



# **Version 3.3**

# **Release Notes**

# **and**

# **Quick Start Guide**

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## Introduction

Metalogix continues to refine the product to address issues experienced by our customers in implementing and maintaining Metalogix StoragePoint as well as incorporate some additional features/enhancements that were requested.

The [Release Notes](#) contained within this document provide details on feature additions and enhancements in this release along with any currently known issues. Please also review the [Quick Start Guide](#) for a high level installation and configuration workflow. For more detailed installation and configuration instructions please refer to the **Metalogix StoragePoint Installation and Administration Guide**.

## Version 3.3 Release Notes

### New Features and Enhancements

#### Licensing Changes

The layout of the License Management page has been reconfigured to show more detail, including the amount of data allowed and used.

Application	License Status	Expiration Date	# of WFE(s)	Data (Used)	Activation
Metalogix StoragePoint (Enterprise)	Valid	12/20/2012	1	2 (0)	Reactivate

To keep this information current (no more than 180 days old), reactivating the license may be required. A timer job which can be run manually or on a schedule has been added to Central Administration. See [Activating the Software in the Metalogix StoragePoint Installation and Administration guide](#) for more information.

#### StoragePoint Database Failover

The checkbox "Failover Active (check to activate failover server)" has been removed from the General Settings page. The failover server name will be in the database connection string as an attribute "Failover Partner", so it is not necessary to do anything manually after Metalogix StoragePoint database failover happens. Metalogix StoragePoint should automatically connect to the failover server when the original StoragePoint database is not available.

#### Single Instancing

Within the scope of a profile, there is now an option to keep only one BLOB if it is identical to but referenced by more than one SharePoint item. The option will be on the storage profile page and will

apply to new items created within the scope of the profile.

<p><b>Single Instancing</b></p> <p>Indicate whether this profile should participate in single instancing. Single instancing maintains one copy of identical blobs per profile instead of one copy per SharePoint reference.</p>	<p>Enable Single Instancing</p> <p><input type="button" value="Yes"/></p>
---	---

## Fixes and Minor Enhancements

Module	Description
Archiving Rules	FIX: Versions archiving rules could behave unexpectedly if the version rule tiers were not contiguous.
Endpoints	FIX: Site endpoint filters would not include sub-sites of the selected site. Only the selected site would be considered.
General Settings	FIX: General Settings page fails to load if StoragePoint database was loaded from different farm.
Librarian	FIX: Specifying a Librarian file type exclusion that is already excluded by SharePoint would generate an error.
Librarian	FIX: Event handler suppression was not working during Librarian cataloging jobs.
Librarian	FIX: Some Librarian errors were logged only to the SharePoint ULS logs and not the Librarian Job Log.
Librarian	FIX: Librarian catalog jobs could appear to hang while cataloging very deep directory structures.
Librarian	FIX: Librarian would fail to generate thumbnails for Picture libraries in MOSS.
Librarian	FIX: Librarian would fail to catalog certain files or folders and would terminate the entire cataloging job.
Librarian	ENHANCEMENT: Librarian performance improvements of up to 30%.
Librarian	ENHANCEMENT: Added Librarian performance logging.
Librarian	FIX: Filenames with dashes (-) would cause issues during Librarian "dual mode" catalog jobs.
Librarian	FIX: Librarian "SharePoint and File Share Mode" would fail to detect changes to file share files that had already been cataloged using RBS.
License Keys	FIX: Offline activation keys may not properly record servers used.
License Keys	FIX: License activation could fail if no adapters or options were included on the key.in the license.
License Keys	FIX: When a StoragePoint license would expire, RBS uploads/writes to SharePoint would error out instead of going into the Content Database. Did not apply to EBS.
License Keys	FIX: FileShare and Basic license types would error out during activation in the StoragePoint installer.
Upgrade	FIX: StoragePoint 2.2 to 3.0 database upgrade was failing on similarly named web applications.

## Known Issues

### Installer May Not Always Rollback on Abort

Depending on how far into the process you are the installer may not be able to rollback all performed operations. It is recommended that you verify in Central Administration that the solution was successfully deployed if you are installing/repairing/upgrading or successfully retracted if you are removing. You can look under Solution Management on the Operations page to check the state of the `bluethread.storagepoint.feature.wsp` feature.

### System Cache Configuration Required to Use File Type Filters

If you have upgraded from a previous version of Metalogix StoragePoint and you used a filter based on file type, you will need to change the **Endpoint Selection Method** to **Asynchronous** on any storage profiles that are using a File Type filter. Once you make this change, you will see your file type filter display in the endpoint description. File Type filters are no longer available for Synchronous write profiles.

**Storage Endpoints**

The **Endpoint Selection Mode** option determines if Endpoint selection is made immediately (Synchronous) or if it happens after the SharePoint list item has been created (Asynchronous). Making this operation asynchronous allows you to select additional filters on the Profile Endpoint configuration dialog. This setting should not be confused with the **Endpoint Write Mode** option on the Profile Endpoint dialog, which dictates how the BLOB write is performed once the target endpoint has been selected. You cannot set this option to **Asynchronous** if the System Cache has not been configured.

Select the endpoint(s) that this profile will write its content to in this section.

Externalize content BLOBs: Yes

Endpoint Selection Mode: Asynchronous

#	Endpoint	Write Mode	Online	Filter
1	File System Endpoint (FileSystem)	Synchronous	Yes	Size and FileType

▢ Add Endpoint

## Version 3.2 Release Notes


### New Features and Enhancements

#### Master and Worker Configurations for Timer Jobs

Some Timer Jobs can be configured to run as a Master and Worker relationship on multiple servers. Configuration is done on each timer job as part of the normal set up, allowing the timer jobs to utilize the entire farm's processing capabilities. The Master does not necessarily need to be included as a worker. The timer jobs for which this can be configured are Content Migrator, BLOB Externalization, BLOB Recall, BLOB Migration, and File Share Librarian.

#### StoragePoint BLOB Recall

Provide StoragePoint BLOB Recall timer job settings in this section. This timer job will recall content BLOBs from the remote BLOB store back into the SharePoint content database(s).

