



# **Content Matrix**

## **Advanced Installation Guide**

February 28, 2018

## Copyright

© Metalogix International GmbH, 2002-2018

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

Content Matrix is a trademark of Metalogix International GmbH.

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

## Technical Support

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

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

# Contents

<b>Introduction .....</b>	<b>4</b>
<b>Content Matrix Installable Components .....</b>	<b>5</b>
<b>Requirements .....</b>	<b>7</b>
Hardware Requirements .....	7
Software Requirements .....	7
Access Requirements .....	9
<b>Installation .....</b>	<b>11</b>
Basic Installation Scenarios for Content Matrix Console .....	11
Scenario based Installation Examples for Content Matrix Console .....	12
On-premises Target Server Installation Scenarios .....	12
Cloud-based Target Server Installation Scenarios .....	14
Non-SharePoint to SharePoint Migration Installation Scenarios .....	15
Installing the Content Matrix Console Client Application .....	15
Installing and Configuring the Content Matrix SharePoint WSPs .....	18
Organizer and License Check .....	19
The Extensions Web Service .....	19
Email Viewer .....	20
Installation Steps for the Content Matrix SharePoint WSPs .....	20
Additional Steps for Installing Organizer or License Check .....	22
Entering the License Key .....	26
Online Activation .....	27
Offline Activation .....	27
<b>Configuration .....</b>	<b>29</b>
Configuring the Extensions Web Service .....	29
Confirming the Metalogix Extensions Web Service is Installed and Working .....	29
Configuring Email Viewer .....	29
Configuring Organizer .....	30
<b>Uninstallation .....</b>	<b>31</b>
Uninstalling the Content Matrix Console Client Application .....	31
Uninstalling Content Matrix SharePoint WSPs .....	33

# Introduction

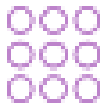
Metalogix Content Matrix Console and its additional components, Metalogix Organizer and the Metalogix SharePoint Extensions Web Service, allow users to migrate their data into SharePoint.

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 be used in conjunction with the [Evaluation Guide](#) to review and evaluate Content Matrix, 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](#).

# 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.

---

NOTE: 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 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.

---

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	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. See the <a href="#">Installing and Configuring the Content Matrix SharePoint WSPs</a> section of this document for more details and permission specifications.

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

## 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 scenario is most likely with SharePoint Edition since the EC (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 provide 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.

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 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.

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 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 of the Online Help for complete details.

## 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**:

- I. Install the Metalogix Extensions Web Service (MEWS) on a Web Front End (WFE) server of the Source SharePoint Farm.
- II. For up to two users, install both the Content Matrix Console and the Metalogix Organizer on a WFE of the Target SharePoint Farm:



**OR**

- III. For three 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:



## Cloud-based Target Server Installation Scenarios

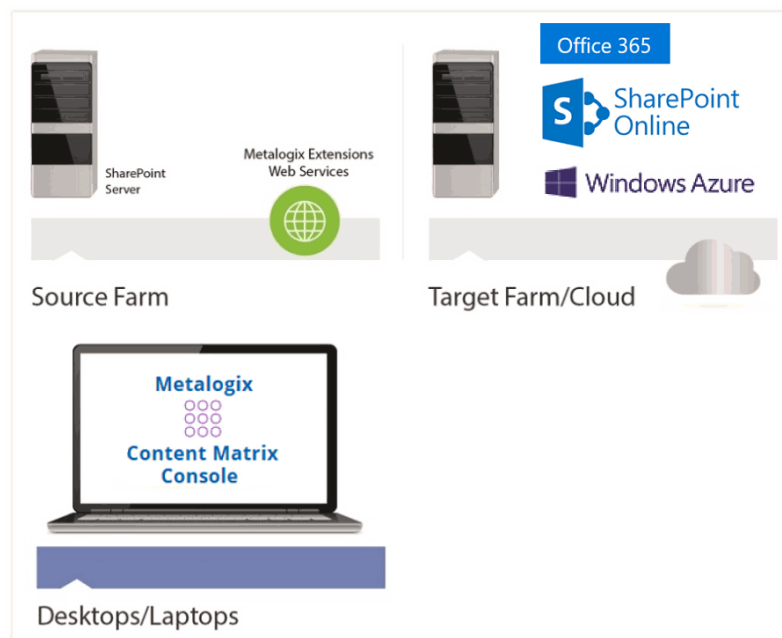
Metalogix recommends one of the following installation options for SharePoint to SharePoint **on-premises to Cloud based migrations**:

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



OR

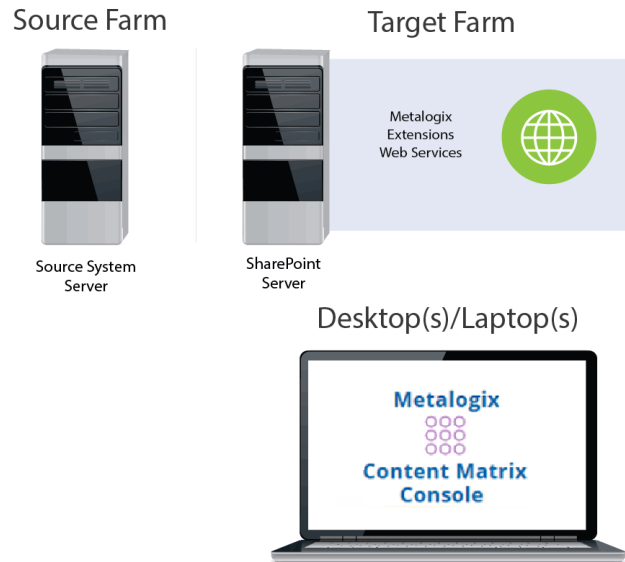
- II. For three or more users install the Content Matrix Console on each user's desktop/laptop, and install MEWS on a WFE of the Source SharePoint Farm.



