
Installation Guide



ControlPoint

Change Manager (Advanced Copy)

SharePoint Migration

v. 4.0



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Preface

This guide contains detailed information about a powerful and flexible tool within the ControlPoint family of products that consists of two separately-licensed components:

The **Change Manager (Advanced Copy)** component enables administrators to copy site content either within or between SharePoint 2010 or 2013 farms.

The **SharePoint Migration** component enables administrators to migrate content from SharePoint 2007 and 2010 to SharePoint 2013.

Why ControlPoint Change Manager/SharePoint Migration?

Advanced Copy and Migration operations are carried out via the Batch Builder client application, which consists of two canvases: Plan and Execute.

The **Plan** canvas allows you to organize your data to meet your project needs. Set up your Content Set by team, by site administrator, by date, by content type—you define what is to be copied/migrated, and when.

The **Execute** canvas provides a filtering option that allows you to include or exclude only the components (lists, Web Parts, Features, and so on) that you specify. You can either perform the Advanced Copy or Migration interactively or schedule it for later execution.

What's New in Version 4.0

Change Manager (Advanced Copy) now supports copying between SharePoint 2013 farms.

Components

Below are descriptions of installed components.

Component	Description
ControlPoint Central Website	A Web site created during the installation process that is the starting point for using the application. Through the ControlPoint Central website you: <ul style="list-style-type: none"> ▪ configure the application ▪ check log files and server connections ▪ install and run the Batch Builder client application.
ControlPoint Change Management Central service	The service that runs on the SharePoint 2010 or 2013 farm where the product is licensed and is the primary service responsible for communicating between all SharePoint farms and the ControlPoint Central Website.

Component	Description
ControlPoint Change Management Connector service	The service that is created when the Connector is installed and reads and writes all of the data being copied and/or migrated between SharePoint sites.
Batch Builder client application	A click-once application that is installed locally from the ControlPoint Central Website and is used as the interface for performing Advanced Copy and/or Migration between SharePoint sites.
	NOTE: Every time you launch the Batch Builder from the ControlPoint Central Website, it ensures that you are running the latest version installed on your server.

System Requirements

Requirements for Installing and Running the ControlPoint Central Website and Connectors

SharePoint

The ControlPoint Central Website can be installed on any server that hosts a SharePoint 2010 or 2013 (Foundation or Server) farm.

ControlPoint Connectors are installed on servers that host the applicable SharePoint farm(s) for the licensed operation(s):

- For **Advanced Copy** operations:
SharePoint 2010 or 2013 Foundation or Server
- For **Migration** operations:
 - SharePoint 2007 WSS or MOSS/SharePoint 2010 Foundation or Server (source farm)
 - SharePoint 2013 Foundation or Server (destination farm)

.NET Framework

The appropriate version of the .NET Framework must be installed on the server where the ControlPoint Central Website and each of the Connectors are installed.

- For **SharePoint 2007** and **SharePoint 2010**: .NET v, 3.5 SP1

NOTE: IF .NET 4.0 is also installed on a SharePoint 2010 farm server, it must be the full version (not the .NET client profile only).

- For **SharePoint 2013**: .NET v. 4.0 or later, full version (not the .NET client profile only).

*Account Requirements**

INSTALLATION ACCOUNT

The account used to install ControlPoint Central or a Connector must:

- be local administrator on the SharePoint farm server
- be a member of the SharePoint Farm Administrator's group
- ideally, be added to the security server role sysadmin for the SQL server

If, for security reasons, the install account cannot be added to the sysadmin role, it will need to have the following privileges:

- db_creator role for the SQL server
- db_owner for:
 - the SharePoint_Config database
 - the SharePoint Central Administration database, and
 - each content database on the farm involved in the Advanced Copy or Migration operation.

SERVICE ACCOUNTS

The account that runs the ControlPoint Change Management Central service or a ControlPoint Change Management Connector Service must:

- be local administrator on the SharePoint farm server
- be a member of the SharePoint Farm Administrator's group.
- be a db_owner for:
 - the SharePoint_Config database
 - the SharePoint Central Administration database, and
 - each content database on the farm that will be involved in an Advanced Copy or Migration operation.

*NOTE: When installing on a farm server that hosts the ControlPoint for SharePoint Administration application, always use the same installation and Service accounts.

Requirements for Running the Batch Builder Client Application

Supported Operating Systems (for installing the Batch Builder client application)

The Batch Builder client application is a locally executed application that is downloaded from the ControlPoint Central Website to the machine from which the browser is run. The following versions of Windows are supported:

- Windows Server 2003, 2008, or 2012
- Windows XP SP2, Vista, or 7

Supported Browsers (for accessing the ControlPoint Central Website)

Internet Explorer (IE) 7, 8, 9, or 10*

* If ControlPoint Central is installed on a SharePoint 2010 server and you want IE 10 to be used as a browser, you may need to apply a hotfix that updates ASP.NET browser definition files. This hotfix is available at <http://support.microsoft.com/kb/2600100>.

First Time Installation

If your license includes ControlPoint for SharePoint Administration, install the ControlPoint Central Website on the same machine where ControlPoint for SharePoint Administration has already been installed. If you are installing ControlPoint for SharePoint Administration for the first time, you will be prompted to begin the installation of Change Manager at the completion of the ControlPoint installation.

Installation Task Summary

A ControlPoint Change Manager or SharePoint Migration installation consists of the following tasks:

- a** Install ControlPoint Central Website.
- b** Record or activate the Advanced Copy and/or Migration license.
- c** Install one or more Connectors.

NOTE: There are two variations of the ControlPoint Central Website installer: **ControlPoint for SharePoint Migration.exe** and **ControlPoint Change Manager.exe**. If you are licensed for both components, you may run *either* of these installer. It is *not* necessary to run both.

