Content Matrix
Advanced Installation Guide

Publication Date: June 12, 2017

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Introduction

Metalogix Content Matrix Console and its additional components, Metalogix Organizer and the Metalogix SharePoint Extensions Web Service, allow users to migrate their data into SharePoint.

This document provides general Users and Administrators with a more advanced and detailed guide on installation and configuration of Metalogix Content Matrix Console and its additional components, as well as providing more information regarding various installation scenarios and creating SharePoint connections.

This guide can still be used in conjunction with the **Evaluation Guide**, but it should be noted that the installation scenario might be different from what is expected. For a quicker run through of the installation process, please see the **Quick Start** guide.

There is a **Content Matrix Evaluation Guide** that is included in the zip file for the installation of Content Matrix. This Evaluation Guide is provided for the purpose of evaluating and reviewing Content Matrix for migrating your content into SharePoint. Prospective client are encouraged to use this guide for basic testing. The Evaluation Guide can also be downloaded directly from the Metalogix website.

Content Matrix Installable Components

Content Matrix consists of a combination of Consoles and SharePoint WSPs. **Content Matrix Consoles** are the primary UI applications for migrating content to SharePoint. The consoles include:

- Content Matrix Console – SharePoint Edition
- Content Matrix Console – File Share Edition
- Content Matrix Console – Public Folder Edition
- Content Matrix Console – Blogs and Wikis Edition
- Content Matrix Console – eRoom Edition

Note: If you are installing **Content Matrix Migration Express** only **SharePoint**, **File Share**, and **Public Folder Editions** of the client application will be available for install. All other Content Matrix Console Editions will be disabled.

The **Content Matrix SharePoint WSPs** include:

- **Metalogix Extensions Web Services**

The Metalogix Extensions Web Services (MEWS) is a web service wrapper around the SharePoint Server Object Model that provides full fidelity and increased speed for migrations. We recommend installing MEWS on either the source or target server in a SharePoint to SharePoint migration depending on your scenario (see below for scenario based recommendations).

- **Metalogix Organizer** (not applicable to Content Matrix Migration Express or Office 365)

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The Metalogix Organizer is a SharePoint UI based content organization solution that allows Farm Admins to delegate reorganization tasks to Site and Site Collection Owners, and bulk movement and reclassification of content to power users. For Example, Site promotion, Site Collection demotion, copying of content types, metadata, permissions between sites, and bulk tagging, reclassification, and movement of content.

Metalogix Organizer can only be installed on on-premises versions of SharePoint Server 2010, 2013, and 2016.

- **SharePoint Email Viewer**

  The SharePoint Email Viewer is a web part that can be installed on target SharePoint servers in cases where you are migrating Exchange Public Folders to SharePoint. The Email Viewer allows users reviewing email folders to preview emails in a web part instead of having to open each email in their default mail client (usually Outlook). For migrations that don't include Exchange Public Folders, this component is not needed and should not be installed.

- **Content Matrix License Check** (not applicable to Content Matrix Migration Express and migrations to SharePoint Online/Office 365)

  The Content Matrix License Check solution is used to track the capacity of your target SharePoint farm for licensing purposes. For on-premises migrations, **if you have not installed the Metalogix Organizer** (which includes the License Check) on your target server farm WFE, **you must install the Content Matrix License Check** in order for Content Matrix to support writing content to your target farm.

Note: If you are installing **Content Matrix Migration Express** you will **not** need to install **Metalogix Organizer** or the **License Check** components. However, you may still need to install the Extensions Web Service or the Email Viewer.

Requirements

The following tables describe the hardware, software, and access requirements for Content Matrix Console. If our requirements are equivalent to, or less restrictive than a SharePoint requirement, it will not be described here.

The requirements for Content Matrix Console are similar to the ones for Metalogix Organizer/License Check, Email Viewer, and the Extensions Web Service. The access requirements might be slightly different, however. If this is the case, the new access permissions will be listed in that components install section.

Note: The items in each of the hardware and software requirement tables may have additional requirements.

Hardware Requirements

Component	Requirement
Processor	Under normal circumstances, the Content Matrix processor requirements are the same as SharePoint.
Memory	1 GB of free RAM, plus double the size of the largest file being migrated in free RAM.

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Component	Requirement
Disk Space	The amount of available hard disk space will change depending on what components of the Content Matrix Console are installed. Each component ranges in hard disk space from 20MB to 50MB.
Display	1024 x 768 screen resolution.

Software Requirements

Component	Requirement
Operating System	Any of: • Windows Server 2003 • Windows Server 2008 • Windows Server 2008 R2 • Windows Server 2012 • Windows XP Professional • Windows Vista • Windows 7 • Windows 8 • Windows 10 All of these Operating Systems are supported on both 32-bit and 64-bit systems.
SharePoint Target Environment	Any of: • Windows SharePoint Services (WSS) 3.0 • Microsoft Office SharePoint Server (MOSS) 2007 • Microsoft Online Services (MOS) • SharePoint Server 2010* • SharePoint 2013 • SharePoint 2016 Microsoft Office 365 – Standard and Dedicated versions.
Database	Any of: • SQL Server 2000 • SQL Server 2005 • SQL Server 2008 • SQL Server 2008 R2 • SQL Server 2012 As well as : • SQL CE 4.0 SP1
Windows PowerShell	Metalogix Content Matrix Console has the ability to run migrations using a pre-configured PowerShell console, provided that PowerShell is installed prior to Content Matrix. Only PowerShell version 3.0 is supported.
Web Browser	Microsoft Internet Explorer 6.x, or higher (8.x or higher is required if browser authentication is being used).
.NET Framework	Microsoft .NET Framework 4.5.2, or higher. **

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***Note:** It is recommended that the Office 2010 SP1 Windows update is installed on the same system that the Content Matrix Console client application is installed on, if users are creating Publishing Sites in the SharePoint 2010 environment they are migrating into.

****Note:** As of version 8.3, the Content Matrix Console client application requires Microsoft .NET Framework 4.5.2 to run.

Since this .NET requirement is on the machine that Content Matrix is installed on, Content Matrix cannot make a local Object Model (OM) connection on a SharePoint 2007 or 2010 environment, because SharePoint 2007 and 2010 require a lower version of the .NET Framework (v.3.5), which prohibits Content Matrix from completing the connection.

Because of this change, any migration 'jobs' that are configured to connect to SharePoint 2007 and 2010 environments using a Local OM connection type will cease to work because of the .NET Framework criteria described above, and these jobs will need to be recreated for use over a different adapter type such as MEWS or DB.

Access Requirements

All of the installation and migration permissions/access requirements can change depending where the Content Matrix Console client application is installed. The below requirements are the standard set of requirements if you are installing Content Matrix on a non-SharePoint machine (i.e. installing on a machine that is not running SharePoint, but has access to the source and target environments).

If you are installing the Content Matrix client application directly on a target SharePoint Server or Web Front End (WFE), then you would need the same permissions that are required for **installing the Extensions Web Service.**

Component	Requirement
Installing User	The user account that is installing the client only needs permissions to install a client application on the target/installation machine. This is because the Content Matrix Installer will attempt to elevate permissions as part of the installation process. However, any user account that is going to be running the Content Matrix Console application will require **Administrator** permission.
Application Pool Accounts	If connecting to a **remote**, on-premise, instance of SharePoint the **Metalogix Extensions Web Service** can be used (for SharePoint 2007 or later). This is a SharePoint solution file that is installed and will use the Application pool user account. Please see the Installing the Extensions Web Service section of this document for more details and permission specifications.
Server Access	The installing user, and any user launching Content Matrix Console, will require **Administrator** permissions on the local machine.
SharePoint Access	The migrating user requires the following permissions (provided that the **Extensions Web Service** is installed on the SharePoint target. • **Site Collection Administrator** on the target SharePoint environment. • **Farm Administrator** on the target SharePoint environment. • Permissions to access all of the **content** that is being migrated.

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Component	Requirement
Firewalls	Access to any ports that allow access to the SharePoint Web Application.
Activation	A valid license key is required.
Content Matrix Components	There are two additional components that can be installed with Content Matrix Console. These are: • Metalogix Organizer • Metalogix Extensions Web Service

Additional permission/access requirements are gained through the use of the **Metalogix Extensions Web Service** which can be installed on remote SharePoint instances.

Installation

This section will review various installation scenarios, as well as how to install the Content Matrix Console client application(s), Organizer, Email Viewer and the Extensions Web Service.

Note: Before installing the latest version of Content Matrix Console, you must first **uninstall any earlier versions** from the system.

If you have any components from a previous version of Content Matrix installed (i.e. the client application, Extensions Web Service, etc.), you will be prevented from upgrading to the new version until those components are removed/uninstalled.

Basic Installation Scenarios for Content Matrix Console

One of the more powerful aspects of Metalogix Content Matrix Console is its flexibility for installation scenarios. Each Edition of Content Matrix Console has multiple scenarios that can be utilized to help with system installation limitations and optimization for performance.

There are three basic scenarios that can be applied when installing Content Matrix Console:

1. **Installing the console directly on the Source system**. This is more likely to happen with SharePoint Edition since the ECM (Electronic Content Management) Editions, such as Blogs and Wikis, File Share, etc., are sufficiently different enough from SharePoint that installing the console on these systems doesn't gain any real benefit for migration performance.

2. **Installing the console directly on the Target system**. In most cases this can be the most beneficial since it will help reduce the network traffic when communicating with the target SharePoint environment during a migration, which helps improve migration performance. Another benefit of this scenario is that it provides the client application with direct access to the local SharePoint Object Model (OM) giving Content Matrix greater fidelity when migrating content. This scenario is not possible when migrating to a target SharePoint Cloud environment.

   NOTE: This also means that the Content Matrix Console client application is installed directly on the target SharePoint server. Many companies have internal policies in place that restrict or limit the installation of any software directly on the server, usually due to general security and/or software quality concerns. Depending on the policy, this could mean that all software must go through an approval/testing phase before it is allowed to be installed on the server. The testing/approval process

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can take anywhere from a few days to a few months depending on the organization. This can be a hindrance if any short timelines are involved with a migration. These strict limitations could also completely prevent any third party software from being installed on a server directly.