Schedule this process to run:   12 AM  00

on Server

with  Processing Threads  
*If blank, will default to one thread per processor.*

in Job Role

with Worker(s) [\(Change\)](#)

- MIPLYAPP01
- MIPLYAPP02
- MIPLYAPP03
- MIPLYWEB01

**Advanced Job Settings** [\(Show\)](#)

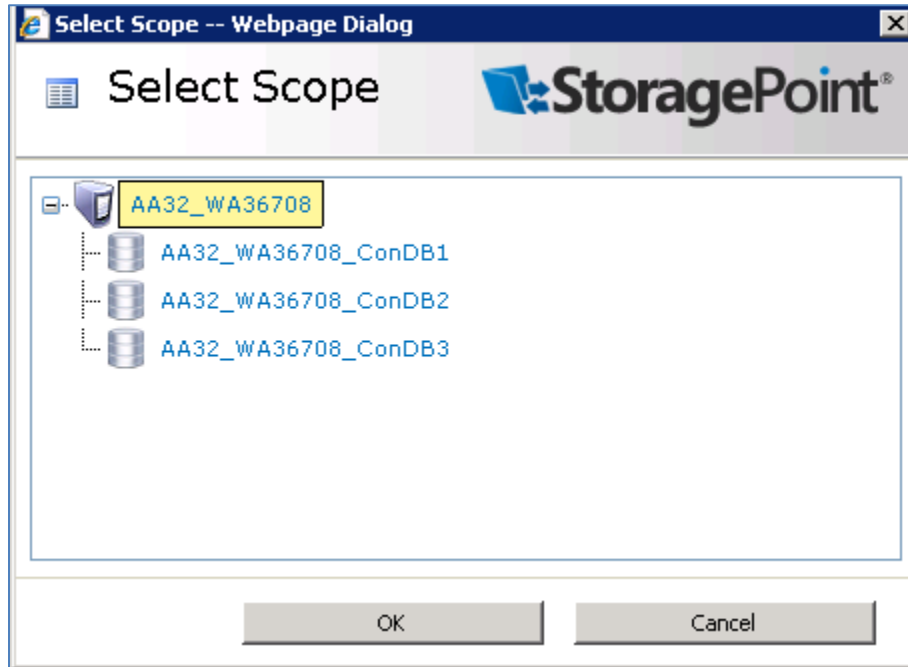
## Timer Job Status Page Updated

The Master and Worker change has required the upgrade of information on the job summary page. You can expand the job summary while running to view progress, change thread counts and view other statistics about the job. Additional filter criteria have also been added to the Job Summary page.

StoragePoint Jobs							
Job Type	Scope	Assigned Server	Started	Status	Percent Complete	Actions (Clear All)	
Migration Queue Processing	N/A	MIPLYAPP01	6/21/2011 9:11 AM	Complete	100%	Clear   Summary	
Migration Queue Processing	N/A	MIPLYAPP01	6/21/2011 9:00 AM	Complete	100%	Clear   Summary	
Librarian	ContentDb (MySites Web App - I2293)	MIPLYAPP01	6/16/2011 1:05 PM	Complete	100%	Clear   Summary	
Bulk Recall	ContentDb (AA32_WA36708_ConDB1)	MIPLYAPP01	6/16/2011 12:46 PM	Complete	100%	Clear   Summary	
Bulk Externalize	ContentDb (AA32_WA36708_ConDB1)	MIPLYAPP01	6/16/2011 12:45 PM	Complete	100%	Clear   Summary	
Bulk Recall	ContentDb (MySites Web App - I2293)	n/a	6/16/2011 10:48 AM	Complete	100%	Clear   Summary	
Bulk Recall	ContentDb (Cemi_Content)	MIPLYAPP02	6/14/2011 5:09 PM	Complete *	100%	Clear   Summary	
Orphan BLOB Cleanup	ContentDb (Cemi_Content)	MIPLYWEB01	6/14/2011 10:54 AM	Complete	100%	Clear   Summary	
Bulk Externalize	ContentDb (AA32_WA36708_ConDB1)	MIPLYAPP01	6/13/2011 4:20 PM	Complete	100%	Clear   Summary	
Orphan BLOB Cleanup	ContentDb (AA32_WA36708_ConDB1)	MIPLYAPP01	6/13/2011 3:47 PM	Complete	100%	Clear   Summary	
Bulk Recall	ContentDb (AA32_WA36708_ConDB1)	MIPLYAPP01	6/1/2011 10:23 AM	Complete	100%	Clear   Summary	
Migration Queue Processing	N/A	MIPLYAPP01	6/1/2011 10:11 AM	Complete	100%	Clear   Summary	

## Broader Archiving Scopes

Archiving rules can now be configured on a broader scope, i.e. Web App or Content Database. You will be able to make these selections when configuring a new Archiving Rule. Custom Metadata rules still need to be configured at the level where they reside, and the most granular rule is the only rule that will ever get evaluated.



## RBS Profiles Now Allow Filtered Endpoint

In StoragePoint 3.1, RBS profiles (content database) required an unfiltered endpoint for synchronous migration. You can now have a greater than or equal to ( $\geq$ ) size filter on this endpoint. Asynchronous operations always allowed filters on the endpoints.

## File Share Librarian Can Be Configured for Existing Storage Profiles Even with Different Endpoints

Multiple endpoints can now be configured for a storage profile even if that profile has an associated File Share Librarian configuration. What this means is that File Share Librarian configurations can be created for scopes that already have an existing storage profile, and the additional endpoint will be added to the existing profile. In StoragePoint 3.1, you would get a message that there is already a profile for this scope, or that the endpoint doesn't match the endpoint on the storage profile.

For example, if you have a content database storage profile, and you create a Fileshare Librarian configuration that catalogs content to a Site Collection within that content database storage profile, the new endpoint will be added to the content database storage profile.

