



Connect Install Guide

Version 3.2

Publication Date: December 16, 2013

Copyright © Metalogix International GmbH 2008-2013 . All Rights Reserved.

This software is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this software, or any portion of it, may result in severe civil and/or criminal penalties and will be prosecuted to the maximum extent possible under the law.

Copyright

© Copyright Metalogix International GmbH 2008-2013

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 2008-2013

Metalogix Connect™ and Replicator™ are trademarks of Metalogix International GmbH 2008-2013

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, please 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.

Table of Contents

Introduction	4
System Requirements.....	5
Hardware Requirements.....	5
Software Requirements	5
Access Requirements.....	6
SharePoint Farm Requirements	7
Installing Connect	8
Installing the Connect SharePoint Solution	9
Configuring Connect.....	11
About Connect Page	13
Adding Connections	13
Specifying the Preferred Connection	14
Using Connect.....	15
Upgrading the Connect SharePoint Solution	16
Determining the Installed Version.....	16
Removing the Installed Solution	16
Installing the New Solution	17
Uninstalling Connect	18
Removing the Connect Program.....	18
Removing the Connect Solution	18
Removing the Connect Database	19

Introduction

Metalogix Connect gives SharePoint administrators tools they can use to monitor and visualize their SharePoint environment. If you are also using Metalogix Replicator to migrate SharePoint structure and content or for real-time replication, then Connect will provide gives your administrators with the ability to manage and monitor those replication activities.

Metalogix Connect is a base product with additional products you can evaluate and enable from within Connect. More information for each of these products is available in their respective documentation, which are included with Connect.

System Requirements

The following tables describe the recommended requirements for Metalogix Connect.

Hardware Requirements

Component	Minimum Requirement
Processor	2.0 GHz minimum, 32- or 64-bit server
Memory	1 GB minimum, 3 GB recommended
Disk Space	120 MB minimum, 500 MB recommended
Screen Resolution	1024 x 768 minimum

Software Requirements

Component	Requirement
Operating System	Any of: <ul style="list-style-type: none"> • Windows Server 2012 • Windows Server 2008 R2 • Windows Server 2008 • Windows Server 2003 SP1 • Windows 8 • Windows 7 • Windows Vista • Windows XP SP2
SharePoint	Any of: <ul style="list-style-type: none"> • Microsoft SharePoint Server 2013 • Microsoft SharePoint Foundation 2013 • Microsoft SharePoint Server 2010 • Microsoft SharePoint Foundation 2010 • Windows SharePoint Services 3.0 • Microsoft Office SharePoint Server 2007

Component	Requirement
Database	<p>Any of:</p> <ul style="list-style-type: none"> • SQL Server 2012 • SQL Server 2008 R2 • SQL Server 2008 • SQL Server 2005 <p>Connect supports any non-embedded version of these database servers. Connect does not support the built-in database installed with the SharePoint standalone installation option.</p> <p>For best results, we recommend using a database installed on the same server where you run Connect.</p>
Metalogix Replicator	<p>Connect for Replicator and Connect for SharePoint Migration support:</p> <ul style="list-style-type: none"> • Metalogix Replicator for SharePoint version 6.x • Metalogix Replicator for SharePoint version 5.x • Metalogix Replicator for SharePoint version 4.x • Metalogix Replicator for SharePoint version 3.x
.NET Framework	<p>.NET Framework, version 3.5 or greater. You can download the latest version of the framework from http://www.microsoft.com/net/.</p>

Access Requirements

Component	Requirement
Server Access	HTTP or HTTPS access to all replication servers, without proxies requiring a separate login.
SharePoint Access	Access to the SharePoint web applications using Windows authentication.

Component	Requirement
Activation	<p>Connect activates your license key during its installation by contacting a Metalogix server. Connect will periodically refresh the activation as it runs.</p> <p>For customers without an Internet connection or who want to review the information that is being sent to Metalogix, offline activation is available. Installations using offline activation must be manually refreshed every 365 days.</p>

SharePoint Farm Requirements

Component	Requirement
Farm Load	<p>Connect uses multiple threads to connect to your SharePoint farms and retrieve data. The expected load is comparable to up to 5 full time users accessing your farm when the scheduled data retrieval occurs, a comparison runs, or a snapshot is created.</p>

Installing Connect

To install Connect:

1. From the directory where you extracted the Connect installer, run **Metalogix Connect** to start the setup process.
2. At the welcome screen, click **Next**.
3. At the License Agreement screen, review the agreement, select one of the choices and click **Next**. If you do not accept the agreement, then you must click Cancel and exit the installer.
4. At the Customer Information screen, enter your name and organization. Click **Next** to continue.
5. On the Destination Folder screen, click **Next** to install Connect in the default folder. If you want to change the folder, then click Change and select a new installation folder.
6. On the Ready to Install screen, click **Install** to start installing Connect.
7. After the installer finishes, click **Finish** to exit the installer.