3. **Installing the console on a third machine that has access to both the Source and Target systems**. This is the most common use case for most customers. This scenario allows users to install, run, and even upgrade their version of Content Matrix without needing to access the source or target environments. And with the use of the **Metalogix Extensions Web Service** (installed on the target SharePoint environment) users can install the client on their own machine and still have remote access to the SharePoint Object Model for any on-premise installations, providing the same level of fidelity that the local OM connection would give if Content matrix was installed locally on the target SharePoint server or a Web Front End (WFE).

In all cases Metalogix Organizer would need to be installed on any on-premise SharePoint environments in order for Content Matrix to have a “writable” connection to the SharePoint target. If Organizer is not installed on the target, then any connection made to the target SharePoint environment would be a “read-only” connection, and no data can be migrated. In the case of a SharePoint Cloud (O365, etc.) target, organizer does not need to be installed.

Now that we know the three basic scenarios that you will likely encounter when looking to install Content Matrix Console, we also need to have a rough understanding of the different SharePoint connection types that are possible, so you can better determine what installation scenario best meets your needs.

Connections to other source environments are all roughly similar and only have one method for direct connection. However, there are multiple connection types for SharePoint. These connection types consist of:

- **SharePoint Database Connection** – This is a **read-only** connection directly to a SharePoint Database (DB). This connection type is only used in **SharePoint Edition** for connection to a SharePoint source environment (mainly a SharePoint 2003 source).

- **SharePoint Local Object Model Connection** – This connection can only be made when Content Matrix is **installed directly on the target SharePoint server or WFE**. It accesses the SharePoint OM locally on the machine, which allows it to preserve more existing metadata and grant deeper access for some Content Matrix features.

- **SharePoint Remote Object Model Connection** – This connection requires the installation of the **Metalogix Extensions Web Service** on the target SharePoint environment. The Extensions Web Service allows Content Matrix to have a **remote connection to the SharePoint OM**. This grants all of the same access for features and metadata that is available from the **Local OM** connection (see above). This connection type is available for on-premise installation, but is also available for SharePoint Online Dedicated environments (**by request**).

- **SharePoint Client Side Object Model Connection** – This connection is only possible for SharePoint 2013 or 2016 environments. While it connects through the SharePoint Client Side Object Model (CSOM), it does not have the same level of fidelity that the **Local OM** or **Remote OM** connections have. This connection type is mainly used when connecting to O365 environments, or when remotely connecting to a

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SharePoint server/WFE that **does not** have the Extensions Web Service installed.

- **SharePoint Native Web Service Connection** – This connection type is only possible for SharePoint 2010 environments and earlier. This is similar to the CSOM connection (above) in its feature and metadata restrictions, but uses the SharePoint Native Web Service instead.

Please see the **Connecting to SharePoint** section (under "Configuration" for more details on all of the SharePoint connection adapters.

Scenario based Installation Examples for Content Matrix Console

Now that we have a better idea of the basic installation scenarios and the possible SharePoint connection adapters that might be involved, we can look at some examples. The below example center around **Content Matrix Console – SharePoint Edition**, since the SharePoint to SharePoint case can be the most varied.

- For migrations to **on-premises** SharePoint servers, click here to view recommended installation configurations.

- For migrations to **cloud based** SharePoint servers, click here to view recommended installation configurations

On-premises Target Server Installation Scenarios

Metalogix recommends one of the following installation options for SharePoint to SharePoint on-premises migrations:

1. Install the Metalogix Extensions Web Service (MEWS) on a Web Front End (WFE) server of the Source SharePoint Farm.

2. For up to 2 users, install both the Content Matrix Console and the Metalogix Organizer on a WFE of the Target SharePoint Farm:

OR

3. For 3 or more users install the Content Matrix Console on each user's Desktop/Laptop, and install MEWS and Metalogix Organizer on a WFE of the Target SharePoint Farm:

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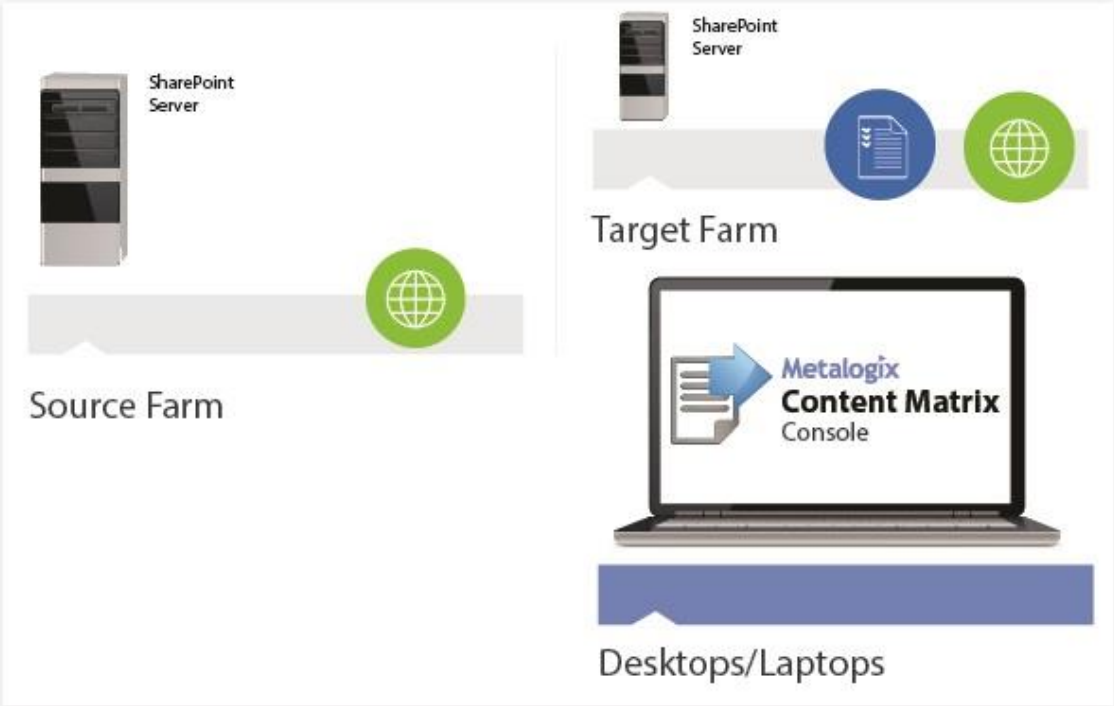

Cloud-based Target Server Installation Scenarios

Metalogix recommends one of the following installation options for SharePoint to SharePoint on-premises to **cloud** based migrations[1]:

1. For up to 2 users, install the Content Matrix Console on a Web Front End (WFE) of the Source SharePoint Farm:

OR

2. For 3 or more users install the Content Matrix Console on each user's Desktop/Laptop, and install MEWS on a WFE of the Source SharePoint Farm.

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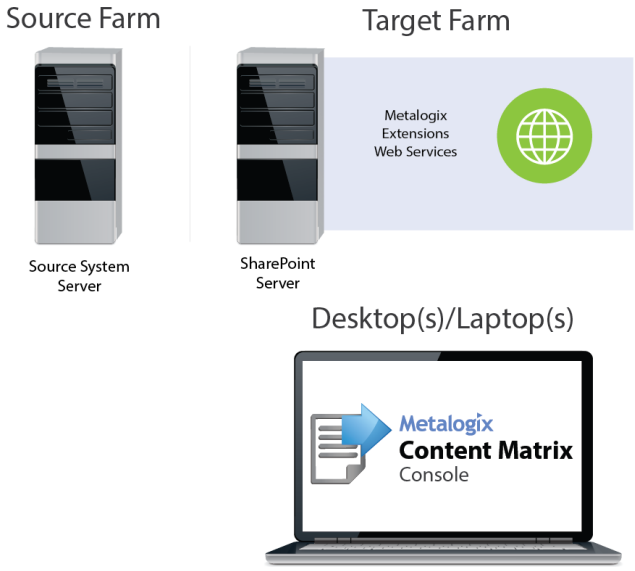
Non-SharePoint to SharePoint Migration Installation Scenarios

Metalogix recommends one of the following installation options for migrations from File Shares, Blogs and Wikis, Exchange Public Folders, and eRooms to SharePoint **on-premises migrations**:

1. For up to 2 users, install both the Content Matrix Console, the Metalogix Organizer, and for Public Folder Migrations, the SharePoint Email Viewer on a WFE on the Target SharePoint Farm.



OR

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2. For 3 or more users install the Content Matrix Console on each user's Desktop/Laptop, and install MEWS, Metalogix Organizer, and the SharePoint Email Viewer on a WFE of the Target SharePoint Farm:

Metalogix recommends one of the following installation options for migrations from File Shares, Blogs and Wikis, Exchange Public Folders, and eRooms to SharePoint **cloud migrations**:

1. For up to 2 users, install the Content Matrix Console on the server of the source system, such as the MS Exchange Server, ERoom Server, etc. if these have sufficient RAM
2. For 3 or more users or when the source system or file share server does not have sufficient RAM, install the Content Matrix Console on each user's Desktop/Laptop.

Installing the Content Matrix Console Client Application

This section will review the installation steps for the Content Matrix Console client application.

Before running an installation of the Content Matrix Console client application, please see the Basic Installation Scenarios section to better determine what installation scenario works best for you. This will help you determine the best location for you to install the Content Matrix client application.

Installation Steps for the Content Matrix Console Client Application

1. Copy the **ContentMatrix_Web_Setup.exe** file to the machine that the Content Matrix client application should be installed on. This can be any system that has access to both the source and target environments, but does not have SharePoint installed on it directly (and is not a WFE).

2. Close all open applications, including Internet Explorer.

3. Open Windows Explorer to the folder containing the Metalogix Content Matrix Setup installer file. Double-click the **ContentMatrix_Web_Setup.exe** to start the installation process.