## 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:**

- I. For up to two 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

- II. For three 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:

- I. For up to two 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
- II. For three 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 describes 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.

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

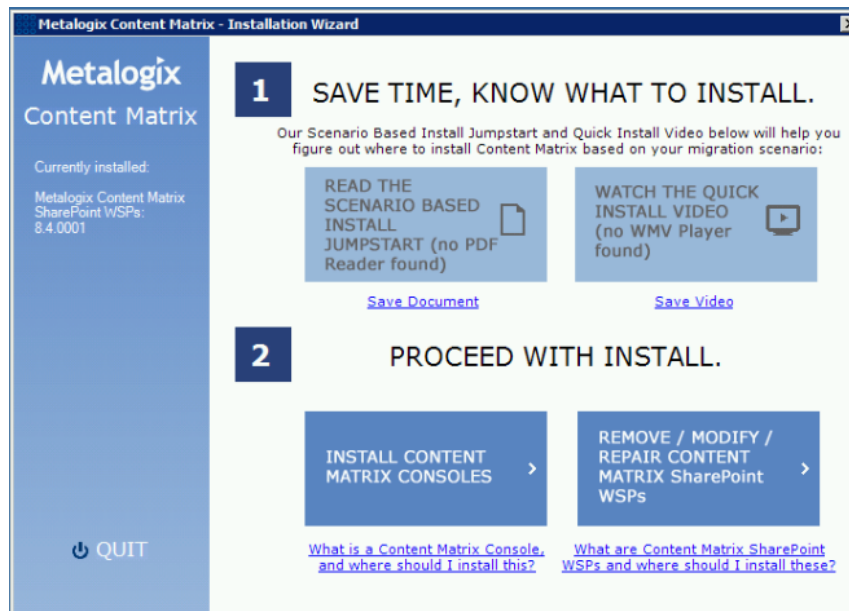
Matrix client application. This can be any system that has access to both the source and target environments, but does not have SharePoint installed on it directly (and is not a WFE).

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 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.).

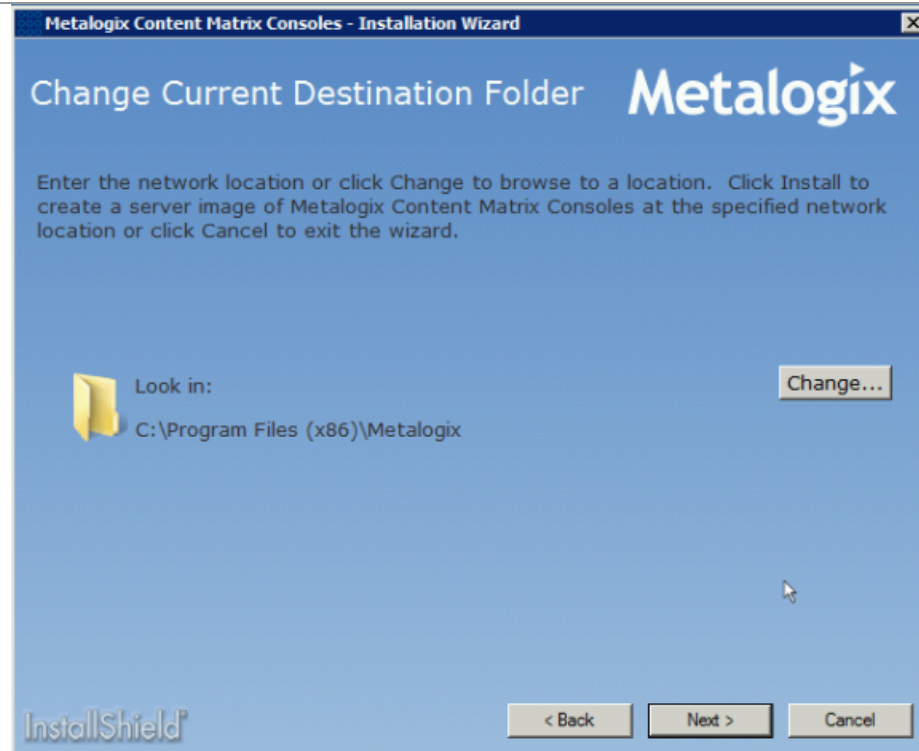


4. When ready to proceed with the Content Matrix Console client application install, click **[Install Content Matrix Migration Consoles]** under Step 2.
5. Click **[Next]**.
6. Read and accept the **License Agreement** terms then click **[Next]**.

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 this guide.