Installing the ControlPoint Central Website

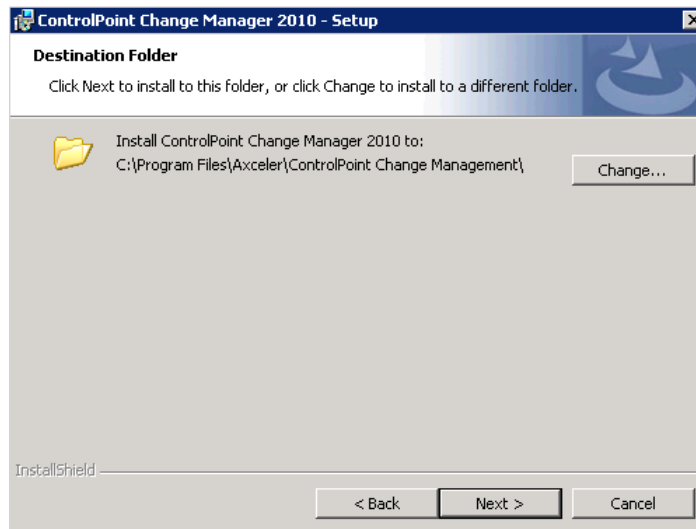
To install the ControlPoint Central Website:

- 1** Log into your farm server as the **Installation Account** (on page 5).
- 2** To begin the installation process, double-click the version of the **ControlPoint for SharePoint Migration** or **ControlPoint Change Manager** file that is appropriate for the version of SharePoint that is running on the server (2010 or 2013).

REMINDER: If you are installing ControlPoint for SharePoint Administration for the first time, you will be prompted to begin a Change Manager installation after the ControlPoint for SharePoint Administration installation has been completed.

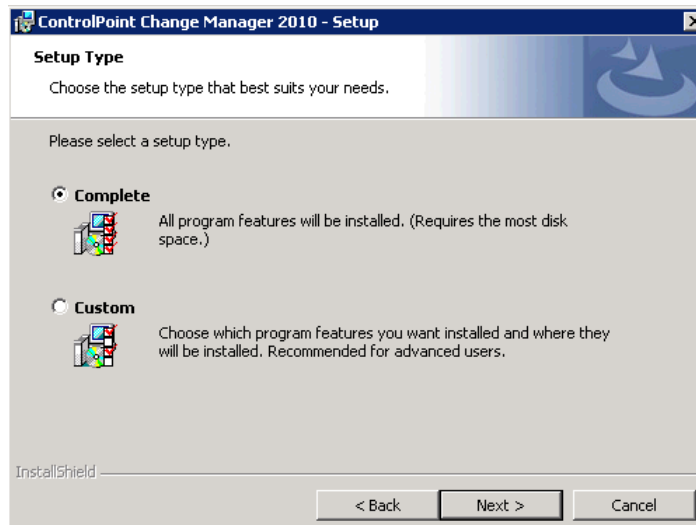
- 3** From the Welcome screen, click [**Next**] to display the **Software License Agreement**
- 4** Read the license agreement. Select **I accept the terms in the license agreement** to continue.

- 5 Click **[Next]** to display the Destination Folder dialog.



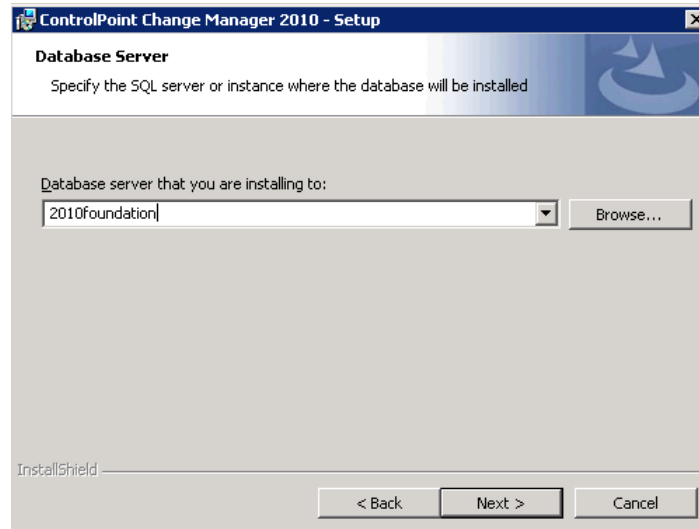
The installer specifies a default install directory (C:\Program Files\Axceler\ControlPoint Change Management), but you can click **[Change]** and select a different one.

- 6 Click **[Next]** to display the Setup Type dialog.
- 7 For Setup Type, accept the default option (Complete).

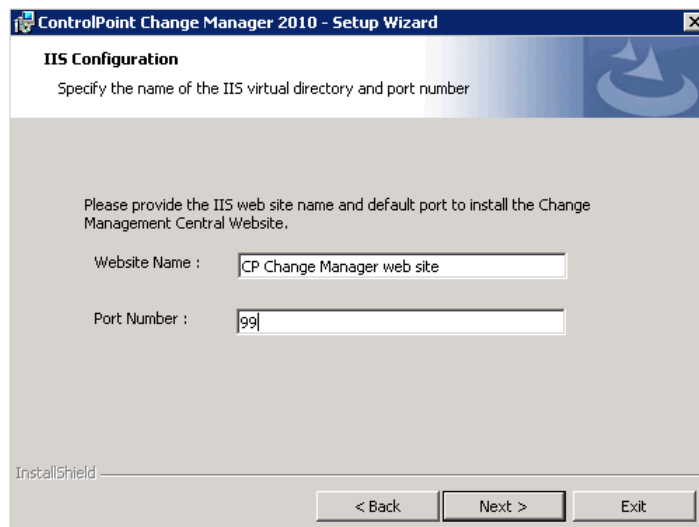


- 8 Click **[Next]** to display the Database Server dialog.

- 9 Enter the name of the database server on which you want to install the ChangeManagemerAdmin database.

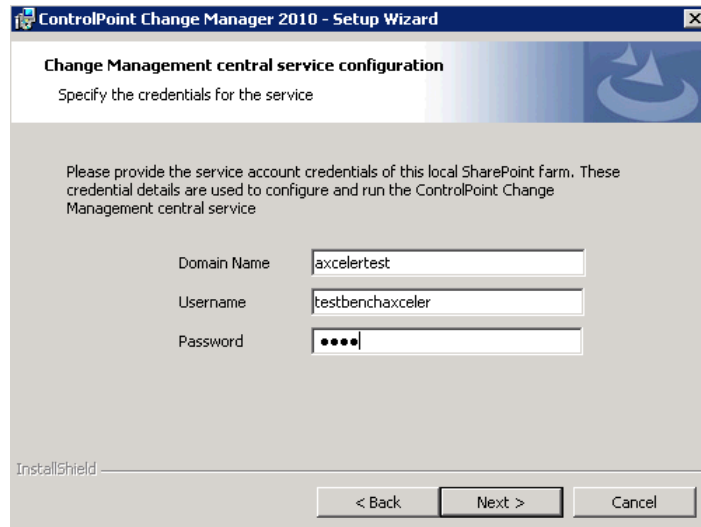


- 10 Click [Next] to display the IIS Configuration dialog. Accept the default Website Name and Port Number.