   Note: Users can also run the **ContentMatrix_Offline_Setup.exe** file. The Web Setup file is the same as the **ContentMatrix_Offline_Setup.exe** file except that it doesn't actually contain the installer components. Instead, when it is run it will **download** only the selected installation components and run the installation for those. This means that the EXE file itself is smaller in size, but the system that Content Matrix Console is being installed on **must have access to the internet** so the appropriate components can be downloaded for installation.

   Because this installer requires an elevated set of permissions to run, if you do not have the required permissions a message will open informing you that elevated permissions are required. To run the installer with these elevated permissions, select the installer file, right-click and select the **Run as administrator** option.

4. The Metalogix Content Matrix Installation Wizard will open. Under **Step 1** you can access a copy of the **Scenario Based Install JumpStart Guide**, as well as watch **a Quick Install video demo**. **Step 2** allows you to proceed with the installation for both the Content Matrix client application and the Content Matrix SharePoint WSPs (i.e. the server side components such as Metalogix Organizer and the Extensions Web Service, etc.).

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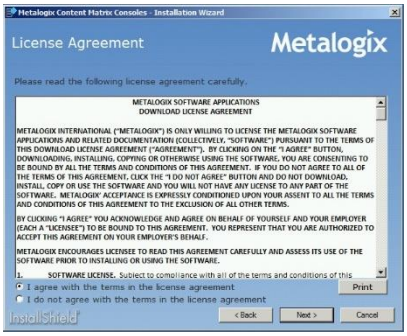
When ready to proceed with the Content Matrix Console client application install, click the "**Install Content Matrix Migration Consoles**" button under **Step 2**.

5. The **Metalogix Content Matrix – Installation Wizard** will close and the **Metalogix Content Matrix Console – Installation Wizard** will open. Click **Next** to continue.

6. The User License Agreement will open. Read through the **License Agreement**. If you agree to the terms of the license agreement, click the "**I agree with the terms in the license agreement**" radio button, and then click **Next** to continue.



There is also a **Print** button on this screen if users would like to have a hard copy of the license agreement.

If you do not agree to the terms of the license agreement, click the "**I do not agree with the terms in the license agreement**" option, and the installation will be canceled.

7. The Installation Wizard will run a license key check and validation. If you already have a license key entered on the installing system, the installation wizard will detect and verify this key and skip you straight to the next step.

If this is the first time that you have installed Content Matrix Console, or if an existing license has expired, then you will be prompted to enter your **Activation License Key**. For more information on entering license keys, please see the Installing the License Key section of this guide.

After the license key has been entered and verified, click **Next** to continue with the installation.

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You will now have the option to choose the desired installation location for the Content Matrix client application(s) on the installing system.

By default the installation Wizard will install all of the selected Content Matrix client applications under the following location:

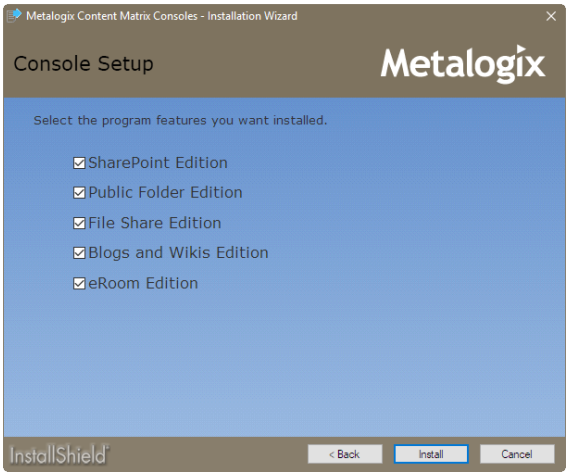
- For 64-bit systems - C:\Program Files (x86)\Metalogix
- For 32-bit systems - C:\Program Files\Metalogix

If you want to change the install location to something different than the default setting, click the **Change** button. This will open a **Browse For Folder** explorer window. Users can use this explorer window to navigate to the desired folder that the Content Matrix client applications should be installed under. If the desired folder doesn't already exist, you can use the **Make New Folder** button to create and name the new folder to install the files under.

After the desired folder location has been selected, click **OK**. This will return you to the **Change Current Destination Folder** page in the installation process.

Once the installation location has been determined and set, click **Next** to continue.

8. A list of check-box options will be displayed allowing users to select which Edition(s) of Content Matrix to include in the installation process. The Editions of Content Matrix Console include: SharePoint Edition, Public Folder Edition, File Share Edition, Blogs and Wikis Edition and eRoom Edition.



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Note: If you are installing **Content Matrix Migration Express** only **SharePoint**, **File Share**, and **Public Folder Editions** of the client application will be available for install. All other Content Matrix Console Editions will be disabled.

Only the Editions that are checked will be installed on the system. Select which Editions of Content Matrix Console should be installed.

If migrating to an **on-premise** version of **SharePoint 2010, 2013,** or **2016** it is **required** to install the Metalogix Organizer or the Content Matrix License Check component on the target SharePoint environment in order for Content Matrix Console to "write" data to the target.

9. After all of the desired Editions of Content Matrix have been selected for install, click the **Install** button to run the installation process.

10. The installation process will run, and the client applications for the selected Editions of Content Matrix Console will be installed.

    Once the installation process has been completed, click **Finish** to exit the installer Wizard.

11. After **Finish** is clicked the **Metalogix Content Matrix Console – Installation Wizard** will close and the **Metalogix Content Matrix – Installation Wizard** will re-open.

    If you have installed the Content Matrix client application on the target SharePoint (2010, 2013, or 2016) server, then you would also need to install either Metalogix Organizer or the Content Matrix License Check component on the same server. In this case, click the **Install Content Matrix SharePoint WSPs** button under **Step 2** of the **Metalogix Content Matrix – Installation Wizard**. This will launch the SharePoint server side installation components

    If the installation of the Content Matrix Console client application(s) is complete and no additional components need to be installed, select the **Quit** button in the bottom left-hand corner to close the installer.

The installation for the Content Matrix Console client application(s) is now complete. You can now proceed to install any Server-Side components that are required for your installation scenario (On premise or Online).

Installing the Content Matrix SharePoint WSPs

This section will walk you through the process of installing the Content Matrix SharePoint WSPs, defined earlier in this guide, on the target SharePoint farm.

Note: When installing the Content Matrix WSPs you should note that an IIS Reset will need to be performed when the solution (WSP) file is deployed through the SharePoint farm. This is a requirement of SharePoint, and not of Metalogix. In most cases this IIS Reset is automatically done as part of the solution deployment. For more general information on this issue, please see the following Microsoft articles: http://technet.microsoft.com/en-

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	ca/library/cc262995(v=office.14).aspx#DeployFarmSolutions and http://msdn.microsoft.com/en-us/library/aa544500.aspx#sectionToggle2. There are a number of methods that can be used to try and mitigate any downtime when deploying a SharePoint farm solution. One of these methods is to schedule the solution deployment for a time period that will have low impact to the environment's users.

Organizer and License Check

When migrating your content to a SharePoint environment you **must** have either **Organizer** or the **License Check** component installed on the target SharePoint server or WFE. Only one of these needs to be installed on the target SharePoint environment, and they will allow you to have a "Writable" connection to SharePoint.

Both **Organizer** and the **License Check** can only be installed in SharePoint 2010, 2013, and 2016 on-premises environments. If you are migrating to a SharePoint 2007 environment, or if you are migrating to a SharePoint Cloud environment, you will not need to install either of these components.

Note: If you have previously installed Web Components version 1 (no Reorganize or Processing pages) you will need to uninstall that version before upgrading to, or repairing, this version of Organizer.

In most cases it will be more beneficial to install **Organizer** as it provides additional features and allows you to perform some actions similar to the Content Matrix Console client application directly within the target SharePoint farm.

The Extensions Web Service

The Metalogix SharePoint Extensions Web Service enables both Read and Write access to remote SharePoint instances. This remote connection accesses the content through the remote SharePoint installation's Object Model (OM). The Extensions Web Service can be installed using the same **Content Matrix Setup.exe** file that installs the client application, allowing it to be installed on SharePoint source environments as well (except for SharePoint 2003), when migrating with Content Matrix Console – SharePoint Edition.

Once the Extensions Web Service is installed on one SharePoint Web Front End (WFE) it will automatically be pushed to any other SharePoint WFE's on the farm as a SharePoint solution file (WSP). When the Web Service has been deployed it can be managed as a SharePoint web solution, and can be accessed through the farm's Central Administration page, to administer, disable, or uninstall the Web Service.

The Extensions Web Service component can be installed on any SharePoint 2007 (MOSS 2007, WSS 3.0), SharePoint 2010 (Foundation or Server), SharePoint 2013 (Foundation or Server) or SharePoint 2016 environment, and is supported on both 32-bit and 64-bit servers. The Extensions Web Service **cannot** be installed on SharePoint 2003 versions (WSS 2.0 and SPS 2003), because the 2003 versions of SharePoint does not use solution files. However, we can still connect to these versions as a **source** (for SharePoint Edition) using the Native Web Service (NWS) or Database (DB) connection types.

The Extensions Web Service helps to enable some migrations features through the remote access to the SharePoint OM, so it is recommended to have them deployed if possible.

After installation, the Web Service will run under the "app pool" user account. This means that any user running a migration with Content Matrix will only need to have general access to the content that is being migrated, in the SharePoint UI.

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Email Viewer

The **Email Viewer** is for use in target SharePoint environments when you are migrating content from Public Folders into SharePoint (using Content Matrix Console – Public Folder Edition). The **Email Viewer** is **a SharePoint web part** that allows you to view any content that has been migrated from Public Folders into SharePoint as if you were viewing the Public Folder messages in Microsoft Outlook.

After the main installation steps are complete there are some **additional manual configuration steps** that need to be taken before the web part will work in the target SharePoint environment.

Installation Steps for the Content Matrix SharePoint WSPs

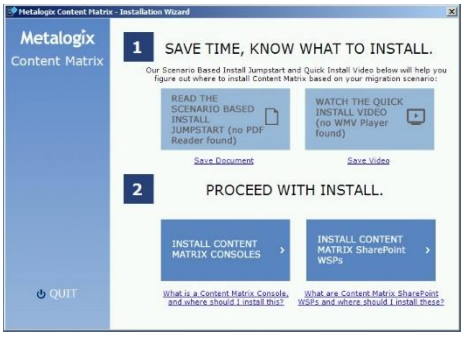
1. Copy the **ContentMatrix_Web_Setup.exe** file to the SharePoint Server or a Web Front End (WFE) that the Content Matrix SharePoint WSPs should be installed on.