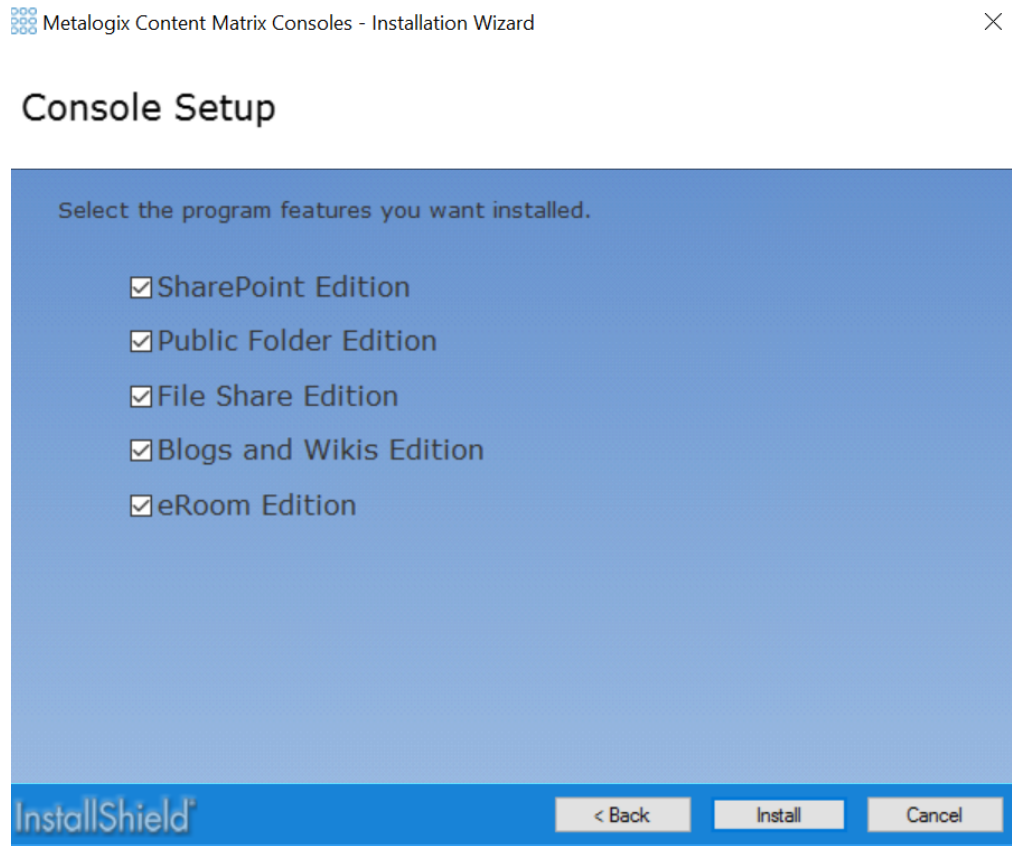
By default the installation Wizard will install all of the selected Content Matrix client applications under the following location:

- 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.

---

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.

---

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.

## Organizer and License Check

When migrating your content to a SharePoint 2010 or later on-premises 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.

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.

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.

## 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.

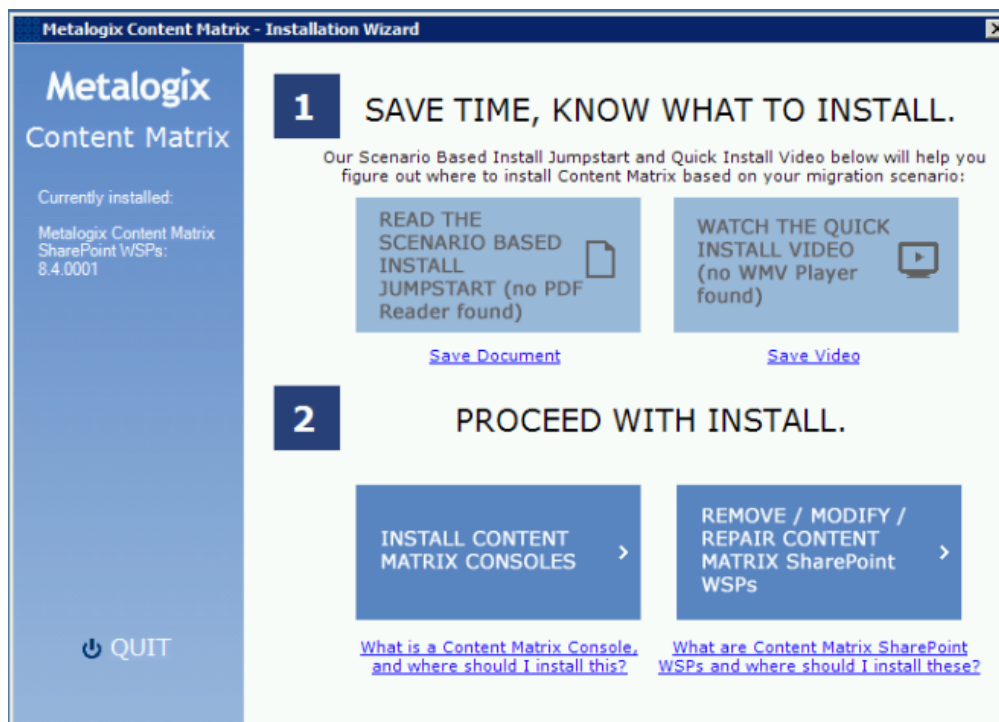
## Email Viewer

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.