<b>Profile Name</b>	Name AA32_wa10860_ConDB1_Profile															
<b>Profile Scope</b>	ContentDb (RBS) AA32_wa10860_ConDB1															
<b>Storage Endpoints</b>	<p>Externalize content BLOBs <input checked="" type="checkbox"/></p> <p>Endpoint Selection Mode Synchronous</p> <p>Storage Endpoints</p> <table border="1"> <thead> <tr> <th>#</th> <th>Endpoint</th> <th>Write Mode</th> <th>Online?</th> <th>Filter</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>AA32_wa10860_ConDB1_Endpoint (FileSystem)</td> <td>Asynchronous</td> <td>Yes</td> <td>None ↓ ×</td> </tr> <tr> <td>2</td> <td>AA32_wa10860_SC1_Endpoint (FileSystem)</td> <td>Asynchronous</td> <td>Yes</td> <td>None ↑ ×</td> </tr> </tbody> </table> <p>▢ Add Endpoint</p>	#	Endpoint	Write Mode	Online?	Filter	1	AA32_wa10860_ConDB1_Endpoint (FileSystem)	Asynchronous	Yes	None ↓ ×	2	AA32_wa10860_SC1_Endpoint (FileSystem)	Asynchronous	Yes	None ↑ ×
#	Endpoint	Write Mode	Online?	Filter												
1	AA32_wa10860_ConDB1_Endpoint (FileSystem)	Asynchronous	Yes	None ↓ ×												
2	AA32_wa10860_SC1_Endpoint (FileSystem)	Asynchronous	Yes	None ↑ ×												
<b>Orphan BLOB Retention Policy</b>	<p>Retain Orphaned Blobs For 0 Days</p> <p>Provide orphan BLOB retention policy settings in this section. These settings will dictate how long StoragePoint will retain content BLOB files after their SharePoint list item or document associations have been removed.</p>															
<input type="button" value="Delete"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>																

## File Share Librarian Endpoints will no longer be the default endpoint for a Storage Profile

If a Storage Profile is associated with a File Share Librarian configuration, only content within the scope of that configuration will go to that endpoint. All other content will go to either the content database or to another non-librarian endpoint if one has been added on the storage profile.

File Share Librarian endpoints will be listed as such on the storage profile, in the Filter column. A mouse rollover will show you the Librarian configuration with which the endpoint is associated.

#	Endpoint	Write Mode	Online?	Filter
1	Departments Librarian Config_Endpoint (FileSystem)	Asynchronous	Yes	Librarian ↓ ×
2	Sales Librarian Config_Endpoint (FileSystem)	Asynchronous	Yes	Librarian ↑ ×

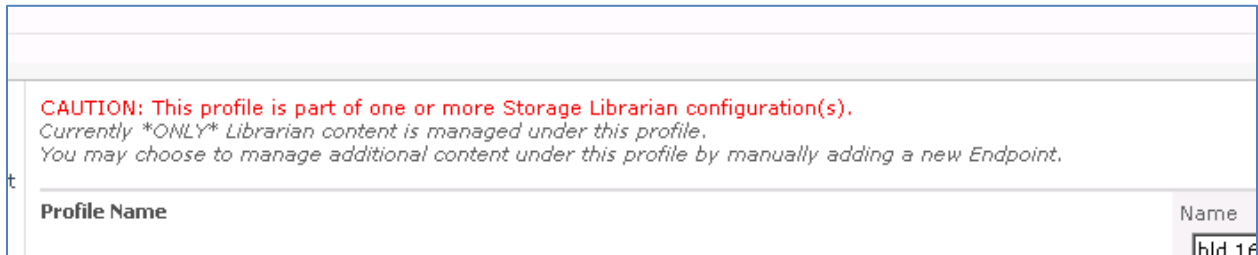
▢ Add Endpoint

From Librarian 'Sales Librarian Config'

Also, you can no longer create broader scoped File Share Librarian configurations. So, for example, if you have 'Site Collection A' as the Destination of your File Share Librarian configuration, you can't create a File Share Librarian configuration with the destination being the Content Database or Web App where 'Site Collection A' resides.

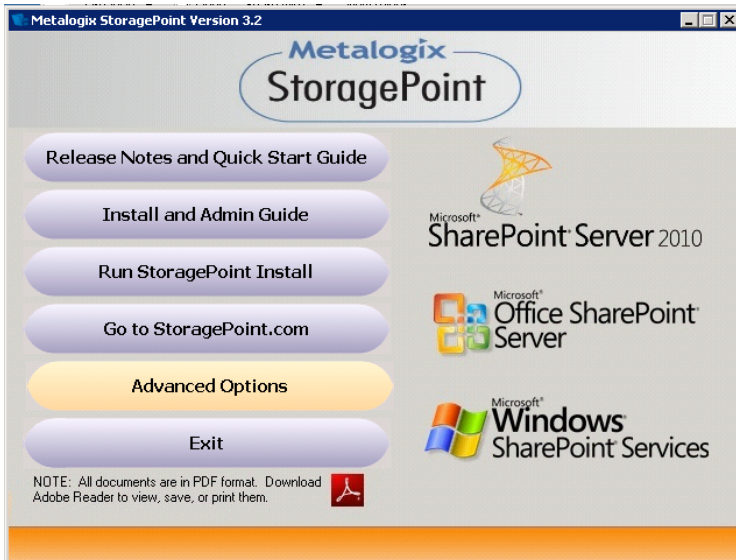
### New Messages on the Storage Profile Page

There are two messages you may see on the storage profile page if the storage profile is associated with a File Share Librarian configuration.



### AppServer Bits and PowerShell Cmdlets Available from Installer

Advanced Options allows users to install the necessary StoragePoint bits on an app server, and make the StoragePoint-specific cmdlets available in powershell.