Metalogix Connect is now installed.

Installing the Connect SharePoint Solution

You must now ensure that the Connect SharePoint Solution is deployed before you can begin using Connect.

If you have already installed Metalogix Replicator, then the Connect SharePoint Solution has already been placed in your repository and must now be deployed. Deploy the solution by following these steps:

1. Open SharePoint Central Administration.
2. Perform one of the following to access your solutions.
 - a. (SharePoint 2007) Select **Operations** and then **Solution Management**.
 - b. (SharePoint 2010) Select **System Settings** and then **Manage farm Solutions**.
 - c. (SharePoint 2013) Select **System Settings** and then **Manage Farm Solutions**.
3. If the **synergyconnect_wss40rep50.wsp** solution does not already have a Status of "Deployed" on the Manage Farm Solutions page, then you must deploy it. Do so by clicking on **synergyconnect_wss40rep50.wsp** and selecting **Deploy Solution** to deploy the solution for the web applications on this farm.
4. Ensure that the solution has deployed by checking its status on the **Manage Farm Solutions** page, the status should say "Deployed".

If you have not installed Metalogix Replicator, then you must perform the following steps in order to place the solution on your farm and install/deploy it.

1. When you installed Connect, the installer stored the solution in **<ConnectFolder>\Connect SharePoint Solution**, where **<ConnectFolder>** is the folder where you installed Metalogix Connect. There are three folders here:
 - WSS40Rep50 – Solution for SharePoint 2010, SharePoint 2013 and Replicator 5.0, 5.1, 6.0
 - WSS40 – Solution for SharePoint 2010 and Replicator 4.1
 - WSS30 – Solution for SharePoint 2007 and Replicator 4.1
 - WSS30Rep3 – Solution for SharePoint 2007 and Replicator 3.3
2. Copy the folders relating to your SharePoint versions to a front-end server in each SharePoint farm.
3. On the front-end server, run the **InstallConnectSolution.bat** file inside the folder you copied. If UAC is enabled on this server, then you must run this command as an administrator.

The Connect SharePoint solution is now installed on your SharePoint farm.

To verify that the Connect SharePoint solution is installed:

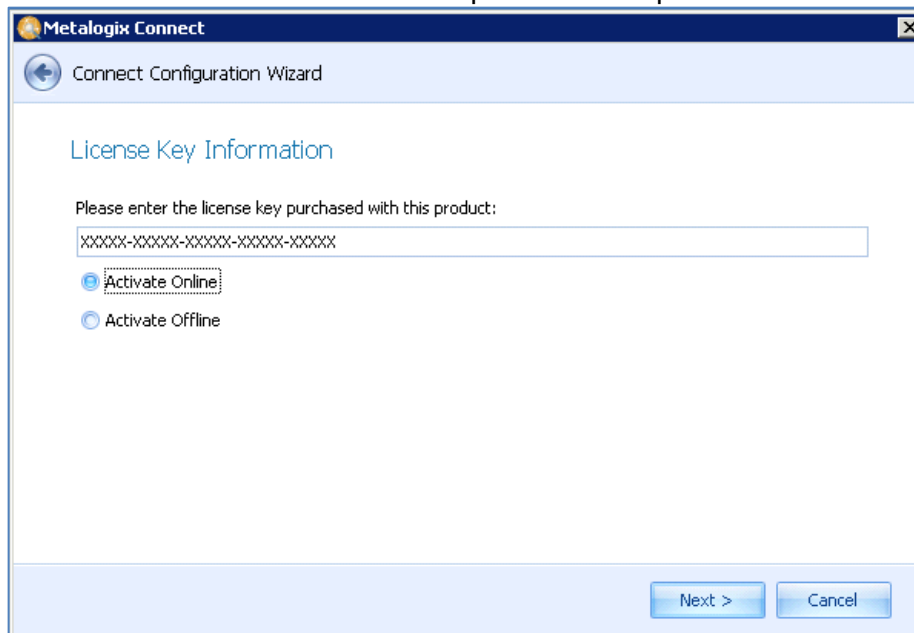
5. Open SharePoint Central Administration.
6. Perform one of the following to see the installed solutions.
 - a. (SharePoint 2007) Select **Operations** and then **Solution Management**.
 - b. (SharePoint 2010) Select **System Settings** and then **Manage farm Solutions**.
 - c. (SharePoint 2013) Select **System Settings** and then **Manage Farm Solutions**.
7. On the Solution Management page, confirm **synergyconnect_wss40rep50.wsp** is deployed to the web applications in this farm.