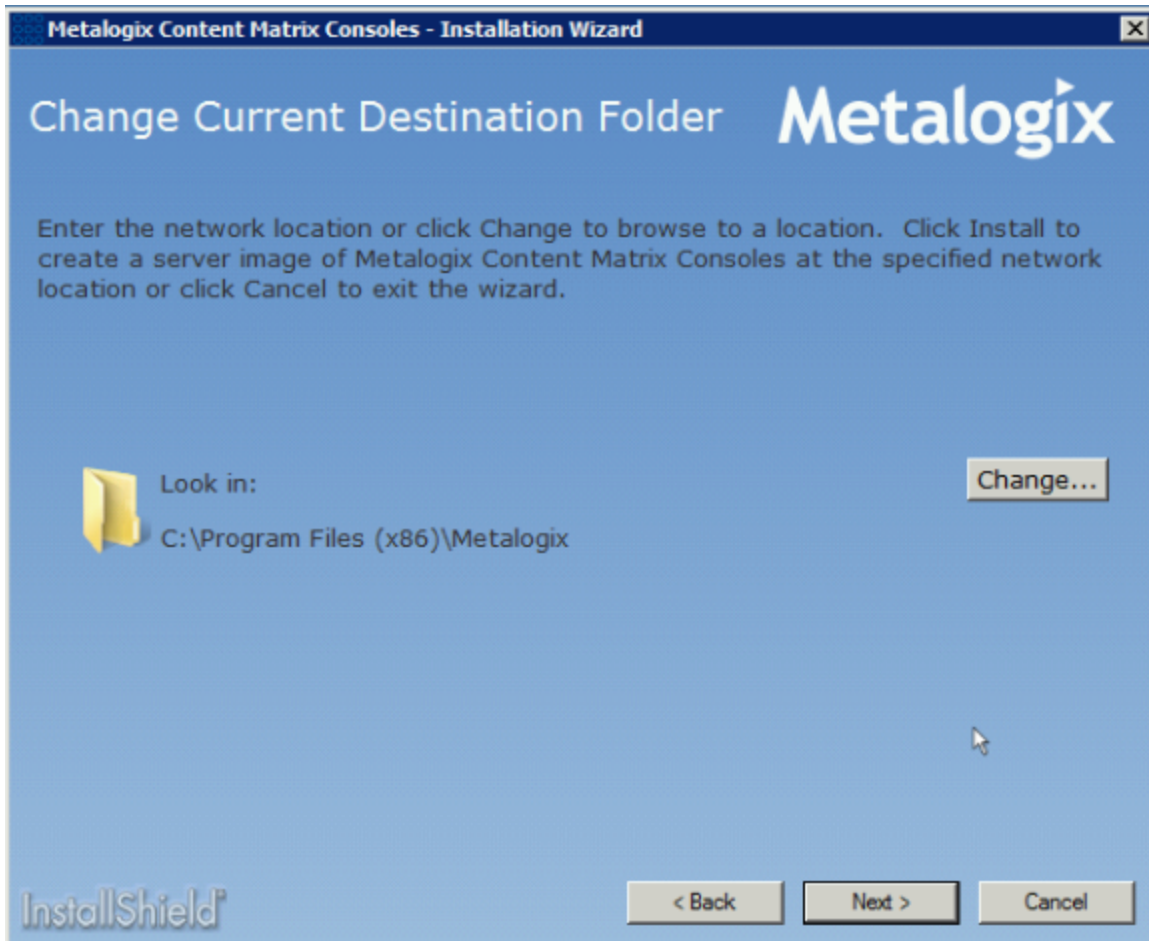
After the [installation steps for the Content Matrix Console client application](#) are complete there are some additional manual configuration steps that need to be taken before the web part will work in the target SharePoint environment.

## Installation Steps for the Content Matrix SharePoint WSPs

1. 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.

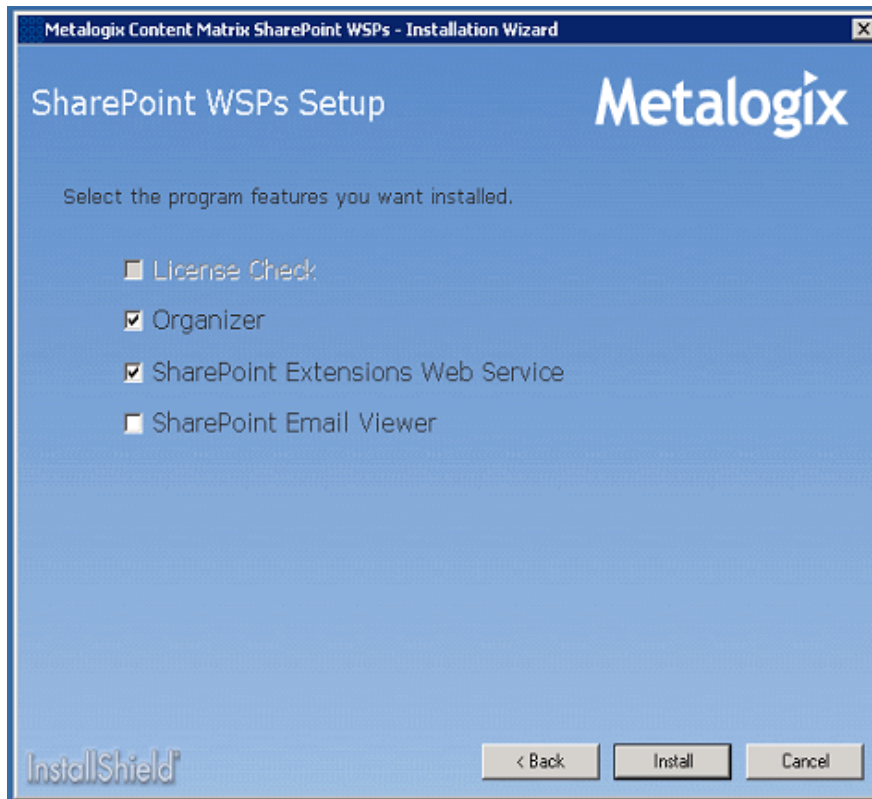
3. Click **[Next]**.

