

ControlPoint

Quick Start Guide

June 26, 2018

Copyright

© Metalogix International GmbH., 2008-2018
All rights reserved. No part or section of the contents of this material may be reproduced or transmitted in any form or by any means without the written permission of Metalogix International GmbH.

ControlPoint™ is a trademark of Metalogix International GmbH.

Windows SharePoint Services is either a registered trademark or a trademark of Microsoft Corporation in the United States and/or other countries. Other product and company names mentioned herein may be the trademarks of their respective owners.

Technical Support

For information about Metalogix Technical support visit http://metalogix.com/support.

Technical support specialists can be reached by phone at +1-202-609-9100. The level of technical support provided depends upon the support package that you have purchased. Contact us to discuss your support requirements.

Contents

Preface 4

System Requirements 5

Server Requirements 5
Installation and Service Account Requirements 6
Compatible Browsers 7

First Time Installation and Configuration 8

Installing ControlPoint Files 9
Performing a Pre-Installation Validation Check 12
Configuring the ControlPoint Application and Deploying SharePoint Solutions 13
Activating ControlPoint 21
Activating your ControlPoint License 22
Activating Your License Online 22
Activating Your License Without Internet Access 24
Recording Your ControlPoint License 27

Preface

Metalogix ControlPoint is a Web-based application that offers a proactive, integrated solution for SharePoint administration and governance.

This Quick Start Guide will take you through the basic steps required for installation and configuration. Once you have completed all the steps in this guide, you will be able to evaluate the product with the use of our *Metalogix ControlPoint Evaluation Guide*.

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

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:

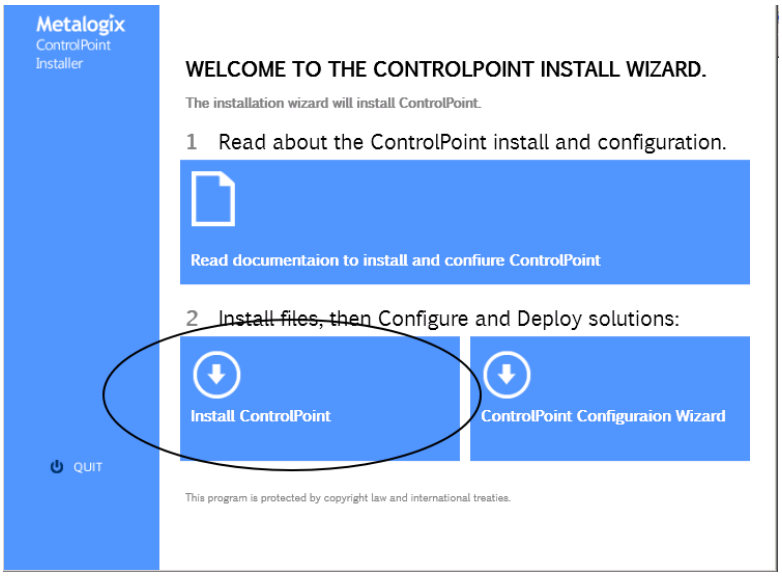
REMINDER: If you are installing ControlPoint on a Windows 2008 server with UAC enabled, you must "Run as Administrator."

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.

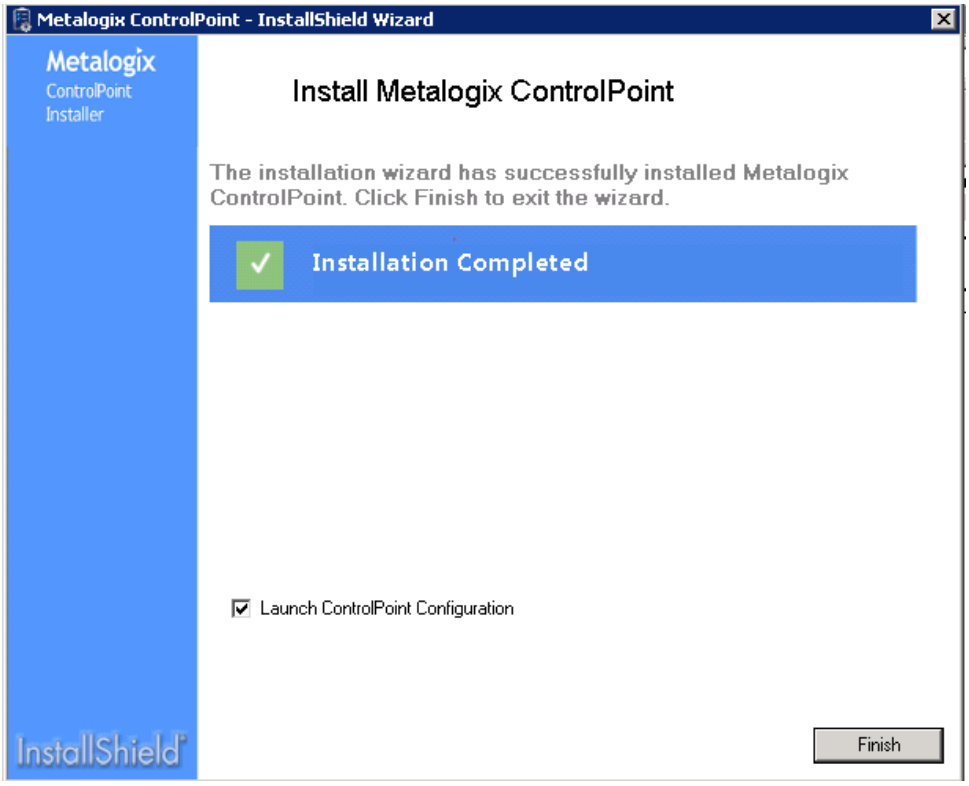
5 Click **[Next]** to display the Destination Folder dialog.