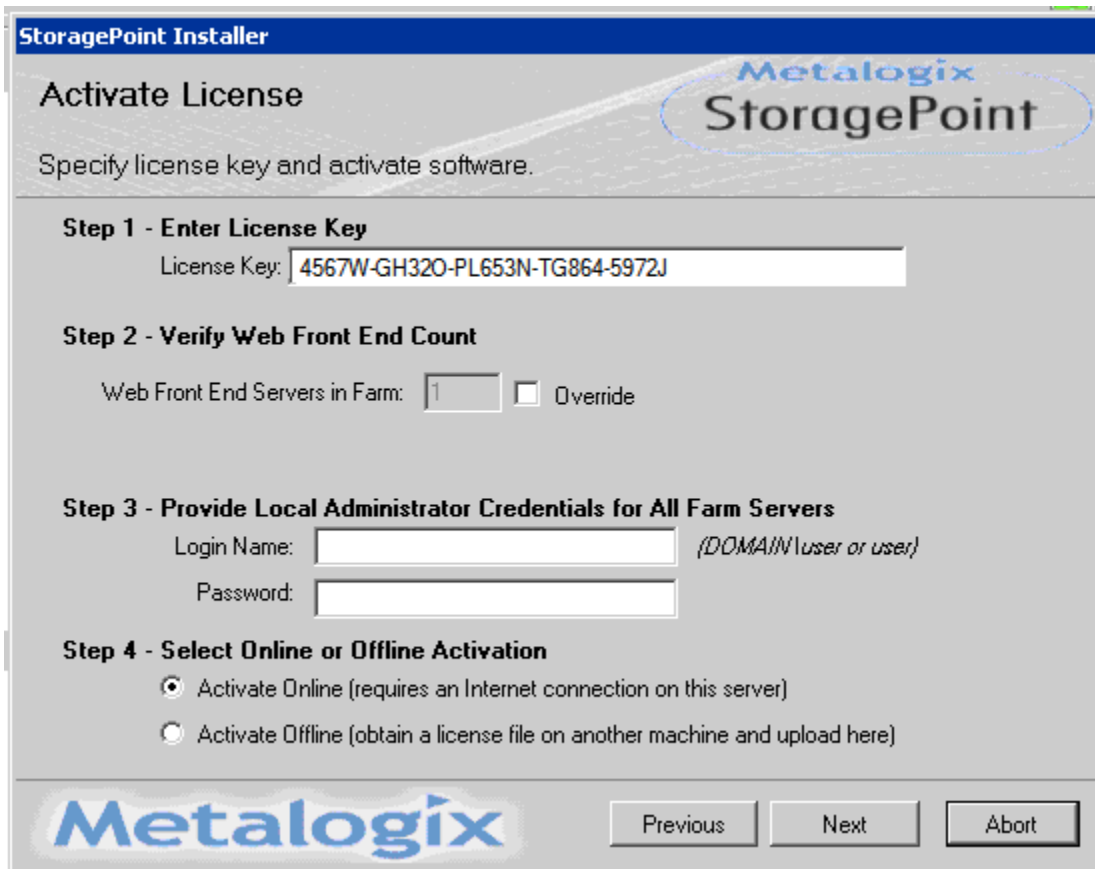
### Storage Adapters are Automatically Installed with the StoragePoint Install

You will not need to install or upgrade adapters separately after Metalogix StoragePoint is installed or updated. The adapters you see when configuring a new endpoint will be based on the license information.

### License Activation is now During Install or Upgrade

A new screen will be in the installation steps now, requiring license information to go forward. The steps will be similar to the activation process that was previously done from the user interface. You will no longer need to visit the Metalogix StoragePoint License Management screen unless you change the

number of servers in a farm or re-provision an existing server, or, if you use the Offline Activation method, you will need to reactivate your license every 6 months.



**StoragePoint Installer**

## Activate License

Specify license key and activate software.

**Step 1 - Enter License Key**  
License Key:

**Step 2 - Verify Web Front End Count**  
Web Front End Servers in Farm:   Override

**Step 3 - Provide Local Administrator Credentials for All Farm Servers**  
Login Name:  (DOMAIN\user or user)  
Password:

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

- Activate Online (requires an Internet connection on this server)
- Activate Offline (obtain a license file on another machine and upload here)

**Metalogix**

## Additional Information

### Minimum Server Software Requirements

- SharePoint (pick one)

Windows SharePoint Services 3.0 (WSS) or Microsoft Office SharePoint Server 2007 (MOSS)

- **Operating System** - Windows 2003 or 2008 Server. Strongly recommend 64 bit.
- **SharePoint Server** - Windows SharePoint Services 3.0 (WSS)  
Microsoft Office SharePoint Server 2007 (MOSS), Standard or Enterprise  
-Service Pack 1 or Higher  
-32 or 64 bit Editions

SharePoint Foundation Server (SFS) or Microsoft SharePoint Server 2010 (MSS)

**NOTE:** For Microsoft SharePoint Server 2010 (MSS), Service Pack 1 or the EBS hotfix must be applied.

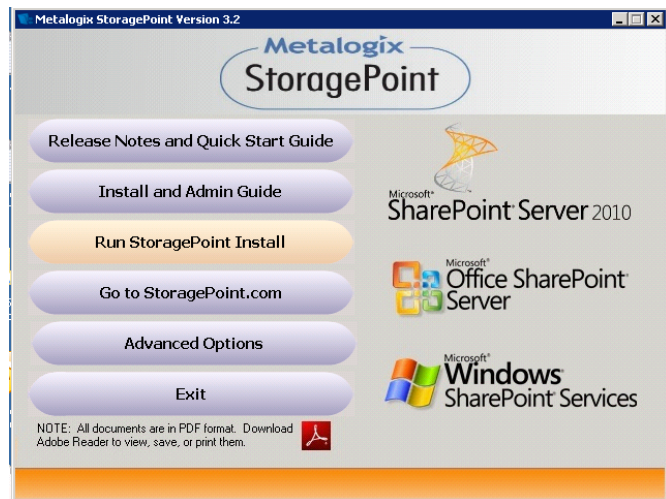
- **Operating System** - Windows 2008 Server
- **SharePoint Server** - SharePoint Foundation Server (SFS)  
- Microsoft SharePoint Server 2010 (MSS), Standard or Enterprise
- **Other Server Software** - SQL Server 2005 or 2008 if using EBS  
- SQL Server 2008 Enterprise Edition if using RBS

## Quick Start Step 1 – Installation

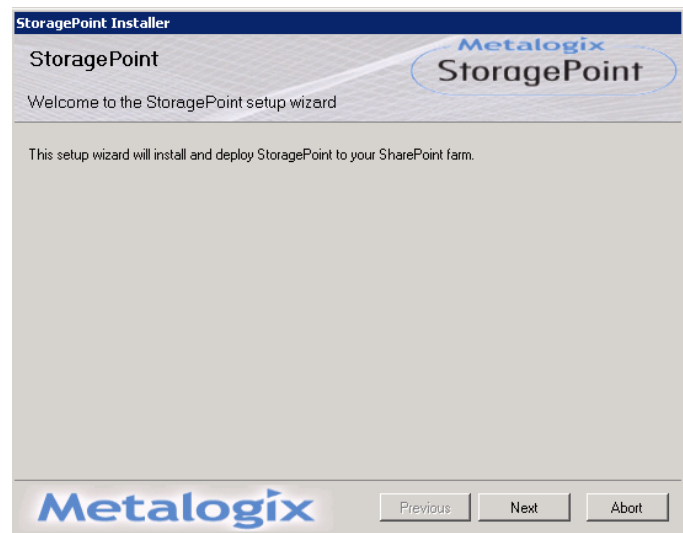
**NOTE:** An upgrade from 2.x to 3.x will be irreversible, so please make sure you want to and are ready to upgrade before proceeding with any 3.x install. As an added precaution it is advisable to back-up your Metalogix StoragePoint configuration database prior to performing any 2.x to 3.x upgrade.