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:

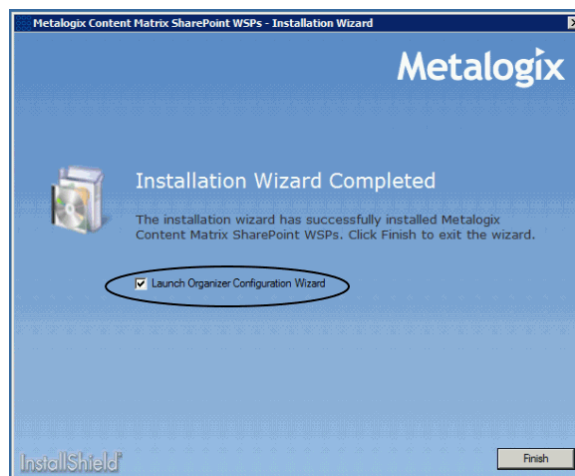
- If Organizer is being installed on the target SharePoint server then the License Check check-box will be grayed out. This is because only one of these two solutions can be installed at any given time. So if the License Check solution is already installed, then Organizer cannot be installed.
- If you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

#### [Additional Steps for Installing Organizer or License Check](#)

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



---

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

---

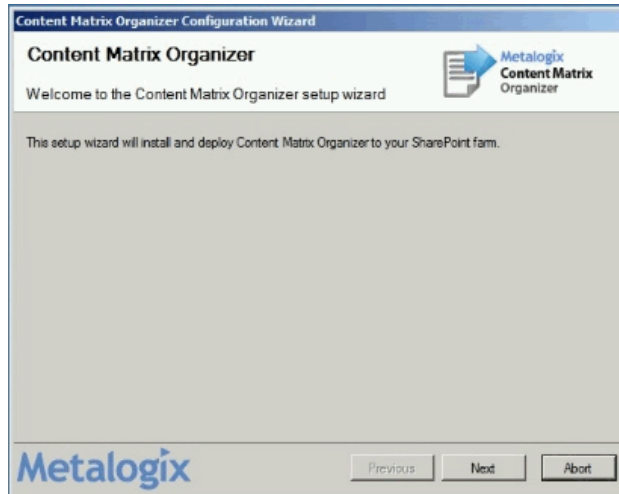
### To configure Organizer or License Check:

---

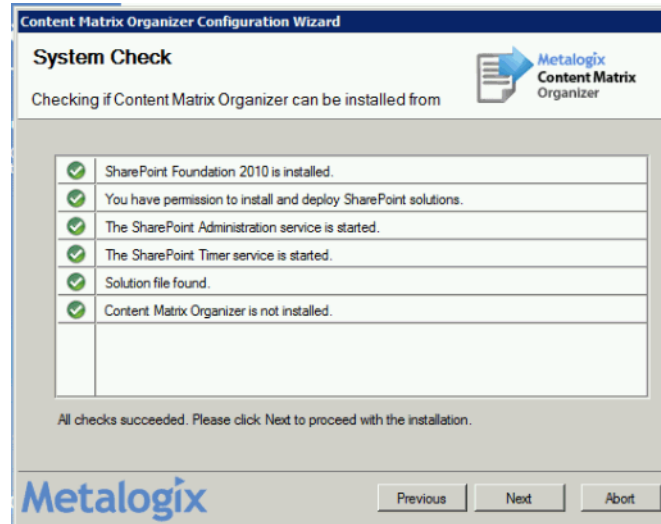
NOTE: The steps below are specific to Organizer. Step 4 (Activate License) is the only step required for License Check.

---

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.



---

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.

---

2. if all of the system checks pass, click **[Next]**.

The User License Agreement will open. Read through the **License Agreement**.

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.**

---

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/License check.

---

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

---

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**.

---

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

---

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

---

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

---

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.

---

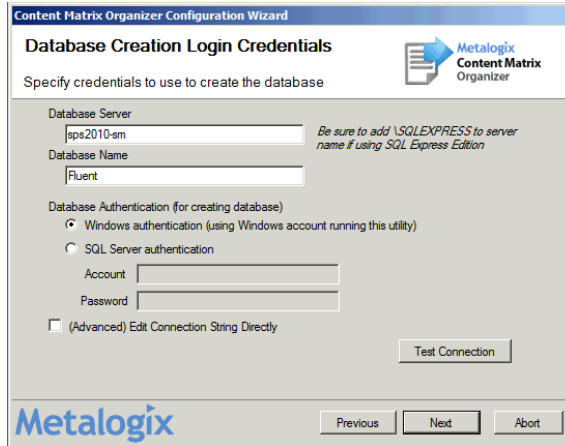
5. After the license key has been activated:

- If you are installing Organizer the installation process will continue.
- 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.



- 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.