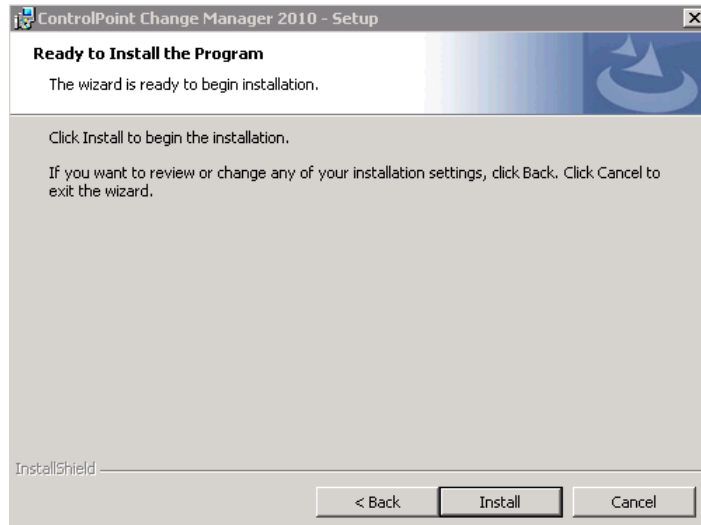


- 11 Click [Next] to display the Change Management central service configuration dialog.

12 Enter the Domain Name, Username, and Password of the ControlPoint Central Service Account.

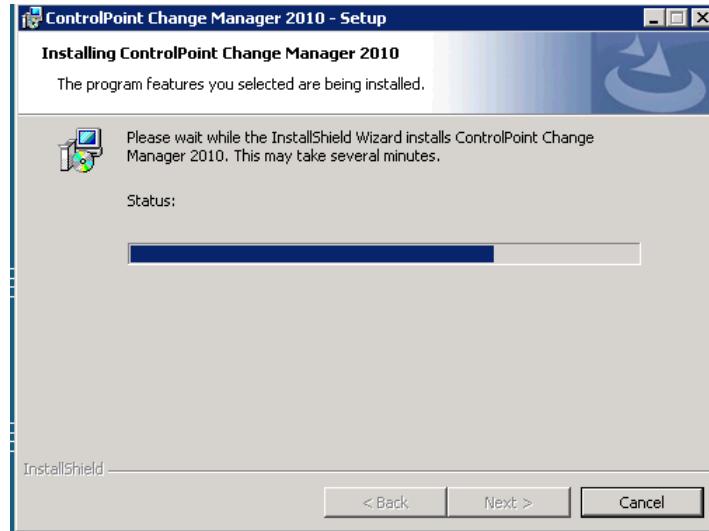


13 Click [Next] to display the Ready to Install the Program dialog.



14 Click [Install].

A status message displays, showing the progress of the installation.



- 15 When the installation is complete, click [Next] then [Finish] to close the installer.
- 16 Use the information in the following table to determine the appropriate next step.

If you are licensed for ...	Then ...
ControlPoint for SharePoint Administration along with Change Manager (Advanced Copy) and/or Migration	make sure ControlPoint for SharePoint Administration has <i>Recording the ControlPoint Central Website URL for ControlPoint (if your license includes ControlPoint for SharePoint Administration</i> on page 11).
Change Manager (Advanced Copy) and/or Migration only	continue with <i>Activating a Standalone Change Management License</i> on page 13.

Recording the ControlPoint Central Website URL for ControlPoint (if your license includes ControlPoint for SharePoint Administration)

After installing the ControlPoint Central Website on your SharePoint server, you must record the website's URL—via the ControlPoint License Management—to make the product accessible from within the ControlPoint for SharePoint Administration application interface.

To record the ControlPoint Central Website URL for ControlPoint:

- 1 From the Web front-end server on which both ControlPoint for SharePoint Administration and the ControlPoint Central Website have been installed:
 - Double-click the MANAGE CONTROLPOINT LICENSES icon (if it appears on your desktop).

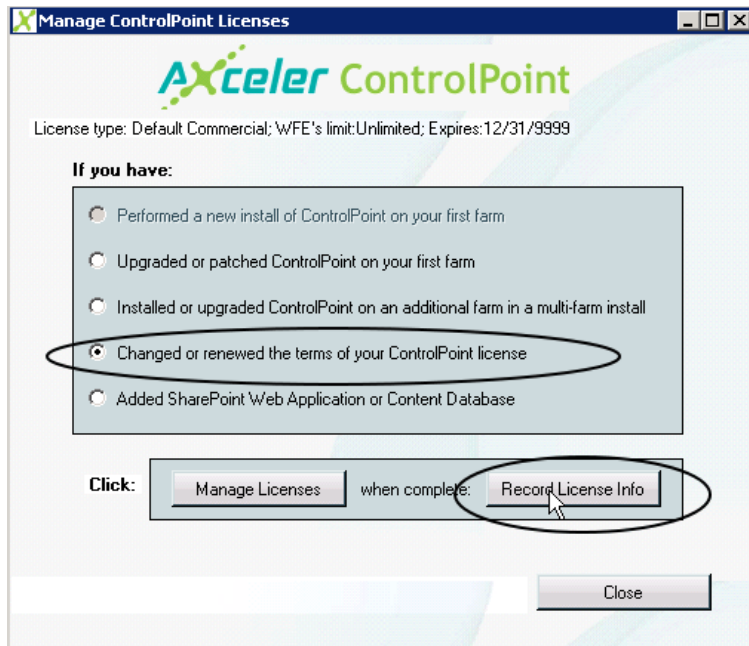
OR

- From the Start menu, choose ALL PROGRAMS > AXCELER > CONTROLPOINT > MANAGE CONTROLPOINT LICENSES.