1. You will receive a welcome e-mail with instructions on how to download the Metalogix StoragePoint software. This e-mail will be sent after you register for a trial or make a software purchase. Follow the instructions and download the software to one of your SharePoint WFEs or download it to another location and copy it to one of your WFEs.
2. Once downloaded or copied to a WFE within your farm or single-server environment, simply double-click the executable to launch the Metalogix StoragePoint Autorun program.

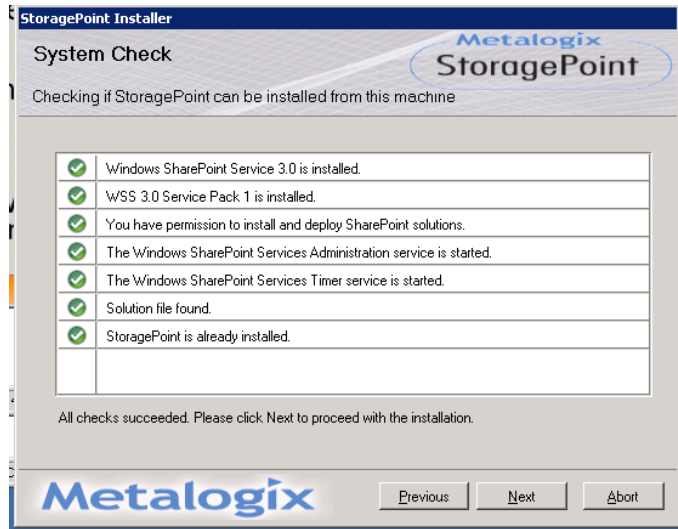
3. Click on the **Run StoragePoint Install** button to launch the Metalogix StoragePoint installer program. You can also load the Release Notes and Quick Start Guide or the Installation and Administration Guide. Please note that both of these documents are PDFs, so please have Adobe Acrobat Reader or some other PDF viewer installed. You can click on the PDF icon on the bottom of the page to download Acrobat Reader.



4. You will be presented with a welcome screen. Click **Next**.



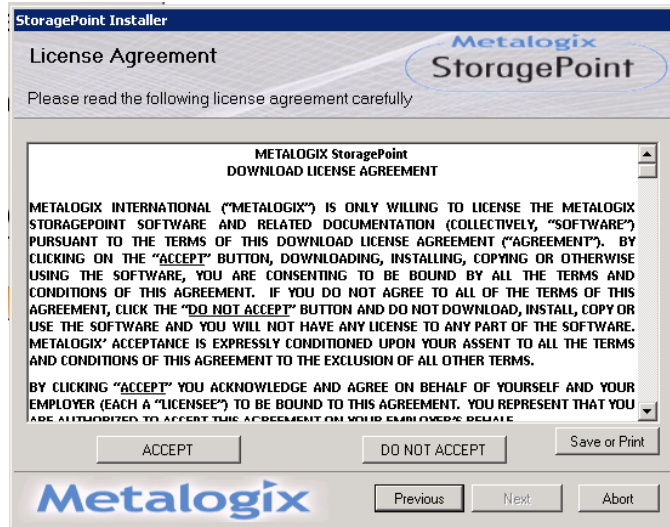
- The installer will now perform a series of system checks to make sure the system is ready for Metalogix StoragePoint to be installed.  
If all system checks pass then click **Next**.



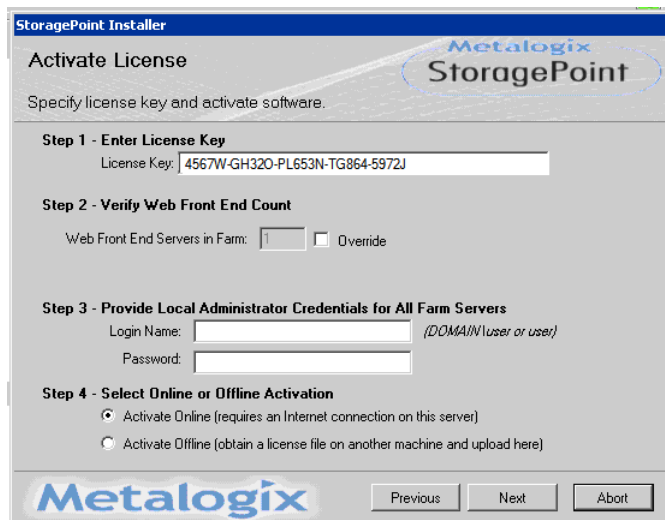
You **MUST** read and ACCEPT the terms and conditions of the **METALOGIX StoragePoint DOWNLOAD LICENSE AGREEMENT** before you can proceed with the installation process.

Clicking the **Save or Print** button will open the document in PDF format. You will need [Adobe Reader](#) if you wish to save or print the agreement.

- Click the **ACCEPT** button to accept the terms of the Agreement and proceed to the next step in the installation process.

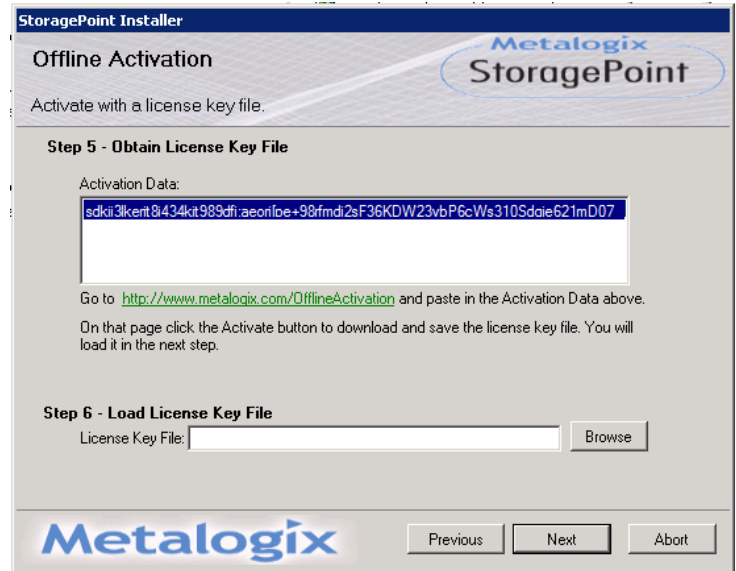


- Enter the license key.  
**NOTE:** You may have more than one registration key depending on what licenses you've installed. Please make sure you are using the correct key. There are different keys for production and non-production licenses.
- Verify the number of WFE servers in the farm. This can be less than the number requested with your license. You must