2. Close all other open applications, including Internet Explorer.

3. Open Windows Explorer to the folder containing the Metalogix Content Matrix Setup installer file. Double-click the **ContentMatrix_Web_Setup.exe** to start the installation process.

   Because this installer requires an elevated set of permissions to run, if you do not have the required permissions a message will open informing you that elevated permissions are required. To run the installer with these elevated permissions, select the installer file, right-click and select the **Run as administrator** option.

   Note: Users can also run the **ContentMatrix_Offline_Setup.exe** file. The Web Setup file is the same as the **ContentMatrix_Offline_Setup.exe** file except that it doesn't actually contain the installer components. Instead, when it is run it will **download** only the selected installation components and run the installation for those. This means that the EXE file itself is smaller in size, but the system that Content Matrix Console is being installed on **must have access to the internet** so the appropriate components can be downloaded for installation.



4. The Metalogix Content Matrix Installation Wizard will open. Under **Step 2** click the "**Install Content Matrix SharePoint WSPs**" button.

5. The **Metalogix Content Matrix – Installation Wizard** will close and the **Metalogix Content Matrix SharePoint WSPs - Installation Wizard** will open. Click **Next** to continue.

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6. The User License Agreement will open. Read through the **License Agreement**. If you agree to the terms of the license agreement, click the "**I agree with the terms in the license agreement**" radio button, and then click **Next** to continue.

   There is also a **Print** button on this screen if users would like to have a hard copy of the license agreement.

   If you do not agree to the terms of the license agreement, click the "**I do not agree with the terms in the license agreement**" option, and the installation will be canceled.

7. You will now have the option to choose the desired root installation location for the Content Matrix SharePoint WSPs on the target SharePoint server.

   By default the installation Wizard will install all of the selected Content Matrix SharePoint WSPs under the following root folder location:

   - For 64-bit systems - C:\Program Files (x86)\Metalogix
   - For 32-bit systems - C:\Program Files\Metalogix

   If you want to change the install location to something different than the default setting, click the **Change** button. This will open a **Browse For Folder** explorer window. Users can use this explorer window to navigate to the desired folder that the Content Matrix client applications should be installed under. If the desired folder doesn't already exist, you can use the **Make New Folder** button to create and name the new folder to install the files under.

   After the desired folder location has been selected, click **OK**. This will return you to the **Change Current Destination Folder** page in the installation process.

   Once the installation location has been determined and set, click **Next** to continue.

8. A list of check-box options will be displayed allowing you to select which Content Matrix SharePoint WSP components to include in the installation process.

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For your **SharePoint target** server you will need:

- Either **Organizer** or the **License Check** to be installed (one of these **MUST** be installed).
- The **Extensions Web Service** may also need to be installed depending on your installation scenario (this will likely need to be installed unless the Content Matrix client application is installed directly on the target server).
- If you are installing Content Matrix Console – Public Folder Edition you will also want to install the **Email Viewer**.

Note: If you are installing **Content Matrix Migration Express** you will **not** need to install **Metalogix Organizer** or the **License Check** components. However, you may still need to install the **Extensions Web Service** or the **Email Viewer**.

For your **SharePoint source** server (if you are migrating from SharePoint to SharePoint using Content Matrix Console – SharePoint Edition) you may need to install the **Extensions Web Service**, depending on your installation scenario (as long as the source is not SharePoint 2003, and the Content Matrix Client application is not installed on the source server).

Once you have selected all of the desired Content Matrix SharePoint WSPs for installation, click **Next**. All of the checked components will be installed at the same time. Once this part of the installation is complete there will be some additional steps for installing/configuring **Organizer**.

9. After all of the desired Content Matrix SharePoint WSPs have been selected for install, click the **Install** button to run the installation process.

10. The installation process will run.

11. Once the installation process has been completed, click **Finish** to exit the **Metalogix Content Matrix SharePoint WSPs – Installation Wizard**.

    Make sure that the **Launch Organizer Configuration Wizard** option is checked before clicking the **Finish** button (if Organizer was installed). This will automatically start the Organizer installation wizard.

You will be returned to the **Metalogix Content Matrix – Installation Wizard**. If you are finished with installation click **Quit** in the bottom left corner of the dialog. If you installed Organizer and checked the **Launch Organizer Configuration Wizard** option, an additional installation/configure wizard will open.

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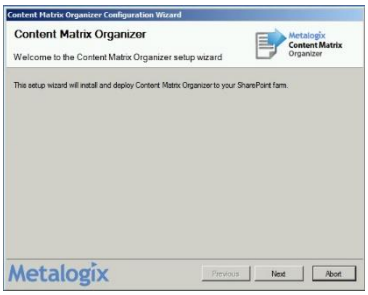
Additional Steps for Installing Organizer and License Check

The installation steps for **Organizer** and **License Check** are **the same until the license key has been installed**. After the license key has been verified and installed the Organizer installation wizard will continue, however, the License Check installation wizard will be finished.

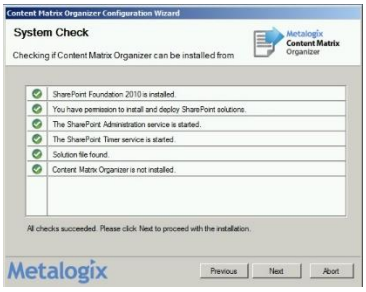
1. The **Content Matrix Organizer – Configuration Wizard** will open.



This can also be opened by going to:
Start>All Programs>Metalogix>Content Matrix Organizer>Content Matrix Organizer Configuration Wizard.

On the Content Matrix Organizer welcome screen click **Next** to begin the install wizard.

2. The installer will now perform a series of system checks to make sure the system is ready for Organizer to be installed. If all system checks pass, click **Next**.



Note: If a system check fails it will be denoted with a red "X" and you will not be able to continue with the installation process until the issue(s) is resolved.

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3. The User License Agreement will open. Read through the **License Agreement**. If you agree to the terms of the license agreement, click the "**ACCEPT**" button.

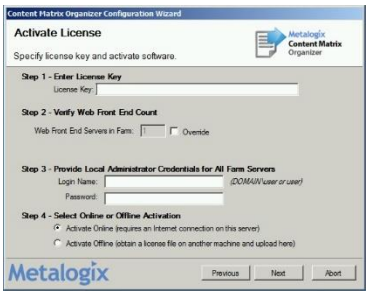
   There is also a **Save or Print** button on this screen if users would like to have a hard copy of the license agreement.

   Note: You will need Adobe Reader if you wish to save or print the agreement.

   If you do not agree to the terms of the license agreement, click the "**DO NOT ACCEPT**" option, and the installation will be canceled. The **Abort** button at the bottom of the dialog will also exit the Wizard.

4. The **Activate License** screen will now open with four steps to follow.

   For **Step 1**, enter the license key.



   NOTE: You may have more than one registration key depending on what licenses you've installed. Please make sure you are using the correct key. There are different keys for production and non-production licenses.

   If you are activating a Trial license key, all Content Matrix features will stop working at the end of the trial period.

5. For **Step 2**, verify the number of WFE servers in the farm. This can be less than the number requested with your license. You must enter an explanation in the **Reason for Override** field if you check the **Override** box.

6. For **Step 3**, provide the credentials for an account that has **local administrator rights** on the WFE(s). The activation and provisioning job that runs requires this access to **register certain components** on each WFE.

7. For **Step 4**, select the **Activate Online** option.

   In some cases users are unable to use the online activation due to security settings or no internet access. In these particular cases, the **Offline activation** option can be selected. Please see the below Offline License Activation section of this document for more details on the offline activation.

   After the desired license activation method has been selected, click **Next**.

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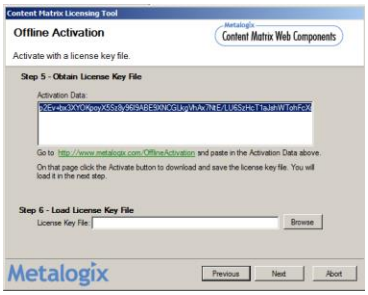
8. If the **Activate Online** option was selected in the previous dialog, then Organizer installer will attempt to contact Metalogix to verify the entered license key. You should not see this process, and the installer will continue on.

   If the **Activate Offline** option was selected instead, then an **Offline Activation** dialog will open, before the installation process continues.

I am running an **Online** license activation. Please skip me down to the next installation steps.

Offline License Activation

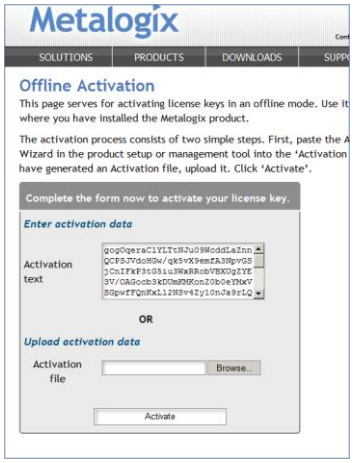
a. If you've selected the **Active Offline** option and clicked **Next**, you will see a **Offline** Activation dialog, with a value already generated in the **Activation Data** window (in **Step 5**).



The data is already selected; copy the data.

b. Click the link or open a browser window on a computer with access to the internet and navigate to http://www.metalogix.com/OfflineActivation.

c. Paste the **Activation Data** in the top field and click the **Activate** button.



d. You will receive an error if you did not enter a valid registration key or Farm Id. If all values entered are valid you will receive a **file download dialog**. Save this file to a location that is accessible by the server where you are performing the license activation.