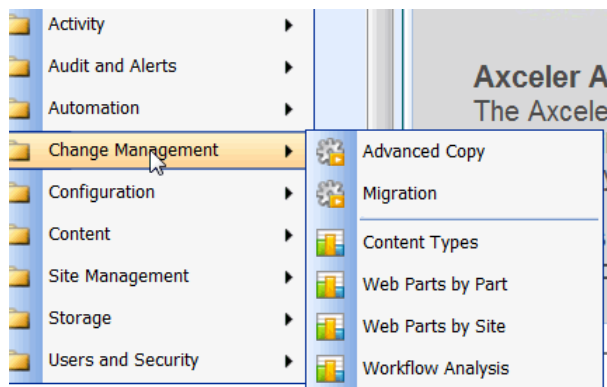
NOTE: You may need to "Run as Administrator" to invoke the dialog.

2 On the Manage ControlPoint Licenses dialog:

- Select Changed or renewed the terms of your ControlPoint license.
- Click [**Record License Info**].



The next time ControlPoint is launched, the ADVANCED COPY and/or MIGRATION menu items (depending on the terms of your license) should now appear in the SharePoint Hierarchy and Manage ControlPoint panels.



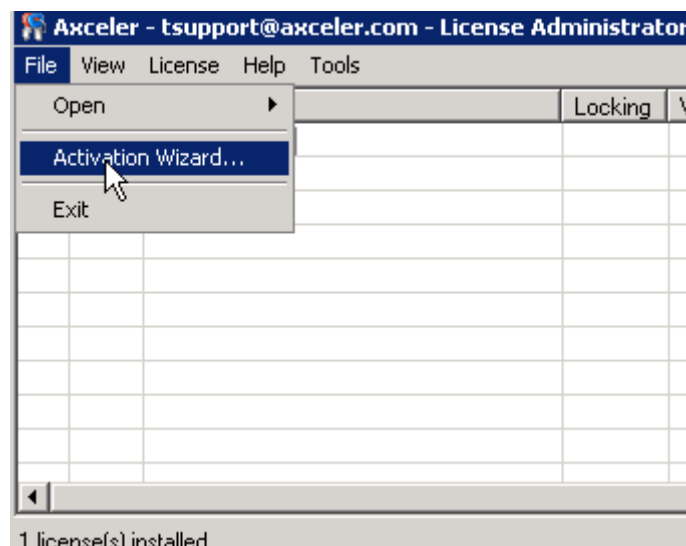
NOTE: If the menu item(s) still do not appear, it may be necessary to restart the Axceler application pool.

Activating a Standalone License

If you are licensed for ControlPoint Change Manager or SharePoint Migration but your license does not include ControlPoint for SharePoint Administration, after installing the ControlPoint Central Website on your SharePoint server, you must activate the license using the following procedure.

To activate a standalone License:

- 1 Navigate to the folder where the ControlPoint Central Website is installed (by default, C:/Program Files/Axceler/ControlPoint Change Management/CCAS).
- 2 Open the file Microsoft.Licensing.LicAdmin.exe to display the License Administrator.
- 3 Choose File > Activation Wizard.



The conventional way to activate your license is over the Internet, using the procedure for *Activating Your Change Management License Over the Internet* (see "*Activating Your License Over the Internet*" on page 13).

If the machine on which the ControlPoint Central Website is installed does not have Internet access, you will need to request a license file from Axceler. Continue with the procedure for *Activating Your License Without Internet Access* (on page 14).

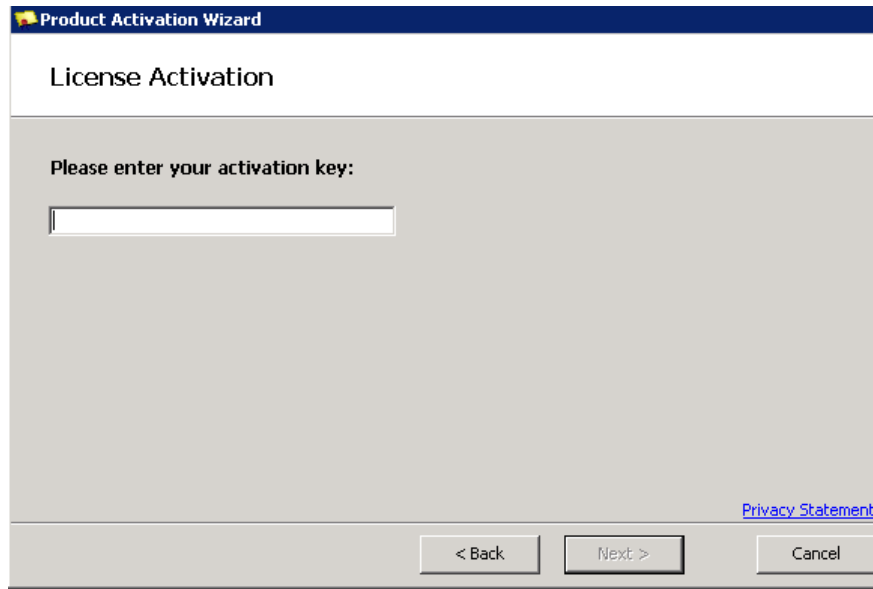
Activating Your License Over the Internet

To activate your Change Management license over the Internet:

- 1 From the Product Activation Wizard dialog, select accept the default option, I want to activate the software over the Internet.

REMINDER: If you do not have internet access, use the procedure for *Activating Your License Without Internet Access* (on page 14).

- 2 Click [**Next**] to display the License Activation dialog.