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

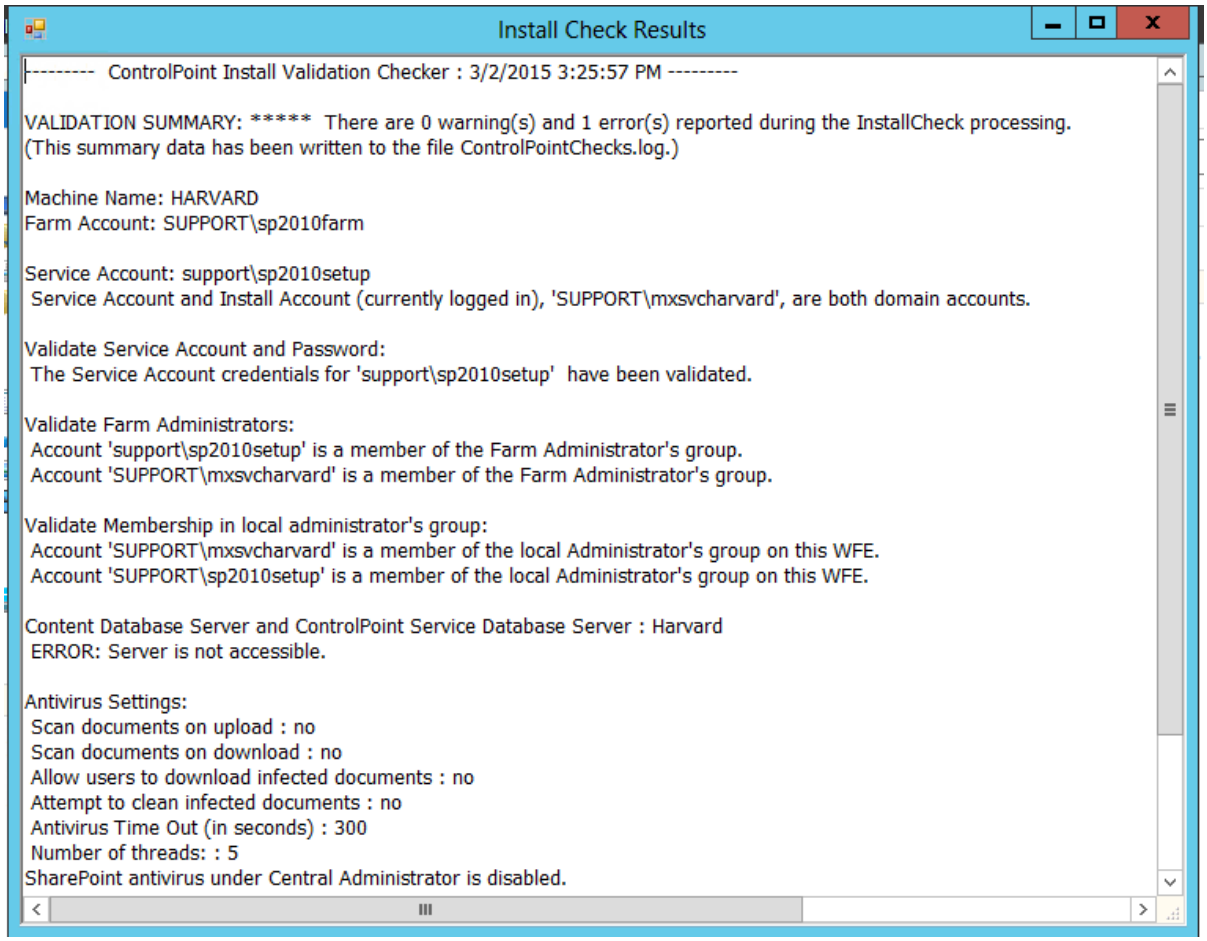
If you...	Continue with ...
are installing ControlPoint for the first time	Configuring the ControlPoint Application and Deploying SharePoint Solutions. NOTE: Before configuring ControlPoint as part of a first-time installation, it is strongly recommended that you perform a pre-installation validation 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.

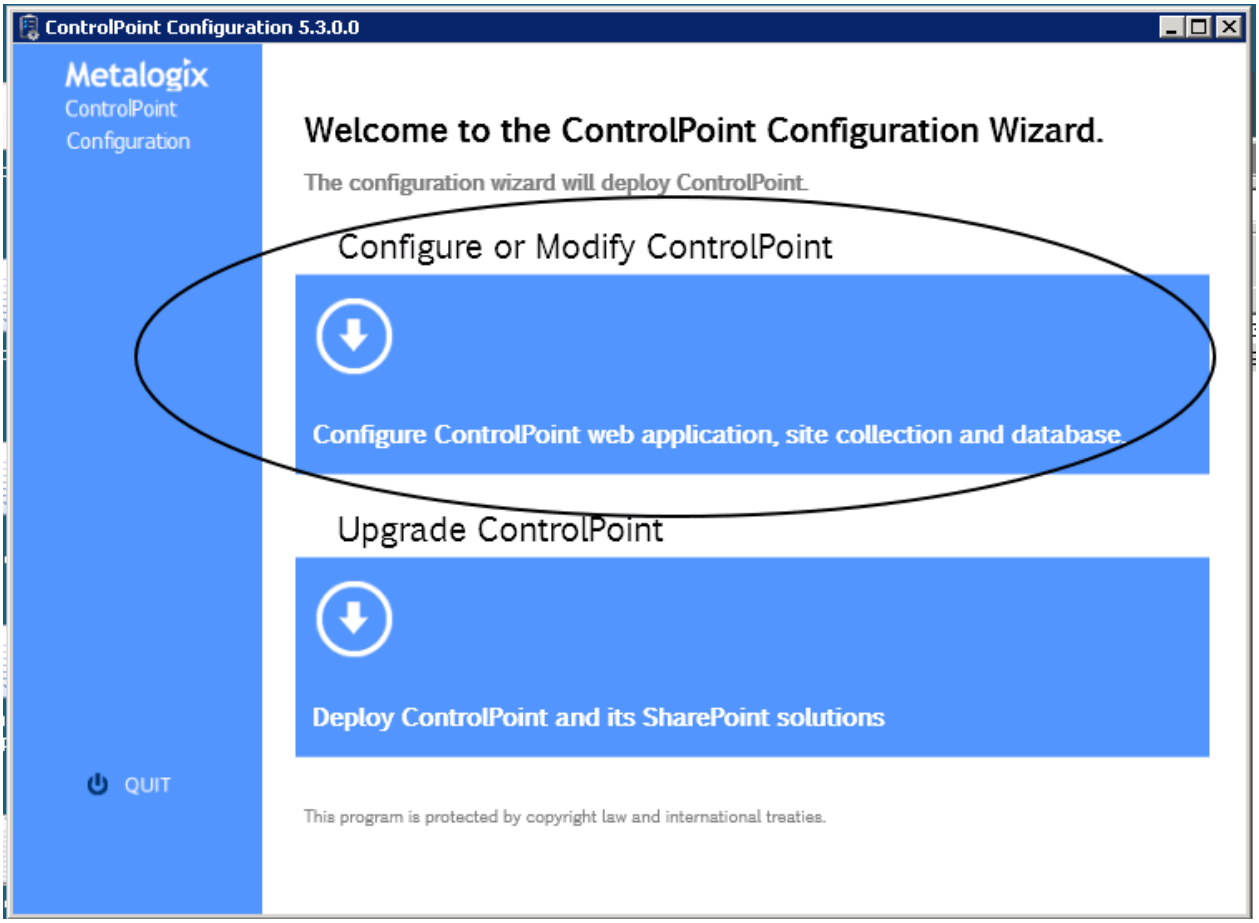
NOTE: As is the case with other SharePoint Solution deployments, upon completion all running application pools will be recycled.

