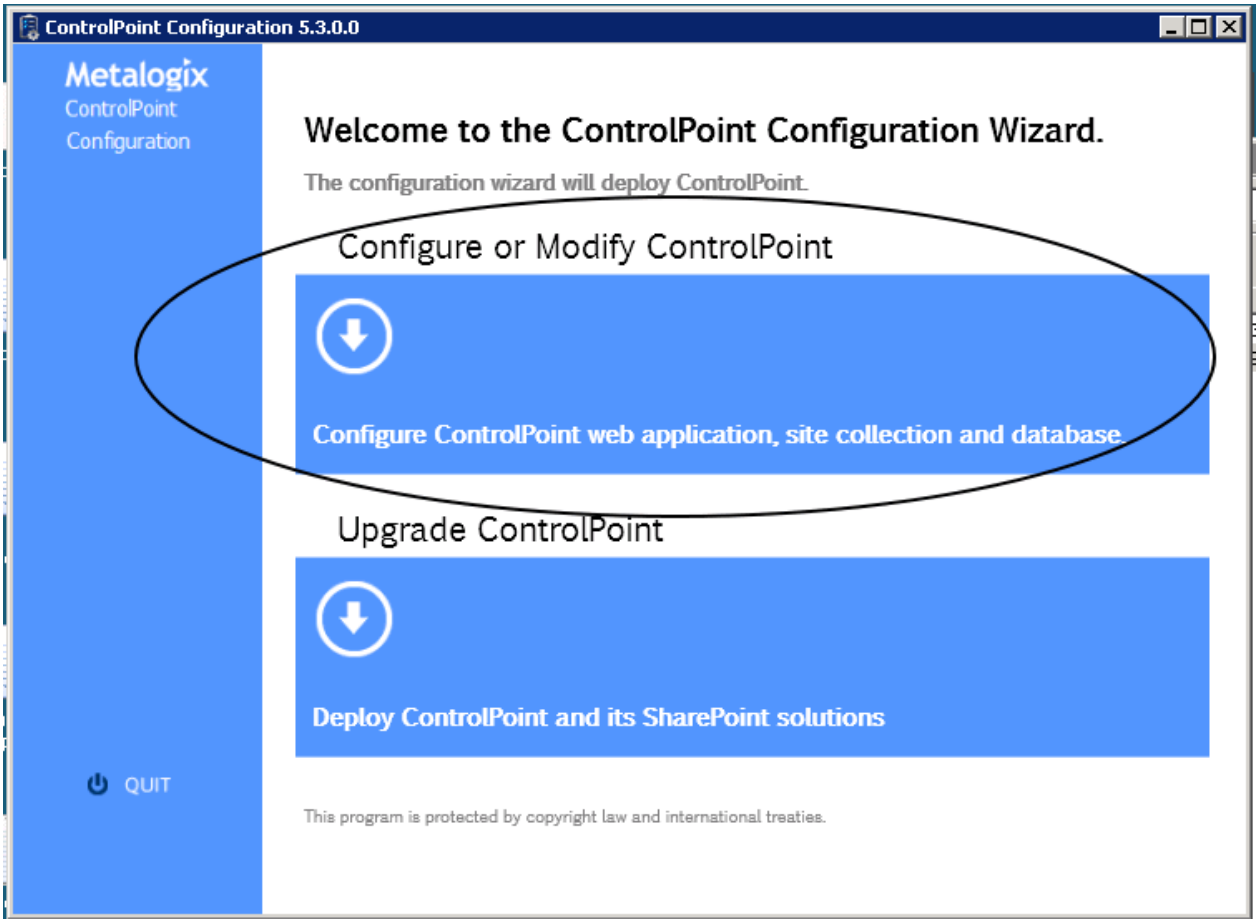
NOTE: As is the case with other SharePoint Solution deployments, upon completion all running application pools will be recycled.

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 left the **Launch ControlPoint Configuration** box checked)	go to the next step.
after installing ControlPoint you chose to configure at a later time (that is, after performing the install you unchecked the **Launch ControlPoint Configuration** box)	double-click the ControlPoint Configuration desktop icon to launch the ControlPoint Configuration Wizard options dialogue

2 From the ControlPoint Configuration Wizard options dialog,choose Configure or Modify ControlPoint.



3 On the **Configure Web Application** dialog, provide the following information.

a) For **Port**, either

- accept the default value (1818)

OR

- enter a different, unused Port number. (It is strongly recommended that you *not* 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 currently in use (including Port 80), you can do so after completing the installation.

b) If different than the default (the currently logged in account), specify the **Service Account** under which you want the ControlPoint Web application to run.

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

c) For **Content Database Name**, either

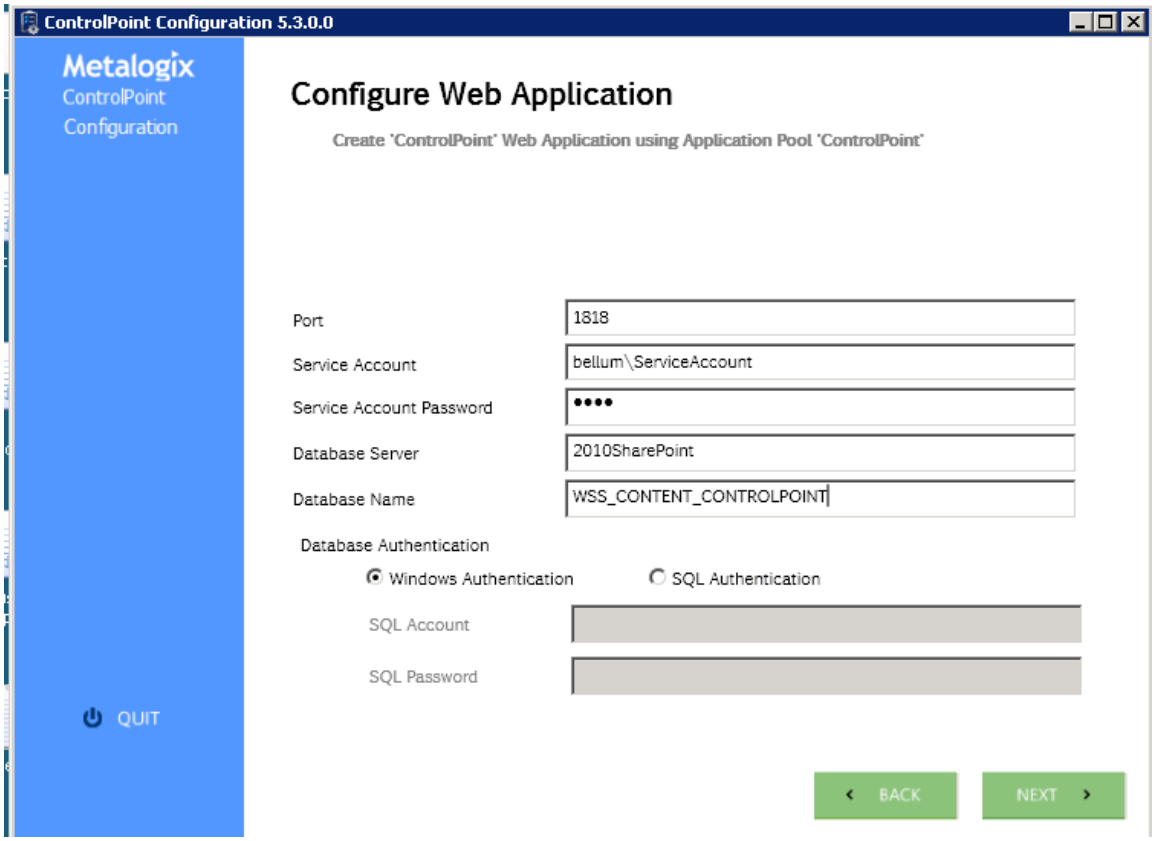
- accept the default value (WSS_CONTENT_CONTROLPOINT)

OR

- enter a different database name

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

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.



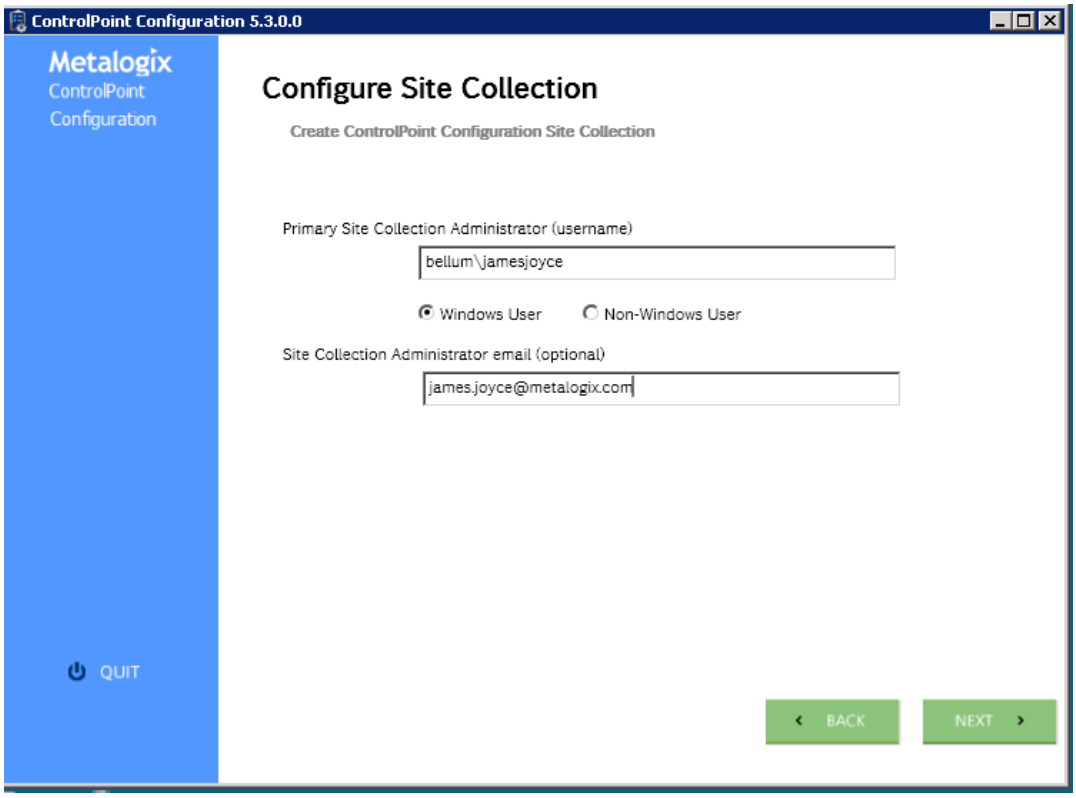
4 Click **[Next]** to display the **Configure Site Collection** dialog.

5 Complete the dialog as follows:

a) If different than the default (the account you specified as the ControlPoint Service Account), enter he account (and (optionally) the email address) that you want to designate as the **Primary Site Collection Administrator**.

NOTE: Remember that, once the ControlPoint configuration Site has been created, you can add to or change Site Collection Administrator(s).

b) If using an authentication method other than Windows (for example, Forms-based authentication) select the **Non-Windows User** radio button. (When this option is selected, the Configuration Wizard will not validate the account against Active Directory).



6 Click **[Next]**.

The Configuration Wizard validates the information you entered, then displays the **Configure ControlPoint Database** dialog.

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

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.