The Connect SharePoint solution is now running on all of the web applications in your farm. Repeat these steps for other farms in your replication network.

Configuring Connect

The first time you run Metalogix Connect, it launches a wizard that guides you through the process of configuring Connect. To do this:

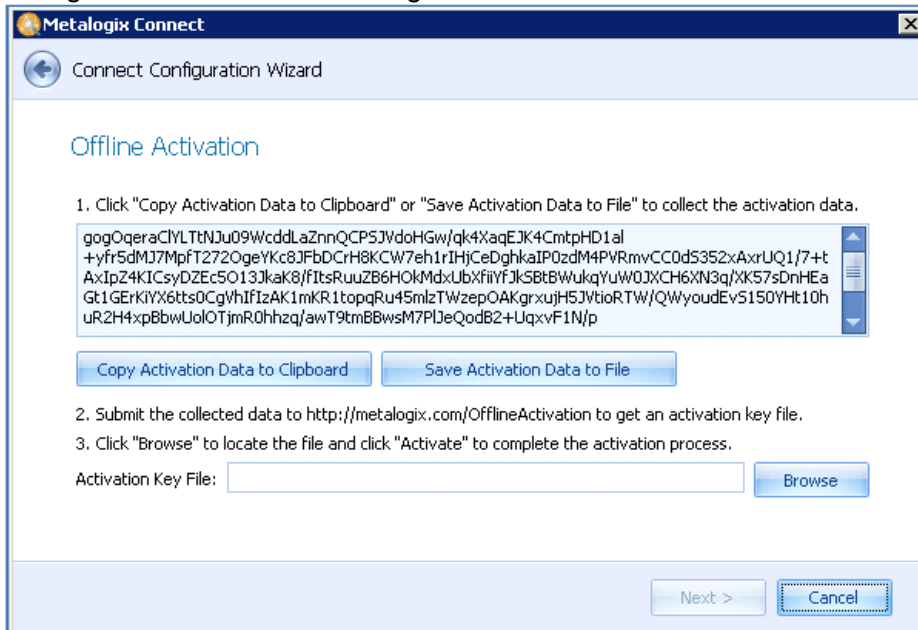
1. Launch Metalogix Connect from the Windows Start menu.
Note: If UAC is enabled on this computer, then you must run Connect as an Administrator. This ensures the Connect Configuration Wizard has the permissions it needs to save your configuration.
2. On the Welcome page, click **Next**.
3. On the License Key Information page, enter your license key and select whether you would like to activate the key automatically online, or activate manually offline. If you chose offline then click **Next** and proceed to step 4, if you chose Activate Online then click **Next** and proceed to step 5.



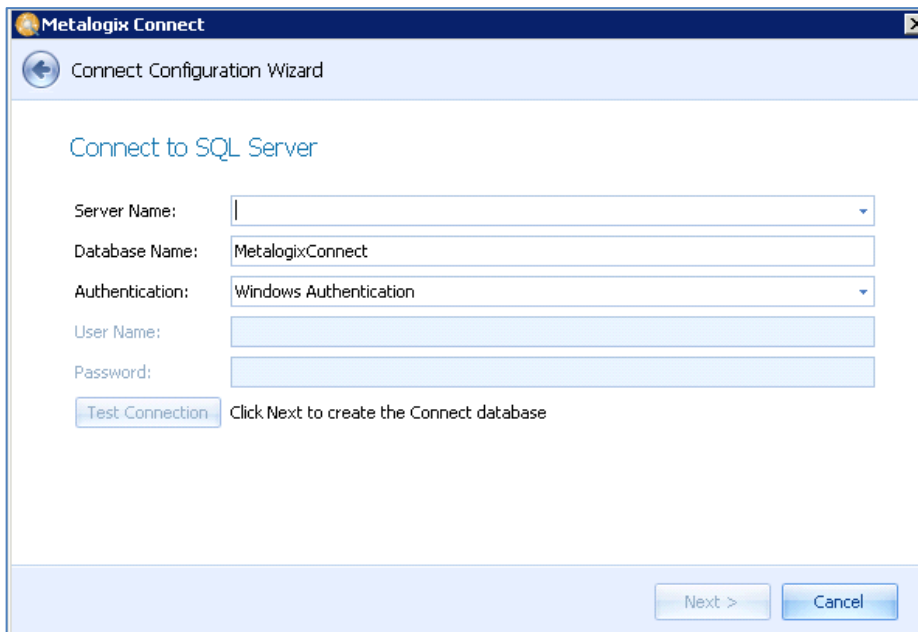
The screenshot shows a window titled "Metalogix Connect" with a sub-header "Connect Configuration Wizard". The main content area is titled "License Key Information" and contains the text "Please enter the license key purchased with this product:". Below this is a text input field containing a placeholder license key "xxxxx-xxxxx-xxxxx-xxxxx-xxxxx". There are two radio button options: "Activate Online" (which is selected) and "Activate Offline". At the bottom right of the window are two buttons: "Next >" and "Cancel".

