



# **Content Matrix**

## **Quick Start Guide**

February 28, 2018

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# Introduction

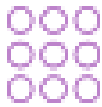
Metalogix Content Matrix Console and its additional components, Metalogix Organizer and the Metalogix SharePoint Extensions Web Service, allow users to migrate their data into SharePoint.

This document is designed to allow you to set up to run the Metalogix Content Matrix Console so you can use the [Evaluation Guide](#) to review and evaluate Content Matrix. Prospective client are encouraged to use this guide for basic testing. Please see the [Advanced Installation Guide](#) for more specific details on installation information, including other installation scenarios, connection adapters, configuration, and uninstallation.

# 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:

## Metalogix Content Matrix Console



- 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

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.

## Metalogix Organizer (not applicable to SharePoint Online/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.

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

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## Content Matrix License Check (not applicable 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.

# 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.

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

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## 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	Any of: <ul style="list-style-type: none"><li>• Windows Server 2003</li><li>• Windows Server 2008</li><li>• Windows Server 2008 R2</li><li>• Windows Server 2012</li></ul>

Component	Requirement
	<ul style="list-style-type: none"> <li>• Windows XP Professional</li> <li>• Windows Vista</li> <li>• Windows 7</li> <li>• Windows 8</li> <li>• Windows 10</li> </ul> <p>All of these Operating Systems are supported on both 32-bit and 64-bit systems.</p>
SharePoint Target Environment	<p>Any of:</p> <ul style="list-style-type: none"> <li>• Windows SharePoint Services (WSS) 3.0</li> <li>• Microsoft Office SharePoint Server (MOSS) 2007</li> <li>• Microsoft Online Services (MOS)</li> <li>• SharePoint Server 2010</li> </ul> <hr/> <p>NOTE: If users are creating Publishing Sites in the SharePoint 2010 environment they are migrating into, 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.</p> <hr/> <ul style="list-style-type: none"> <li>• SharePoint 2013</li> <li>• SharePoint 2016</li> <li>• Microsoft Office 365 – Standard and Dedicated versions.</li> </ul>
Database	<p>Any of:</p> <ul style="list-style-type: none"> <li>• SQL Server 2000</li> <li>• SQL Server 2005</li> <li>• SQL Server 2008</li> <li>• SQL Server 2008 R2</li> <li>• SQL Server 2012</li> </ul> <p>As well as :</p> <ul style="list-style-type: none"> <li>• SQL CE 4.0 SP1</li> </ul>
Windows PowerShell	<p>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.</p>

Component	Requirement
Web Browser	Microsoft Internet Explorer 6.x or higher (8.x or higher is required if browser authentication is being used).
.NET Framework	<p>Microsoft .NET Framework 4.6 or higher.</p> <p>Since this .NET requirement applies to the machine on which Content Matrix is installed, 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, any migration 'jobs' configured to connect to SharePoint 2007 and 2010 environments using a Local OM connection type will cease to work, and these jobs will need to be recreated for use over a different adapter type such as MEWS or DB.</p>

## 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 Metalogix Extensions Web Service (MEWS).

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.
Application Pool Accounts	If connecting to a remote, on-premises 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.



Component	Requirement
Server Access	The installing user, and any user launching Content Matrix Console, will require <b>Administrator</b> permissions on the local machine.
SharePoint Access	<p>The migrating user requires the following permissions (provided that the Extensions Web Service is installed on the SharePoint target).</p> <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 content 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	<p>There are two additional components that can be installed with Content Matrix Console. These are:</p> <ul style="list-style-type: none"> <li>• Metalogix Organizer</li> <li>• Metalogix Extensions Web Service</li> </ul> <p>See <a href="#">Installing and Configuring the Content Matrix SharePoint WSPs</a> for details.</p>

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 describes how to install the Content Matrix Console client application(s), Organizer, Email Viewer and the Extensions Web Service.

## Installing the Content Matrix Console Client Application

This section describes the installation steps for the 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.

This installation scenario may not yield the best migration performance results for your particular environment. It is generally recommended that the Content Matrix Console client application is installed on the target SharePoint Server or WFE, 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.

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 [Advanced Installation Guide](#).

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 greater details on possible installation scenarios, configurations, SharePoint connection adapters, and additional information on other Content Matrix Console components.