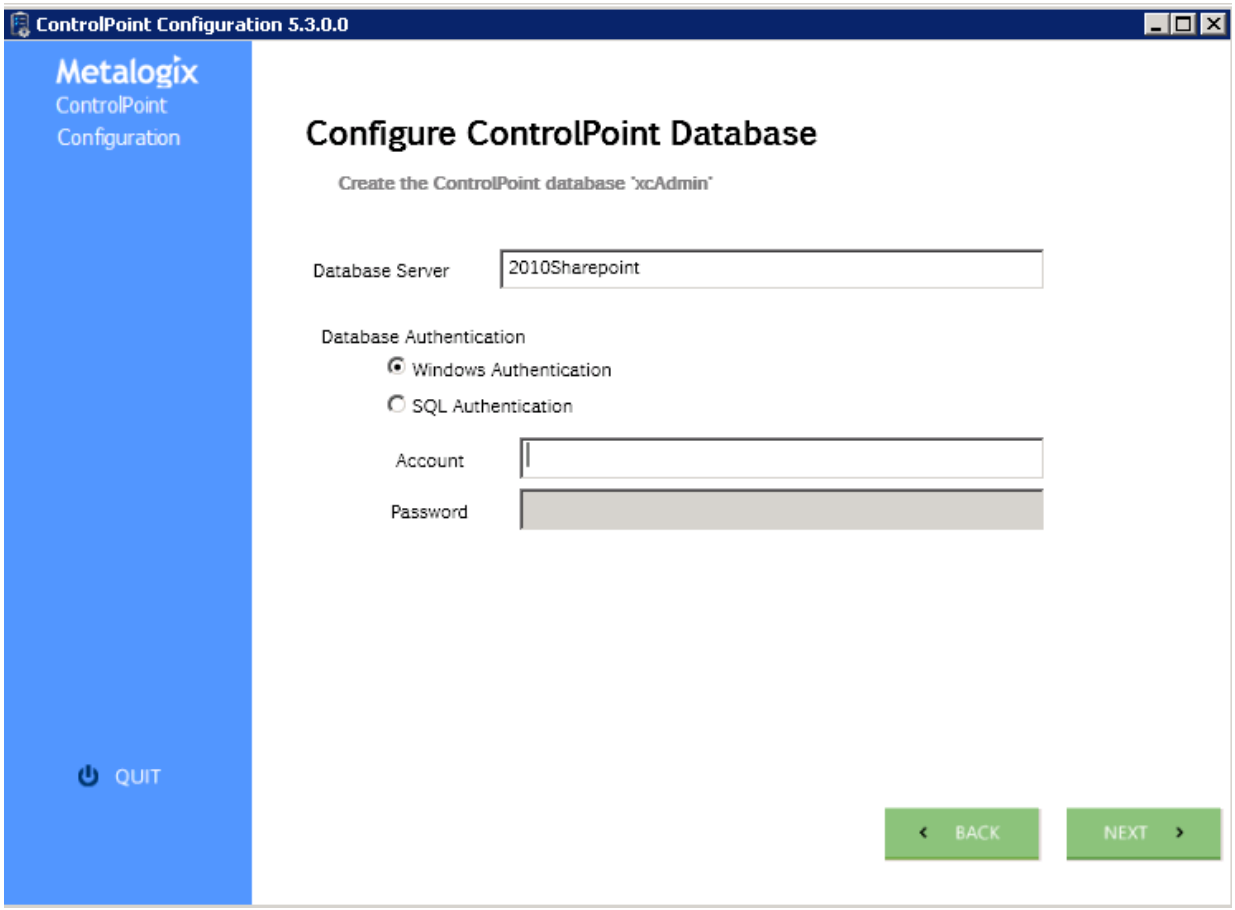
- select a server from the drop-down

OR

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

OR

- enter the server name.

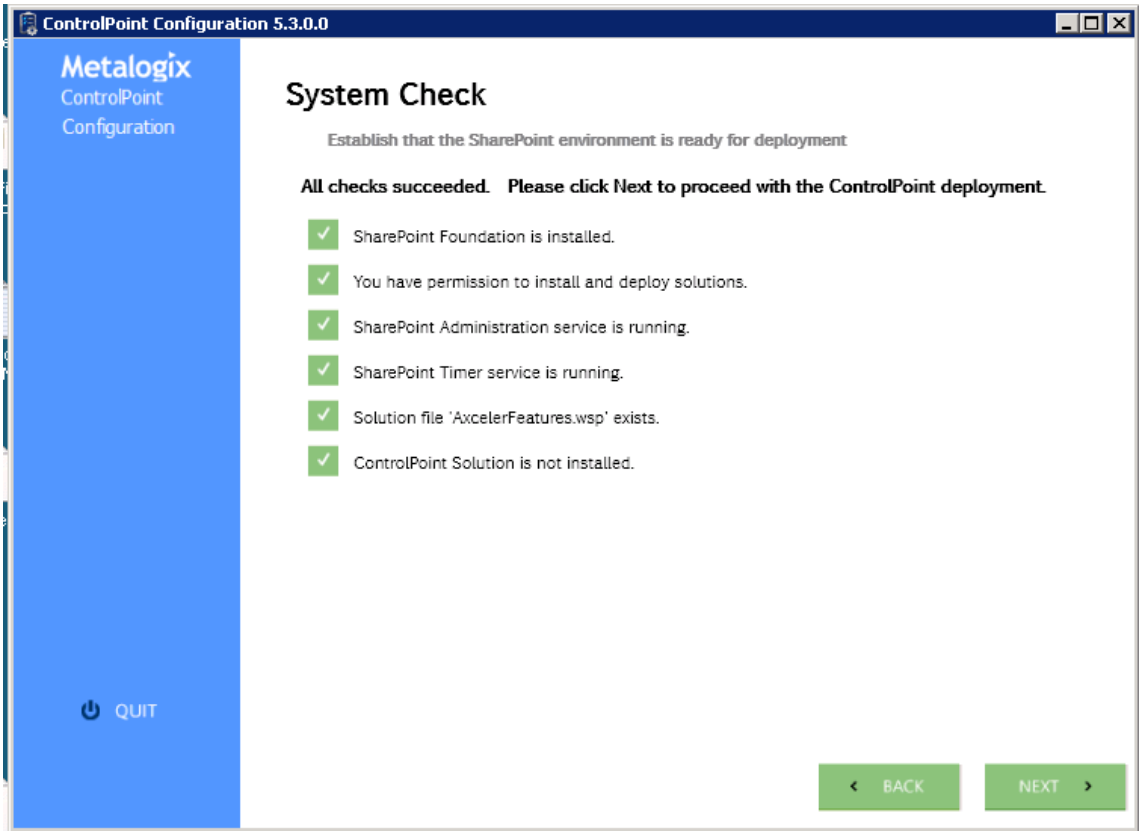


8 Specify the authentication method you want to use. (If you select SQL Server authentication, you will be prompted to enter the **Login ID** and **Password**.)

9 Click **[Next]**.

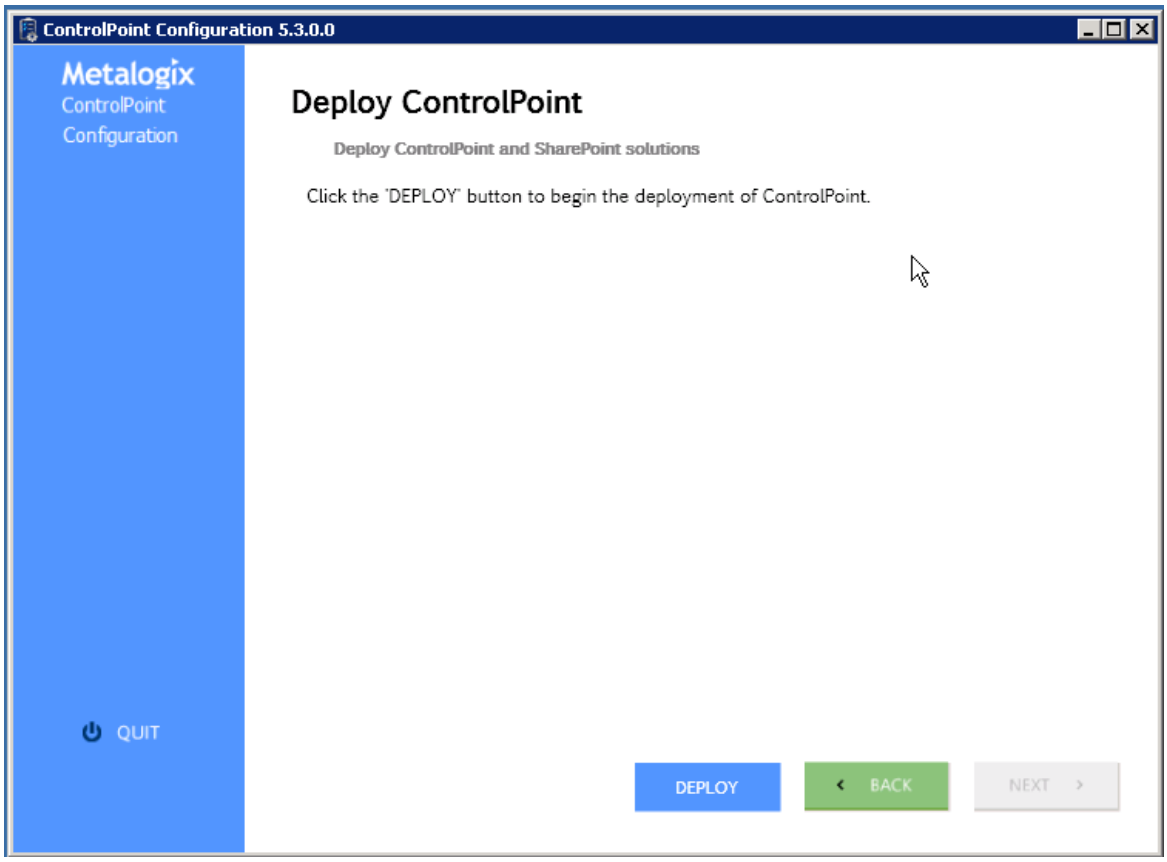
After the Configuration Wizard has validated the information you entered (including whether the ControlPoint Service Account has the proper credentials to create the xcAdmin database), the System Check dialog displays and the Configuration Wizard verifies that the SharePoint environment is ready for deployment.

NOTE: If your environment fails one or more of the system checks listed, you may have the opportunity to correct the issue before proceeding.



10 When the System Check has been completed successfully, click **[Next]** to display the Deploy ControlPoint dialog.

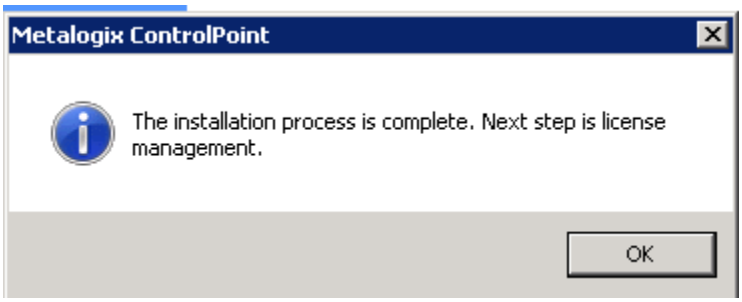
11 Click **[Deploy]**.



The Configuration Wizard begins the configuration and deployment process, which includes:

- installation of prerequisites (if missing)
- the creation of the ControlPoint Web application and Configuration site collection
- the creation of the ControlPoint Service (xcAdmin) database (if applicable)
- addition of the solution to the SharePoint solution store.

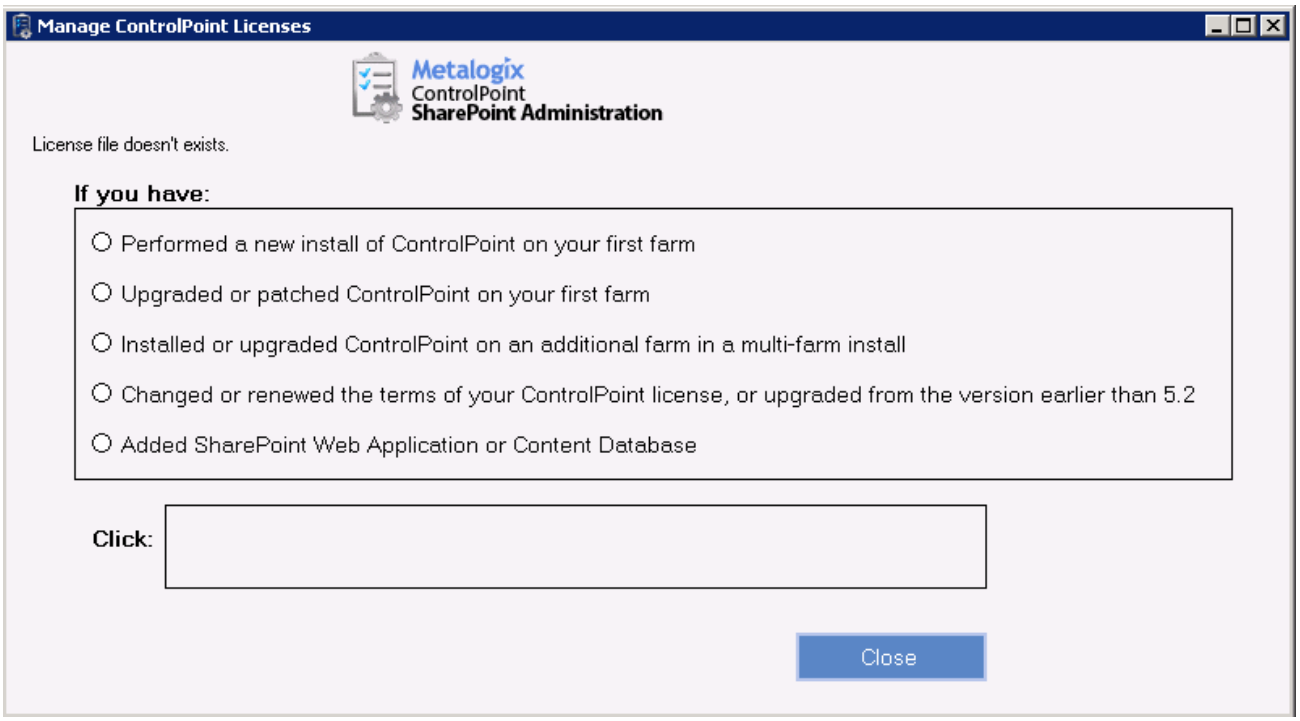
When the configuration and deployment has completed successfully, a pop-up displays, informing you that the installation process is completed and the next step is license management.



