Metalogix

Content Matrix
Scenario Based Install Jumpstart

Publication Date: June 12, 2017

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Introduction

This document will help provide some quick guidance on what the various Content Matrix components are and recommendations on where to install them based on your scenario.

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

Content Matrix Installable Components

Content Matrix consists of a combination of Consoles and SharePoint WSPs. Content Matrix Consoles are the primary User Interface (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

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. 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). Content Matrix Consoles use MEWS to communicate with a SharePoint Server that is not co-located with the consoles. For scenarios where Content Matrix Consoles are installed on a Web Front End (WFE) of a SharePoint Server Farm, Content Matrix Consoles use the SharePoint Server Object Model directly.

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

The Metalogix Organizer is a SharePoint UI based content organization solution that Farm Admins can allow specific Site Collection Owners, Site Owners and Power Users to use to improve usability and findability of content by reorganizing SharePoint content before, during, and after a migration. Examples of reorganization tasks include:

- Site promotion.
- Site Collection demotion.
- Migration of content.
- Migration of content types

  and metadata.
- Migration of permissions.

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. Since the focus of this Quick Install Guide is on SharePoint to SharePoint migrations, this guide will not address the installation of the SharePoint Email Viewer in diagrams below. However, the Advanced Installation Guide for Content Matrix Consoles includes these scenarios and is included in the Content Matrix zip files on the Content Matrix web site under Support/Product Downloads and Resources/Documentation.

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

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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.

Installation Scenarios

In this document, we are covering SharePoint to SharePoint migrations. For migrations from sources other than SharePoint, please read the Quick Start Guide for Content Matrix.

1. For migrations to on-premises SharePoint servers, please proceed on this page to view recommended installation configurations.

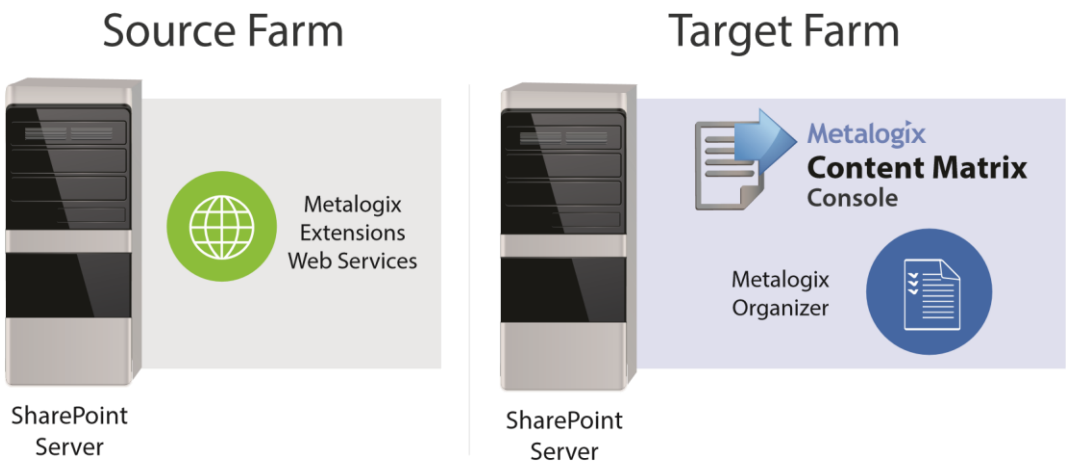
2. For migrations to cloud based SharePoint servers, go to page 7 for recommended installation configurations