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

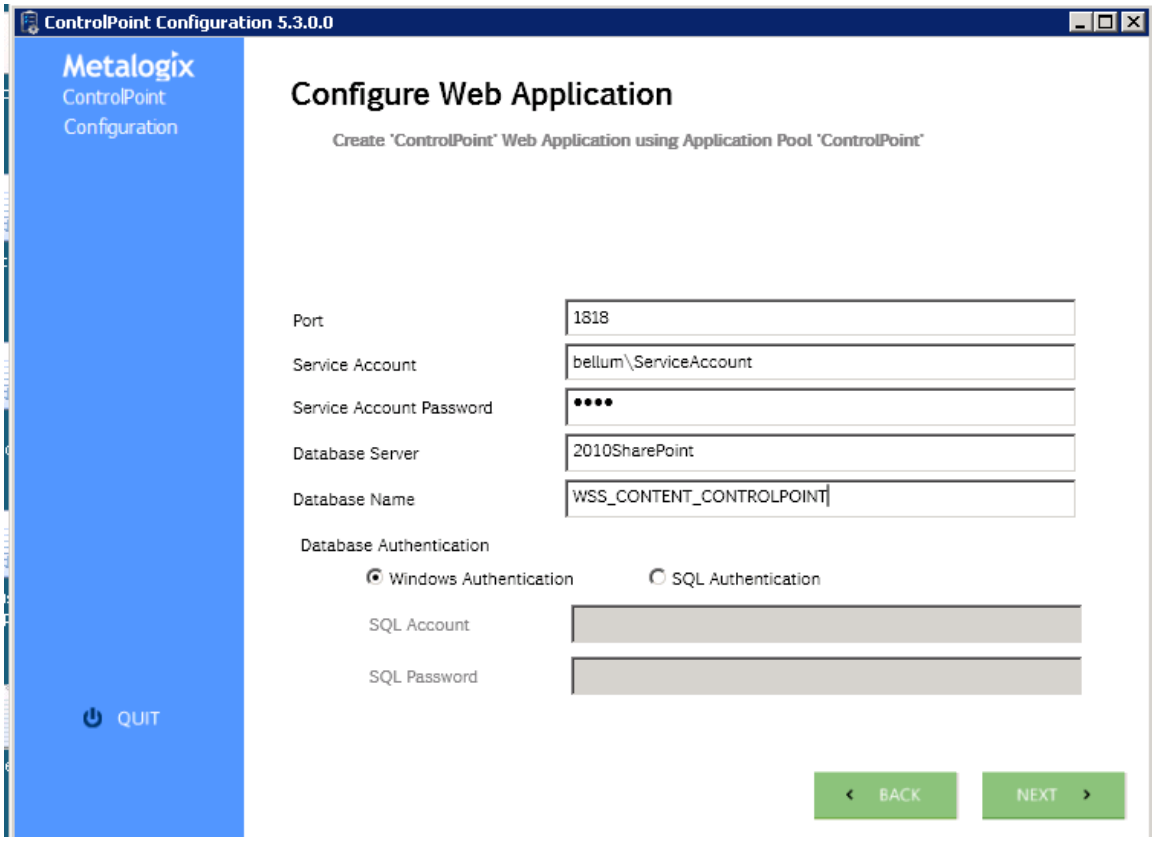
- accept the default value (WSS_CONTENT_CONTROLPOINT)

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.



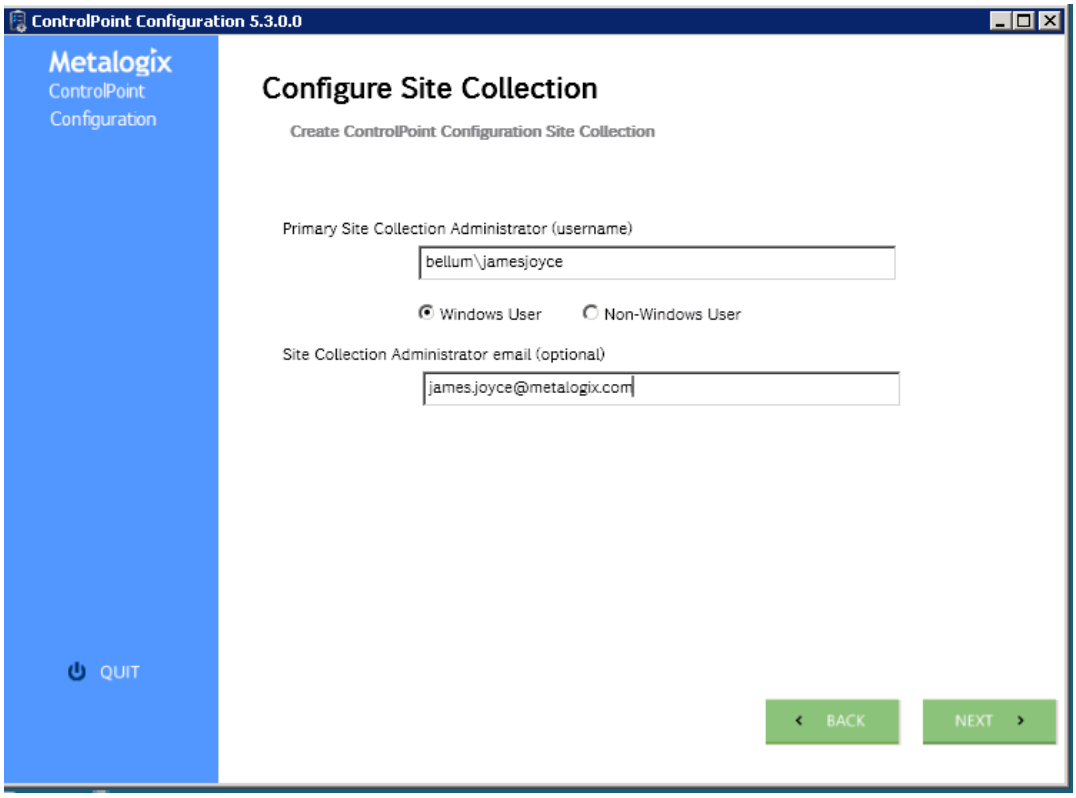
4 Click **[Next]** to display the **Configure Site Collection** dialog.