NOTE: The purpose of this dialog is to discourage you from terminating the process prematurely. (The Manage ControlPoint Licenses dialog will display automatically once the configuration process is complete, but it may take several seconds.)

12 Click **[OK]** to dismiss the configuration dialog and pop-up message.

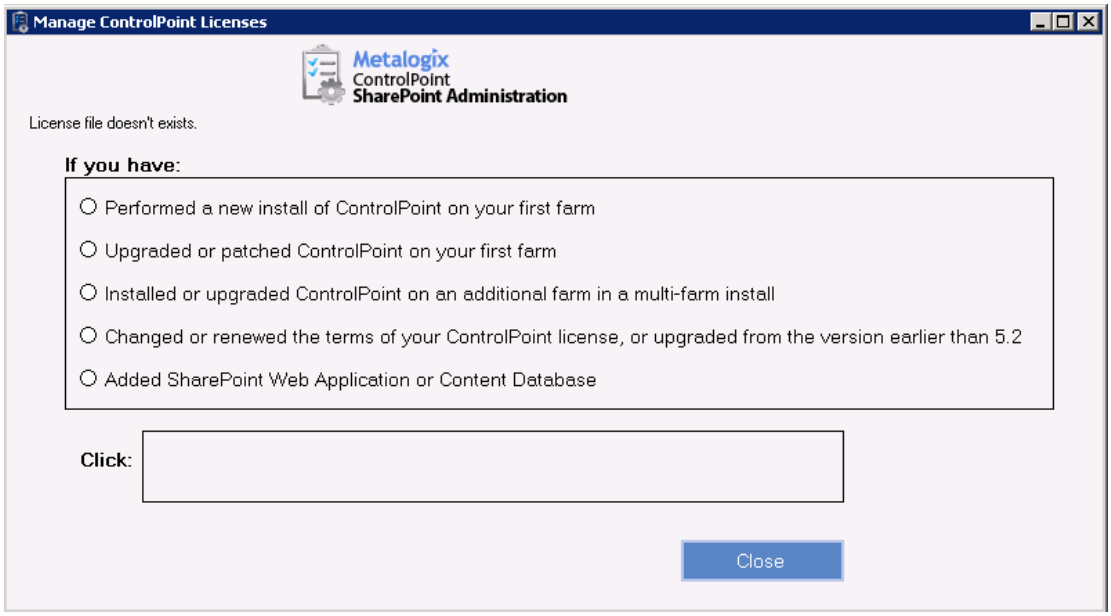
The **Manage ControlPoint Licenses** dialog displays. .



NOTE: You can also invoke this dialog from the Windows Start menu on the machine where the application was installed. Be aware that until license information is recorded, you will be unable to use ControlPoint.

Activating ControlPoint

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



If you choose not to activate ControlPoint 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>Metalogix>Manage ControlPoint Licenses.

IMPORTANT: If UAC is enabled, you will need to Run as Administrator. Otherwise, an error will occur when you attempt to record the license.

If you are activating ControlPoint at a later time, make sure that you log in using the same account that was used to install the application.

The procedure you follow depends on the type of installation you have performed. Use the information in the following table for guidance.

If ...	Then ...
• you have performed a single-farm installation of ControlPoint OR • you have installed ControlPoint on the first farm in a multi-farm installation	follow the procedure for Activating your ControlPoint License.
you have installed ControlPoint on an additional farm in a multi-farm installation	follow the procedure for Activating ControlPoint for Additional Farms in a Multi-Farm Installation.

Activating your ControlPoint License

You must activate your ControlPoint license when installing ControlPoint for the first time or after performing an upgrade.

NOTE: After the initial license activation, you can manage your license from the ControlPoint application interface.

Summary of the ControlPoint License Activation Process

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

- The ControlPoint license is activated, then recorded (which 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 not yet recorded.*

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

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.

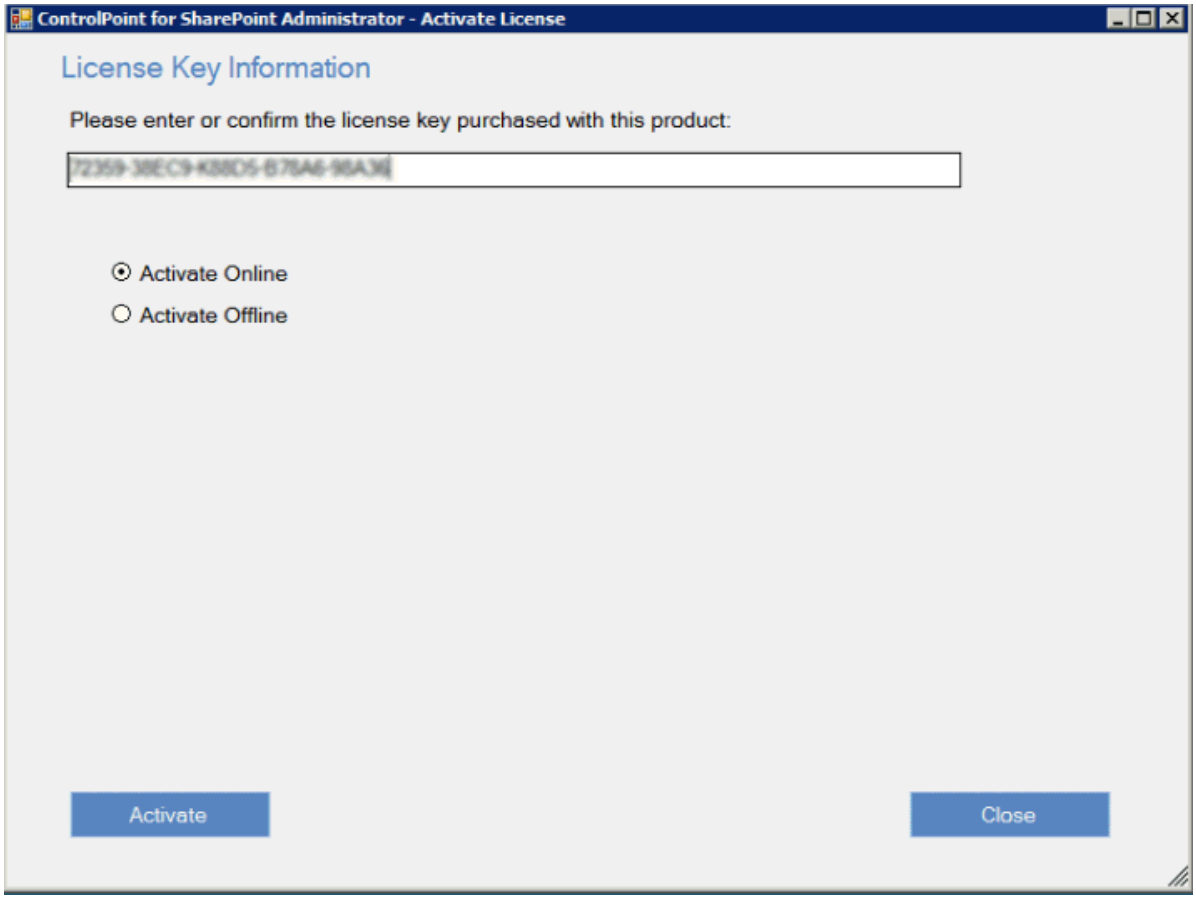
2 Click **[Manage Licenses]** to display the **Activate License** dialog.

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 Without Internet Access.

4 If you have installed ControlPoint for the first time or are upgrading from a version earlier than 5.2, enter the license activation key provided by Metalogix. (If you are upgrading from a version earlier than 5.2, the **License Key** field will already be populated with your current ControlPoint license, which must be replaced with the new license provided by Metalogix.)

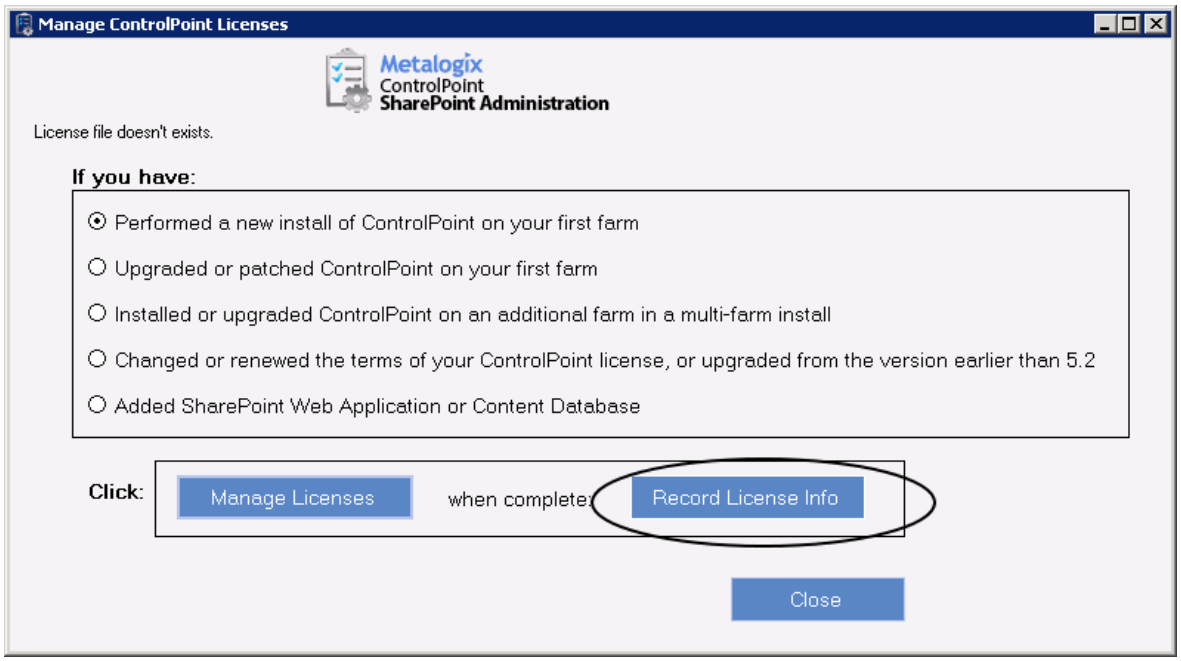
NOTE: If you are upgrading from version 5.2 or later, simply activate the currently-displayed License Key.



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*.

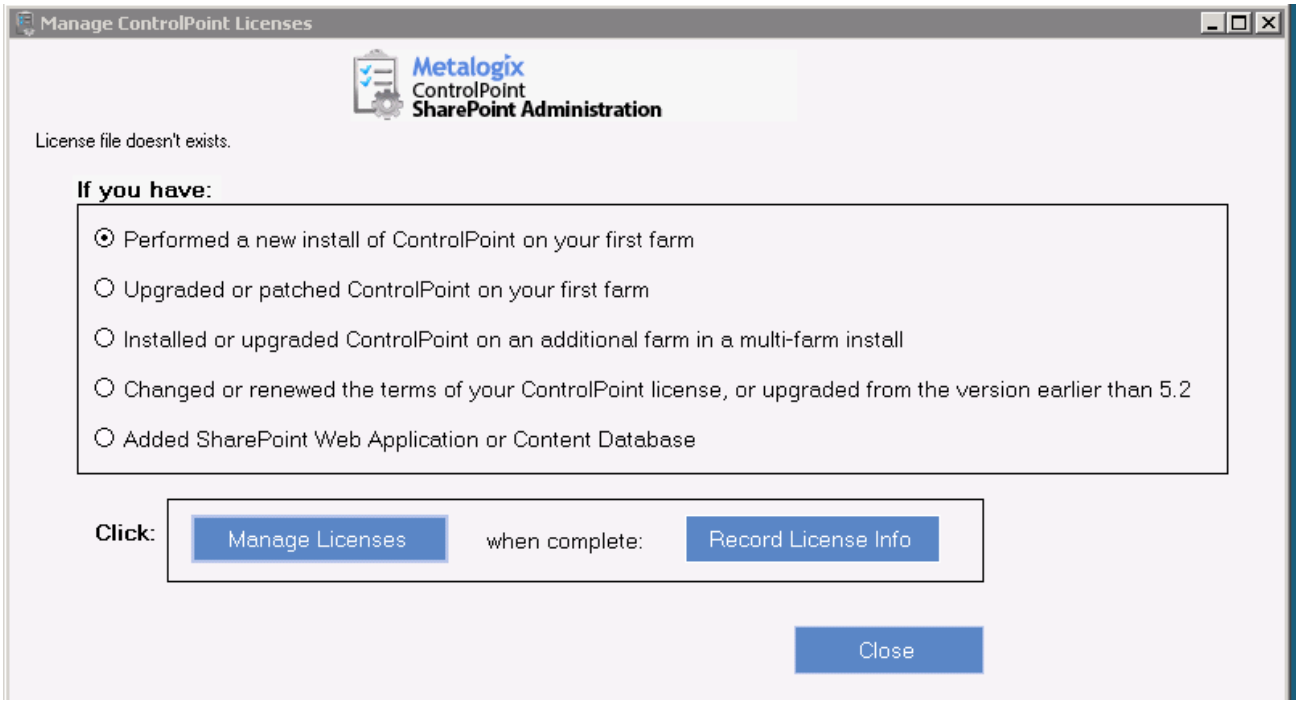
Activating Your License Without Internet Access

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.