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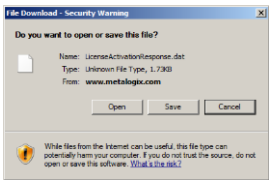
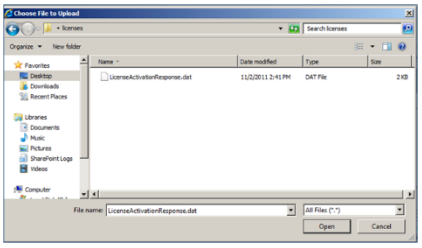


e. Back on the **Offline Activation** dialog, upload the license key file that you received by clicking on the **Browse** button. This can be done by navigating to the location that the file has been saved to, then selecting it and clicking **Open**.



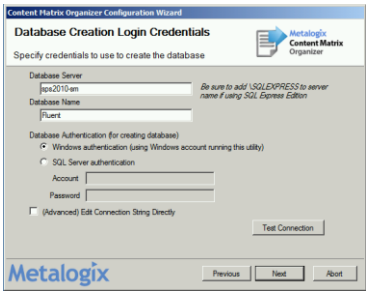
f. Once this file location is loaded in **Step 6** (of the **Offline Activation** window), click **Next** to finish and continue with the main Organizer installation process.

The license key should now be installed and working, and you can continue with the Organizer installation process.

9. After the license key has been installed the installation process will continue if you are installing **Organizer**.

   If you are installing **License Check**, the installation process is now complete and you will be returned to the **Activate License** dialog. Click **Close** to complete the installation process.

10. Provide the name of the **Database Server** where you want the Organizer configuration database to be installed. Optionally you can also change the **Database Name**.



By default, Organizer will use the currently logged in user account (using Windows authentication), but this can be changed to use a SQL Server account instead. The SQL Server authentication account is generally used if the Windows account does not have **Database and Object Create privileges** on the specified SQL Server instance.

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11. You can click the **Test Connection** button to make sure the supplied values are valid.

12. Click **Next**.

13. In the **Database Access Credentials** dialog provide the credentials that will be used to access the Organizer configuration database. We **recommend** using the default setting, which will access the database via the app pool account(s) that the SharePoint web application(s) run under.

As with the **Database Creation Login Credentials** dialog, you can also use the currently logged in user account (using Windows authentication), but this can be changed to use a SQL Server account instead. The SQL Server authentication account is generally used if the Windows account does not have **Database and Object Create privileges** on the specified SQL Server instance.

14. Click the **Test Connection** button to test the connection based on selected authentication method.

15. Click **Next**.

> **Note:** You will see an error if you provided an invalid server/instance name or authentication credentials. Click **Previous** to go back and repair the error.

The SharePoint solution file will now be installed on the local server and deployed to the all servers in the farm.

The page will periodically refresh to update the provisioning status. This process can take upwards of 5 minutes depending on the size of your farm.

> **Note:** If the deployment process fails for any reason the error will be presented in a dialog box. Click **Next.**

16. Upon completion of the deployment process the progress status will change to **All operations successfully completed**. Click **Next**.

17. The installation process is complete. Click **Close**.

After **Close** is clicked the **Content Matrix Organizer – Configuration Wizard** window will close and a browser window will be opened and you will be taken to the **Content Matrix License Management** page in **SharePoint Central Administration**, so you can verify that Organizer has been installed.

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The **Metalogix Content Matrix – Installation Wizard** will still be open in the background. If there are no other Content Matrix SharePoint WSPs that you want to install (i.e. the Extensions Web Service, or the SharePoint Email View), or if you installed them at the same time, you can now exit the installer. Click the **Quit** button in the bottom left-hand corner to exit the installer.

Installing the Content Matrix License Key

Users will be prompted to input an **Activation License Key** when launching the Content Matrix Console for the first time, or when launching it after the current license has expired. If trying to install a new license key over top an existing (active) key, this can be done by going to **Help > Update License** in the main product toolbar. To install a license key:

1. In the **Activate License Key** dialog, select **I have a license key**, and enter the license key, provided with your evaluation or commercial license activation email.

   The key can be copy and pasted into the provided space.

2. Next, select the **activation mode**. Most systems can use the **Online activation** method, as long as the system that Content Matrix Console is on has internet access. In some cases users are unable to use the online activation due to security settings or no internet access. In these particular cases, the **Offline activation** option can be selected.

Online Activation

1. After the license key is entered, select the **Online activation** option. Some users may be trying to authenticate the key through a **proxy**. To do this, click the **Set proxy** option. This will open a new **Proxy server** window.

   This dialog allows users to enter the **Server name/IP** and the **port number** for the proxy, as well as set any necessary **credentials** to access it. After all of these values are set, click the Set button to continue with the license activation. This option is not required in most standard cases.

2. In the **Activate License Key** dialog, click **Next**.

3. Content Matrix Console will contact the Metalogix licensing server and attempt to authenticate the license key. Once it is successful a "**Congratulations!**" message will be returned, and the license key will be active and in use.

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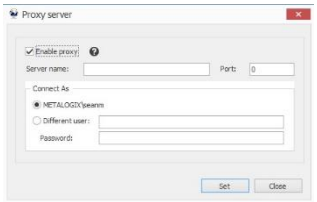


4. Click **Finish** to complete the process.

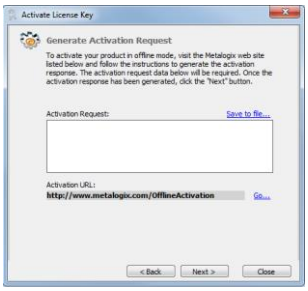
Offline Activation

This option is generally used in cases where users are unable to use the online activation, due to security setting or no internet access. This option will still require some internet access, but allows for the authentication to be done from another machine, one that is not as restricted by security or no internet access.

1. Select the **Offline activation** option.

2. Click **Next**.

3. A **Generate Activation Request** dialog will be displayed. In the **Activation Request** section of this dialog will be a different key. The key in this window cannot be edited. This key is used to help activate the license from another location. This key can either be copied from the window, or the **Save to file** option can be used to save the key into a text file (in case it needs to be copied to another machine).



   There is also an **Activation URL** listed under the **Activation Request**. Copy this URL to a web browser that has internet access. Alternately if the system the Content Matrix Console is installed on does have internet access, and can open a web browser, click **Go** to automatically open a web browser to this URL.

   Navigate to the **Activation URL** web page on a machine that has internet access.

4. On the **Offline Activation** page, in the web browser, enter the key into the **Activation data** text box. Or if the key was saved to a file, select **Browse** and navigate to the file with the key in it.

5. Once the key is entered, click **Activate**.

6. The screen will refresh, and an **Activation Successful** message should be listed next to the text box. The text box itself will have a new key entered in it. You can copy this text by either:

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- Clicking the **Download file** button. This will save the new authenticated license as a DAT file called "LicenseActivationResponse" to a location on that local system.

- Clicking the **Copy text** button. This will attempt to copy the text onto the local systems clipboard, so it can be later pasted into the Content Matrix Console, or pasted into another file. If the copy to the clipboard is successful, a message will be displayed stating "Activation Text successfully copied to the clipboard." Click **OK** to continue.

- Manually copy the text, by right-clicking in the text box and using the **Select all** option, then right-click again and choose **Copy**.

7. Once the authenticated license has been copied, return to the Content Matrix Console.

8. If the **Generate Activation Request** window is still open, click **Next**. This should move to the **Enter your Activation Response** window.

9. Paste the new license key into this window (right-click inside the text box, and choose **Paste**). Alternately, if the license was saved to a file from the web page, the **Load from file** option can be used to navigate to, and select, the DAT file. This would then load the license. Once the license has been entered, click **Next**.

10. The authenticated license has now been entered into the Content Matrix Console. A "**Congratulations!**" message will be returned, and the license key will be active and in use.

11. Click **Finish** to complete the process.

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Configuration

This section will review some of the basic configuration options that are required to quickly get up and running with the Content Matrix Console client application(s), Organizer, Email Viewer and the Extensions Web Service.

Configuring Content Matrix Console

While there are a number of options that can be configured in Content Matrix, there are no options that require additional configuration before Content Matrix can be used to migrate content.

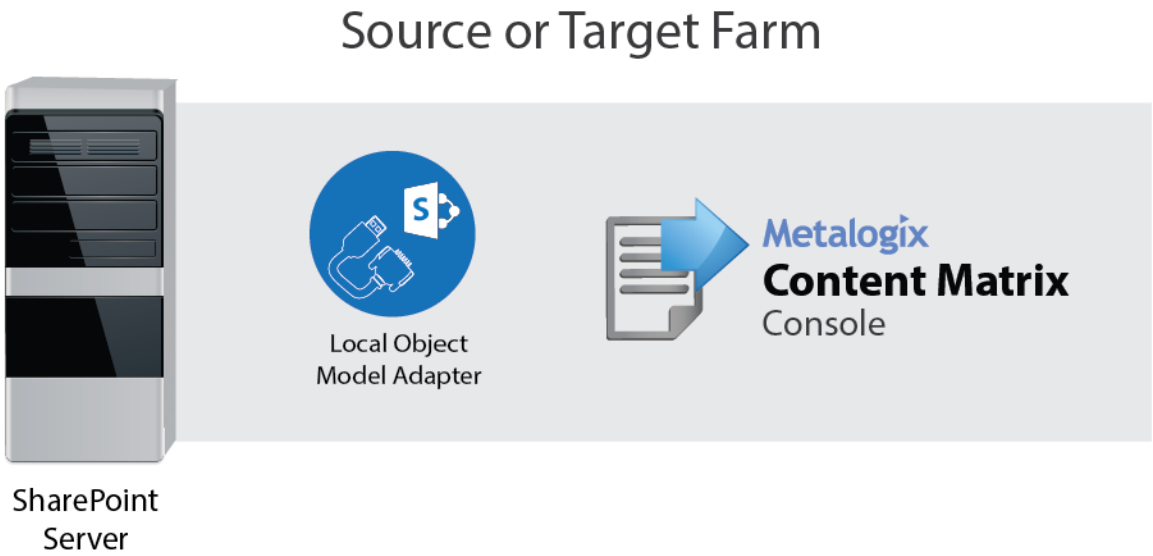
Content Matrix SharePoint Connection Adapters

Metalogix Content Matrix includes a number of adapters that can be used to connect to SharePoint. Each adapter has different benefits for specific scenarios, and determining which adapter to use for connecting to SharePoint sources and destinations involves an understanding of these adapters.