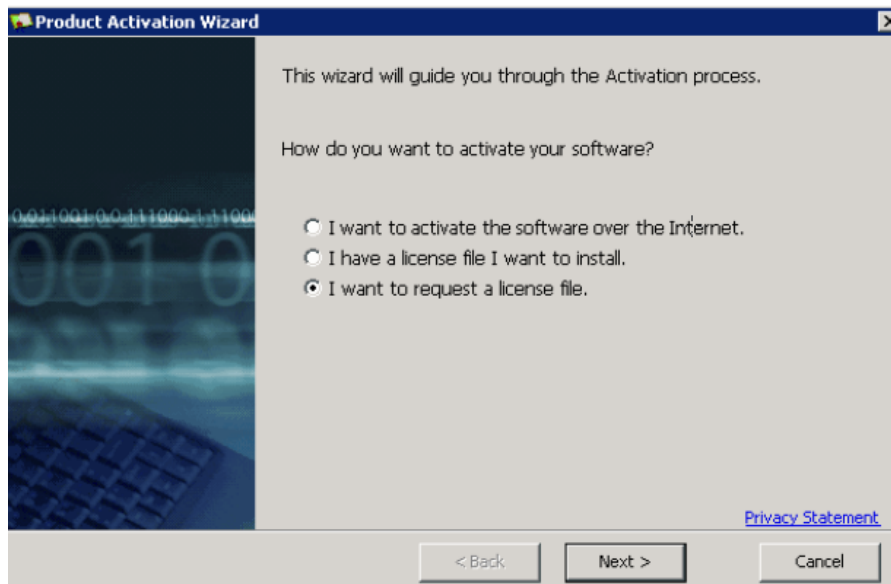


- 3 Enter the license activation key provided by Axceler, then click [**Next**].
- 4 When the license activation is complete, click [**Finish**].

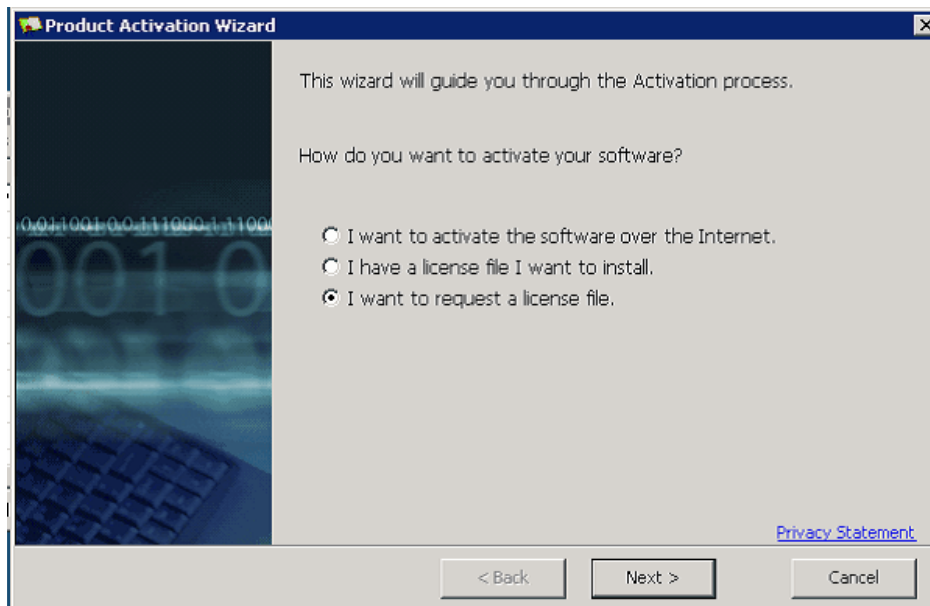
Activating Your License Without Internet Access

To activate your ControlPoint license without Internet access:

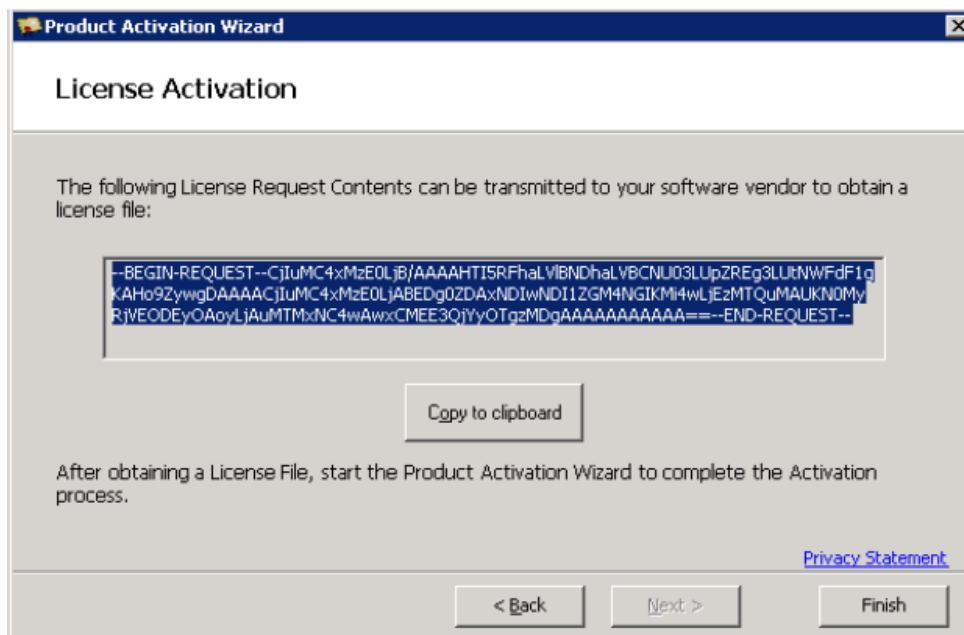
- 1 From the Product Activation Wizard dialog, select the I want to request a license file option.



- 2 Click [Next] to display the License Activation dialog.

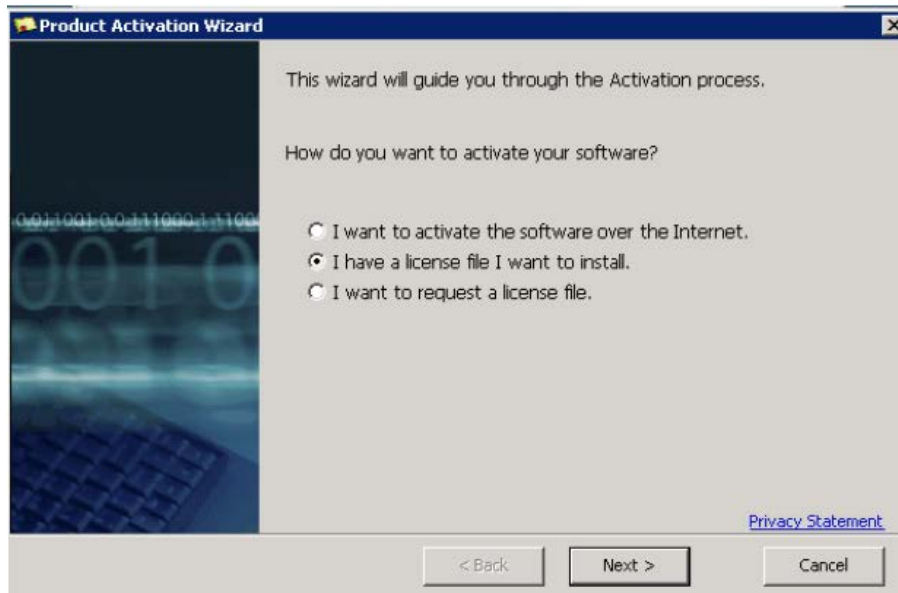


- 3 Enter the activation key provided by Axceler.
- 4 Click [Next] to generate a request string.