1. Copy the **ContentMatrix\_Web\_Setup.exe** file to the machine on which you want to install the Content Matrix client application. 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).

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NOTE: You 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

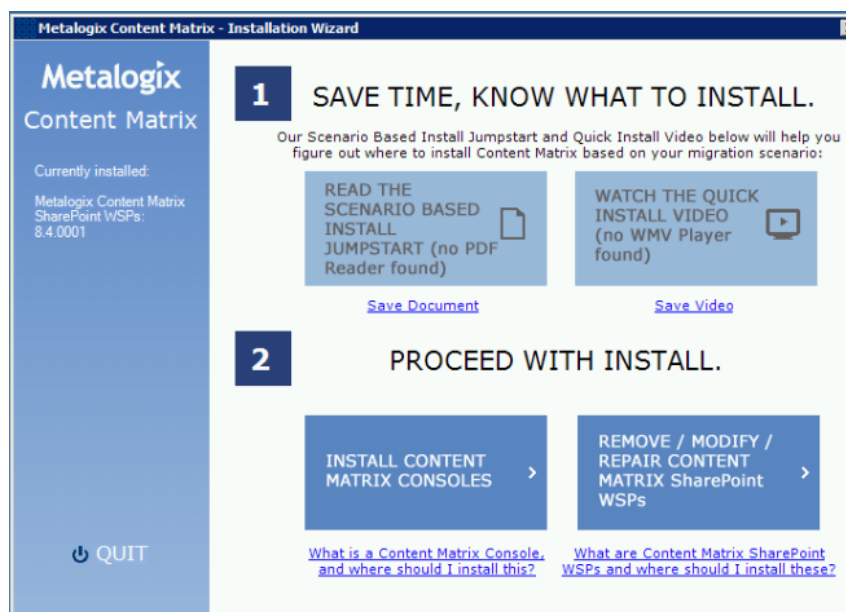
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Content Matrix Console is being installed on must have access to the internet so the appropriate components can be downloaded for installation.

2. Close all open applications, including Internet Explorer.
3. Double-click **ContentMatrix\_Web\_Setup.exe** to start the installation process.

NOTE: 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.

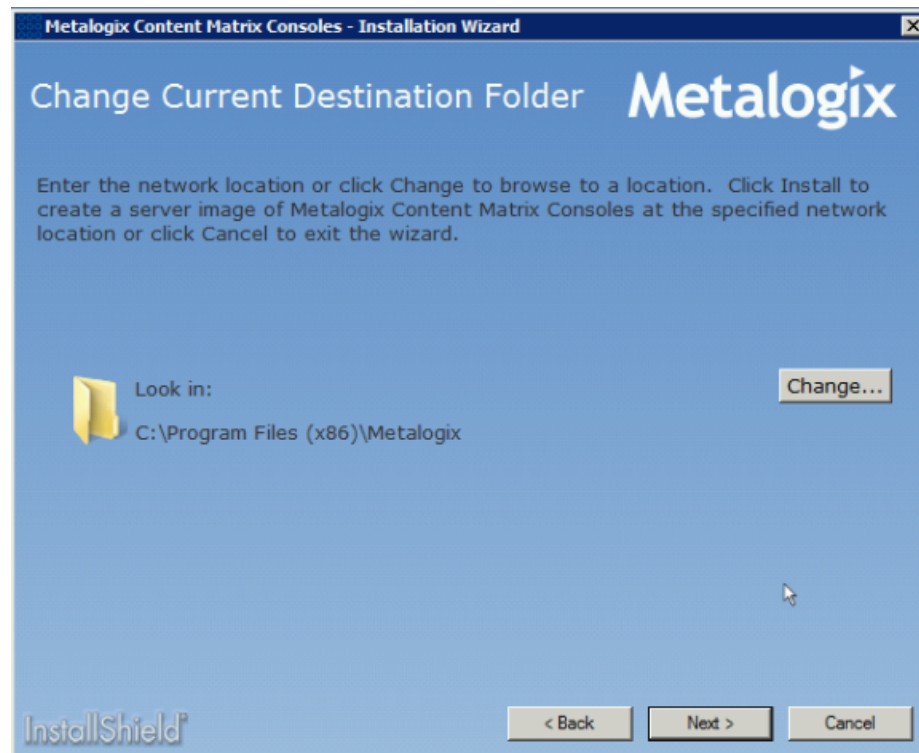
The Metalogix Content Matrix Installation Wizard will open. Under Step 1 you can access a copy of the Quick Start Guide, as well as watch a Quick Install video demo. Step 2 allows you to proceed with the installation for both the Content Matrix client application and the Content Matrix SharePoint WSPs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



4. When ready to proceed with the Content Matrix Console client application install, click **[Install Content Matrix Migration Consoles]** under Step 2.
5. Click **[Next]**.
6. Read and accept the **License Agreement** terms then click **[Next]**.