**Content Matrix Organizer Configuration Wizard**

**Database Creation Login Credentials**

Specify credentials to use to create the database

Database Server:  Be sure to add \SQLEXPRESS to server name if using SQL Express Edition

Database Name:

Database Authentication (for creating database)

☒ Windows authentication (using Windows account running this utility)

☐ SQL Server authentication

Account:

Password:

☐ (Advanced) Edit Connection String Directly

**Metalogix**

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

---

**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.

---



**Content Matrix Organizer Configuration Wizard**

**Database Access Credentials**

Specify credentials Content Matrix will use to access the d

Database Authentication (for accessing database within Content Matrix)

☒ Windows authentication using SharePoint app pool account (recommended)

☐ SQL Server authentication

Account:

Password:

☐ (Advanced) Edit Connection String Directly

Click Next to Create or Upgrade Database

**Metalogix**

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]**.

---

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. 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.

---

NOTE: 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.

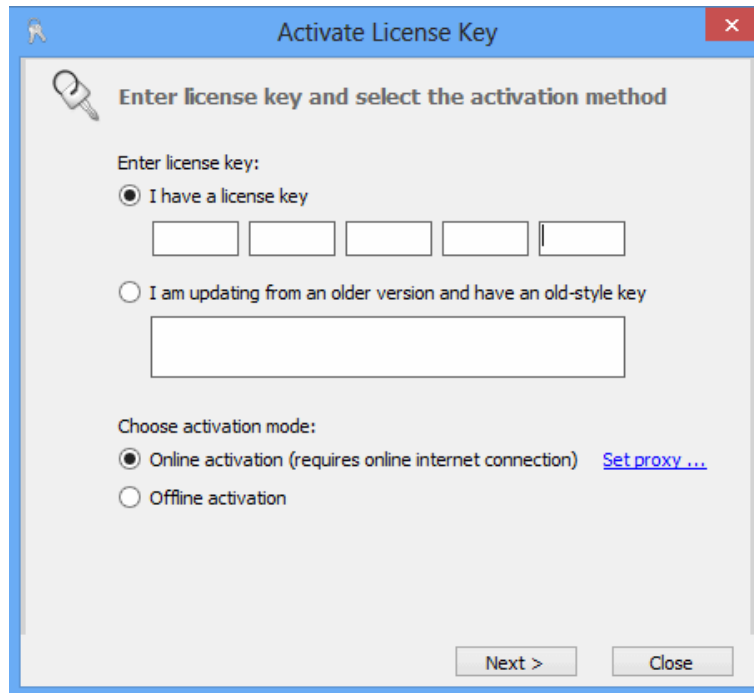
---

## Entering the License Key

When installing the Content Matrix Console for the first time or when launching the Console after your license has expired, you will be prompted to input an Activation License Key. You will also be prompted to enter a license key when [installing Organizer or License Check](#).

### To enter a license key:

1. In the **Activate License Key** dialog, select **I have a license key**, and enter the license key provided by Metalogix (the key can be copied and pasted into the provided space).




---

NOTE: If you are updating from a Content Matrix installation **older than version 6**, select the **I am updating from an older version and have an old-style key** option, and enter the key in the provided space (or paste into the first field from your clipboard).

---

2. Select the appropriate activation method.

---

NOTE: Most systems can use the Online activation method **as long as** the system has internet access. If you are unable to use the online activation method due to security settings or lack of internet access, the Offline activation option can be used.

---

### Online Activation

1. After entering the license key, select **Online activation**.

If you need to authenticate the key through a proxy (not a common practice), click **Set Proxy** then enter the **Server name/IP** and **port number** for the proxy, as well as any necessary **credentials** to access it.

2. Click **[Next]**.

---

Content Matrix will contact the licensing server and attempt to authenticate the license key, after which, on successful activation, a 'Congratulations!' message will be returned, and the license key will be active and in use.

---

3. Click **[Finish]** to complete the process.

### Offline Activation

---

NOTE: The offline activation option is generally used in cases where you cannot use the online activation due to security settings or lack of internet access. This option will still require some internet access, but allows for the authentication to be done from another machine that is not as restricted by security or has a connection to the internet.

---

1. Select **Offline activation**.
2. Click **[Next]**.

A **Generate Activation Request** dialog displays with a different key. This key can 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).
3. Copy the **Activation URL** (listed under the Activation Request) to a web browser that has internet access.

Alternately if the system the Content Matrix Console is on does have internet access through a Web browser, click **Go** to automatically open a web browser to this URL.
4. On a machine that has internet access, use the Activation URL to navigate to the Offline Activation page.
5. Either:
  - 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.
6. Click **[Activate]**.

Upon successful activation, a new key displays in the text box.
7. Do one of the following:
  - To save the key as a DAT file, click **[Download file]**.OR
  - To copy the key to the clipboard (if the license will be activated on the same machine), click **[Copy text]**.
8. Click **[OK]** to continue.
9. Return to the Activate License dialog.
10. If the Generate Activation Request window is still active, click **[Next]** to the **Enter your Activation Response** window.
11. Use one of the following options:
  - If you copied the key to the clipboard on the same machine, paste it into the window.
  - If you saved the key to a DAT file, navigate to, and select the DAT file.
12. Click **[Next]**. The license key will be active and in use.
13. Click **[Finish]** to complete the process.

# Configuration

This section describes some of the basic configuration options that are required to quickly get up and running with the Content Matrix Console Extensions Web Service, Organizer, and Email Viewer.