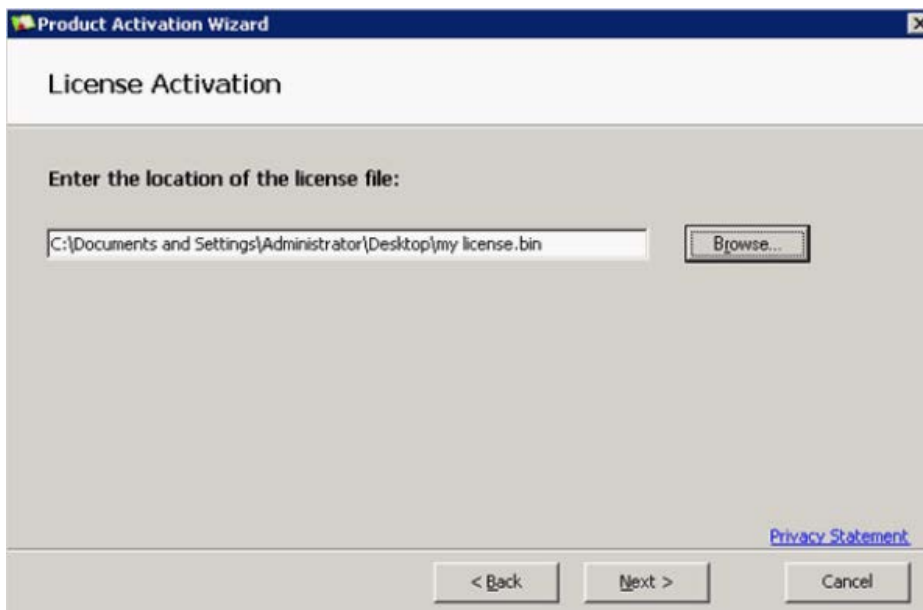


- 5 Copy the request string to the clipboard, paste it into an email, and send it to tsupport@axceler.com.
- 6 When you have received the license file from Axceler, save it to an accessible location.

- 7 Return to the Activation Wizard and select the I have a license file I want to install option.



- 8 Click [Next]
- 9 Browse to the location where the license file has been saved.



- 10 Click [Next] to activate the license.

Installing the Connectors for Managed Farms

After installing ControlPoint Central, you must install a Connector on each server that you will be including in Advanced Copy and/or Migration operations. This includes the server on which Change

Management Central is installed, if applicable. (That is, the Connector installation is separate from the installation for Change Management Central.)

To install the change Management Connector:

- 1 Log into the server where you want to install the Connector as the **Installation Account** (on page 5).
- 2 Launch a browser session and enter the url for the Change Management Central Website:

http://<ServerName>:<PortNumber>/ChangeManager

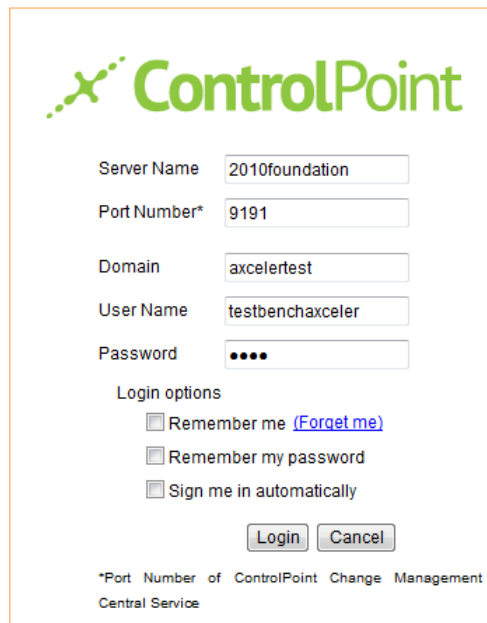
where:

- ServerName is the name of the SharePoint farm server where the ControlPoint Change Management Central Service is installed
- PortNumber is the port number for the ControlPoint Central Website (99 by default).



http://detroit:99/ChangeManager/Default.aspx

- 1 From the Change Management Central Login screen, provide the following credentials:
 - the Server Name where the ControlPoint Change Management Central service is installed
 - the Port Number of the ControlPoint Change Management Central service (9191 by default)
 - the Domain, User Name, and Password of the ControlPoint Central Service Account.



ControlPoint

Server Name

Port Number*

Domain

User Name

Password

Login options

Remember me ([Forget me](#))

Remember my password

Sign me in automatically

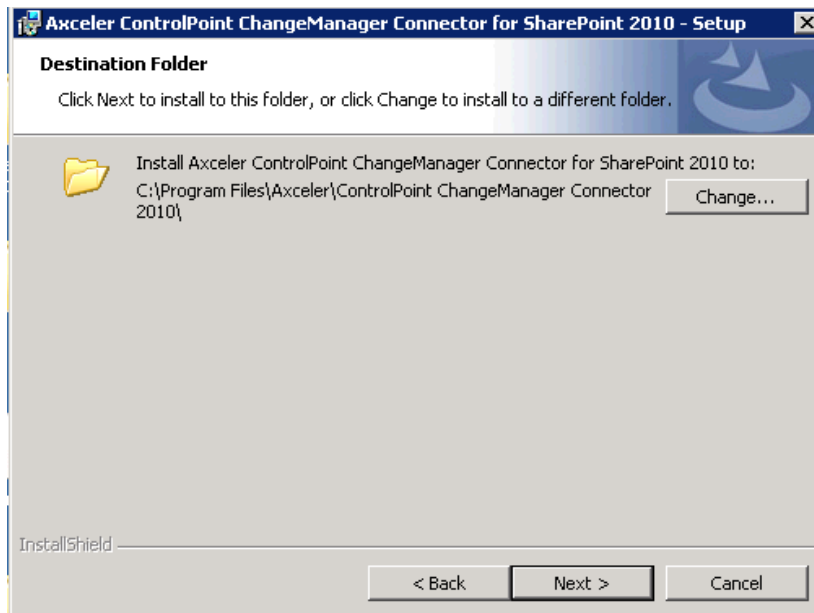
*Port Number of ControlPoint Change Management Central Service