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.

NOTE: 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 Entering the License Key section of the [Advanced Installation Guide](#).



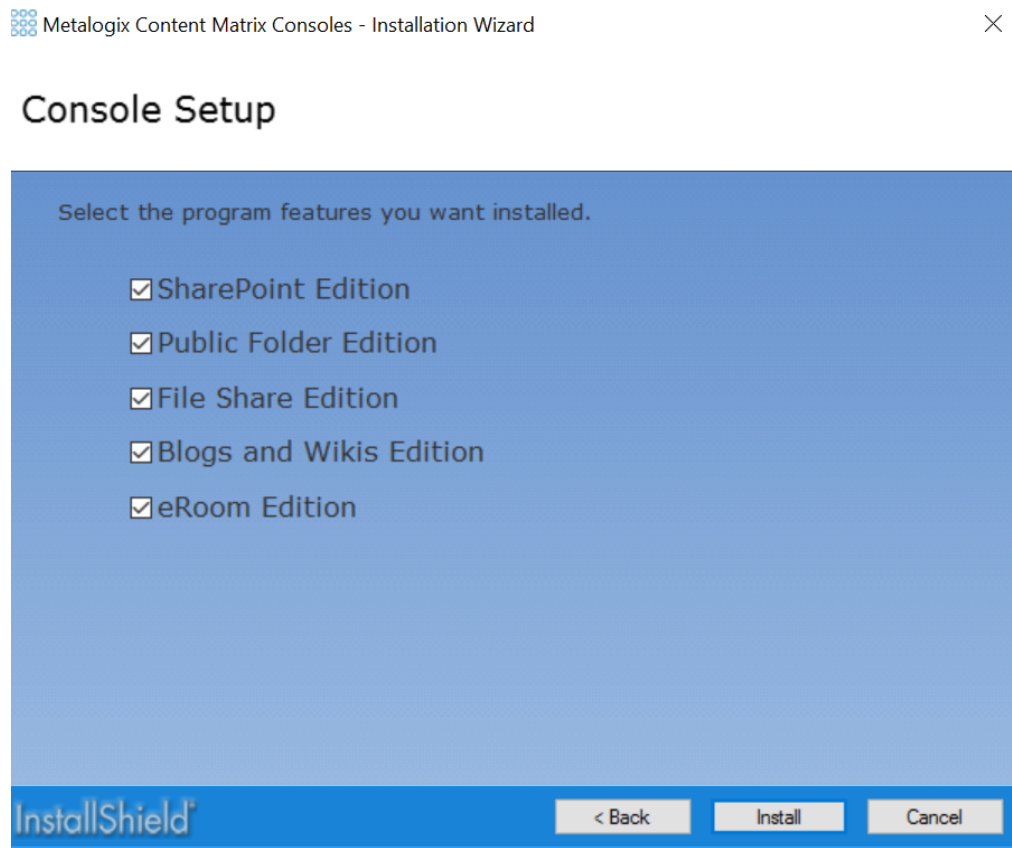
By default the installation Wizard will install all of the selected Content Matrix client applications under the following location:

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

You can, however, click **[Change]** and select a different directory.

7. Click **[Next]**.

A list of check-box options will be displayed allowing you to select which Edition(s) of Content Matrix to include in the installation process.



8. Select which Editions of Content Matrix Console to install.

9. Click **[Install]**.

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

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REMINDER: If migrating to an on-premises 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. If you are installing these or other server-side components on the same machine, you can do so at this time using the **Content Matrix SharePoint WSPs** option under Step 2 of the Installation Wizard.

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10. Click **Quit** to exit the Installation Wizard.

