



# **Content Matrix Quick Start Guide**

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## Contents

Introduction .....	4
Content Matrix Installable Components.....	4
Requirements.....	5
Hardware Requirements .....	5
Software Requirements.....	6
Access Requirements .....	6
Installation.....	7
Content Matrix Console Client Application .....	7
Installing the Content Matrix Console.....	8
Content Matrix SharePoint WSPs .....	11
Installing the Content Matrix SharePoint WSPs.....	11
Additional Steps for Installing Organizer.....	14
Next Steps .....	18
Additional Documentation .....	18
Getting Additional Support.....	18

## Introduction

This document is Quick Start installation guide for Metalogix Content Matrix Console, which allows users to migrate their source content into SharePoint.

This document is aimed at getting users installed and set up to run the Metalogix Content Matrix Console, so you can use the **Evaluation Guide** and determine if Content Matrix will meet your SharePoint migration needs. For experienced Metalogix Content Matrix or Migration Manager Customers, this guide should be sufficient for a full installation with the [Advanced Installation Guide](#) available as a reference for any additional information.

You will be given steps on how to quickly install **Content Matrix Console**, **Metalogix Organizer**, and the **Metalogix Extensions Web Service**. The installation steps will guide you on where to install which components, so evaluation and testing can begin. Please see the [Advanced Installation Guide](#) for more specific details on installation including: hardware requirements, software requirements, access requirements, other installation scenarios, connection adapters, configuration, general information, and uninstallation.

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)



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.

- **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. Please see the [Advanced Installation Guide](#) for more specific details on installation requirements.

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.
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	Windows Server 2003 or later, for both 32-bit and 64-bit systems.
SharePoint Target Environment	SharePoint 2007 (MOSS and WSS 3.0) and later.* This includes Microsoft Office 365 – Standard and Dedicated versions.
Database	SQL Server 2000 and later, 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. **

**\*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).


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 <b>Administrator</b> permission.

Component	Requirement
Application Pool Accounts	If connecting to a <b>remote</b> , on-premise, instance of SharePoint the <b>Metalogix Extensions Web Service</b> 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 <a href="#">Installing the Extensions Web Service</a> section of this document for more details and permission specifications.
Server Access	The installing user, and any user launching Content Matrix Console, will require <b>Administrator</b> permissions on the local machine.
SharePoint Access	The migrating user requires the following permissions (provided that the <b>Extensions Web Service</b> is installed on the SharePoint target. <ul style="list-style-type: none"> <li>• <b>Site Collection Administrator</b> on the target SharePoint environment.</li> <li>• <b>Farm Administrator</b> on the target SharePoint environment.</li> <li>• Permissions to access all of the <b>content</b> that is being migrated.</li> </ul>
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: <ul style="list-style-type: none"> <li>• <a href="#">Metalogix Organizer</a></li> <li>• <a href="#">Metalogix Extensions Web Service</a></li> </ul>

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 how to install each of the Content Matrix Console components.

	<p><b>Note:</b> Before installing the latest version of Content Matrix Console, you must first <b>uninstall any earlier versions</b> from the system.</p> <p>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.</p>
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## Content Matrix Console Client Application

The Content Matrix Console Setup file can be installed on any computer that meets the minimum hardware and software requirements for each component that is installed, provided that the computer also has access to the source and target environments (for connection purposes). This Quick Start guide will direct you to install Content Matrix and its related components under a specific scenario to help with evaluation.

	<p><b>Note:</b> This installation scenario may not yield the best <b>migration performance</b> results for your particular environment. It is generally recommended that the Content Matrix Console client application is <b>installed on the target SharePoint Server or WFE</b>, but this is not possible in all cases, such as migrating to a SharePoint Cloud environment, or if there are policies that prevent you from installing the client application directly on the Server.</p>
	<p>For more detailed information on what installation scenario might work best for you, and what factors may play a role in your decision, please see the <a href="#">Advanced Installation Guide</a>.</p>

This scenario involves:

- Installing the **Content Matrix Console client application** on the **target** SharePoint Server or a Web Front End (WFE). This system must have access to the source environment.
- Installing **Metalogix Organizer** on the **target** SharePoint Server or a Web Front End (WFE). This option is only available for SharePoint 2010 and later, and is not available if migrating to Office 365.
- Installing the **Metalogix Extensions Web Service** on the **target** SharePoint Server or a Web Front End (WFE). This option is not available if migrating to Office 365, unless it is “Dedicated.”