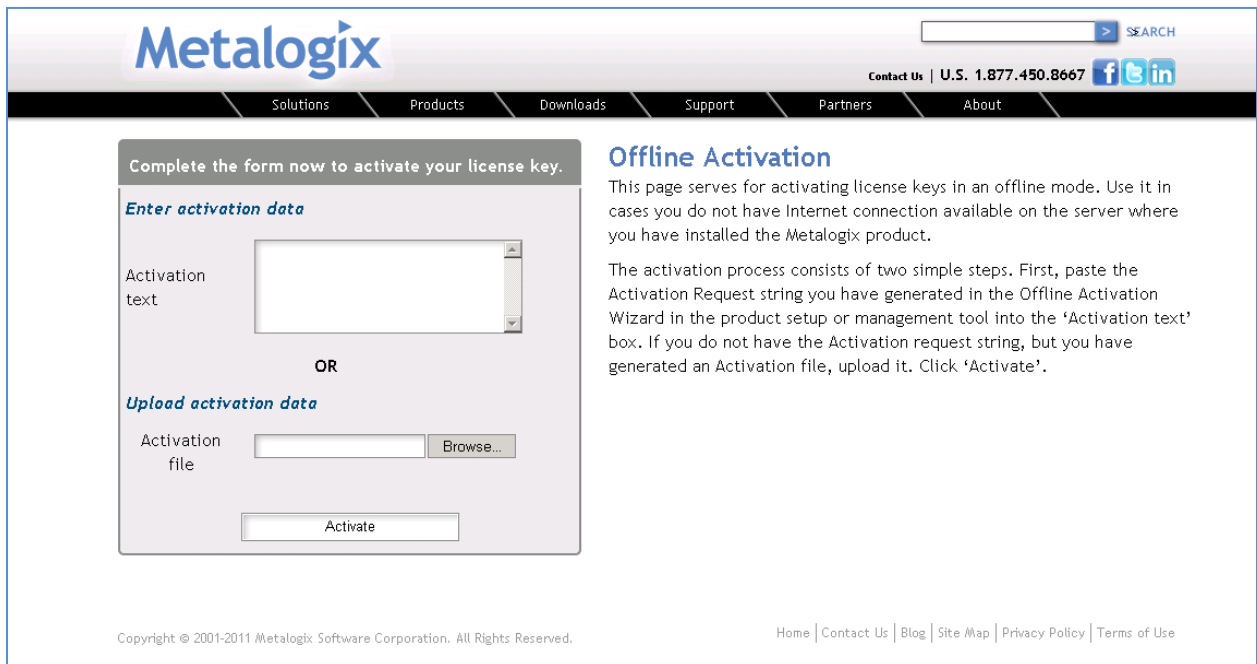


- enter an explanation in the Reason for Override field if you check the Override box.
9. Provide the credentials for an account that has local administrator rights on the WFE(s). The activation and provisioning job that runs requires this access to register certain components on each WFE.
  10. Select the **Activate Online** option and click **Next**, or if your server does not have an Internet connection, click Activate Offline and go to the next step.

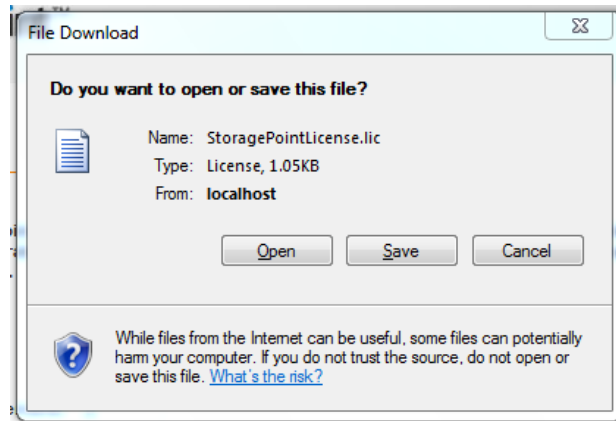
11. (OPTIONAL) If you've selected the Active Offline option and clicked **Next**, you will see a screen with Activation Data generated. The data is already selected; copy the data.
12. Click the link or open a browser on a computer with access to the internet and navigate to <http://www.metalogix.com/OfflineActivation>.



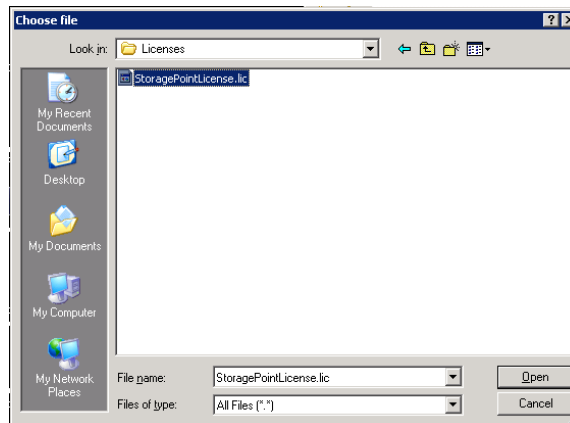
13. Paste the Activation Data in the top field and click the **Activate** button.



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



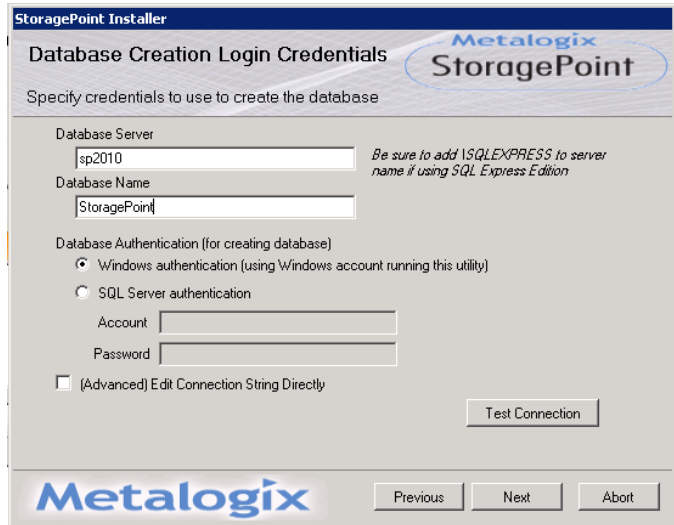
15. Back on the Offline Activation window, upload the license key file that you received by clicking on the **Browse...** button.
  - a. Navigate to the location where you saved the file to.
  - b. Select the file and click **Open**.