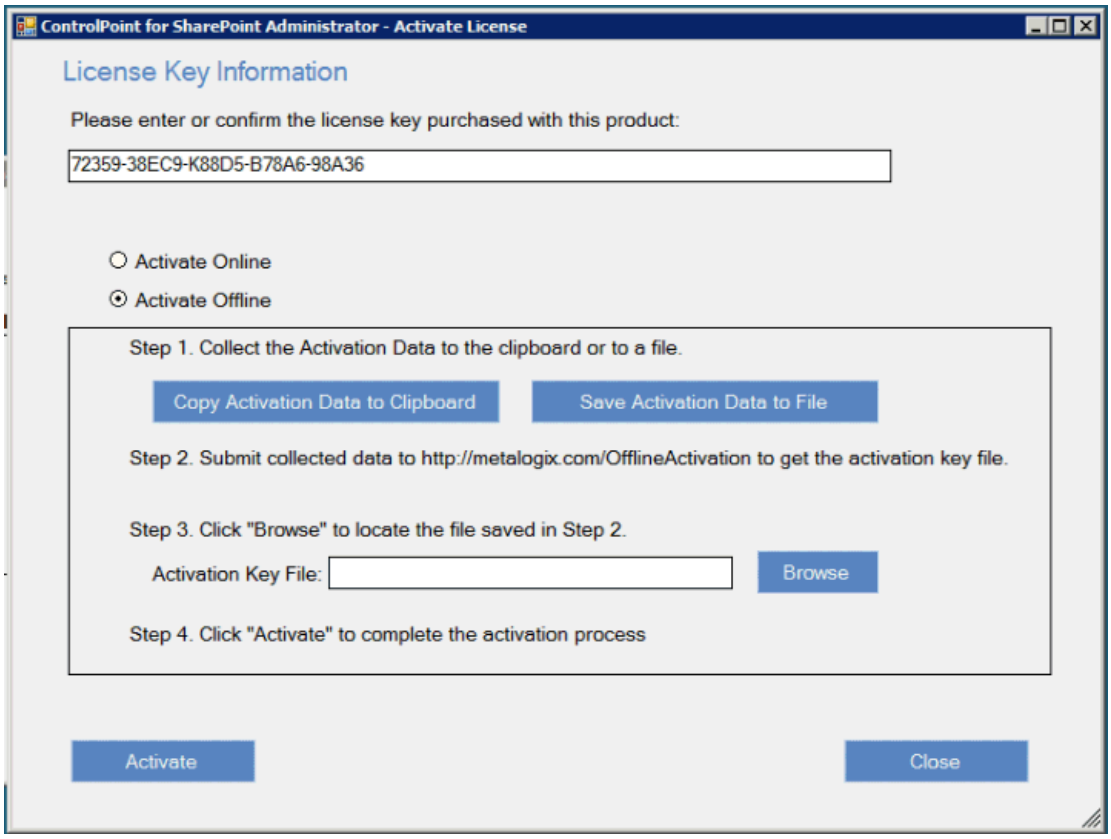


2 Click [Manage Licenses] to display the **Activate License** dialog.

3 If you have installed ControlPoint for the first time or are upgrading from a version earlier than 5.2, enter the license activation key provided by Metalogix. (If you are upgrading from a version earlier than 5.2, the License Key field will already be populated with your current ControlPoint license, which must be replaced with the new license provided by Metalogix.)

NOTE: If you are upgrading from version 5.2 or later, simply activate the currently-displayed License Key.

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.

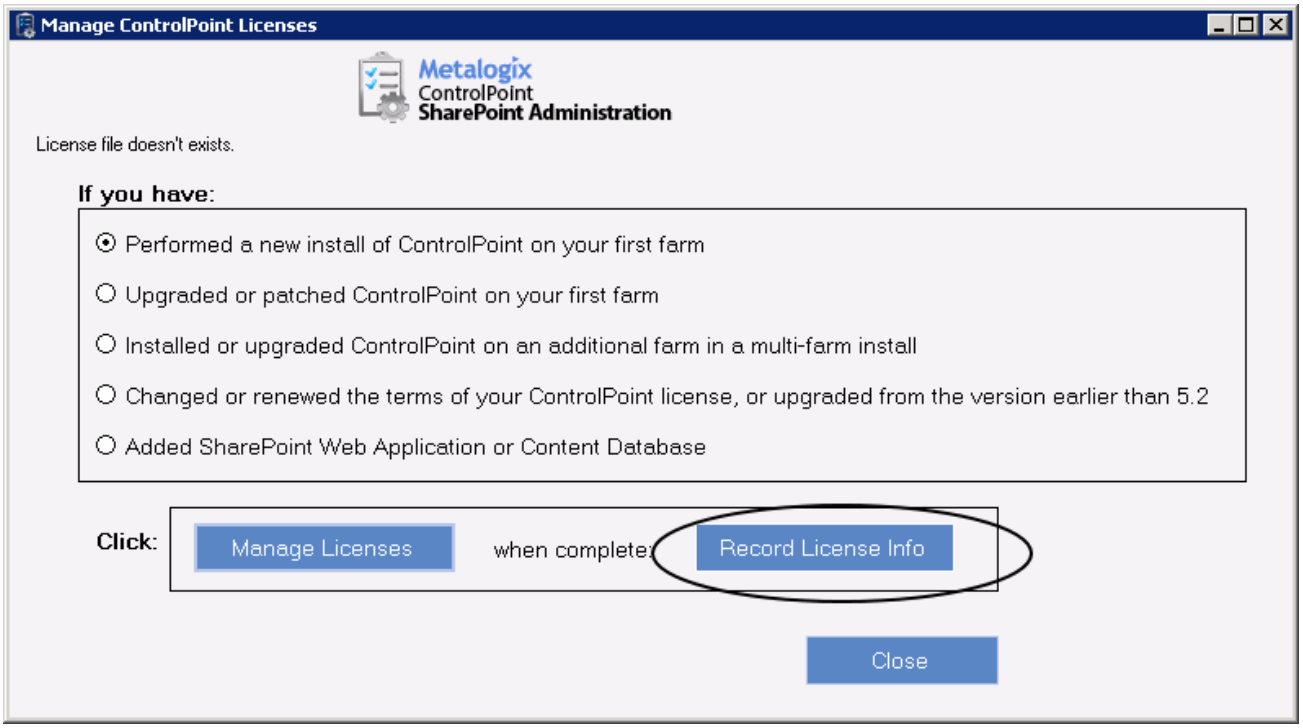
When your activation key is returned, you have the option of copying it to the clipboard or saving it to a data file. Make sure that you choose the option to save to a data file as it is the only method that Activate License dialog allows.

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.*

Recording Your ControlPoint License

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*.

Activating ControlPoint for Additional Farms in a Multi-Farm Installation

If you have installed ControlPoint on an additional farm in a multi-farm installation, follow the procedure below to activate the ControlPoint application for that farm.

Summary of the Additional Farm Application Process

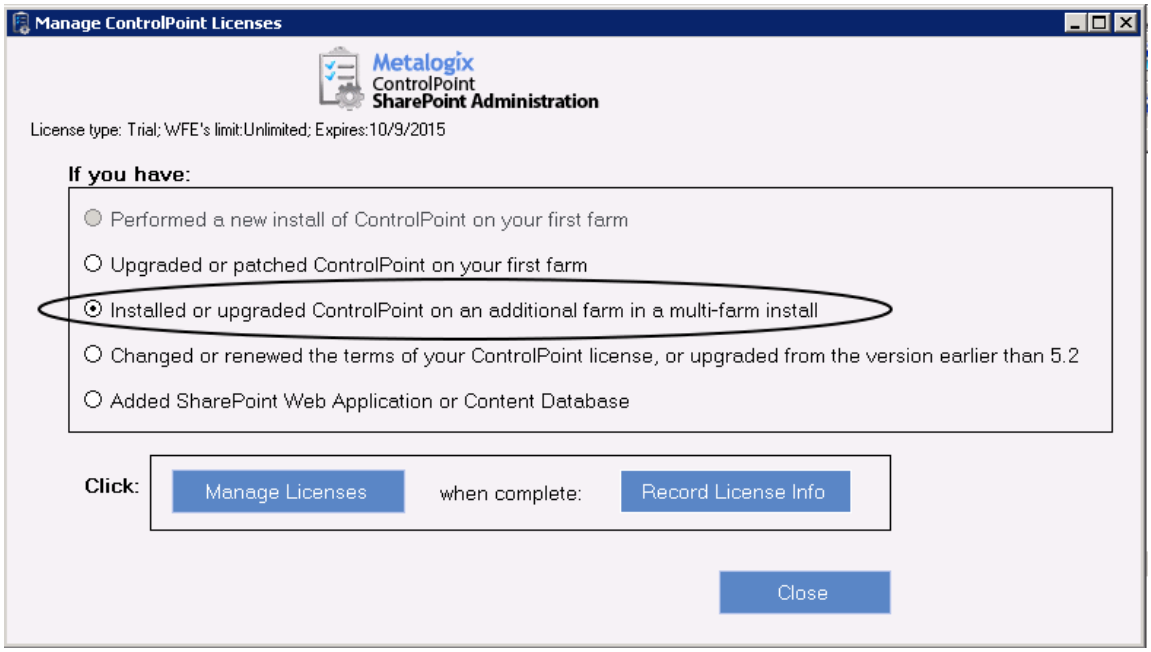
When you activate ControlPoint for additional farms, the following actions are carried out:

- The polices on all existing Web applications are set to grant the ControlPoint Service Account Full Control access.
- The ControlPoint Service Account is given the following database rights:
  - Connect
  - Authenticate
  - Read
  - Execute
- Final setup on the ControlPoint Configuration site is performed.

To activate ControlPoint for additional farms:

1 On the **Manage ControlPoint Licenses** dialog, click the **Installed or updated ControlPoint on additional farms in a multi-farm install** radio button.

The **[Manage Licenses]** and **[Record License Info]** buttons display, prompting you to enter or update your current license.



2 Follow the procedure for Activating your ControlPoint License.

3 Click [**Close**] to dismiss the dialog.

Configuring the Environment in Which ControlPoint Will Run

Once the ControlPoint application has been installed and configured on the first Web front-end server in your SharePoint farm, you can perform the following tasks as needed:

- Configure ControlPoint for each additional Web front-end server in your farm (both when installing ControlPoint for the first time and whenever a new Web front-end server has been *added* to your farm).
- Set up host headers and/or alternate access mappings (for load balancing).
- If you use alternate authentication providers in your farm, configure ControlPoint to recognize them.

REMINDER: Each farm in a multi-farm installation has its own copy of the ControlPoint application. Therefore, if you have installed ControlPoint on multiple farms, you must perform the entire configuration and setup process for each farm.

Configuring ControlPoint for Additional Web Front-End Servers

If you have more than one Web front-end server in your farm, SharePoint automatically propagates the ControlPoint application to all of them. However, you must perform the following tasks manually on each additional Web front-end server:

- Install the appropriate version of the NET Framework, if it is not already on the server. From the installation folder, run **prerequisites.exe.**

  NOTE: It is important that additional Web front-end servers run with the version of prerequisites provided by Metalogix. Refer to the topic Installing ControlPoint Files *in the ControlPoint Installation and Upgrade Guide* for more information on prerequisites.

- Create an IIS Virtual Directory, as described below.