4. In order to perform offline activation, follow the steps outlined in the configuration wizard. These include copying the activation data to the clipboard, submitting the collected data to the metalogix.com/OfflineActivation, saving the activation key file provided on the website, and loading it into the allowed space in the

configuration wizard. After doing this click **Next**.



5. If the code is successfully activated, then you will be taken to the Connect to SQL server page.
6. On the Connect to SQL Server page, enter the connection information for the SQL Server database where Connect will store its configuration data. The user you specify must have sufficient privileges on this database to create a new database. Click **Test** to verify the information you entered and **Next** to continue.



7. On the Database Creation page, click **Next** once the database is created.
8. On the Configuration Complete page, click **Finish**.

Metalogix Connect is now configured on your computer.



About Connect Page

All the Connect products that you are licensed to use are shown on the About Connect page, accessed by selecting the **Metalogix Connect** tab on the top menu module, followed by the **About** tab found on the left hand menu module. The about page can also be used for refreshing your licensing.

About Connect

Connect Build: 3.1.5801.0
SQL Server: jt-demo
Connect Database: MetalogixConnect_spadmin

Product	License Type	Status	Version	Quantity	In Use	Enabled
> Connect for SharePoint	Standard License		2.1	-1	3	<input checked="" type="checkbox"/>
Connect for Replicator	Standard License		2.5	-1	3	<input checked="" type="checkbox"/>
Connect for Sharelink	Standard License		2.0			<input type="checkbox"/>
Connect for Collaboration Migration	Standard License		1.0			<input type="checkbox"/>
Connect for SharePoint Migration	Standard License		1.0	-1	3	<input checked="" type="checkbox"/>

[Refresh Licensing](#)

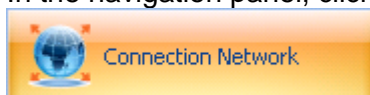
We recommend that you refresh all Connections in Connect after enabling additional Connect products. Instructions for doing this are in the Connect user guides.

Adding Connections

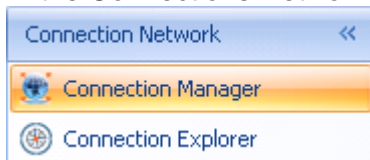
Connections specify how Metalogix Connect communicates with each of your SharePoint farms where you installed the Connect Solution.

To add a connection:

1. In the Metalogix Connect window, select the **Home** tab.
2. In the navigation panel, click **Connection Network**.



3. In the Connections Network panel, click **Connection Manager**.



4. In the ribbon, click **Add Connection**.



5. Enter the connection information for a web application where the Connect SharePoint solution is deployed. The account you specify must be in the Central Administration Farm Administrators group. If you want to automatically add all of the web applications in this farm, then select **Discover Other Web Application in this farm**.

Click **Add** to connect to the farm and its web applications.

 A screenshot of the "Add Connection" dialog box. It has a title bar with a close button. The main area is titled "Connection Settings" and contains several input fields:

- Connection Type: SharePoint (dropdown)
- Protocol: http (dropdown)
- DNS Name: corporateoffice
- Port: 80
- Domain: corporateoffice
- Farm Administrator: spadmin
- Password: *****
- Discover other web applications in this farm:

 At the bottom right, there are "Add" and "Cancel" buttons.