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.

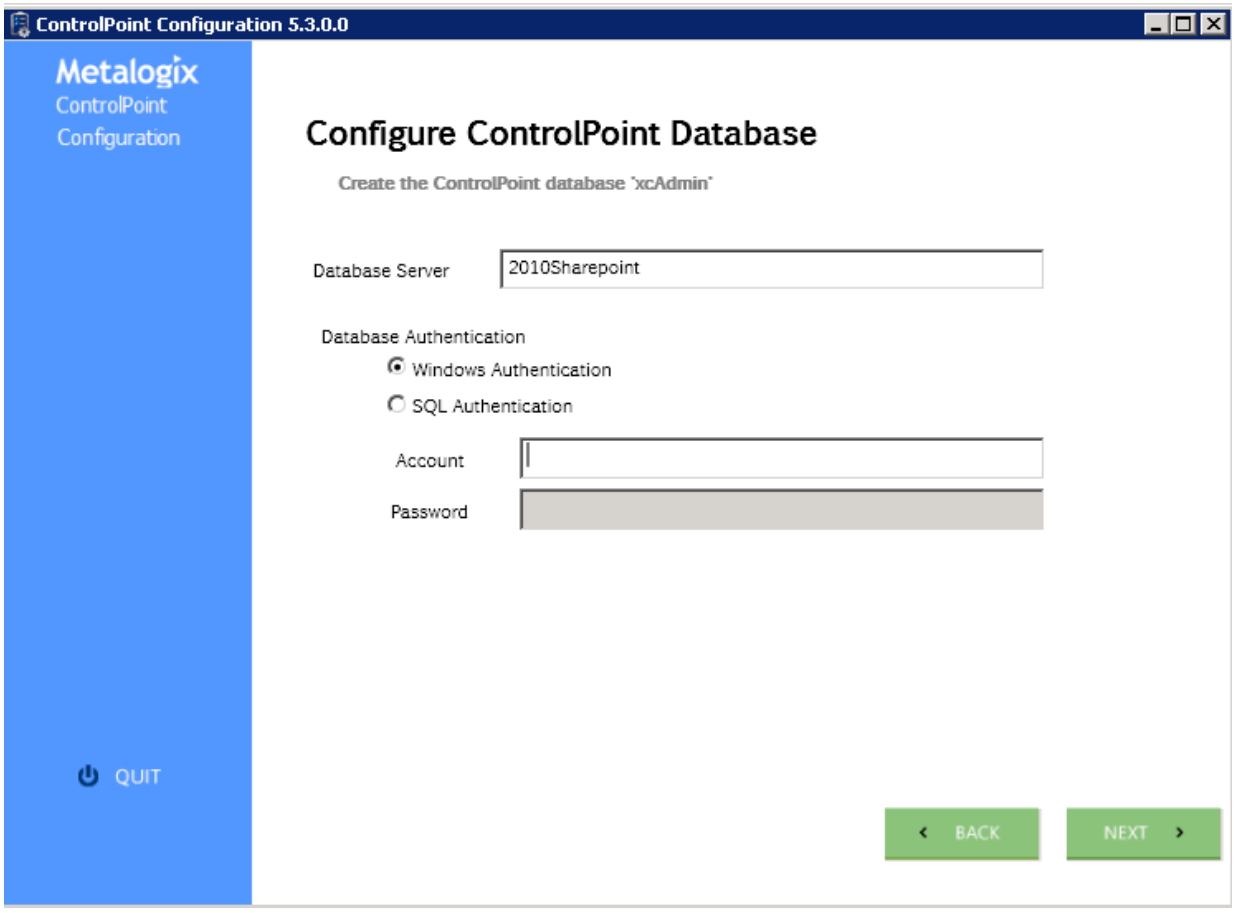
- select a server from the drop-down

OR

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

OR

- enter the server name.

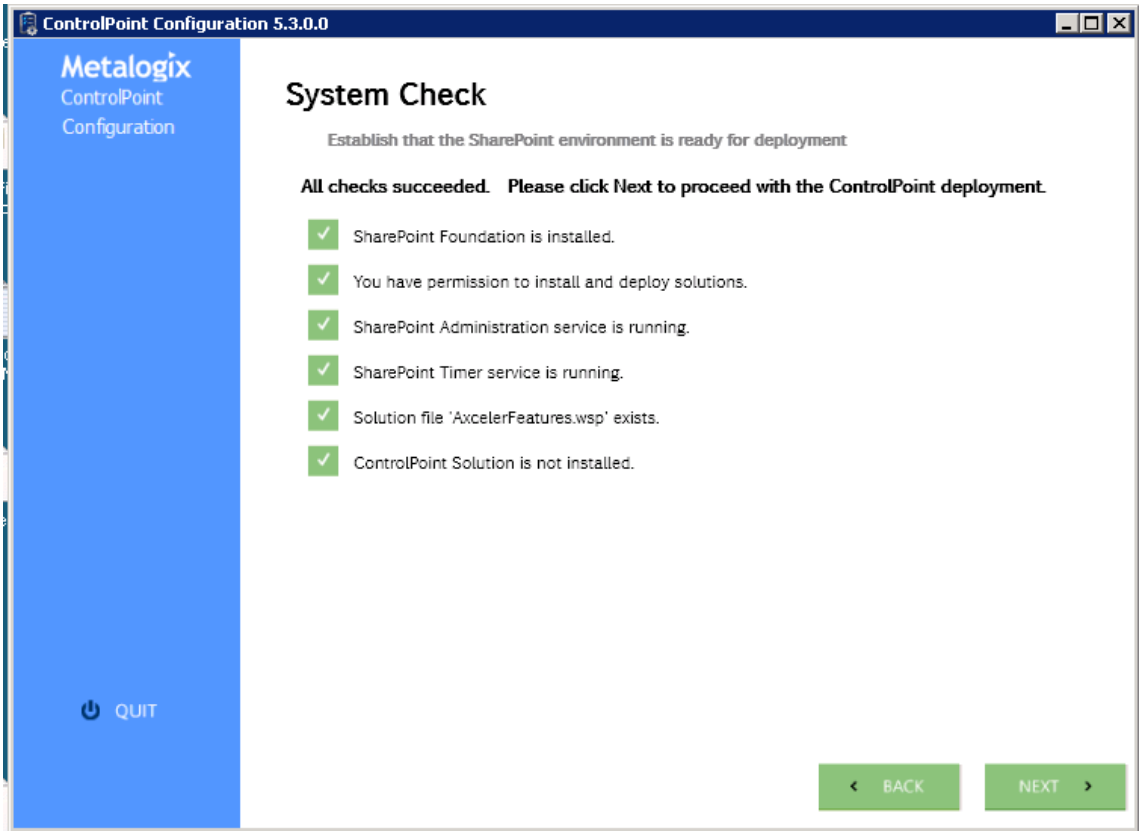


8 Specify the authentication method you want to use. (If you select SQL Server authentication, you will be prompted to enter the **Login ID** and **Password**.)