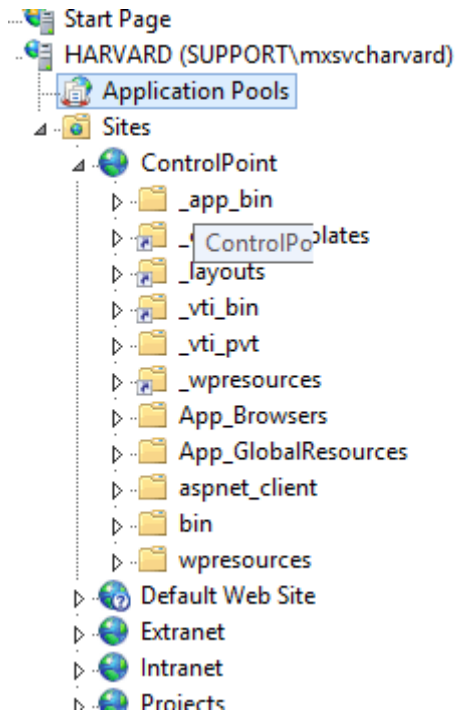
  NOTE: SharePoint automatically propagates the ControlPoint application to all Web front end servers; however, it only creates the IIS Virtual Directory on the machine on which ControlPoint was installed. Included with ControlPoint is a utility called **CreateVirtDirectory.exe** to help automate this process. Alternatively, you can create the IIS Virtual Directory manually. Consult your Microsoft Server documentation for details, as the procedure varies based on the version of IIS Manager you are running.

To create an IIS Virtual Directory on an additional front-end server using the Create Virtual Directory utility:

1 Open the IIS Manager on the additional Web front-end server.

2 Verify that SharePoint has propagated the ControlPoint website, as indicated by its presence in the IIS of the server).

NOTE: The amount of time it takes for SharePoint to propagate the ControlPoint website to additional Web front-end servers depends on a number of factors, including the size of your farm.



3 On the front end server where the ControlPoint application was initially installed, go to the following directory: **C:\Program Files\Metalogix\ControlPoint\ControlPointFeature**.

4 Copy the file **CreateVirtDirectory.exe** to any location on the additional front-end server, then double-click to run it.

NOTE: It may be necessary to "Run as Administrator."

5 Repeat Steps 1-4 for each additional front-end server in your farm.

Additional ControlPoint Management Tasks

For information on performing additional ControlPoint management tasks (such as setting up host headers and alternate access mappings, managing ControlPoint users and groups, and making ControlPoint available to business users), refer to *The ControlPoint Administration Guide*,..

Launching ControlPoint

Use one of the following options to start the ControlPoint application.

From your workstation browser:

Enter **http://**<*server_machine_name*>:<*port_number*>/**_layouts/axceler/xcMain.aspx**.

(The server machine name is the name of the machine on which ControlPoint is installed. 1818 is the default port number for the ControlPoint Web application.)

NOTE: If you are a ControlPoint Application Administrator logging in for the first time, complete the login screen using the account that was designated as the ControlPoint Site Collection Administrator account at the time the ControlPoint application was installed.

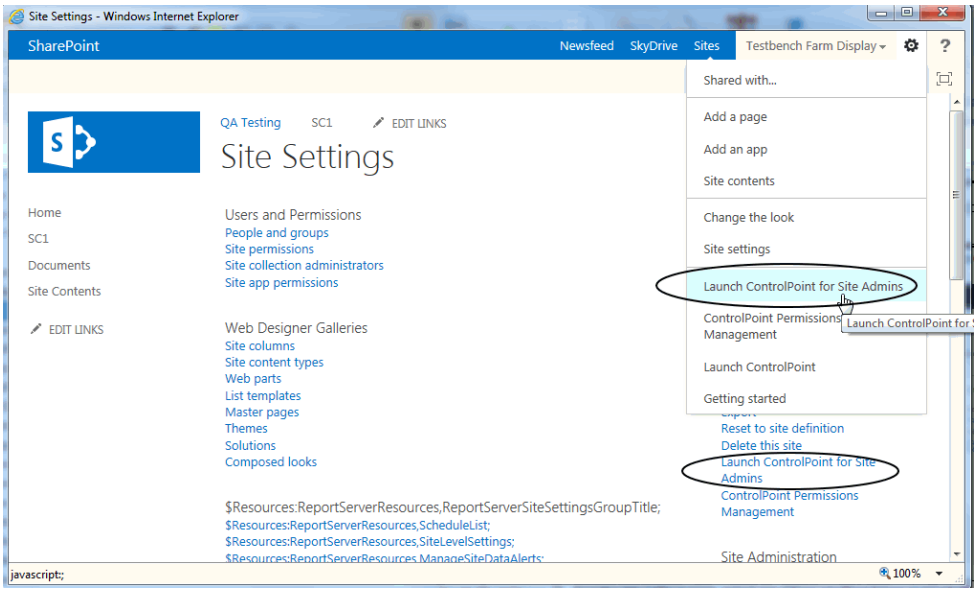
From the server on which ControlPoint is installed:

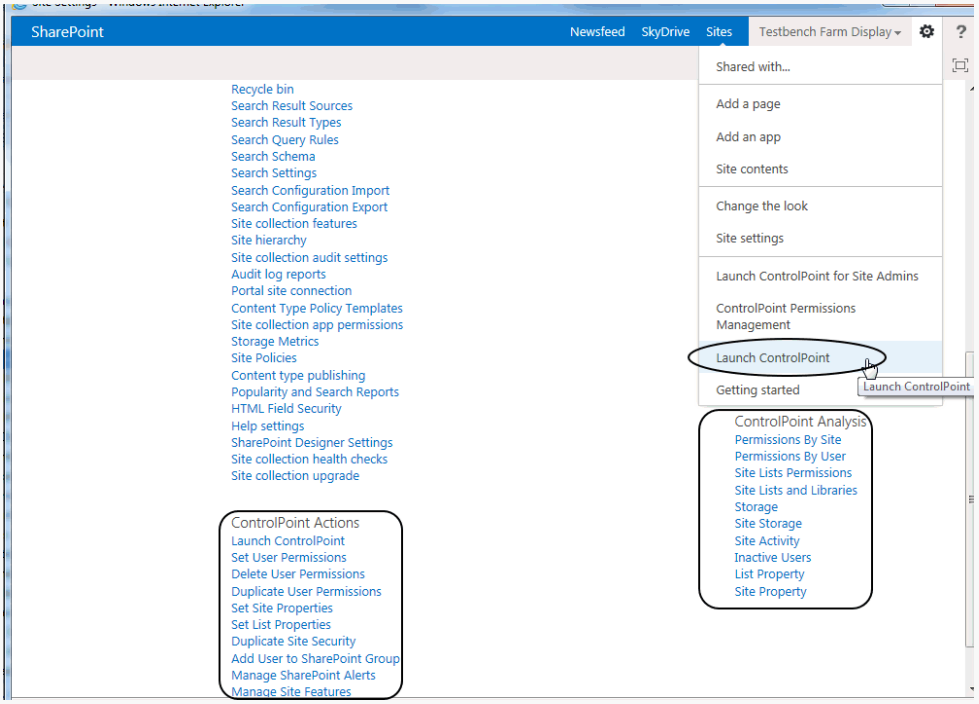
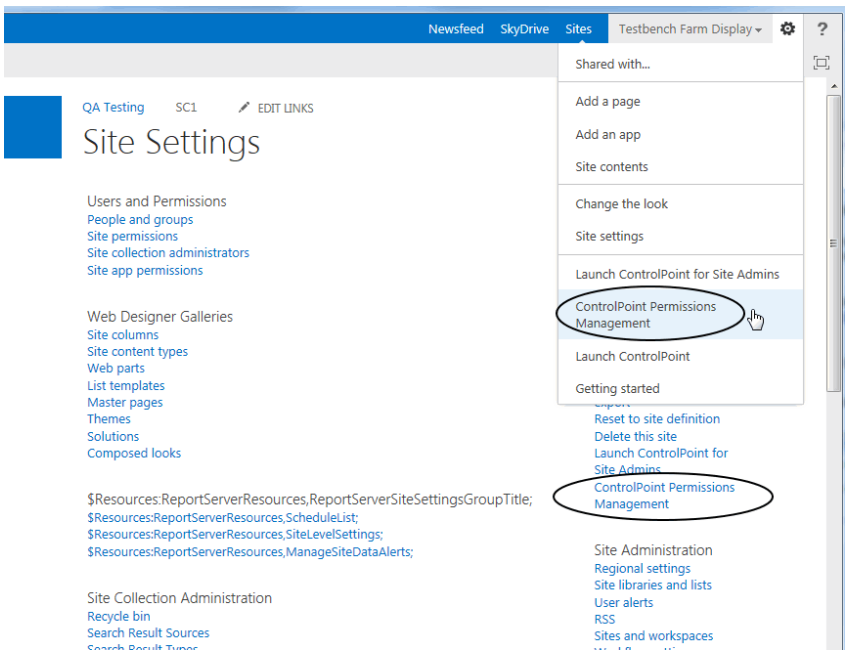
1 Log into the server using the account that was designated as the ControlPoint Service Account at the time the ControlPoint application was installed.

2 From the Windows Start menu, choose Programs > Metalogix > ControlPoint > Launch ControlPoint Application.

From within a SharePoint site:

NOTE: You can launch ControlPoint from within a SharePoint site only if the ControlPoint for Site Admins feature and/or the ControlPoint Menus for Site Settings feature has been activated for the site. More information can be found in the *ControlPoint Administration Guide*.

If ...	Then ...
ControlPoint for Site Admins has been activated	from the SharePoint Site Settings page or the Site Actions menu, choose Launch ControlPoint for Site Admins. 
ControlPoint Menus for Site Settings has been deployed and activated	• from the Site Settings page, select one of the **ControlPoint Actions** or a **ControlPoint Analysis** OR • from the Site Actions menu, choose Launch ControlPoint.

If ...	Then ...
	
ControlPoint Permissions Management for Site Admins has been activated	from the SharePoint Site Settings page or the Site Actions menu, choose Launch ControlPoint Permissions Management. 

Moving ControlPoint to A Different Web Front-End Server

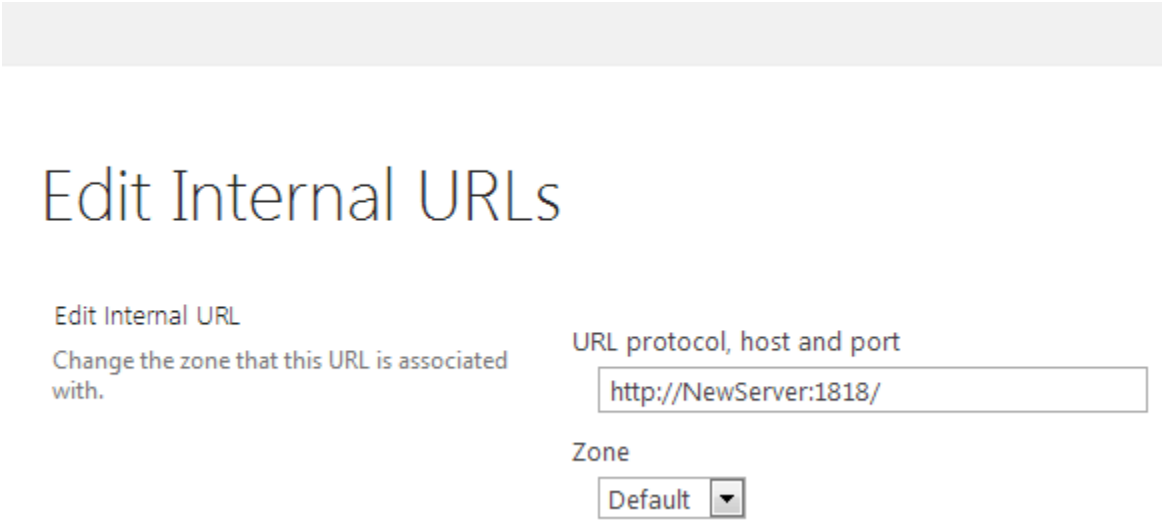
If the need arises to move the ControlPoint application from the Web front-end server on which it was originally installed (for example, the machine may have become nonoperational or is being decomissioned), you can install it on a different Web front-end server using the following procedure.

To move ControlPoint to a different Web front-end server:

1 Contact Metalogix and obtain a new license code.

NOTE: When a ControlPoint license is initially activated, the license is node-locked to the machine on which it is installed and cannot be entered on a different machine.

2 In Central Administration, change the url in the default zone for the ControlPoint Web application to a url that includes the new machine name and port number that has already been specified for the ControlPoint Web application (1818 is the ControlPoint default).