## Installing and Configuring the Content Matrix SharePoint WSPs

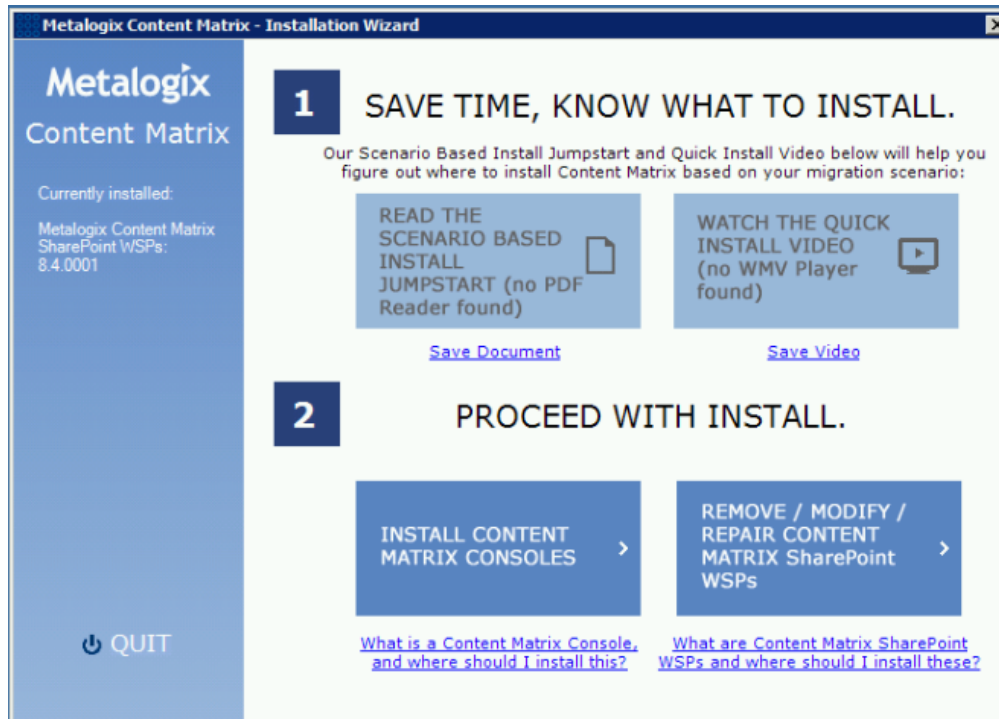
This section will walk you through the process of installing the server components (Content Matrix SharePoint WSPs) on the target SharePoint farm.

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-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>.