9 Click **[Next]**.

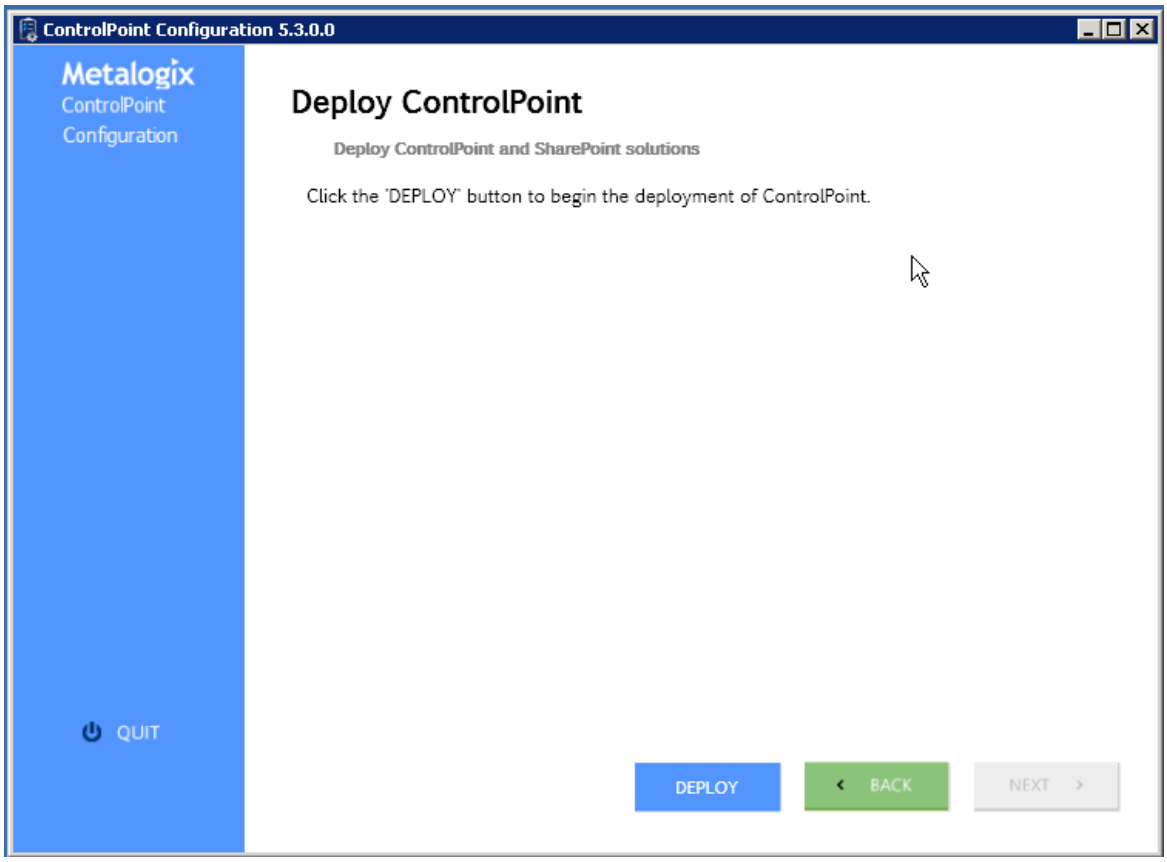
After the Configuration Wizard has validated the information you entered (including whether the ControlPoint Service Account has the proper credentials to create the xcAdmin database), the System Check dialog displays and the Configuration Wizard verifies that the SharePoint environment is ready for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

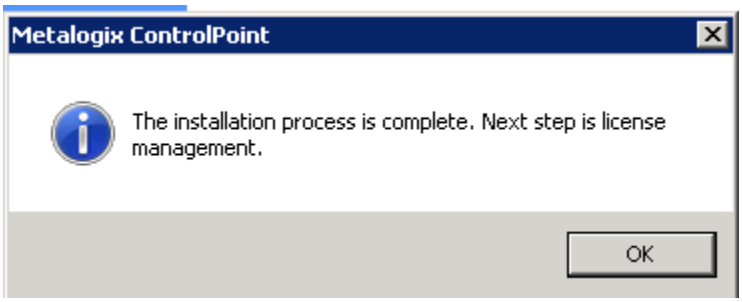
11 Click **[Deploy]**.



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.