NOTE: It is important to complete this step *before* installing on the new Web front-end to allow the installer to recognize that the Web application that hosts the ControlPoint Configuration Site Collection exists within the context of the new machine name.

3 Install, configure, and activate ControlPoint on the new Web front-end using the instructions for First Time Installation and Configuration. Provide all of the same information used for the original installation— Service Account credentials, port number, location of the ControlPoint Service database, and so on.

The installer will find and re-use the existing ControlPoint Configuration site and ControlPoint Service (xcAdmin) database, so all settings and historical data will be preserved.

Upgrading from a Previous Version of ControlPoint

When upgrading to a new version of ControlPoint:

Make sure that you:

- run the installer on the Web front-end server on which the original installation was performed
- log in using the account from which the original installation was run.

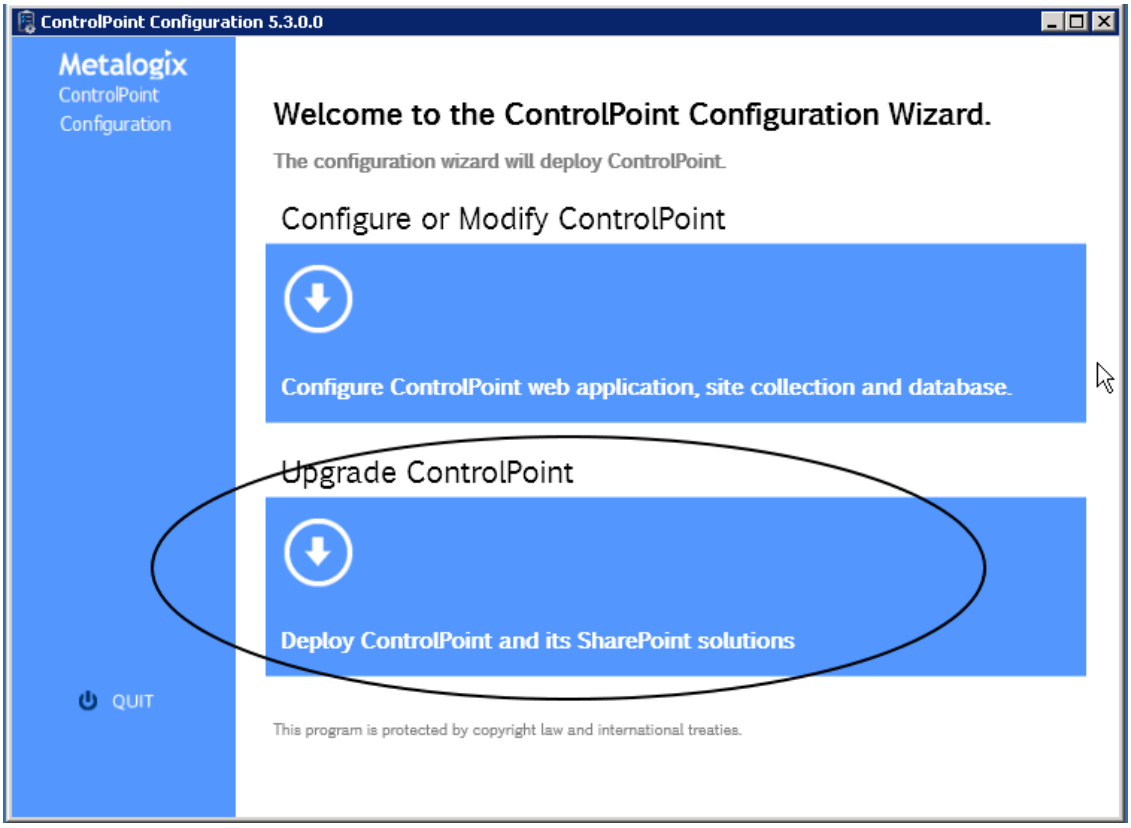
Remember to perform this procedure for each farm in a multi-farm installation.

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

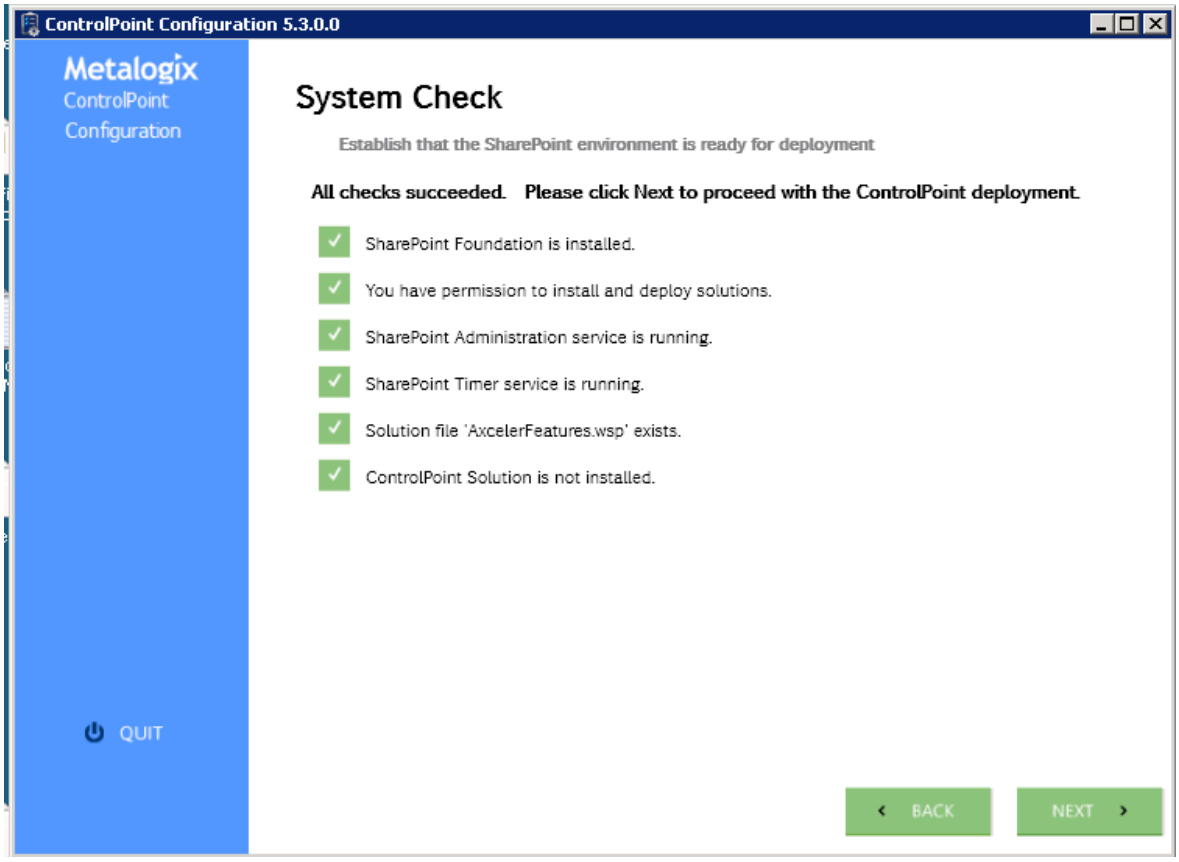
To upgrade ControlPoint:

1 Install the ControlPoint files using the procedure for Installing ControlPoint Files.

2 Once the ControlPoint Configuration Wizard has been launched (either directly from the Installation Wizard or from the desktop shortcut), choose Upgrade ControlPoint.

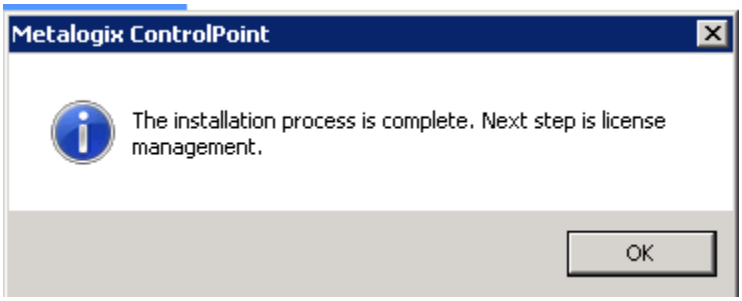


3 The System Check dialog displays and verifies that the SharePoint environment is ready for deployment.



The Configuration Wizard begins the configuration and deployment process.

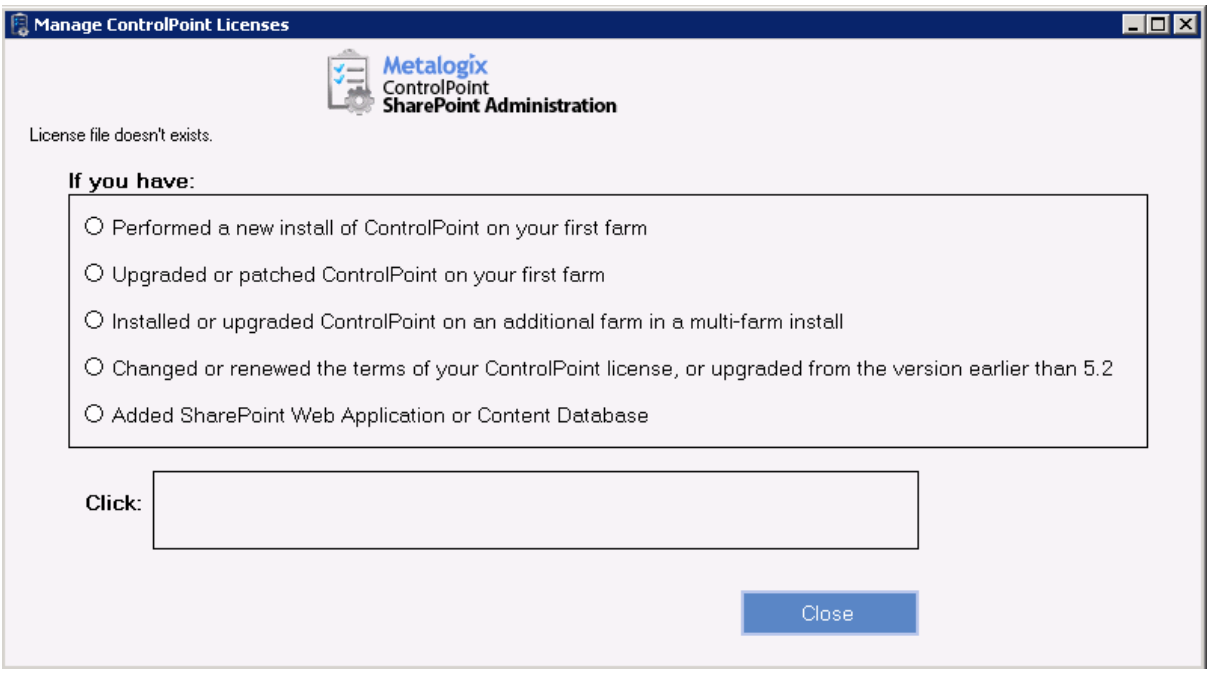
4 When the configuration and deployment has completed successfully, a pop-up displays, informing you that the installation process is completed and the next step is license management.



NOTE: The purpose of this dialog is to discourage you from terminating the process prematurely (The Manage ControlPoint Licenses will dialog display automatically once the configuration process is complete, but it may take several seconds.)

5 Click **[OK]** to dismiss the configuration dialog and pop-up message.

The **Manage ControlPoint Licenses** dialog displays.



Continue with Updating Your ControlPoint License After a Software Upgrade or Maintenance Release.

If any ControlPoint policies were created in an earlier version:

After performing the upgrade, existing ControlPoint policies will not be fully enforceable until you have:

- performed an IIS reset on the machine on which ControlPoint has been installed

AND

- re-registered all policies (See the *ControlPoint User's Guide* for information on re-registering policies).

Updating Your ControlPoint License After a Software Upgrade or Maintenance Release

The **Manage ControlPoint Licenses** dialog automatically displays at the conclusion of a software upgrade or maintenance release.

If you choose not to activate ControlPoint 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>MetalogixManage ControlPoint Licenses.