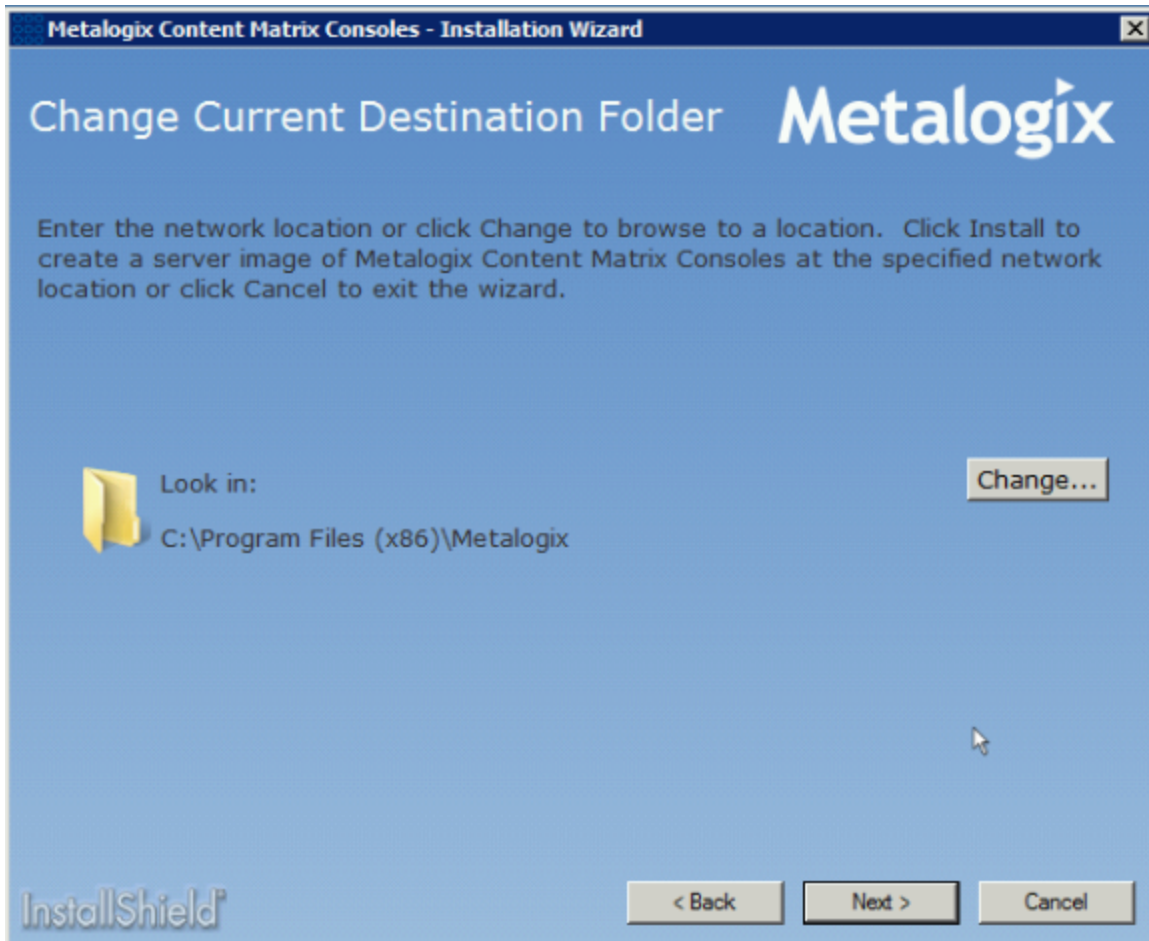
There are a number of methods that can be used to try and mitigate any downtime when deploying a SharePoint farm solution. One of these methods is to schedule the solution deployment for a time period that will have low impact to the environment's users.

## Installation Steps for the Content Matrix SharePoint WSPs

1. Under Step 2 of the Installation Wizard, click [Install Content Matrix SharePoint WSPs].



2. Read and accept the License Agreement terms then click [Next].



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

You can, however, click **[Change]** and select a different directory.

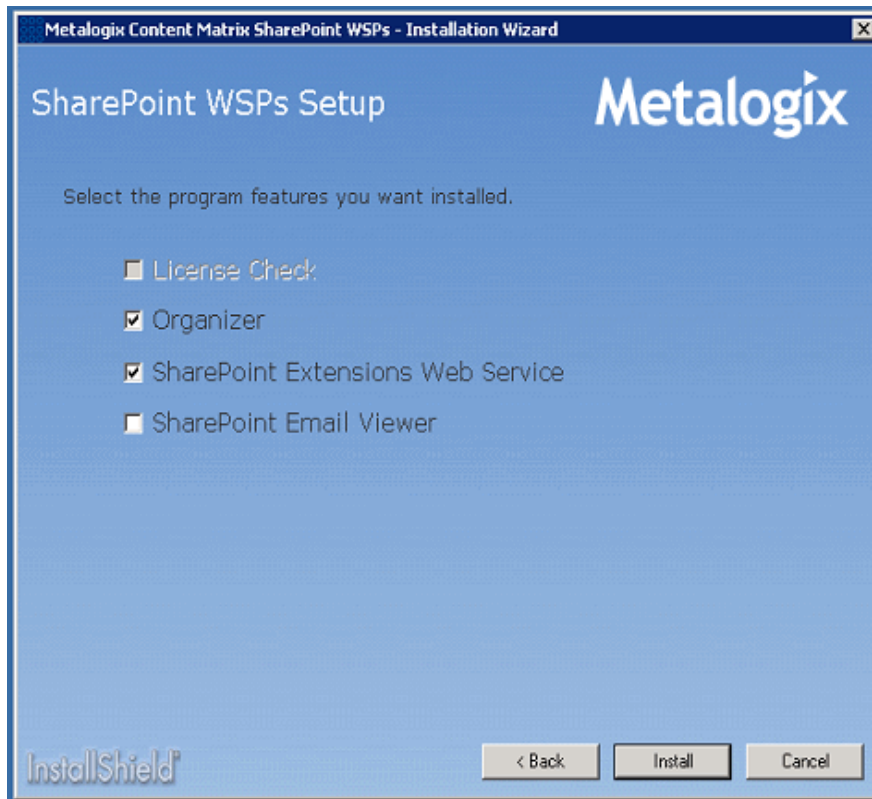
3. Click **[Next]**.