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 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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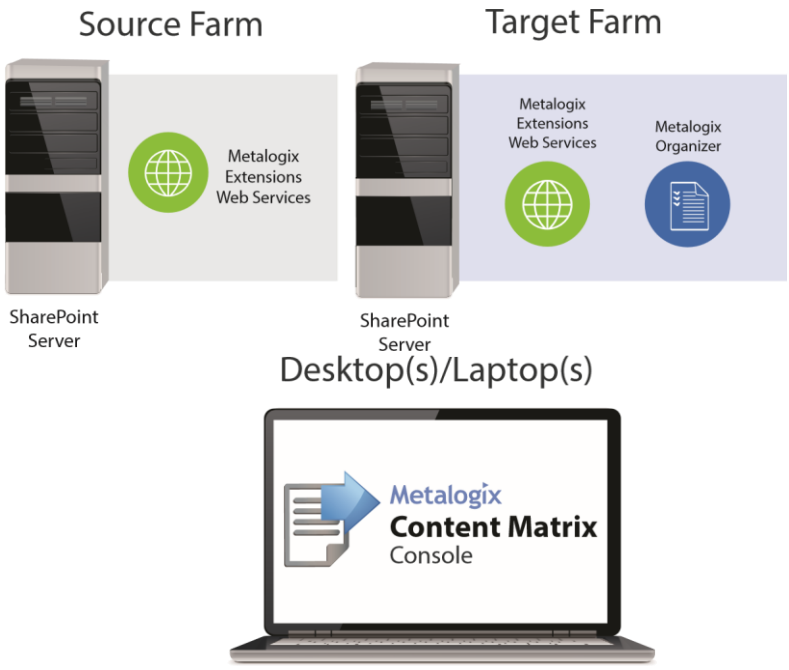
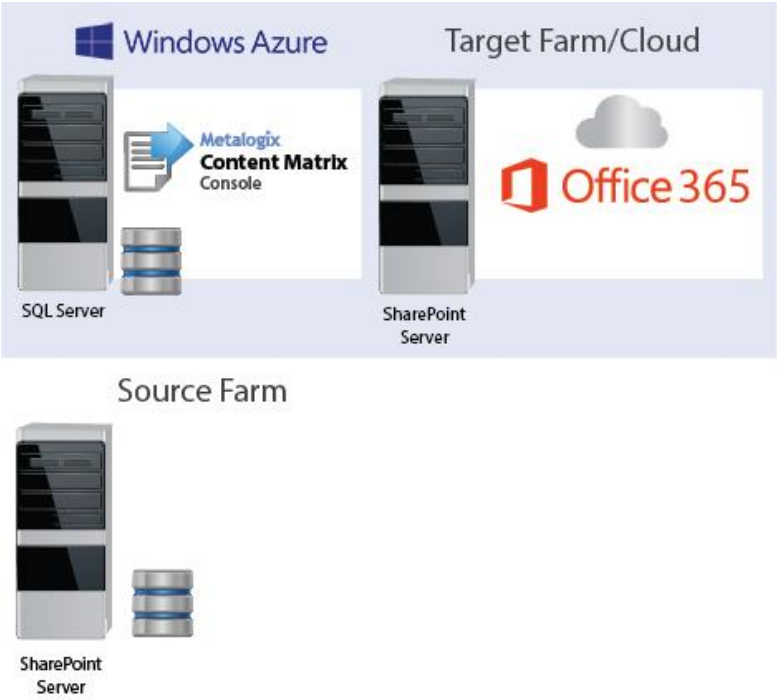


Cloud-Based Target Server Installation Scenarios

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

1. For migrations to Office 365S, determine what region your Office 365 tenancy is, and spin up 1 or more Azure based VMs in the same region (eg. Eastern United States) as your Office 365S tenancy:



   i One or more of the Azure VMs should include Microsoft SQL Server 2008 R2 or later.
   ii Backup your Source Farm Content Databases, and restore them into the Azure based SQL Server.