You can also install the **Extensions Web Service** on a SharePoint **source** environment, if using Content Matrix Console – SharePoint Edition. This option is not available for SharePoint 2003 sources.

Please see the [Advanced Installation Guide for Content Matrix Console](#) for greater details on possible installation scenarios, configurations, SharePoint connection adapters, and additional information on other Content Matrix Console components.

## Installing the Content Matrix Console

1. Copy the **ContentMatrix\_Web\_Setup.exe** file to the target SharePoint server that the Content Matrix client application 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.

**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.



- 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.).



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

- The **Metalogix Content Matrix – Installation Wizard** will close and the **Metalogix Content Matrix Client Consoles - Installation Wizard** will open. Click **Next** to continue.
- 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.

- 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 the [Advanced Installation Guide](#).

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

8. 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

For this Quick Start Guide we will use the **default** setting for your system. Please see the [Advanced Installation Guide](#) for details and steps on how to change the installation directory (using the “**Change**” button).

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

9. 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.



**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.

10. After all of the desired Editions of Content Matrix have been selected for install, click the **Install** button to run the installation process.
11. 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.

12. After **Finish** is clicked the **Content Matrix Console – Client Installation Wizard** will close and the **Metalogix Content Matrix – Installation Wizard** will re-open. Since the installation of the Content Matrix Console client application(s) is complete, 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).

## 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:** If you have previously installed Content Matrix Web Components version 1 (no Reorganize or Processing pages) you will need to uninstall that version before upgrading or repairing to Organizer.

When installing each of the Content Matrix SharePoint 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-ca/library/cc262995\(v=office.14\).aspx#DeployFarmSolutions](http://technet.microsoft.com/en-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.

## Installing 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.

**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 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.
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

For this Quick Start Guide we will use the **default** setting for your system. Please see the [Advanced Installation Guide](#) for details and steps on how to change the installation directory (using the “**Change**” button).

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. Make sure that the **Organizer** and **SharePoint Extensions Web Service** check-boxes are selected. This will install both Content Matrix components at the same time. Once this is complete there will be some additional steps for installing/configuring **Organizer**.

Uncheck the **SharePoint Email Viewer** check-box.



**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**.

If **Organizer** is being installed on the target SharePoint server then the **License Check** check-box will be grayed out. This is because only one of these two solutions can be installed at any given time. So if the **License Check** solution is already installed, then **Organizer** cannot be installed.

**Note:** If you are installing the Content Matrix SharePoint WSPs on a SharePoint **source**, with Content Matrix Console – SharePoint Edition, you will **only** need to have the **SharePoint Extensions Web Service** option checked.

9. After all 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.

#### Additional Steps for Installing Organizer

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

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 [Advanced Installation Guide for Content Matrix Console](#) for details on the offline activation. This document will continue with the **Online** license activation method.

Click **Next**.

8. Provide the name of the **Database Server** where you want the Organizer configuration database to be installed. You can optionally change the **Database Name** and provide SQL credentials if the currently logged on (Windows authentication) user does not have **Database and Object Create privileges** on the specified SQL Server instance.



9. Click **Test Connection** to make sure the supplied values are valid.
10. Click **Next**.
11. 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.





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

13. 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 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**.

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

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

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.

## Next Steps

The Metalogix Content Matrix Console, Organizer, and the Extensions Web Service are now installed and 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 Center](#) under the Content Matrix heading:  
<http://www.metalogix.com/Support/Support-Resources/Content-Matrix/Content-Matrix-Documentation.aspx>.

Additional documentation sets are listed in the Content Matrix Installation Guide under 'Additional Documentation'.

## 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](mailto:sales@metalogix.com).



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