The connection you added and any additional connections in the same farm are now available for you to examine and manage using Metalogix Connect.

Specifying the Preferred Connection

If you are connecting to a web application that has been extended in SharePoint with alternate access maps, then you can specify the preferred URL for Connect to use. This indicates the first URL Connect will use to retrieve information about the web application.

If you are connecting to a web application that uses forms-based authentication, then you must specify a preferred URL that uses Windows authentication.

To specify a preferred URL:

1. From the Connection Manager page, select the connection.

2. In the bottom-right corner of the window, select the preferred map from the list of alternate access maps.

Alternate Access Maps		
Preferred	Url Zone	Address
<input type="radio"/>	Default	http://extranett
<input checked="" type="radio"/>	Intranet	http://extranett:2222

3. Click **Save**.

Using Connect

After enabling the Connect features you want to use and adding connections, you are now able to use Connect. For more information, refer to one of the following guides:

- If you are only using Connect for SharePoint to explore and visualize your SharePoint environment, then see the *Connect for SharePoint User Guide*.
- If you are using Connect for Replicator to monitor your Replication Network, then see the *Connect for Replicator User Guide*.
- If you are using Connect to migrate SharePoint structure and content, then see the *Connect for SharePoint Migration User Guide*.



Upgrading the Connect SharePoint Solution

As new versions of Connect and Replicator are released with new features and functionality, they may include newer versions of the Connect solution. To take advantage of these changes, you will have to upgrade the installed Connect solution in each of your SharePoint farms using the following steps.

Determining the Installed Version

To determine which version of the Connect solution you have installed in your SharePoint farms:

1. In the Metalogix Connect window, select the **Home** tab.
2. In the navigation panel, click **Connection Network**.
3. In the Connections Network panel, click **Connection Manager**.
4. See the installed solution versions in the connections table.

	Connection Name	Farm Name	Domain	User Name	Solution Version
					
	Corporate Portal	corporateoffice	contoso	spadmin	2.0.12.00
	Extranet Portal	corporateoffice	contoso	spadmin	2.0.12.00
	London Branch Portal	corporateoffice	contoso	spadmin	2.0.12.00
	SharePoint - 80	corporateoffice	contoso	spadmin	2.0.12.00

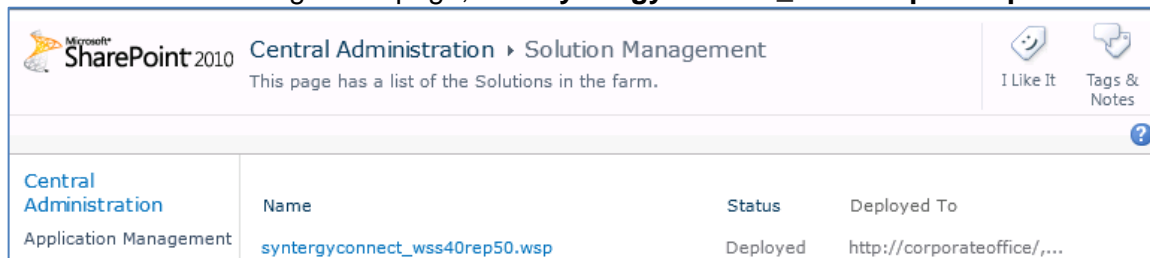
You can use this information to decide which farms to install a new solution to.

Removing the Installed Solution

To remove an installed solution from a SharePoint farm:

8. Open SharePoint Central Administration.
9. Perform one of the following to see the installed solutions.
 - a. (SharePoint 2007) Select **Operations** and then **Solution Management**.
 - b. (SharePoint 2010) Select **System Settings** and then **Manage farm Solutions**.
 - c. (SharePoint 2013) Select **System Settings** and then **Manage Farm Solutions**.

10. On the Solution Management page, click **synergyconnect_wss40rep50.wsp**.



Central Administration > Solution Management			
This page has a list of the Solutions in the farm.			
I Like It Tags & Notes			
?			
Central Administration	Name	Status	Deployed To
Application Management	synergyconnect_wss40rep50.wsp	Deployed	http://corporateoffice/...

11. On the Solution Properties page, click **Retract Solution**.
12. On the Retract Solution page, click **OK**. SharePoint will then start retracting the solution and returns to the Solution Management page.
13. On the Solution Management page, click **synergyconnect_wss40rep50.wsp** again.
14. On the Solution Properties page, click **Remove Solution**. If SharePoint is still retracting the solution, then this link will not be available. Reload the page until the solution is retracted and then click **Remove Solution**.