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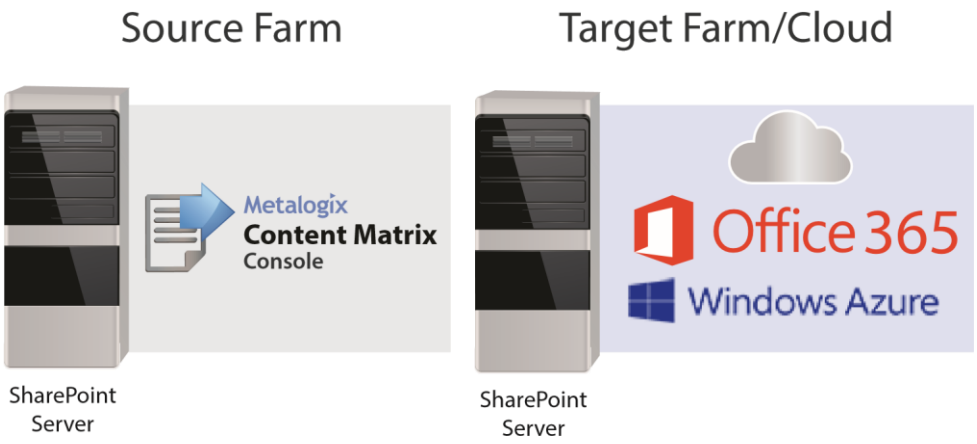
iii Install the console on the Azure VM, and to achieve significant parallel processing to make up for WAN based performance constraints, on one or more Azure VMs within the same domain as the SQL Server Azure VM.

iv User the built in Database Adapter in Content Matrix to connect to the Source Farm Content DBs on the Azure machines.

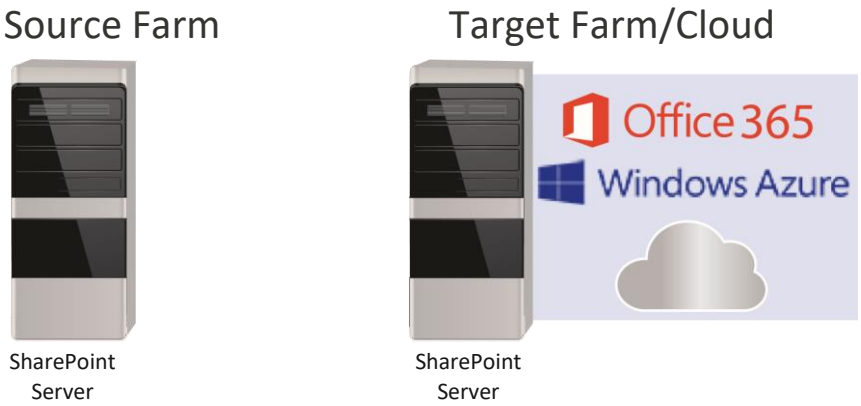
OR

2. For up to 2 users, install the Content Matrix Console on a WFE of the Source SharePoint Farm:



OR

3. 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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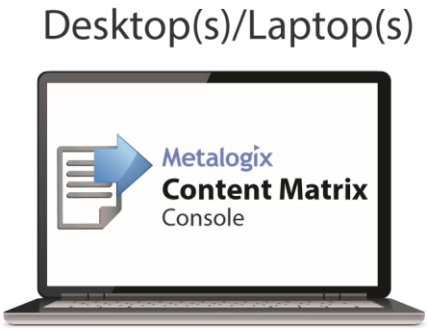

For more scenario based installation options, please read the Content Matrix Advanced Installation Guide, or click on the button on the install screen to watch the Content Matrix Quick Install Video.

[1] – For Office 365 Dedicated (O365-D) migrations, MEWS should be installed on a WFE of the SharePoint Target farm as it would be in on-premises migrations.

About Metalogix

Metalogix is the leader in **management tools for Microsoft content and collaboration platforms**, including SharePoint, Exchange, and Office 365. Metalogix tools provide **a better way to monitor, migrate, store, synchronize, archive, govern and backup content**.

14,000 customers on 7 continents rely on Metalogix' best of breed suite of tools and 24x7 LIVE support to improve availability, reduce risks, and lower costs of their mission-critical Microsoft platforms.

Metalogix is a Microsoft Gold Partner, Microsoft Public Sector managed partner and certified GSA provider. Headquartered in Washington DC, Metalogix is backed by Insight Venture Partners and Bessemer Venture Partners.

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