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.

4. Make sure that the **Organizer** and **SharePoint Extensions Web Service** boxes are checked, and uncheck the **SharePoint Email** box.

NOTES:

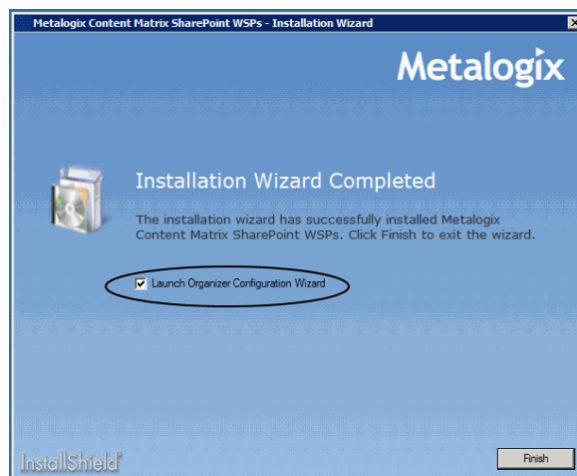
- If Organizer is being installed on the target SharePoint server then the License Check check-box will be grayed out. This is because only one of these two solutions can be installed at any given time. So if the License Check solution is already installed, then Organizer cannot be installed.
- If you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



5. After all the desired Content Matrix SharePoint WSPs have been selected for install, click **[Install]**.
6. Once the installation process has been completed, make sure that the **Launch Organizer Configuration Wizard** option is checked then click **[Finish]**. This will automatically start the Organizer installation wizard. You will be returned to the Metalogix Content Matrix – Installation Wizard.
7. Continue with [Additional Steps for Installing Organizer](#).

#### Additional Steps for Installing Organizer

When an installation of Organizer has completed, the **Launch Organizer Configuration Wizard** option is automatically checked, and the wizard will launch when **[Finish]** is clicked.





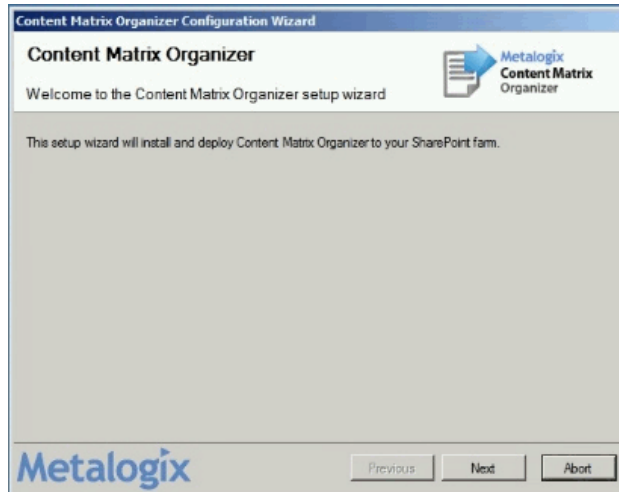
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NOTE: If you want to configure Organizer at a later time, you can invoke the Configuration Wizard from Start > All Programs > Metalogix > Content Matrix Organizer > Content Matrix Organizer Configuration.

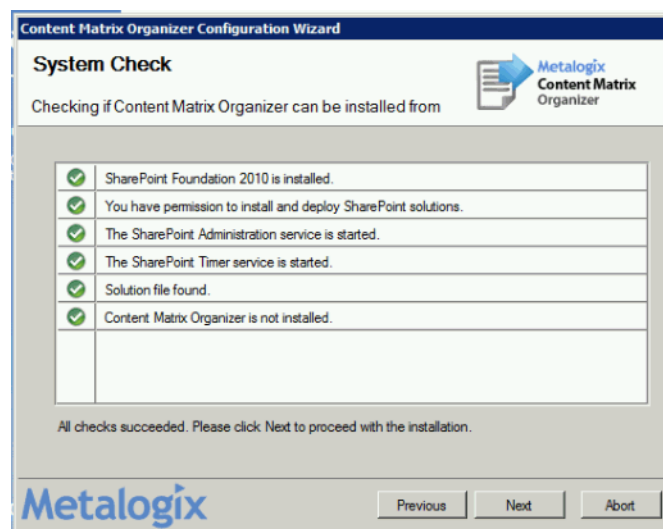
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### To configure Organizer:

1. On the Content Matrix Organizer Welcome screen click **[Next]** to begin the Configuration Wizard.



The installer will perform a series of system checks to make sure the system is ready for Organizer to be installed.