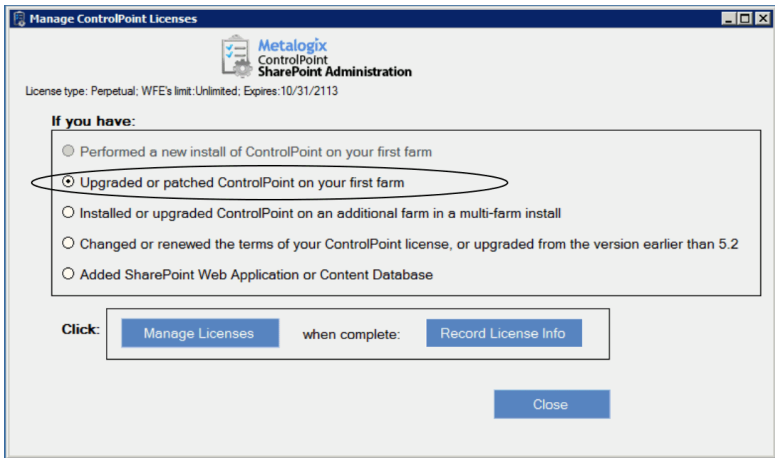
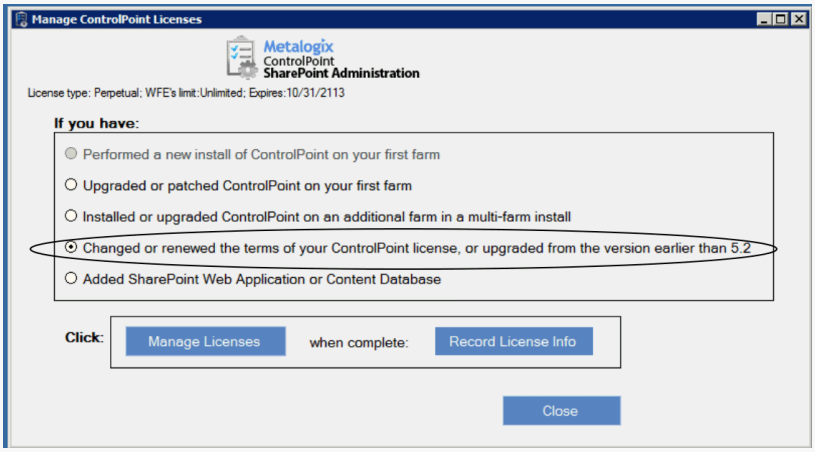
If you are activating ControlPoint at a later time, make sure that you log in using the same account that was used to install the application.

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

Use the following procedures to update your ControlPoint license after you have installed a software upgrade or maintenance release from Metalogix.

To update your ControlPoint License for the first (or only) farm:

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

If you have ...	Then ...
upgraded from version 5.2 or later	select **Upgraded or patched ControlPoint on your first farm.** 
upgraded from a version earlier than 5.2	select **Changed or renewed the terms of your ControlPoint license, or upgraded from a version earlier than 5.2.** 

2 The **[Manage Licenses]** and **[Record License Info]** buttons display, prompting you to enter or update your current license.
Follow the procedure for Activating your ControlPoint License.

3 Click **[Close]** to dismiss the dialog.

To update your ControlPoint license for additional farms in a multi-farm installation:

Follow the procedure for Activating ControlPoint for Additional Farms in a Multi-Farm Installation.

Updating the xcAdmin Database After SharePoint Has Been Upgraded via a "Database Attach"

If your SharePoint environment has been upgraded using the "database attach" method, you can use the ControlPoint Database Recovery utility to make data that has been collected in the ControlPoint Service (xcAdmin) database available for use in the upgraded environment. The utility accomplishes this by mapping Farm- and Web Application-level GUIDs in the original environment to those in the upgraded environment.

In order to perform this procedure, Discovery must have been on both the Current Farm and Recovered Farm. Instructions can be found in the *ControlPoint Administration Guide*.

Data That Can Be Recovered

For any portion of the farm on which the ControlPoint Discovery job has been run, the utility can recover:

- historical information, including site collection storage and activity
- definitions of ControlPoint Policies

  NOTE: It will be necessary to *re-register* those policies, which will enable the event handlers that actually perform the enforcement.
- Group associations used by the Manage (Linked) SharePoint Groups operation.

  NOTE: Associated (linked) group will continue to display in ControlPoint, regardless of whether the content database in which they reside has been migrated.
- Information reported in the ControlPoint Task Audit.
- Scheduled ControlPoint operations.

  EXCEPTIONS:
  - Scheduled jobs to restore permissions will remain but will fail because permissions backups are not recovered.
  - Set Site Properties operations will run if the operation includes the setting of icons or theme.
  - For Set List Properties operations, the template URL may not be properly reset for the new environment.

  Any job that references content that has not been migrated will fail until that content *has* been migrated.

Data That Cannot Be Recovered

The utility will *not* recover the following:

- User-specific information (such as last temporary location use in Copy/Move operations).
- Permissions backups.

Prerequisites

Before running the ControlPoint Database Recovery Utility, ensure that:

- the upgraded farm has been created
- ControlPoint has been installed and configured on the upgraded farm (with the existing xcAdmin database specified as the ControlPoint Service (xcAdmin) Database)
- The xcAdmin database is accessible to software running on the upgraded farm
- The content databases for which you want to run the utility have been attached and imported

NOTE: If you are attaching content databases in stages, the utility can be re-run as needed. Remember to also run Manage ControlPoint Licenses for newly attached content databases.

- ControlPoint Discovery has been run on all portions of the upgraded farm for which you want to recover xcAdmin data

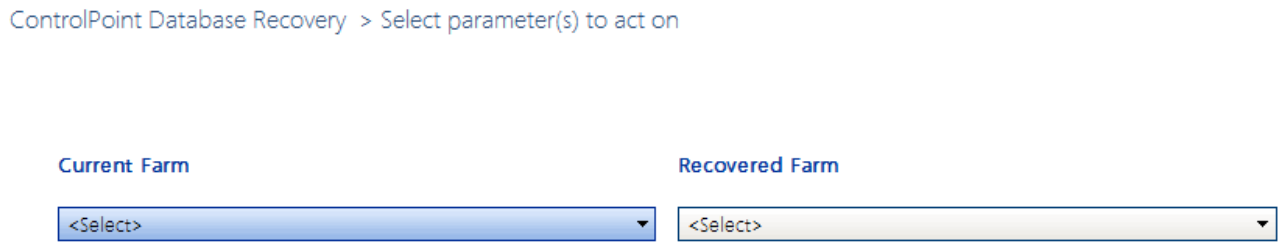
The utility assumes that, if more than one content database is associated with a Web application, those content databases will continue to be associated with the same Web application. If content databases are reorganized or regrouped, the utility will not work properly.

To run the ControlPoint Database Recovery Utility:

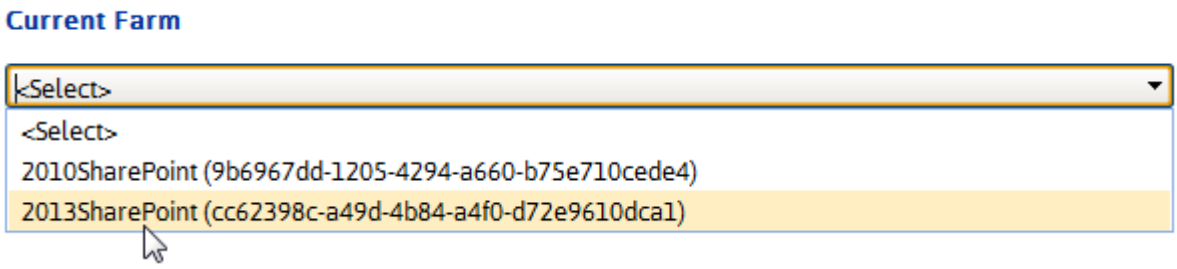
1 Launch a browser session and enter the following url:

http://<*server_name*>:<*port_number*>/_layouts/axceler/xcControlPointDatabaseRecovery.aspx

where <*server_name*> is the name of either the server you are upgrading *to* or the server you are upgrading *from* and <*port_number*> is the number of the port that hosts the ControlPoint Web application (1818 is the ControlPoint default value).



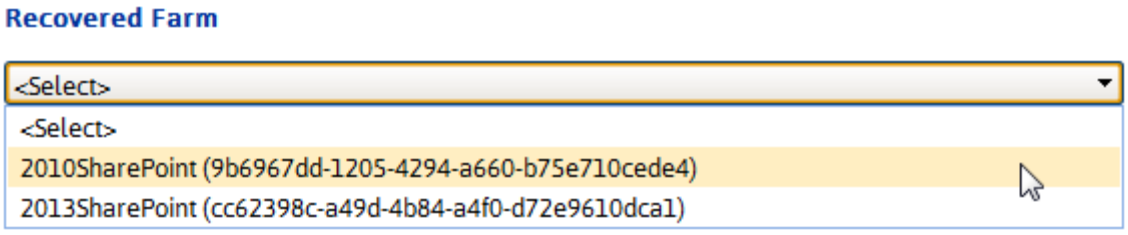
2 From the **Current Farm** drop-down, select the farm *to which* content databases have been imported (that is, the upgraded farm)..



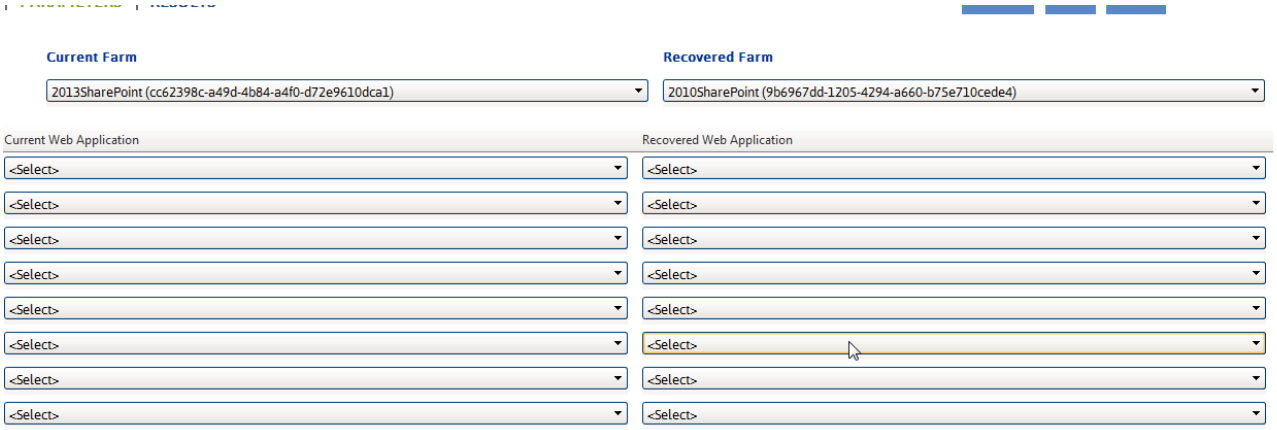
NOTE: If the upgraded farm does not appear in the drop-down, make sure that:

- the ControlPoint Service (xcAdmin) database of the old farm has been designated as the Database Server for the upgraded farm, and
- Discovery has been run on some portion of the upgraded farm.

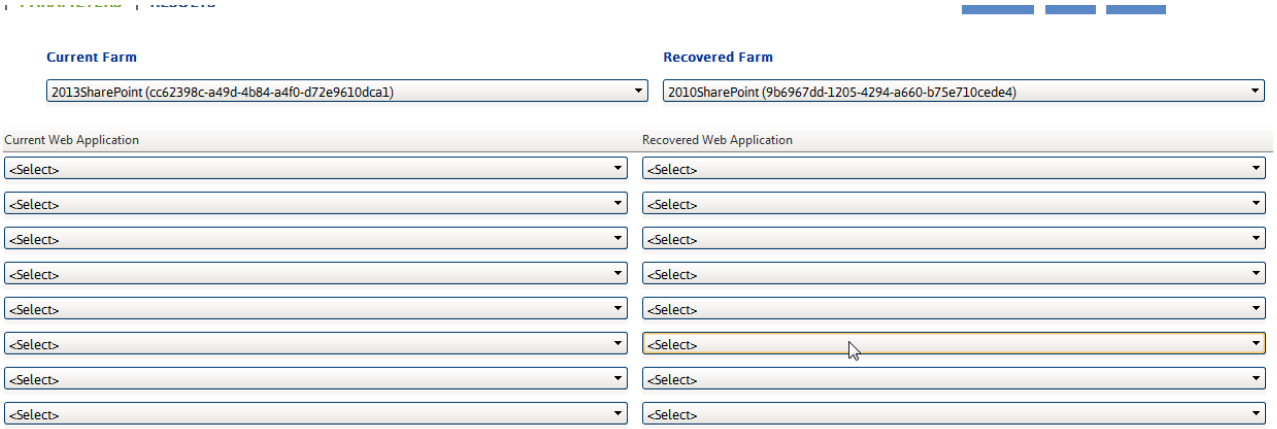
3 From the **Recovered Farm** drop-down, select the farm *from which* the content databases were imported.



Two sets of drop-downs display, which enable you to map Web applications in the old farm with corresponding Web applications in the upgraded farm.