- 2 Click [**Login**].
- 3 From the Install New Farm panel, choose **the applicable version**:
 - **For Advanced Copy: 2010**

- **For Migration: 2007 (for source farm) or 2013 (for destination farm)**



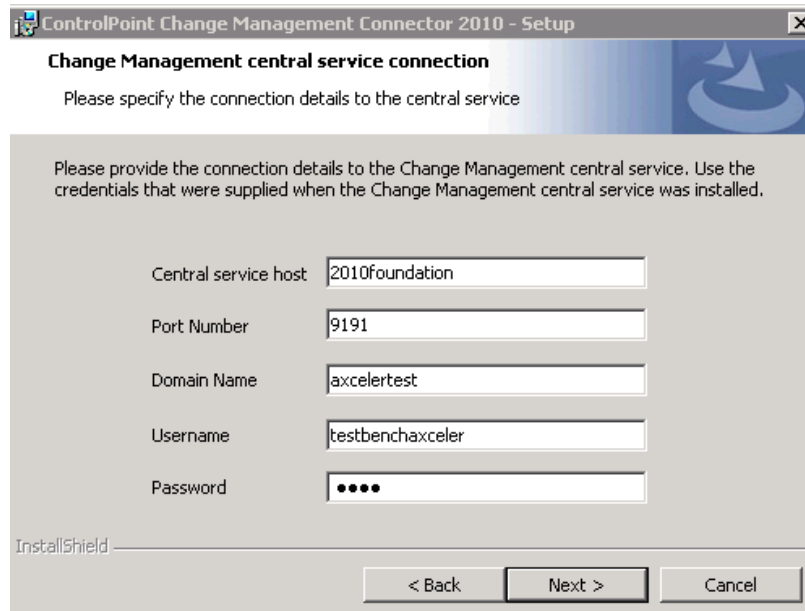
- 4 Click **[Run]** to start the setup process.
- 5 From the Welcome screen, click **[Next]** to display the Software License Agreement
- 6 Read the license agreement. Select I accept the terms in the license agreement to continue.
- 7 Click **[Next]** to display the Destination Folder dialog.



The installer specifies a default install directory (C:\Program Files\Axceler\ControlPoint Change Management Connector 2010), but you can click **[Change]** and select a different one.

- 8 Click **[Next]** to display the Change Management Central service connection dialog.

- 9 Enter the credentials for the Change Management Central Service Account to enable the Connector Service to communicate with the Change Management Central Service. Note that this is the same information you entered to log onto Change Management Central in Step 3.



ControlPoint Change Management Connector 2010 - Setup

Change Management central service connection

Please specify the connection details to the central service

Please provide the connection details to the Change Management central service. Use the credentials that were supplied when the Change Management central service was installed.

Central service host: 2010foundation

Port Number: 9191

Domain Name: axcelertest

Username: testbenchaxceler

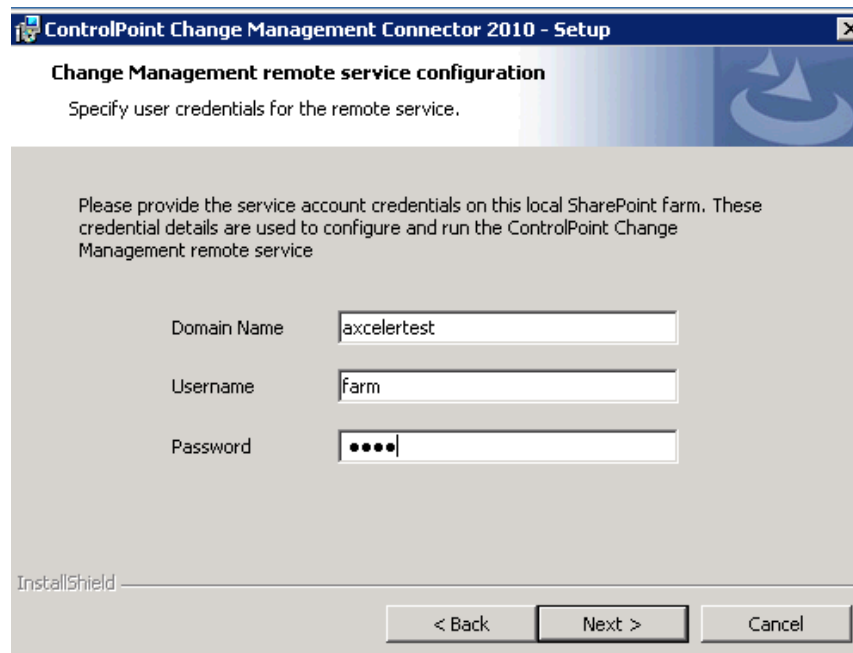
Password: ●●●●

InstallShield

< Back Next > Cancel

- 10 Click [Next].

- 11 Enter the credentials for the Change Management Connector Service Account.



ControlPoint Change Management Connector 2010 - Setup

Change Management remote service configuration

Specify user credentials for the remote service.