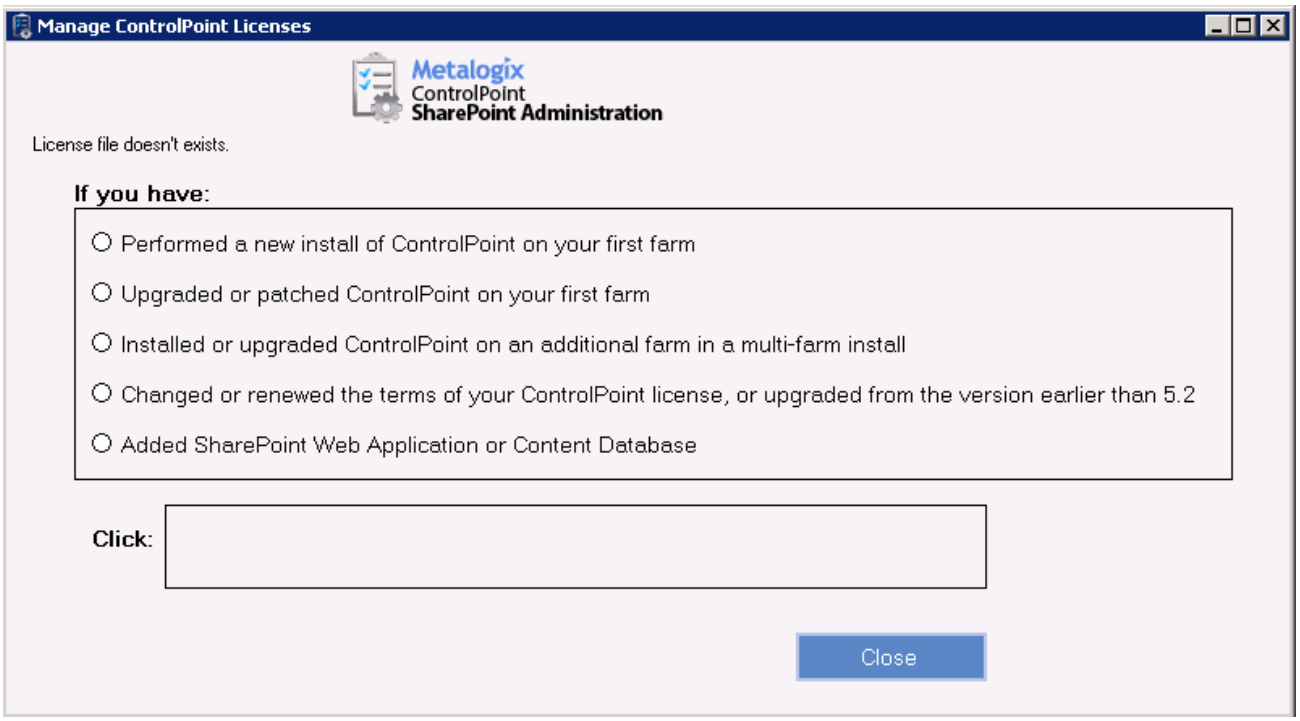
When the configuration and deployment has completed successfully, a pop-up displays, informing you that the installation process is completed and the next step is license management.



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.

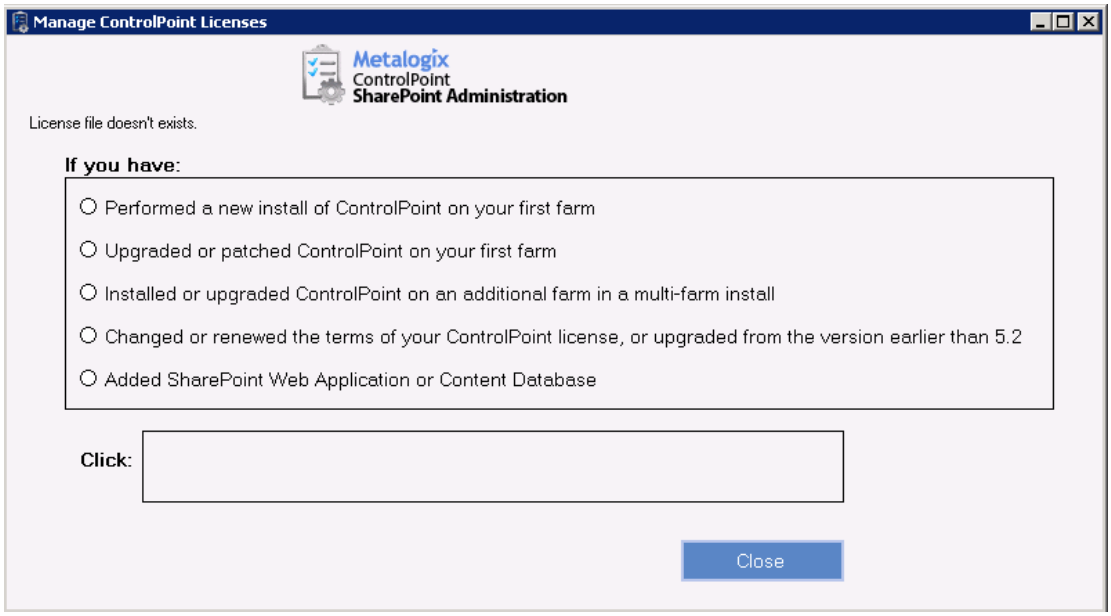
The **Manage ControlPoint Licenses** dialog displays. .



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.

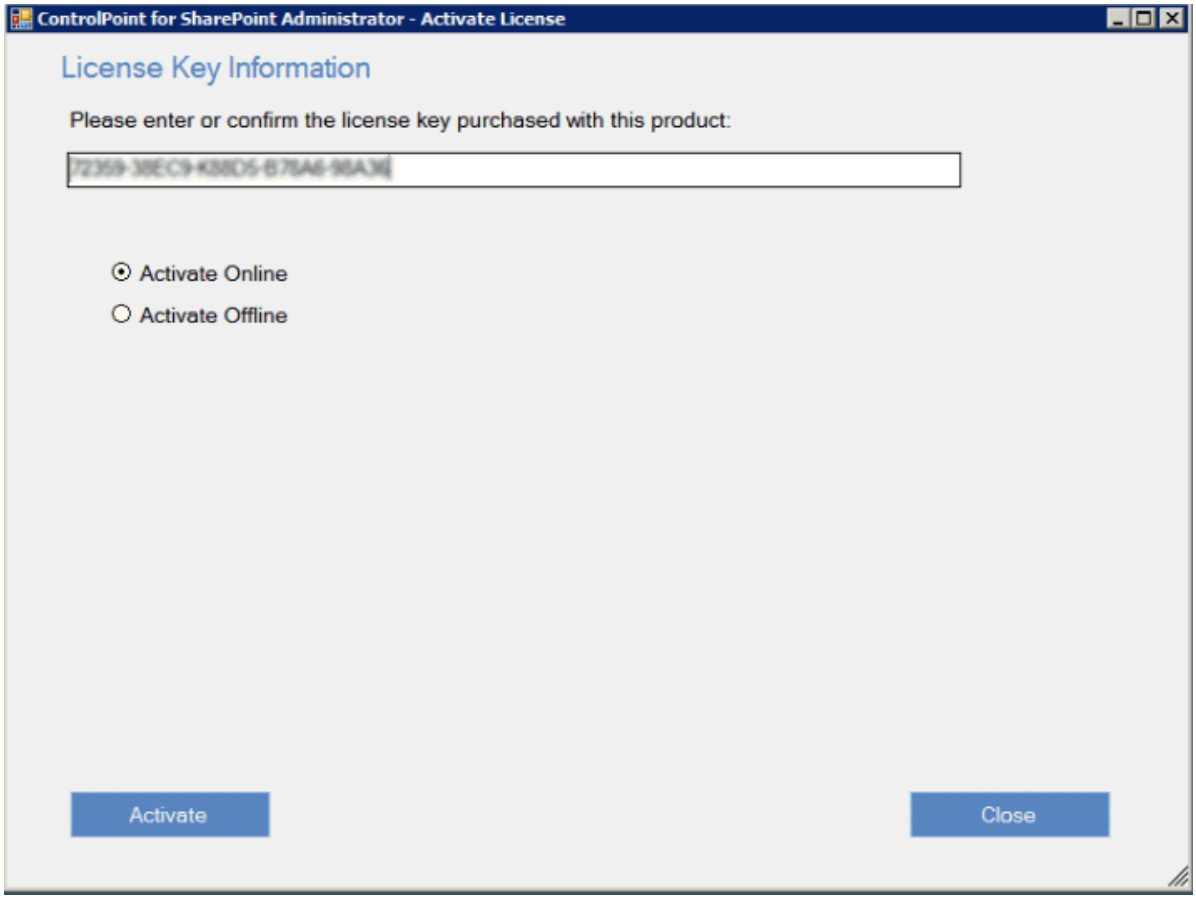
2 Click **[Manage Licenses]** to display the **Activate License** dialog.