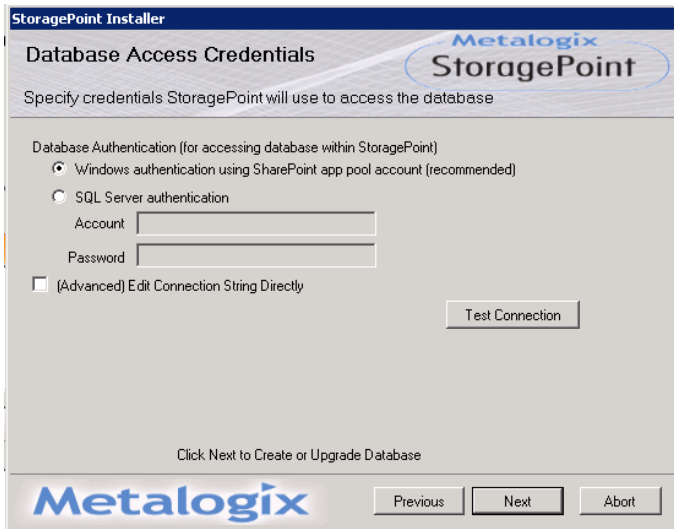
See Automatic (Internet) Activation or Manual Activation in the Installation and Administration guide for more information on this process.

16. Click **Next**.

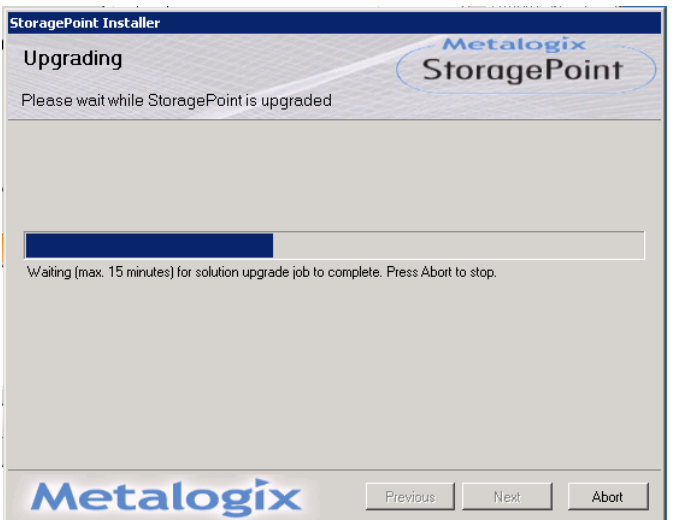
17. Provide the name of the database server where you want the Metalogix StoragePoint configuration database installed. You can also optionally change the database name and provide SA credentials if the currently logged on user does not have database and object create privileges on the specified SQL Server instance.
18. Click **Test Connection** to make sure the supplied values are valid.
19. Click **Next**.



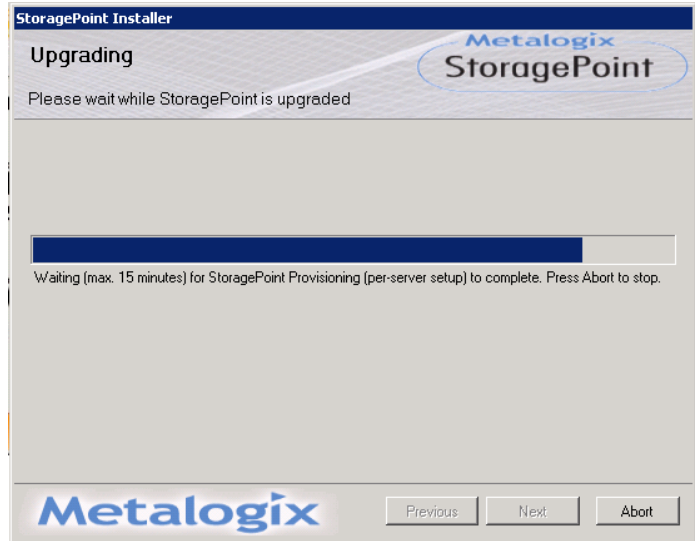
20. Provide the credentials that will be used to access the Metalogix StoragePoint configuration database. We recommend using the default setting, which will access the database via the app pool account(s) that the SharePoint web application(s) run under.
21. Click **Test Connection** to test the connection based on selected authentication method.
22. Click **Next**.



23. The solution file will now be installed on the local server and deployed to the all servers in the farm. This process can take upwards of 5 minutes depending on the size of your farm.

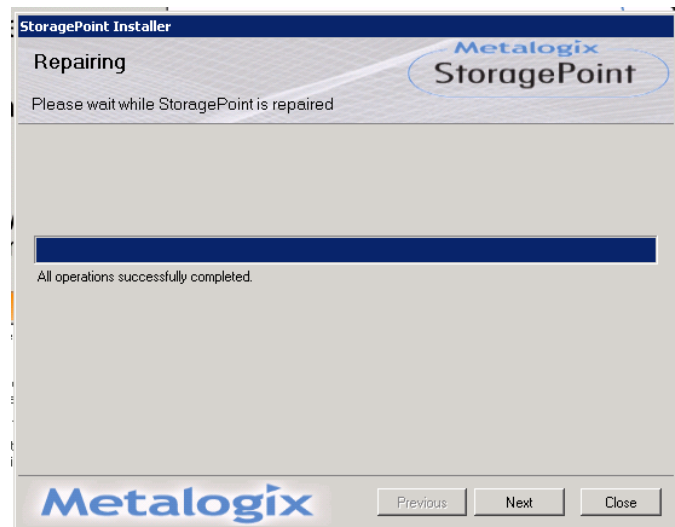


This page will periodically refresh to update the provisioning status.