## 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]/mlspextensions.asmx`. For example, if the Extensions Web Service (version 8.5.0.1) is installed on a server named SharePointServ, then you would enter:

**SharePointServ/\_vti\_bin/ml/8.5.0.1/mlspextensions.asmx.**

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, you 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. On the target SharePoint server where the Email Viewer Web Part is installed, open the **web.config** 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 />`

If the `httpModules` tag already contains 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 replace

`<httpModules />` with `<httpModules> </httpModules>`

3. Add the following line as a child under the `httpModules` tag.

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

4. Find the `enableSessionState` tag and ensure that it is set to **True**.

5. Save the `web.config` file.

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

If the Email Viewer is still not work after adding the extra line to the `<httpModules>` tag, find the `<modules runAllManagedModulesForAllRequests="true">` tag and remove the line `<remove name="Session" />`.

If you are encountering further issues with the Email Viewer, see the "Email Viewer Web Part Troubleshooting" page of the [Content Matrix Public Folder online help](#) for possible tips and troubleshooting steps.

## 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](#).

# Uninstallation

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

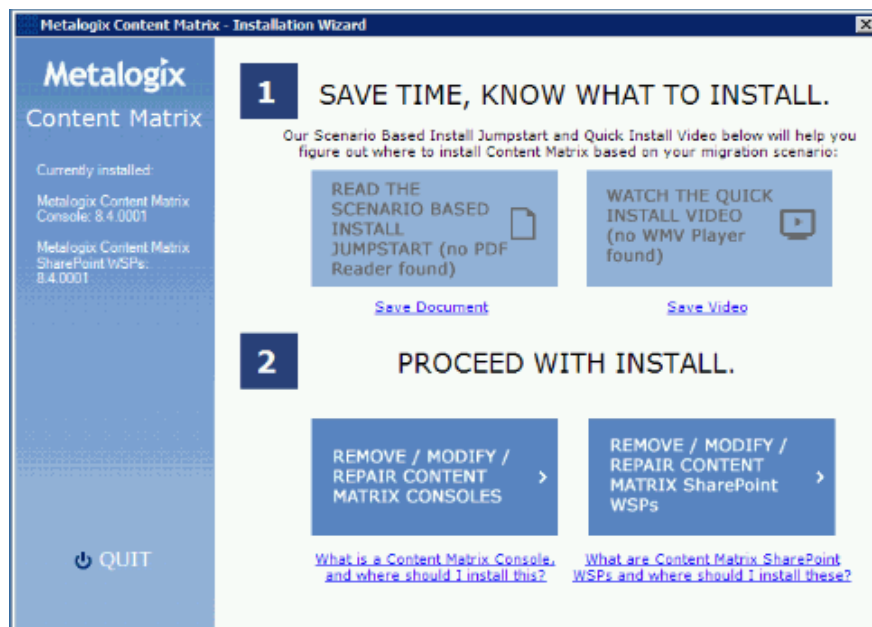
## Uninstalling the Content Matrix Console Client Application

You can uninstall Content Matrix Consoles using the **ContentMatrix\_Web\_Setup.exe** file or from **Windows Programs and Features**.

### To uninstall the Content Matrix Console Using ContentMatrix\_Web\_Setup.exe:

1. Locate and launch **ContentMatrix\_Web\_Setup.exe** to display the Installation Wizard.

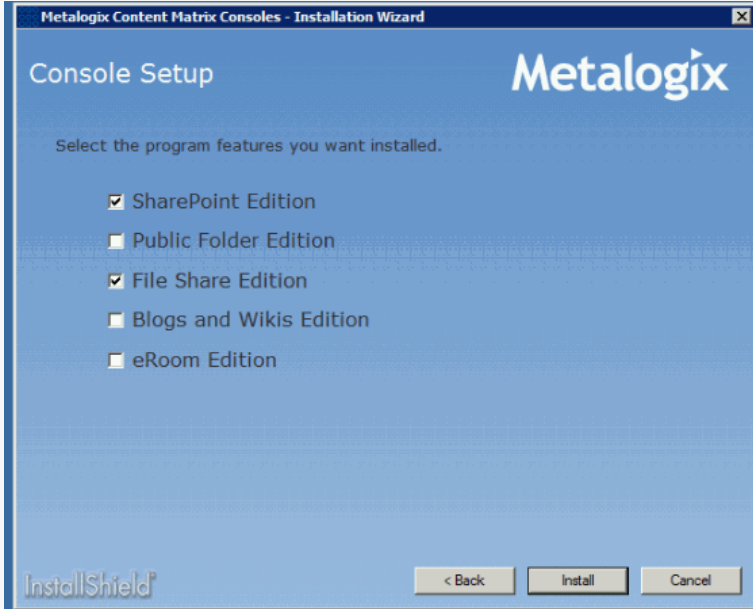
NOTE: Because this installer requires an elevated set of permissions to run, if you do not have the required permissions a message will open informing you that elevated permissions are required. To run the installer with these elevated permissions, select the installer file, right-click and select the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



2. Click **[Remove/Modify/Repair Content Matrix Consoles]** to display the **Program Maintenance** dialog.



3. Use the information in the following table to determine the appropriate action to take.

If ...	Then ...
you want to uninstall <i>all</i> Consoles that may be installed on the machine	select <b>Remove</b> .
you have multiple editions of the Console installed on the machine and want to choose which ones to uninstall	<p>a) Select <b>Modify</b> to display the Console Setup dialog.</p> <p>b) <i>De-select</i> the Console editions you want to uninstall.</p> 



If ...	Then ...
	c) Click <b>[Install]</b> .