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.)

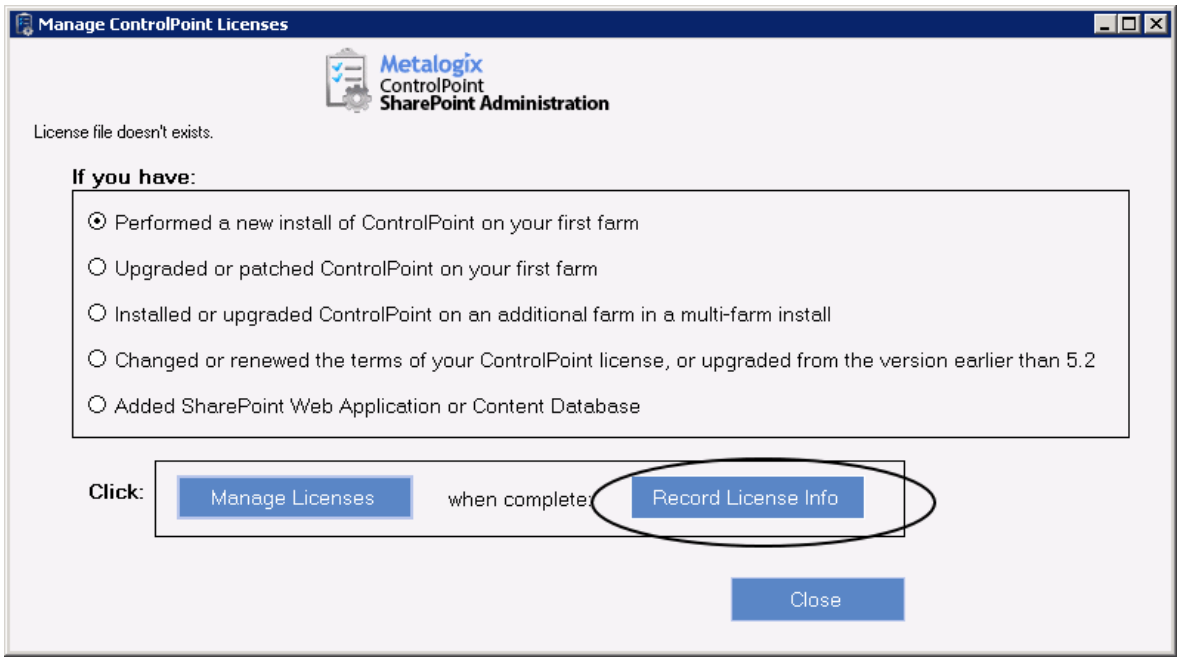
NOTE: If you are upgrading from version 5.2 or later, simply activate the currently-displayed License Key.



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*.

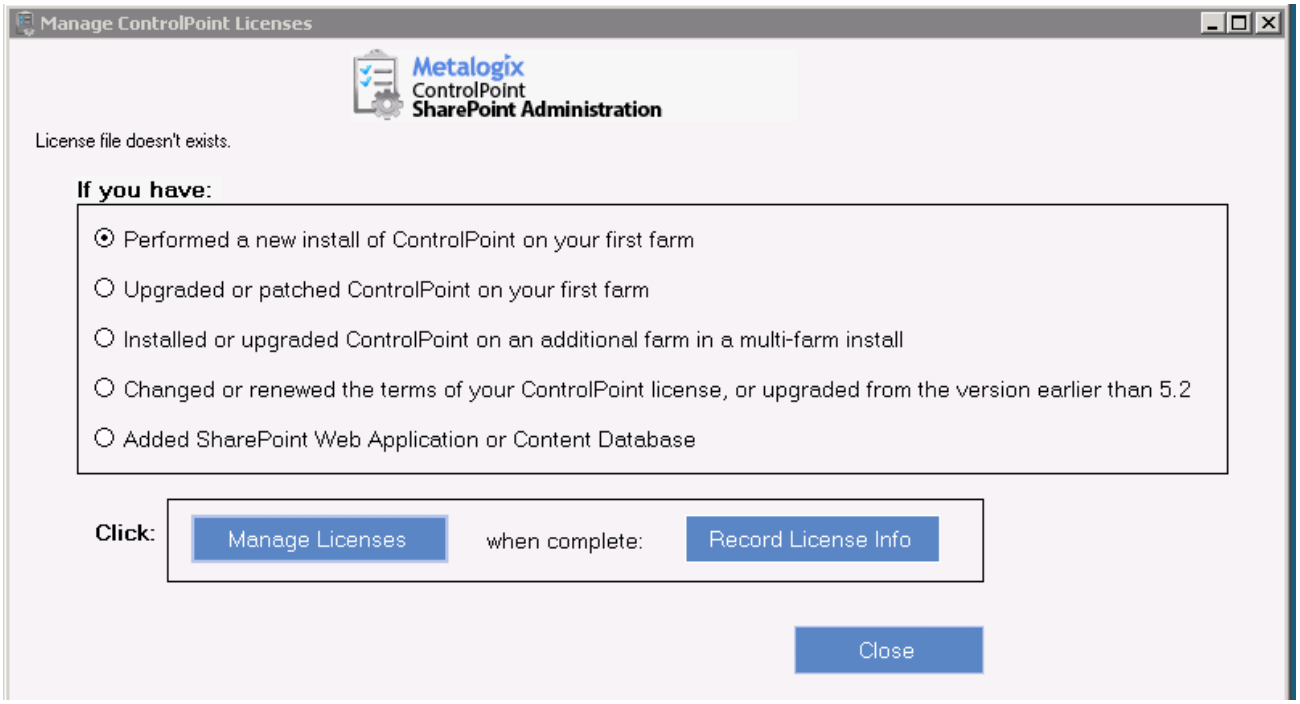
Activating Your License Without Internet Access

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.