4 For each Web application whose ControlPoint xcAdmin data you want to recover, map the **Current Web Application** to its corresponding **Recovered Web Application**.



Note that the **Recovered Farm** list may include the names of Web applications that no longer exist.

5 When you have finished mapping Web applications, click **[Run Now]**.

Note that it may take some time for the progress indicator to appear. When the operation is completed, a ControlPoint Task Audit is generated for the action and displays in the Results section.

Removing (Uninstalling) ControlPoint

After the initial installation of ControlPoint, you can use the **Remove** option if you want to completely remove ControlPoint from your farm.

The Web application that hosts the ControlPoint Configuration Site collection and all of its contents will be deleted as part of the uninstall.

When removing installed components:

Make sure that you:

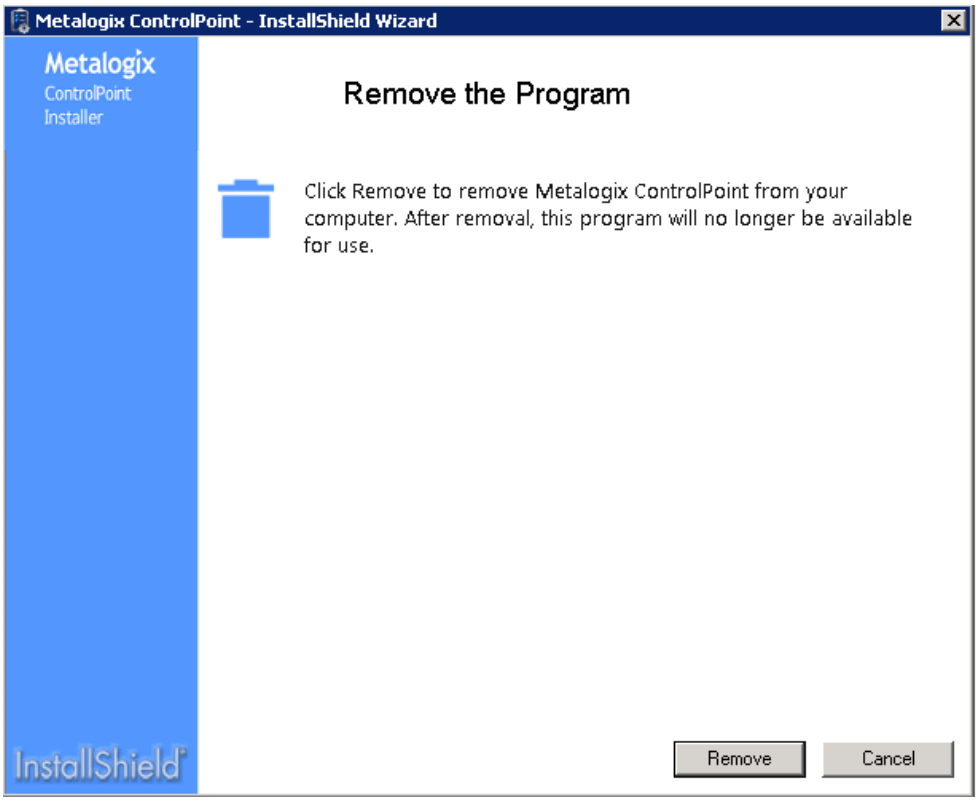
- run the installer on the Web front-end server on which the original installation was performed, and
- log in using the account from which the original installation was run.

To launch the installer:

From the Control Panel Programs and Features select **Metalogix ControlPoint** and choose Uninstall

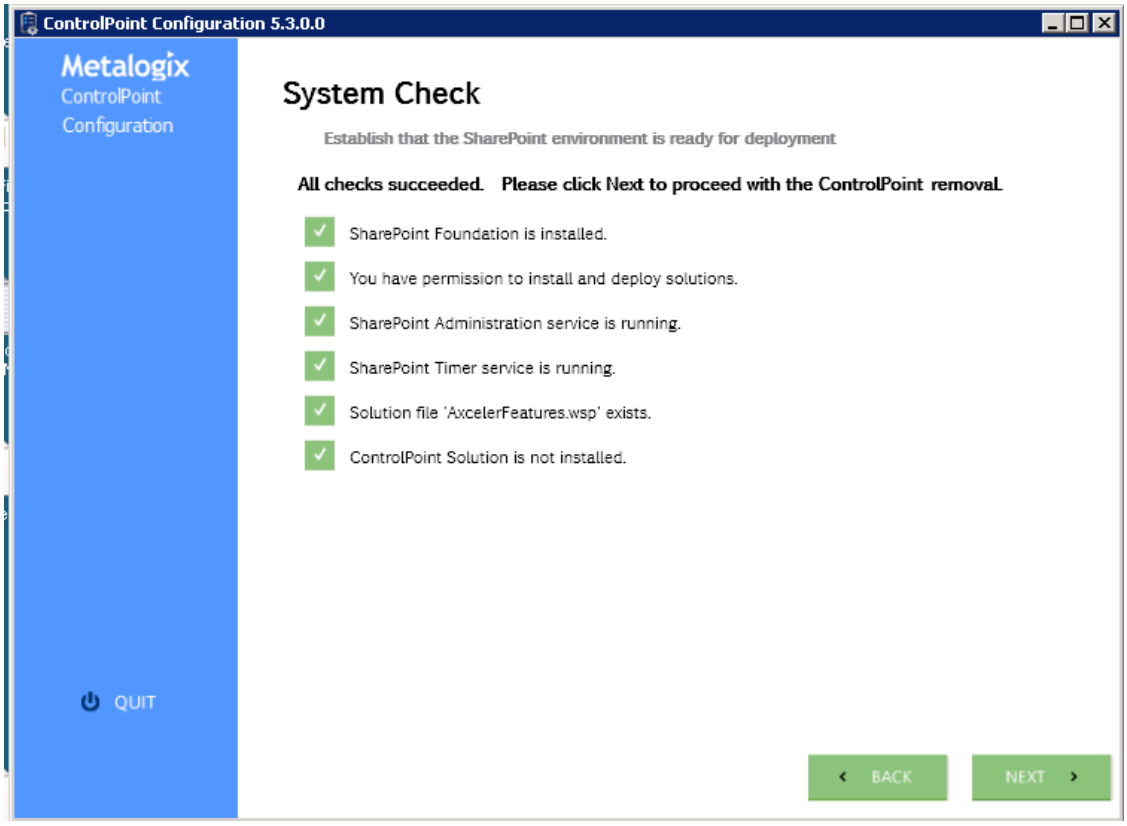
To remove (uninstall) ControlPoint:

1 From the Remove Program dialog click **[Remove]**.

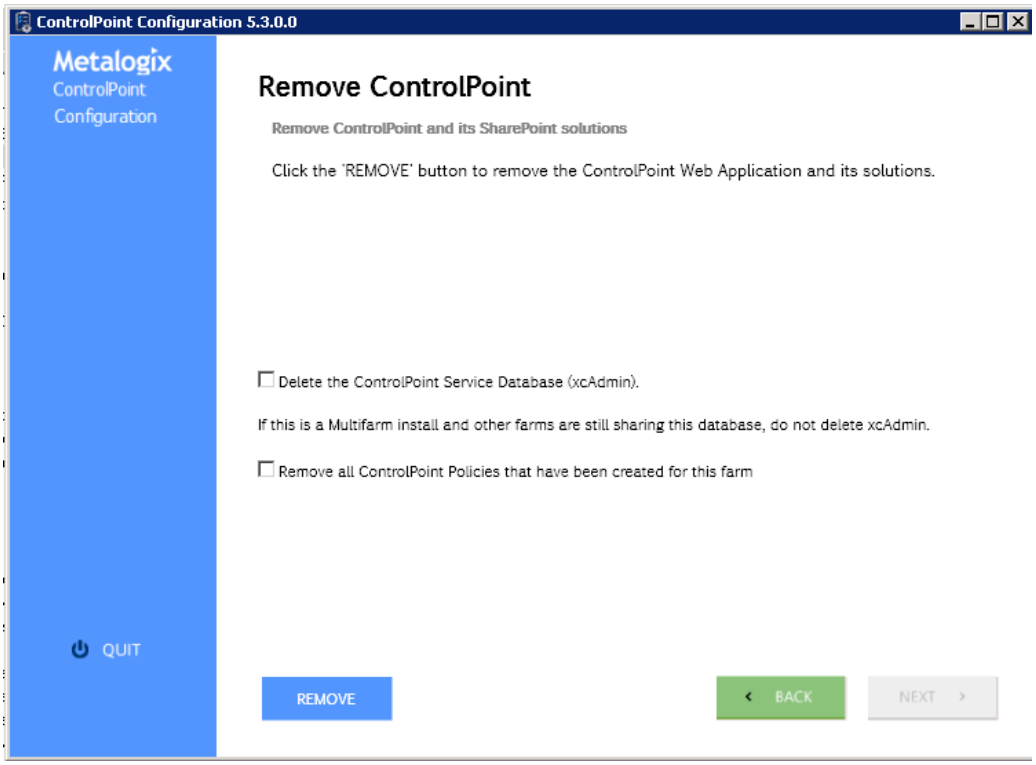


The System Check dialog displays and the Configuration Wizard verifies that the Sharepoint environment is ready for deployment.

NOTE: If your environment fails one or more of the system checks listed, you may have the opportunity to correct the issue before proceeding.



2 When the System Check has been completed successfully, click **[NEXT]** to display the Remove ControlPoint dialog.



3 Use the information in the following table to determine the appropriate option to select for **Delete the ControlPoint Service Database (xcAdmin)**.

If ...	Then ...
• you are using ControlPoint in a multi-farm environment and want to continue to use it to manage other farms OR • you plan to reinstall ControlPoint in your environment	leave the **Delete the ControlPoint Service Database (xcAdmin)** box unchecked.
• you are permanently removing ControlPoint from a single-farm environment OR • you have a multi-farm installation of ControlPoint and you want to permanently remove the application from all farms	check the **Delete the ControlPoint Service Database (xcAdmin)** box.

4 Use the information in the following table to determine the appropriate option to select for **Remove all ControlPoint Policies that have been created for the farm**.

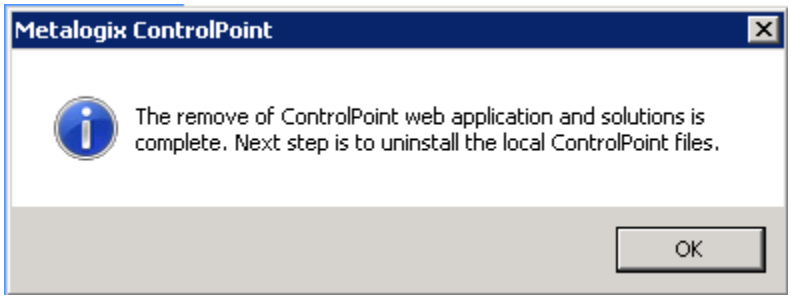
If ...	Then ...
• you plan to reinstall ControlPoint in your environment and you want all existing ControlPoint policies to be retained OR • no ControlPoint polices have been created for your farm	leave the **Remove all ControlPoint Policies that have been created for the farm**. box unchecked
you are permanently removing ControlPoint from the farms	check the **Remove all ControlPoint Policies that have been created for the farm**. box. NOTE: The program xcUtilities will be copied to the system temp directory and will be executed from there. Normally, it will continue to perform its cleanup after other aspects of the uninstall have completed.

5 Click **[Remove]**.

The Configuration Wizard removes installed components, including the ControlPoint Web application and solution.

6 When the *ControlPoint was successfully removed* message displays, click **[Next]**.

A pop-up displays, informing you that the removal of the ControlPoint web application is complete and the next step is to uninstall local ControlPoint files.



7 Click **[OK]** to dismiss the pop-up and begin the uninstallation of ControlPoint files.

8 When the *Uninstallation Completed* message displays, click **[Finish]**.

ControlPoint Log Files

There are a number of log files that can help in troubleshooting ControlPoint issues.

NOTE: If you cannot diagnose your issue using the information in this guide and need to contact Metalogix Technical Support, have any applicable log file(s) readily available to help the Technical Support Specialist better assist you.

Installation Log (xcControlPoint.log)

`xcControlPoint.log`:

- is the log file where the progress of a ControlPoint installation is recorded, and
- is located on the machine on which ControlPoint was installed for the farm, in the directory **C:\Program Files\Metalogix\ControlPointOnline\AxcelerFeature**.

Licensing and Activation Log File (xcClient.log)

`xcClient.log`:

- is the log file where ControlPoint license activation and management is recorded, and
- is located on the machine on which ControlPoint was installed for the farm, in the directory **C:\Program Files\Metalogix\ControlPoint\ControlPointFeatures**.