The Local Object Model Adapter

The local object model adapter uses the SharePoint Server Object Model API to communicate with SharePoint. Since the SharePoint Server Object Model offers the most functionality of all SharePoint APIs, this is the most capable of adapters available.

Because this adapter uses the local object model, it can only be used when the Content Matrix Console is installed on one of the SharePoint WFE's in the SharePoint farm:



The Metalogix SharePoint Extensions Web Services Adapter

The Metalogix SharePoint Extensions Web Services Adapter is installed as a SharePoint Solution on either the source or destination SharePoint server or both, and allows the Content Matrix Console to remotely execute a majority of the SharePoint Server Object Model APIs through a web services wrapper created by Metalogix:

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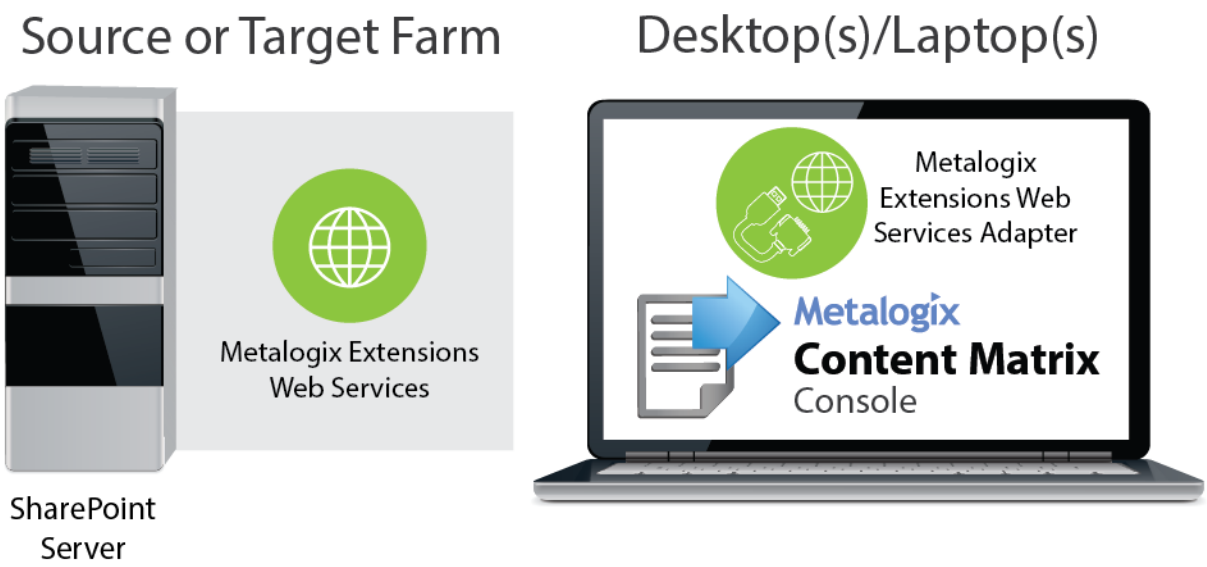
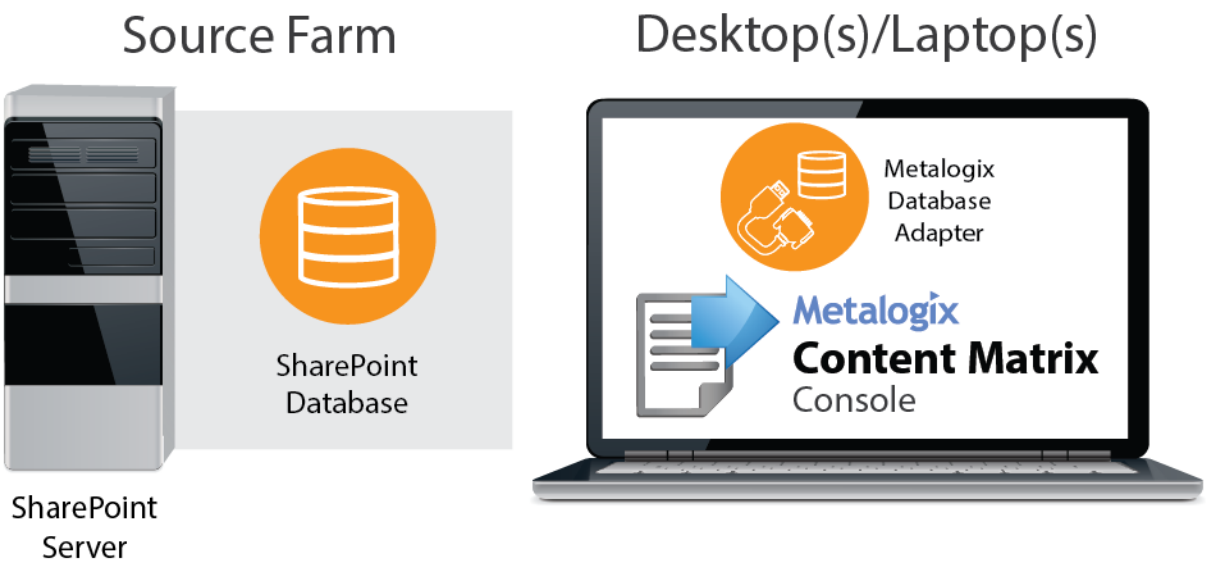


The Metalogix Database Adapter

The Metalogix Database Adapter is installed in the same location as the Content Matrix client application is installed, whether the client application is installed on a standalone machine or on the target server, and accesses **source only** SharePoint data by reading the Content Databases directly from the SQL Server which the Source SharePoint farm is using. This database can be copied to the destination farm location to speed up migration if needed. An example of a scenario where this would be useful is if your source server is on-premises, while your destination server is hosted on Azure:



The Metalogix Client Side Object Model (CSOM) Adapter

The Metalogix CSOM Adapter is installed in the same location as the Content Matrix Console, and leverages the SharePoint Client Side Object Model to communicate with SharePoint 2013 Online or SharePoint 2013 or 2016 On-premises. Because of limitations in the Client Side Object Model as compared to the Server Object Model, this

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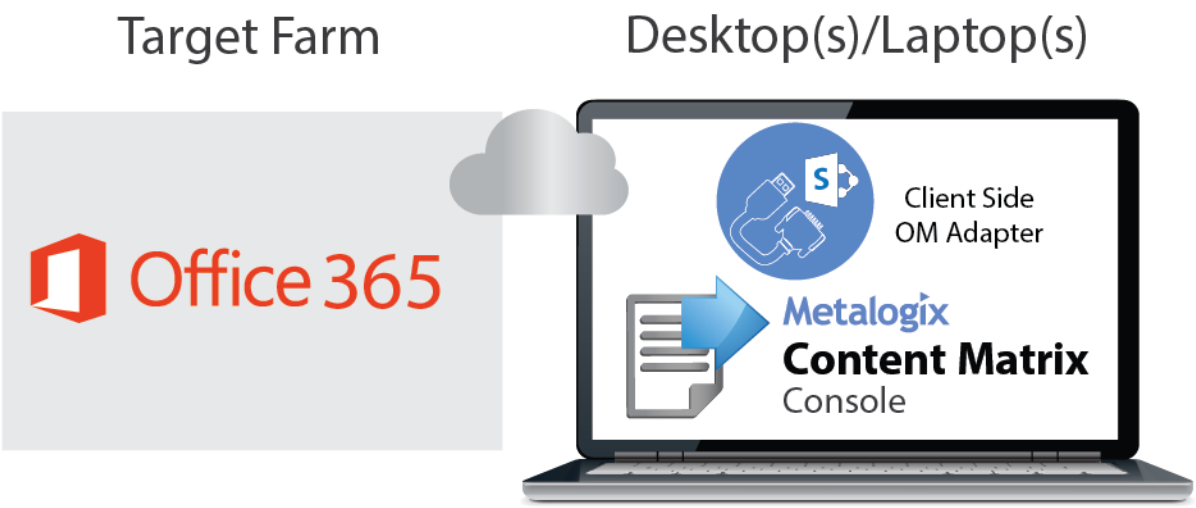
adapter is typically only used for scenarios where the SharePoint Server is a multi-tenant SharePoint Online server on Office 365:



The Metalogix Native Web Services Adapter

The Metalogix Native Web Services Adapter is installed in the same location as the Content Matrix Console, and is the least capable of all of the adapters available. It leverages the Native Web Services that Microsoft SharePoint provides for Microsoft SharePoint Server. These web services are relatively limited in functionality as compared to the Metalogix Extensions Web Services, and this adapter is typically only used in scenarios where all of the other adapters are not supported due to limitations or in the client environment.

Configuring Organizer

The only configuring needed for Organizer is access. By Default, all users with **Contribute** or greater access will see the Organizer ribbon, and **Site Collection** and **Farm Administrators** will see the Reorganize option. To disable any of this, please see the **Access and Settings** section of the Content Matrix Organizer Administration Guide.

Configuring License Check

Once License Check is installed and the second Installation Wizard has been run, no additional configurations need to be made.

Configuring the Extensions Web Service

While there are no settings that need to be configured for the Extensions Web Service, there is a way to confirm that they are installed correctly and are working.

Confirming the Metalogix Extensions Web Service is Installed and Working

After installing the Extensions Web Service, you should check to make sure that it was installed correctly. To do this you can attempt to connect to the web service page in a browser window by entering: **[YourSiteURL]/_vti_bin/ml/[Extensions Web Service version number (7.X.X.X)]/mlspextensions.asmx**. For example, if the Extensions Web Service (version 6.1.0.4) is installed on a server named **SharePointServ**, then you would enter:

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SharePointServ/_vti_bin/ml/6.1.0.4/mlspextensions.asmx.

Note: The version number is only required in the file path in versions 5.0.0.4 and later. Using the version number in the folder path does not work for any of the v.4.X.X.X versions of the Extensions Web Service.

If this command does not successfully connect to the Metalogix Extensions Web Service web page, then it may mean that the Web Service was not installed on all Web Front Ends, for this farm.