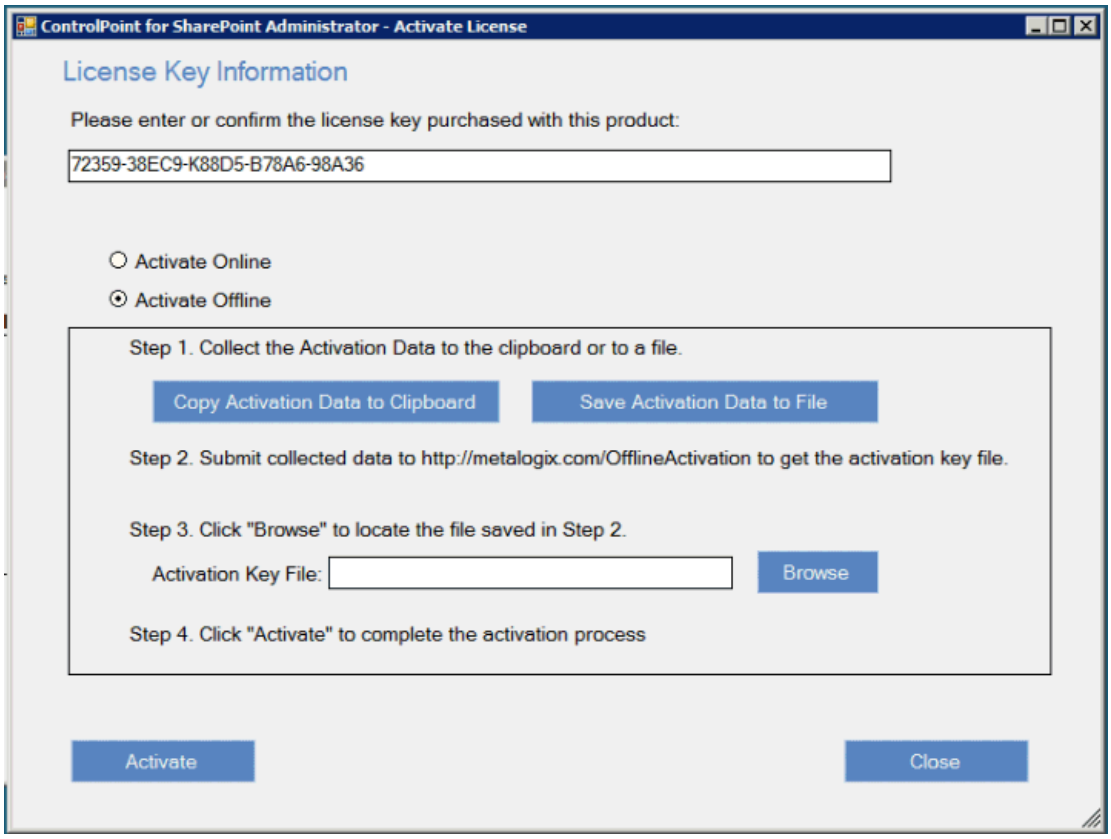


2 Click [Manage Licenses] to display the **Activate License** dialog.

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.

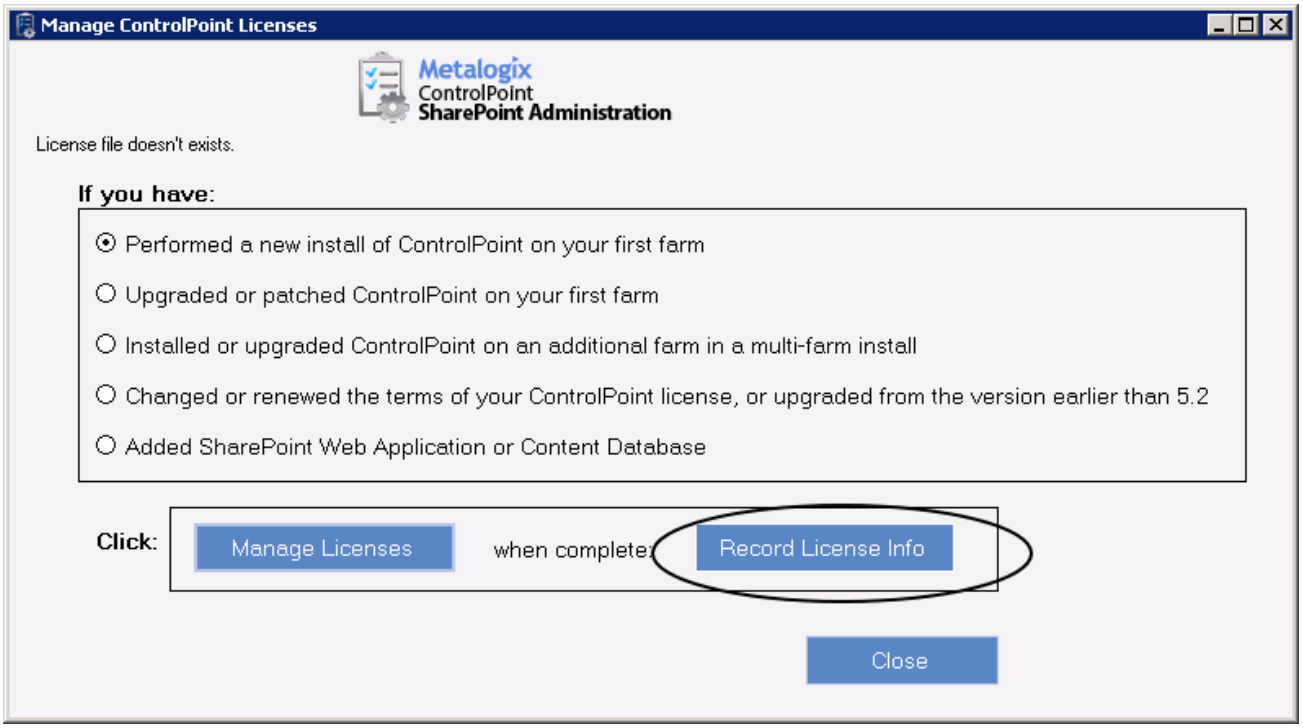
When your activation key is returned, you have the option of copying it to the clipboard or saving it to a data file. Make sure that you choose the option to save to a data file as it is the only method that Activate License dialog allows.

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*.