The old solution has now been removed from this farm. Repeat these steps to remove the solution from other farms which you will be accessing using Connect.

Installing the New Solution

To install the Connect SharePoint solution:

- When you installed Connect, the installer stored the solution in **<ConnectFolder>\Connect SharePoint Solution**, where **<ConnectFolder>** is the folder where you installed Metalogix Connect. There are three folders here:
 - WSS40Rep50 – Solution for SharePoint 2010, SharePoint 2013 and Replicator 5.0, 5.1, 6.0.
 - WSS40 – Solution for SharePoint 2010 and Replicator 4.1
 - WSS30 – Solution for SharePoint 2007 and Replicator 4.1
 - WSS30Rep3 – Solution for SharePoint 2007 and Replicator 3.3
- Copy the folders relating to your SharePoint versions to a front-end server in each SharePoint farm.
- On the front-end server, run the **InstallConnectSolution.bat** file inside the folder you copied. If UAC is enabled on this server, then you must run this command as an administrator.

The Connect SharePoint solution is now installed on your SharePoint farm. All existing connections in Connect will use the new solution automatically. Repeat these steps to install the new solution to other farms you will access using Connect.

Uninstalling Connect

To uninstall Connect, you must remove each of its components individually. The following sections guide you through removing each component.

Removing the Connect Program

To remove the Connect program from your computer, perform the following steps:

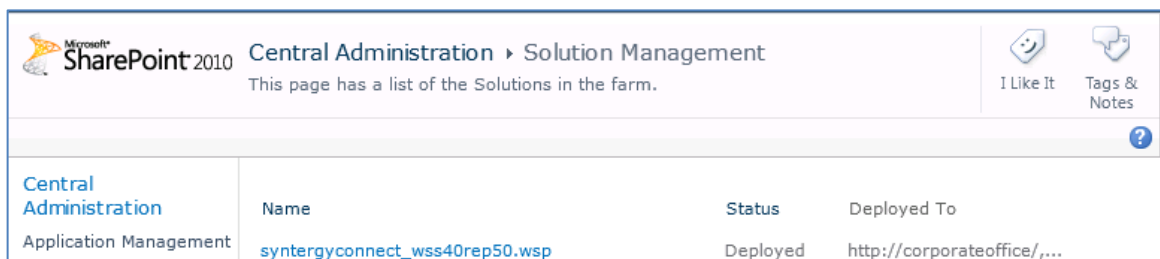
1. Start the Windows uninstall application using one of the following methods:
 - (Windows Server 2003) In **Control Panel**, open **Add or Remove Programs**.
 - (Windows Server 2008) In **Control Panel**, under **Programs**, open **Programs and Features**.
 - (Windows Server 2008 R2) In **Control Panel**, under **Programs**, open **Uninstall a program**.
2. Double-click **Metalogix Connect**. If prompted, then confirm you want to delete this program.

You will see a progress bar as Connect is removed. When this completes, the Connect program is no longer installed on your computer.

Removing the Connect Solution

To remove the Connect solution from a SharePoint farm:

15. Open SharePoint Central Administration.
16. Perform one of the following to see the installed solutions.
 - a. (SharePoint 2007) Select **Operations** and then **Solution Management**.
 - b. (SharePoint 2010) Select **System Settings** and then **Manage Farm Solutions**.
 - c. (SharePoint 2013) Select **System Settings** and then **Manage Farm Solutions**.
17. On the Solution Management page, click **synergyconnect_wss40rep50.wsp**.



Central Administration		Solution Management	
Application Management		Name	Deployed To
		synergyconnect_wss40rep50.wsp	http://corporateoffice/...

18. On the Solution Properties page, click **Retract Solution**.
19. On the Retract Solution page, click **OK**. SharePoint will begin retracting the solution and return to the Solution Management page.

20. On the Solution Management page, click **synergyconnect_wss40rep50.wsp** again.
21. On the Solution Properties page, click **Remove Solution**. If SharePoint is still retracting the solution, then this link will not be available. Reload the page until the solution is retracted and then click **Remove Solution**.

The old solution has now been removed from this farm. Repeat these steps to remove the solution from other farms.

Removing the Connect Database

When you first configured Connect, you specified a database server and name for the Connect database. Using SQL Server Management Studio, delete this database.

The default database name is `metalogixConnect_user`, where *user* is the Windows account that created the database.