4. When the uninstall is complete, click **[Finish]**.

## Uninstalling Content Matrix SharePoint WSPs

You can uninstall Content Matrix WSPs (Organizer/License Check, Metalogix Extension Web Service, and/or Email Viewer) using the **ContentMatrix\_Web\_Setup.exe** file or from **Windows Programs and Features**.

### Special Considerations When Uninstalling WSPs

- Before **Organizer** can be removed from the environment, it must first be stopped and retracted via the **Content Matrix Organizer Configuration Wizard**, which is launched automatically at the beginning of the uninstall process if you are using **ContentMatrix\_Web\_Setup.exe**. If you want to retract Organizer as a separate action, or if you are uninstalling Organizer using Windows Programs and Features, you can launch the wizard from the Start menu by choosing All Programs > Metalogix Organizer > Content Matrix Organizer Configuration Wizard.
- An alternate method for removing the **Metalogix Extension Web Service** is by retracting the **metalogix.sharepoint.adapters.extensions** solution from the Solutions page in Central Administration:
  - for SharePoint 2010, 2013, or 2016:  
Central Administration > System Settings > Farm Management > Manage farm solutions
  - for SharePoint 2007  
Central Administration > Operations > Solution Management

### To uninstall Content Matrix WSPs using ContentMatrix\_Web\_Setup.exe:

1. Locate and launch **ContentMatrix\_Web\_Setup.exe** to display the Installation Wizard.

---

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.

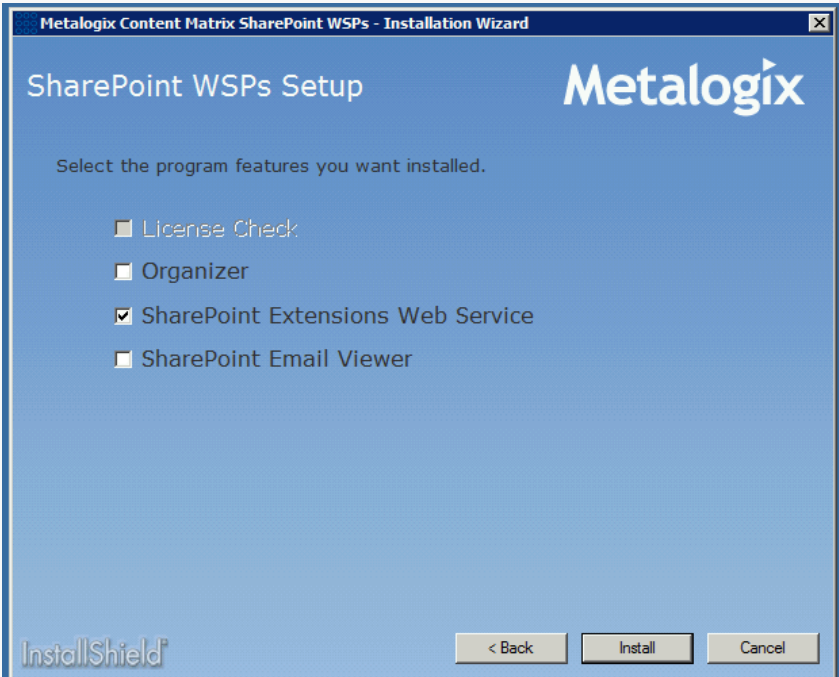
---

2. Click **[Remove/Modify/Repair Content Matrix WSPs]** to display the Program Maintenance dialog.

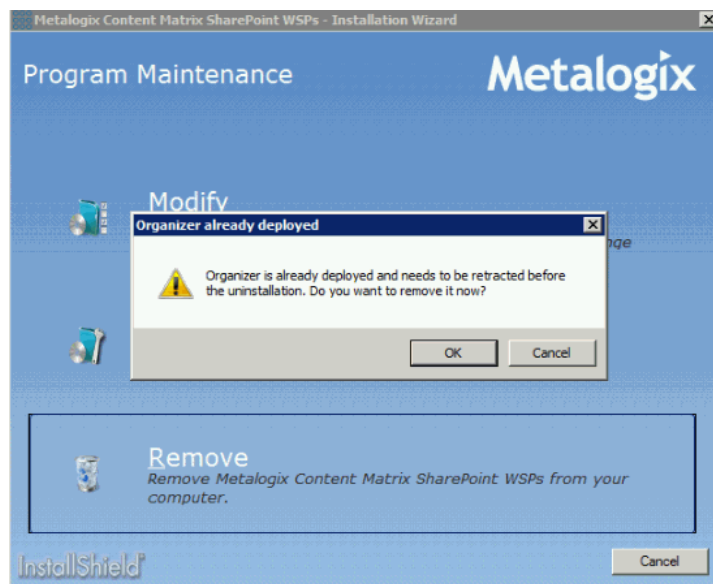


3. Use the information in the following table to determine the appropriate action to take.

If ...	Then ...
you want to uninstall <i>all</i> WSPs that may be installed on the machine	select <b>Remove</b> .
you have multiple WSPs installed on the machine and want to choose which ones to uninstall	a) Select <b>Modify</b> to display the Console Setup dialog. b) <i>De-select</i> the WSPs you want to uninstall.

If ...	Then ...
	 <p>c) Click <b>[Install]</b>.</p>

If you are uninstalling Organizer, you will be prompted to retract the solution before continuing with the uninstall. Click **[OK]** to launch the **Content Matrix Organizer Configuration Wizard** and follow the prompts to retract the Organizer solution. When completed, the uninstall will continue.



4. When the uninstall is complete, click **[Finish]**.