Another method that can be used to check if the Extensions Web Service was installed is to go to the **Solution Management** page in **Central Administration** and see if the **metalogix.sharepoint.adapters.extensions.X.X.X.X.wsp** file is listed (where "X" is replaced by the version number). Users can find the **Solution Management** page at:

- **SharePoint 2007** - Central Administration > Operations > Solution Management.
- **SharePoint 2010, 2013**, and **2016** - Central Administration > System Settings > Farm Management > Manage farm solutions.

Configuring Email Viewer

After installation of the Email Viewer web part is complete, users will need to manually enable it in order for the web part to be used. This is because the Email Viewer web part would otherwise make changes to the **web.config** file for the environment it is installed on, so in order to enable it for use, some settings need to be manually configured in the **web.config** file.

This file is generally found on the server that the Email Viewer web part is installed on, at the following location:

C:\inetpub\wwwroot\wss\VirtualDirectories\<Port>

There are two changes that need to be made in the **web.config** file to enable the Email Viewer for use. These changes primarily center around the Session State settings, and should be made by an Administrator. The following steps should help guide you through these changes.

1. Open the **web.config** file on the target SharePoint server that the Email Viewer Web Part is installed on. This file should be in the same location as mentioned above. It is recommended to open this file in Notepad or a similar program, where it can be edited.

   This can also be reached by going into your **Internet Information Services (IIS) Manager**, selecting your SharePoint Site (under "Sites"), the right-clicking on the SharePoint site node and choosing **Explore**. This will open a Windows Explorer window to the desired folder.

2. Search for the "**httpModules**" tag (it may be an empty tag that looks like this: "**<httpModules />**").

3. If the "**httpModules**" tag is found, and already contains other content you will need to add a new line under the node. If the tag doesn't have any listed modules (i.e. it is a closed tag) you will need to remove:

   <httpModules />

   And replace it with:

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<httpModules> </httpModules>

4. When ready, the following line will need to be added as a child under the "**httpModules**" tag.

   <add name="Session" type="System.Web.SessionState.SessionStateModule" />

5. Next, still in the **web.config** file, find the "**enableSessionState**" tag (this is generally somewhere below the "httpModules" tag). Modify this tag to read as "**True**" (or confirm that it is already reading as "True").

6. Now save the **web.config** file with these changes.

Users should now be able to view and use/load the Email Viewer Web Part in their target SharePoint environments.

Note: In some cases the Email Viewer may still not work after adding the extra line to the **<httpModules>** tag. In these cases users will need to find the:

<modules runAllManagedModulesForAllRequests="true">

tag and remove the following line from under it:

<remove name="Session" />.

Once this line is removed and saved, Email Viewer should now work.

If users are encountering further issues with the Email Viewer, please see the Email Viewer Web Part Troubleshooting page for possible tips and troubleshooting steps.

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Next Steps

The Metalogix Content Matrix Console, Organizer, and the Extensions Web Service are now installed in running in your migration environment(s). Please go to the Metalogix Content Matrix Evaluation Guide for the next steps in beginning your evaluation and testing.

Additional Documentation

The Metalogix Content Matrix Console documentation ships with the client, but is also available online at the Metalogix Product Resource Certer under the Content Matrix heading: http://www.metalogix.com/Support/Support-Resources/Content-Matrix/Content-Matrix-Documentation.aspx.

Additional documentation sets include:

Metalogix Content Matrix Evaluation Guide	The Evaluation Guide will guide you through various Metalogix Content Matrix Console migration actions. This is provided for the purpose of evaluating and reviewing Content Matrix to migrate your content into SharePoint. Prospective clients are encouraged to use this guide for basic testing. A copy of this document should be in the download Zip file, but can also be found online here: http://www.metalogix.com/Libraries/Product_Collateral/Metalogix_Content_Matrix_Evaluation_Guide.pdf
Quick Start Guide for Content Matrix Console	The Quick Start Guide provides a quick explanation of how to install the Metalogix Content Matrix Console, and its additional components (Metalogix Organizer and the Extensions Web Service). This document helps get users installed and set up under a specific scenario in order to start Evaluation testing. A copy of this document should be in the download Zip file, but can also be found online here: http://www.metalogix.com/Support/Support-Resources/Content-Matrix/Content-Matrix-Documentation.aspx
Full Documentation for Content Matrix Console	Metalogix Content Matrix Console is comprised of a number of migration "Editions," and each of these Editions has its own set of "Help" documentation. This documentation can be found within the client application itself by going to **Help** in the ribbon menu, and selecting **Help Topics** (this is the same for all Editions, and provides you with general directions and information on all of the available migrations and actions. There are also Online versions of the documentation that can be found here: • SharePoint Edition: http://www.metalogix.com/help/Content%20Matrix%20Console/SharePoint%20Edition/ • File Share Edition: http://www.metalogix.com/help/Content%20Matrix%20Console/File%20Share%20Edition/

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	• Public Folder Edition: http://www.metalogix.com/help/Content%20Matrix%20Console/Public%20Folder%20Edition/ • eRoom Edition: http://www.metalogix.com/help/Content%20Matrix%20Console/eRoom%20Edition/ • Blogs and Wikis Edition: http://www.metalogix.com/help/Content%20Matrix%20Console/Blogs%20and%20Wikis%20Edition/
Content Matrix Release Notes	For every release of Metalogix Content Matrix Console, there is also a set of Release notes. These notes list all of the new **features and fixes** that have been included in the release build. This list also includes all of the features and fixes for Content Matrix Organizer. A copy of the release notes can be found online here: http://www.metalogix.com/docs/default-source/product-collateral/Content_Matrix_Release_Notes.pdf
Content Matrix Organizer Users Guide	The Metalogix Content Matrix Organizer User Guide provides general users with directions and information on all of the available actions and configurations for the Organizer. A copy of this document should be in the download Zip file, but can also be found online here: http://www.metalogix.com/docs/default-source/product-collateral/Content_Matrix_Organizer_User_Guide.pdf
Content Matrix Organizer Administrators Guide	The Metalogix Content Matrix Organizer Administrators Guide provides Administrator users with directions and information on all of the available actions and configurations for the Organizer. These directions are more advanced than the standard Users Guide. A copy of this document should be in the download Zip file, but can also be found online here: http://www.metalogix.com/docs/default-source/product-collateral/Content_Matrix_Organizer_Administration_Guide.pdf

Getting Additional Support

Metalogix offers support packages with all purchased licenses of Metalogix Content Matrix Console. Qualified licensees can receive technical support by calling 1-202-609-9100.

You can also visit our resource center page. For information about new builds, you can also subscribe to the Metalogix corporate blog or the Metalogix Twitter account.

A support ticket can also be filed directly at Support Portal.
For pricing and order information, please contact sales@metalogix.com.

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Uninstallation

This section will review how to uninstall Metalogix Content Matrix Console and its additional SharePoint WSPs components.

Uninstalling the Content Matrix Console Client Application

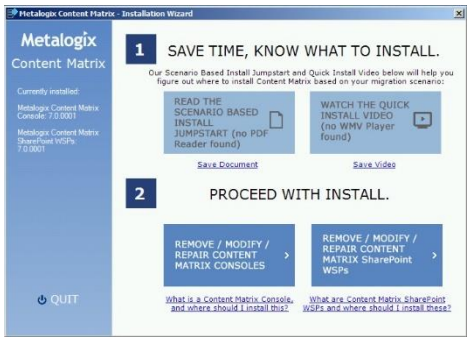
It is recommended that uninstalling Content Matrix Console should be initiated from the **ContentMatrix_Web_Setup.exe** file. Using this method will automatically uninstall the Content Matrix Console client application.

1. Open Windows Explorer to the folder containing the Metalogix Content Matrix Setup installer file. Double-click the **ContentMatrix_Web_Setup.exe** to start the installation process.

   Because this installer requires an elevated set of permissions to run, if you do not have the required permissions a message will open informing you that elevated permissions are required. To run the installer with these elevated permissions, select the installer file, right-click and select the **Run as administrator** option.

   Note: Users can also run the **ContentMatrix_Offline_Setup.exe** file. The Web Setup file is the same as the **ContentMatrix_Offline_Setup.exe** file except that it doesn't actually contain the installer components. Instead, when it is run it will **download** only the selected installation components and run the installation for those. This means that the EXE file itself is smaller in size, but the system that Content Matrix Console is being installed on **must have access to the internet** so the appropriate components can be downloaded for installation.

2. The Metalogix Content Matrix Installation Wizard will open.



3. If the Content Matrix Console client application is installed on this machine, then the "**Install Content Matrix Consoles**" button, under **Step 2** will be changed to "**Remove/Modify/Repair Content Matrix Consoles**."

   Click the "**Remove/Modify/Repair Content Matrix Consoles**" button to continue the uninstallation.

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4. This will open the **Program Maintenance** dialog in the **Metalogix Content Matrix Client Consoles - Installation Wizard** window.

Here you will have two options:

- The first method is to select the **Remove** option, which will remove all the Content Matrix Editions that are installed on the current machine. When the **Remove** button is clicked, you will be prompted with an Uninstall confirmation message, asking you to confirm that you want to uninstall Content Matrix Console and all its features from the current system. Click **OK** to confirm and proceed with the uninstallation.

- The second method is to select the **Modify** option. This will allow you to specifically select any Content Matrix Console Edition check-box option, and any check-boxes that are still selected will **not** be uninstalled.

  For example, if SharePoint and File Share Editions are installed, and the **Modify** option is selected. If you then uncheck SharePoint Edition and continue with the modification, SharePoint Edition would be uninstalled (since it is unchecked), but File Share Edition will still be installed (because it was still checked).

  Once desired Content Matrix Console Editions are unchecked, click the **Install** button to continue running the uninstallation process.

5. Any **unchecked** Content Matrix Console Editions will be uninstalled. Or, if **Remove** was selected, all installed Content Matrix Console Editions will be uninstalled.

6. The uninstallation process will run, and the client applications will be uninstalled. Once the installation process has been completed, click **Finish** to exit the installer Wizard.