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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 any issues are resolved.

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2. If all of the system checks pass, click **[Next]**.  
The User License Agreement will open.
3. Read and accept the terms of the **License Agreement**, then click **Next**
3. If you agree to the terms of the license agreement, click **[Accept]**, and then click **[Next]**.  
You can also Save or Print a copy of the License Agreement as a .pdf file.

If you do not agree to the terms of the license agreement, click **[Do Not Accept]** and the configuration will be canceled.

4. Complete the **Activate License** screen as follows:

- **Step 1 - Enter License Key.**

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NOTE: You may have more than one 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 the license key is the same as that used for Content Matrix Console, it must still be activated separately for Organizer.

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- **Step 2 - Verify Web Front End Count.**

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NOTE: This can be less than the number requested with your license. If you check the **Override** box, you must enter a **Reason for Override**.

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- **Step 3 - Provide Local Administrator Credentials for All Farm Servers.**

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NOTE: The activation and provisioning job that runs requires local administrator rights to register certain components on each WFE.

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- **Step 4- Select Online or Offline Activation.**

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NOTE: The process for Offline Activation is the same as that for the standard Content Matrix Offline Activation, although the user interface is somewhat different.

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5. After the license key has been activated: in the **Database Creation Login Credentials** dialog, 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) to create the database, 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. You can click the **[Test Connection]** button to make sure the supplied values are valid.

The screenshot shows the 'Database Creation Login Credentials' dialog box. It has a title bar 'Content Matrix Organizer Configuration Wizard' and a subtitle 'Database Creation Login Credentials'. Below the subtitle is the instruction 'Specify credentials to use to create the database'. The dialog contains the following fields and options:

- Database Server:** A text box containing 'sps2010-sm'. To its right is a note: 'Be sure to add 'SQL EXPRESS' to server name if using SQL Express Edition'.
- Database Name:** A text box containing 'Fluent'.
- Database Authentication (for creating database):**
  - ☒ Windows authentication (using Windows account running this utility)
  - ☐ SQL Server authentication
- Account:** A text box (empty) under SQL Server authentication.
- Password:** A text box (empty) under SQL Server authentication.
- ☐ (Advanced) Edit Connection String Directly
- Test Connection:** A button.
- Navigation:** 'Previous', 'Next', and 'Abort' buttons at the bottom.

7. Click **[Next]**.
8. In the **Database Access Credentials** dialog provide the credentials that will be used to access the Organizer configuration database.

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**NOTE:** 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.

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The screenshot shows the 'Database Access Credentials' dialog box. It has a title bar 'Content Matrix Organizer Configuration Wizard' and a subtitle 'Database Access Credentials'. Below the subtitle is the instruction 'Specify credentials Content Matrix will use to access the d'. The dialog contains the following fields and options:

- Database Authentication (for accessing database within Content Matrix):**
  - ☒ Windows authentication using SharePoint app pool account (recommended)
  - ☐ SQL Server authentication
- Account:** A text box (empty) under SQL Server authentication.
- Password:** A text box (empty) under SQL Server authentication.
- ☐ (Advanced) Edit Connection String Directly
- Test Connection:** A button.
- Navigation:** 'Previous', 'Next', and 'Abort' buttons at the bottom.

At the bottom of the dialog, there is a text label: 'Click Next to Create or Upgrade Database'.

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

9. Click **[Next]**.

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**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.

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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. If the deployment process fails for any reason the error will be presented in a dialog box.

10. Click **[Next]**.

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

11. Click **[Next]** then 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 in running in your migration environment(s). Please see the [Metalogix Content Matrix Evaluation Guide](#) for the next steps in beginning your evaluation and testing.

## Additional Documentation

Content Matrix documentation ships with the application, but is also available online at the [Metalogix Content Matrix documentation page](#).

Additional documentation is described in the [Content Matrix Advanced Installation Guide](#).