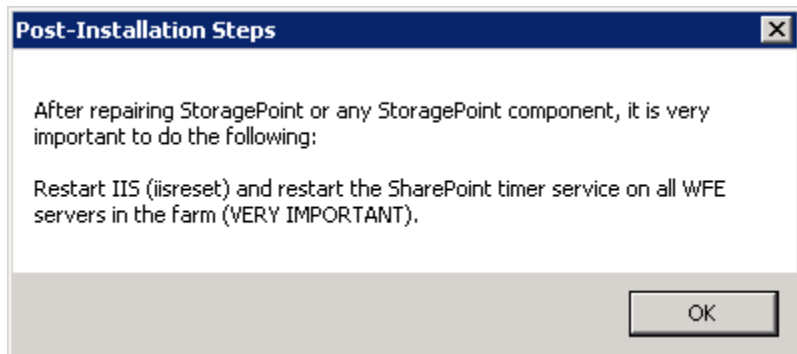


Upon completion of the deployment process the progress status will change to **All operations successfully completed.**

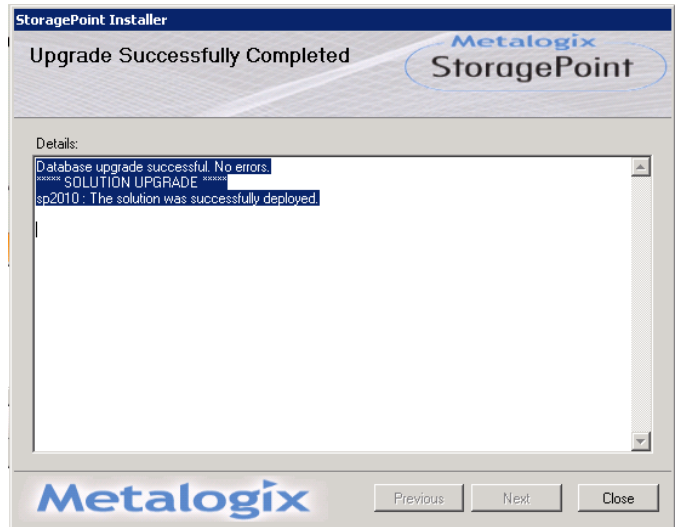
Click **Next**.



24. After the install, you will be reminded to restart IIS and the SharePoint timer service. Click **OK**.



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



A browser window will be opened and you will be taken to the Metalogix StoragePoint **License Management** page in **SharePoint Central Administration**.

## Quick Start Step 2 – Setting up Metalogix StoragePoint

Metalogix StoragePoint is entirely managed within **SharePoint Central Administration** on the **Application Management** page. Once there, you can change the state of the EBS Provider, establish farm-wide storage profile defaults, and manage your storage profile(s).

The general high-level steps to follow when setting up Metalogix StoragePoint to run within your SharePoint farm are as follows:

1. Configure Metalogix StoragePoint Logging. **(OPTIONAL)**
  - a. This step will establish how verbose Metalogix StoragePoint logs information and errors.
  - b. Go to the **Configuring Metalogix StoragePoint Logging** section of the **Metalogix StoragePoint Installation and Administration Guide** for detailed instructions on performing this step.
2. Configure the Metalogix StoragePoint System Cache **(OPTIONAL)**
  - a. This step will establish the temporary location for BLOBs during Asynchronous operations. If you are leveraging a cloud-based storage platform or want to take advantage of any of the additional capabilities associated with asynchronous operations then this is a required step.
  - b. Go to the **System Cache** section of the **Metalogix StoragePoint Installation and Administration Guide** for details on performing this step.
3. Activate the EBS Provider. **(REQUIRED only for EBS)**
  - a. This step will prepare the farm to externalize BLOBs.
  - b. Go to the **Change the State of the External BLOB Store (EBS) Provider** section of the **Metalogix StoragePoint Installation and Administration Guide** for detailed instructions on performing this step.
4. Configure the General Settings and Farm Wide Timer Jobs. **(OPTIONAL)**
  - a. This step will establish default values for newly-created endpoints and storage profiles. If defaults are not configured then newly-created endpoints and storage profiles will be blank. This step will allow the administrator to monitor the health and activity of the storage endpoints, as long as capacity thresholds are established when endpoints are created. It will also set up the frequency of migration jobs for archiving and asynchronous externalization.
  - b. Go to the **General Settings** section of the **Metalogix StoragePoint Installation and Administration Guide** for detailed instructions on performing this step.
5. Configure the Storage Endpoints. **(OPTIONAL)**
  - a. This step will create the storage location(s) (endpoints) where content will be externalized to. One or more endpoints can be defined per storage profile. You can create them from the **Storage Endpoints** link in Metalogix StoragePoint's Central Administration section or from within the Storage Profile UI.
  - b. Go to the **Manage Storage Endpoints** section of the **Metalogix StoragePoint Installation and Administration Guide** for detailed instructions on performing this step.
6. Create one or more Storage Profiles. **(REQUIRED)**
  - a. This step will create the storage profile(s) that will dictate how BLOBs are externalized. You will be able to create profiles by web application, content database, and/or site collection.

- b. Go to the **Managing Storage Profiles** section of the **Metalogix StoragePoint Installation and Administration Guide** for detailed instructions on performing this step.
7. Configure Archiving Setting for each storage profile. **(OPTIONAL)**
  - a. This step will enable less accessed content to be moved to less expensive tiers of storage.
  - b. Go to the **Archiving** section of the **Metalogix StoragePoint Installation and Administration Guide** for detailed instructions on performing this step.
8. Configure the Orphan BLOB Cleanup Job for the Storage Profile. **(OPTIONAL)**
  - a. This step involves scheduling how frequently the Orphan BLOB Cleanup Job is run.
  - b. There are important considerations to keep in mind when scheduling this job. Please see the **Orphan BLOB Cleanup Job Considerations** section of the **Metalogix StoragePoint Installation and Administration Guide** for more information.
9. Run an Externalize job for each configured Storage Profile. **(OPTIONAL)**
  - a. This step assumes that you have an existing content database and want to externalize the existing BLOBs.
  - b. Go to the **Configure Storage Profile Timer Jobs** section of the **Metalogix StoragePoint Installation and Administration Guide** for detailed instructions on performing this step.

Once you have completed these simple steps the BLOBs within your SharePoint farm will start externalizing to their configured locations (endpoints).