Please provide the service account credentials on this local SharePoint farm. These credential details are used to configure and run the ControlPoint Change Management remote service

Domain Name: axcelertest

Username: farm

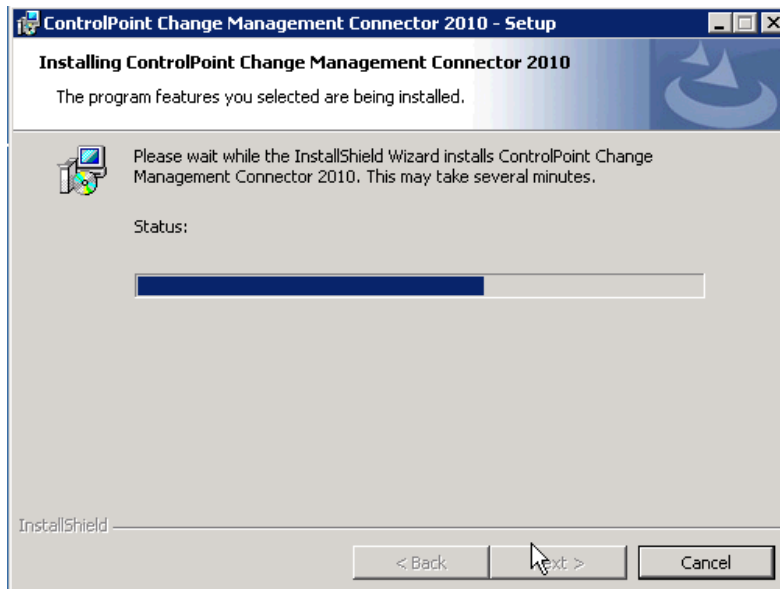
Password: ●●●●

InstallShield

< Back Next > Cancel

- 12 Click [Next].

13 To begin the installation, click **[Install]**.



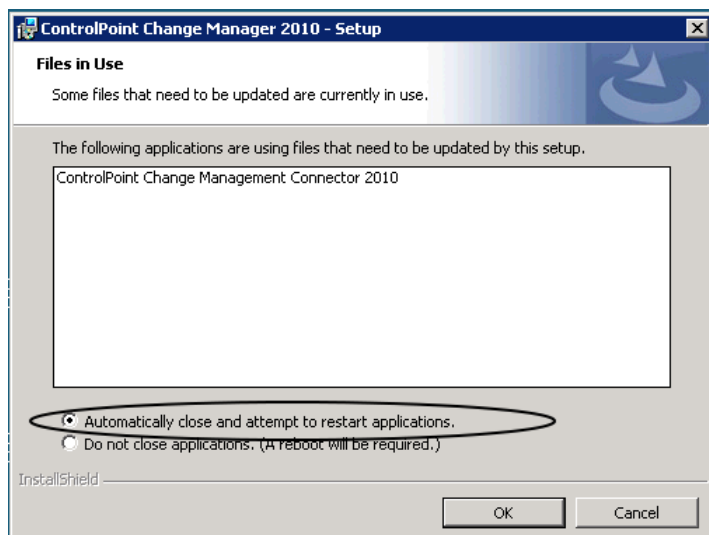
A status message displays, showing the progress of the installation.

14 When the installation is complete, click **[Finish]** to close the installer.

Upgrading from an Earlier Version

If you are upgrading from an earlier version of ControlPoint Change Manager and/or SharePoint Migration, run the installer for the ControlPoint Central and Connectors to upgrade your current installation.

- During the upgrade, you may receive a **Files in Use** dialog (if the installer has detected that the ControlPoint Change Management Connector service is currently running). Accept the default option, **Automatically close and attempt to restart application**, then click **[OK]**.



- Upon completion of the upgrade you will be prompted to restart your system. A restart is not necessary, however. Click **[No]** to dismiss the message.

NOTE: Unless the terms of your license have changed, it will not be necessary to re-activate it.

Uninstalling (Removing) Installed Components

The tasks involved in uninstalling ControlPoint Change Manager and/or SharePoint Migration should be performed in the following order:

- a** Remove the Connector from managed farm servers.
- b** Remove ControlPoint Central from the server where it is installed.

To uninstall a Connector:

Log into your farm server as the *Installation Account* (on page 5).

- 1** From the Start menu choose the appropriate option for the version of Windows you are running; either:
 - CONTROL PANEL > PROGRAMS AND FEATURES (Windows Server 2008)
 - OR
 - CONTROL PANEL > ADD OR REMOVE PROGRAMS (Windows Server 2003 and earlier)
- 2** Double-click **ControlPoint Change Management Connector (2007 or 2010 or 2013)**.
- 3** From the Welcome screen, click [**Next**].
- 4** To confirm that you want to begin the uninstall process, click [**Remove**].
The setup wizard provides a status as each component is removed.
- 5** When the Setup Wizard has successfully uninstalled the Connector, click [**Finish**].

NOTE: After a Connector has been uninstalled, you can remove the managed farm from Change Management Central via the Managed Farm Connectivity tab.

To uninstall ControlPoint Central:

- 1** Log into your SharePoint farm server as the ControlPoint Central *Installation Account* (on page 5).
- 2** From the Start menu choose CONTROL PANEL > PROGRAMS AND FEATURES.
- 3** Double-click:
 - ControlPoint Change Manager (2010 or 2013)
 - OR
 - ControlPoint for SharePoint Migration (2010 or 2013).
- 4** From the Setup Wizard Welcome screen, click [**Next**].
- 5** Select **Remove** then click [**Next**].
- 6** To confirm that you want to begin the uninstall process, click [**Remove**].
The setup wizard provides a status as each component is removed.

- 7 When the Setup Wizard has successfully uninstalled Change Management Central, click **[Finish]**.

Technical Support

Axceler is committed to providing timely and effective customer support to its customers worldwide. Axceler Technical Support is available to help you solve problems. The standard customer support contract guarantees technical support during contractually specified hours. To obtain technical support, have your customer license number ready.

To contact Axceler Technical Support, telephone, fax, or e-mail the nearest office listed below.

Axceler - North America

600 Unicorn Park Drive

Woburn, MA 01801

Phone: 781.995.0063

Toll Free: 866.767.0173

Fax: 781.287.0180

e-mail: Technical.Support@Axceler.com

Axceler - Europe

7 Swallow Place

London W1B 2AG, UK

Phone: +44 (0) 20 7850.0199

Fax: +44 (0) 20 7850.0270

e-mail: Technical.Support.UK@Axceler.com

The Axceler Customer Portal

If you have an active support contract with Axceler and your email address is in Axceler's Technical Support database, you can log into the Axceler Customer Portal at <https://support.axceler.com> and access the following product resources:

- announcements of new versions, critical maintenance releases, and other information that may be useful to users of Axceler products
- the product Knowledge Base, which includes training videos, product documentation, and FAQs
- articles, use cases, white papers, and company blogs

You can also connect directly with Axceler's support team and file and manage your own support tickets.

If you are visiting the portal for the first time, enter your email address in the log in screen then click the **[Retrieve Password]** button. You will promptly receive a temporary password for your account via email from Axceler Technical Support.