7. After **Finish** is clicked the **Content Matrix Console – Client Installation Wizard** will close and the **Metalogix Content Matrix – Installation Wizard** will re-open.

   If you have installed the Content Matrix client application on the target SharePoint (2010, 2013, or 2016) server, then you may also need to uninstall either Metalogix Organizer or the Content Matrix License Check component on the same server. In this case, click the **Remove/Modify/Repair Content Matrix SharePoint WSPs** button under **Step 2** of the **Metalogix Content Matrix – Installation Wizard**. This will launch the

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SharePoint server side installation components allowing you to uninstall.

If the uninstallation of the Content Matrix Console client application(s) is complete and no additional components need to be uninstalled, select the **Quit** button in the bottom left-hand corner to close the installer.

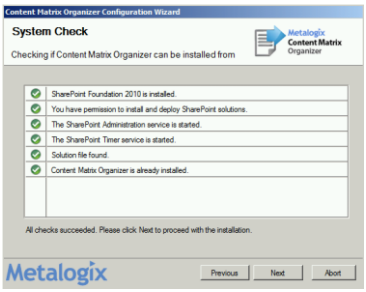
Uninstalling Metalogix Organizer

It is recommended that uninstalling Organizer should be initiated from the **Metalogix Content Matrix Setup.exe** file. Uninstalling and removing Organizer must be done in two parts. The first step is running the **uninstall** action from the **Content Matrix Organizer Configuration Wizard** which will stop and retract Organizer. The second step is to remove Organizer from the environment using the **Metalogix Content Matrix Setup.exe** file.

1. Open the **Content Matrix Organizer Configuration Wizard**. This can be done by going to:

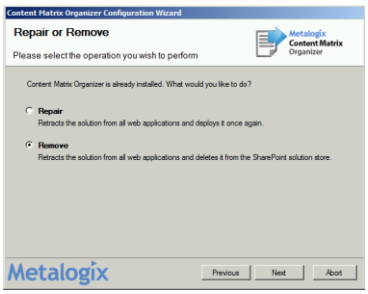
   Start > All Programs > Metalogix > Metalogix Organizer > Content Matrix Organizer Configuration Wizard.

2. The **Content Matrix Organizer** configuration wizard will open. Click **Next** to continue.



3. The installer will now perform a series of system checks to make sure the system is ready for Organizer to be removed. If all system checks pass, click **Next**.

   NOTE: If a system check fails it will be denoted with a red "X" and you will not be able to continue with the uninstall process until the issue(s) is resolved.



4. Choose the **Remove** radio button, and click **Next**.

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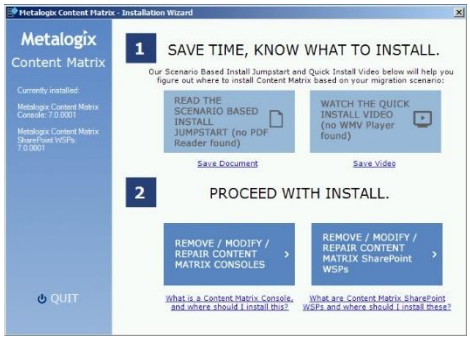
5. The solution file will now be removed from all servers in the farm. This process can take upwards of 5 minutes depending on the size of your farm.

6. Upon completion of the uninstall process the progress status will change to **All operations successfully completed**. Click **Next**.

7. The uninstall (removal) process is complete. Click **Close**.

8. Once this is complete navigate to the location that contains the **ContentMatrix_Web_Setup.exe** file. Then run the **EXE Setup** file.

9. The Metalogix Content Matrix Installation Wizard will open.



10. If Organizer, or any other Content Matrix SharePoint WSPs, is installed on this machine, then the "**Install Content Matrix SharePoint WSPs**" button, under **Step 2** will be changed to "**Remove/Modify/Repair Content Matrix SharePoint WSPs**."

    Click the "**Remove/Modify/Repair Content Matrix SharePoint WSPs**" button to continue the uninstallation.

11. This will open the **Program Maintenance** dialog in the **Metalogix Content Matrix SharePoint WSPs - Installation Wizard** window.

    Here you will have two options:
    - The first method is to select the **Remove** option, which will remove all the Content Matrix SharePoint WSPs that are installed on the current machine. When the **Remove** button is clicked, you will be

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prompted with an Uninstall confirmation message, asking you to confirm that you want to uninstall the Content Matrix SharePoint WSPs and all their features from the current system. Click **OK** to confirm and proceed with the uninstallation.

- The second method is to select the **Modify** option. This will allow you to specifically select any Content Matrix SharePoint WSPs to remove by using their check-boxes. Any check-boxes that are still selected will **not** be uninstalled, but any SharePoint WSPs that are un-checked will be removed.

  For example, if Organizer and the Extensions Web Service are installed, and the **Modify** option is selected. If you then uncheck Organizer and continue with the modification, Organizer would be uninstalled (since it is unchecked), but the Extensions Web Service will still be installed (because it was still checked).

  Once desired Content Matrix SharePoint WSPs are unchecked, click the **Install** button to continue running the uninstallation process.

12. Any **unchecked** Content Matrix SharePoint WSPs will be uninstalled. Or, if **Remove** was selected, all installed Content Matrix SharePoint WSPs will be uninstalled.

13. The uninstallation process will run, and Organizer will be uninstalled. Once the installation process has been completed, click **Finish** to exit the installer Wizard.

14. After **Finish** is clicked the **Metalogix Content Matrix SharePoint WSPs - Installation Wizard** will close and the **Metalogix Content Matrix – Installation Wizard** will re-open.

    If you have installed any of the other Content Matrix SharePoint WSPs on the target SharePoint (2010, 2013, or 2016) server, then you may also need to uninstall the Extensions Web Service component on the same server. Or if the Content Matrix Console client application is installed, you may need to remove it as well.

    If the uninstallation of Organizer is complete and no additional components need to be uninstalled, select the **Quit** button in the bottom left-hand corner to close the installer.

Please see the appropriate section of this document for help with uninstalling any additional Content Matrix Console components.

Uninstalling the Metalogix Extensions Web Service

It is recommended that uninstalling the Extensions Web Service should be initiated from the **ContentMatrix_Web_Setup.exe** file. Using this method will automatically retract the solution, and then uninstall it.

1. Navigate to the location that contains the **ContentMatrix_Web_Setup.exe** file.
   Run the **EXE Setup** file.

2. The Metalogix Content Matrix Installation Wizard will open.

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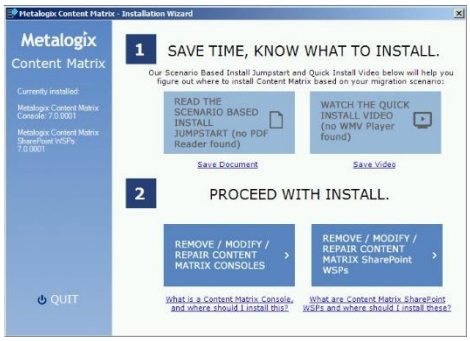
3. If the Extensions Web Service, or any other Content Matrix SharePoint WSPs, is installed on this machine, then the "**Install Content Matrix SharePoint WSPs**" button, under **Step 2** will be changed to "**Remove/Modify/Repair Content Matrix SharePoint WSPs**."



Click the "**Remove/Modify/Repair Content Matrix SharePoint WSPs**" button to continue the uninstallation.

4. This will open the **Program Maintenance** dialog in the **Metalogix Content Matrix SharePoint WSPs - Installation Wizard** window.

Here you will have two options:

- The first method is to select the **Remove** option, which will remove all the Content Matrix SharePoint WSPs that are installed on the current machine. When the **Remove** button is clicked, you will be prompted with an Uninstall confirmation message, asking you to confirm that you want to uninstall the Content Matrix SharePoint WSPs and all their features from the current system. Click **OK** to confirm and proceed with the uninstallation.

- The second method is to select the **Modify** option. This will allow you to specifically select any Content Matrix SharePoint WSPs to remove by using their check-boxes. Any check-boxes that are still selected will **not** be uninstalled, but any SharePoint WSPs that are un-checked will be removed.

  For example, if Organizer and the Extensions Web Service are installed, and the **Modify** option is selected. If you then uncheck Organizer and continue with the modification, Organizer would be uninstalled (since it is unchecked), but the Extensions Web Service will still be installed (because it was still checked).

  Once desired Content Matrix SharePoint WSPs are unchecked, click the **Install** button to continue running

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the uninstallation process.

5. Any **unchecked** Content Matrix SharePoint WSPs will be uninstalled. Or, if **Remove** was selected, all installed Content Matrix SharePoint WSPs will be uninstalled.

   The uninstallation process will run, and the Extensions Web Service will be uninstalled. This will retract and remove the Extensions Web Service from all WFE's on the farm. Once the installation process has been completed, click **Finish** to exit the installer Wizard.

6. After **Finish** is clicked the **Metalogix Content Matrix SharePoint WSPs - Installation Wizard** will close and the **Metalogix Content Matrix – Installation Wizard** will re-open.

   If you have installed any of the other Content Matrix SharePoint WSPs on the target SharePoint (2010, 2013, or 2016) server, then you may also need to uninstall the Metalogix Organizer component on the same server. Or if the Content Matrix Console client application is installed, you may need to remove it as well.

   If the uninstallation of the Extensions Web Service is complete and no additional components need to be uninstalled, select the **Quit** button in the bottom left-hand corner to close the installer.

Another option is to manually **retract and remove** the Extensions Web Service through SharePoint's **Central Administration** page.

This can be done from:

- **SharePoint 2010, 2013,** or **2016**
  Central Administration > System Settings > Farm Management > Manage farm solutions.
- **SharePoint 2007**
  Central Administration > Operations > Solution Management.

Please see the appropriate section of this document for help with uninstalling any additional Content Matrix Console components.

Uninstalling the License Check

The process for uninstalling the Content Matrix License Check component is the same as the process for uninstalling the Extensions Web Service. Please see steps 1-6 of the Uninstalling the Extensions Web Service section (above) for details.

If using the "**Modified**" uninstall method please make sure that the **"License Check**" check-box is un-checked.

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