



# ControlPoint Installation

## Before you begin

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*If you are using a custom (non-windows) claims provider, or if you cannot create a new web application and therefore must install ControlPoint in an existing web application, you may require the special Native kit – please contact Metalogix Support for advice on the version of the kit to be used.*

You must install ControlPoint on a server that meets the following requirements:

- Windows Server 2008 or 2012 with IIS activated.

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NOTE: If you are installing ControlPoint on a Windows 2008 server with UAC enabled, both the installer and the License Manager must be "Run as Administrator."

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- SharePoint 2010 or 2013 web front end (a machine running the SharePoint Foundation Web Application service)
- Connects to SQL Server 2008, 2012, or 2014
- Can connect to the internet (if this is not true, you can activate your license offline)
- The account used to **install** ControlPoint must:
  - Be a member of the local Administrator's group on the machine where it is installed
  - Be a Farm Administrator (as it will be creating a new Web application called ControlPoint)
  - Be added to the `sysadmin` security role in the SQL server used for config and content databases and the SQL server used for the ControlPoint Service Database. If that is not possible, the install account will require the SQL server roles `securityadmin` and `dbcreator` as well as `SharePoint_Shell_Access` rights to the SharePoint Configuration database, and you will be prompted to execute the final step of the install using the Farm Account (the account under which Central Admin runs).
- The account under which ControlPoint will be **run** (that is the ControlPoint Web Application's **Service Account**) must:
  - Be a member of the Farm Administrators group (this can be omitted with a small loss of functionality to the core ControlPoint functionality– contact support if this is a concern.
  - Be a member of the local administrator's group.
- **ControlPoint users**
  - Must use local or Active Directory accounts; alternate authentication providers are supported with proper configuration – see the manual for details.
  - Should be using Internet Explorer version 10 or higher (version 10 requires compatibility mode). On SharePoint 2010 and 2013, Firefox and Chrome are also supported.

As with all SharePoint solution deployments, SharePoint will restart all application pools during the deployment of the ControlPoint solution.

Please temporarily disable all virus checkers before starting the ControlPoint install.

## ***Special Notes***

Please consult the full ControlPoint Installation document if any of the following is true:

- If you have more than one Web Front End, see the Installation Instructions to set up the additional front end server(s) – you **should** complete the install on all Web Front Ends.
- If you will be installing ControlPoint to manage more than one farm in a coordinated way (i.e. a multi-farm), see the instructions for details on using the Manage ControlPoint Licenses program.
- If you will be installing ControlPoint into a SharePoint farm in which the default language is other than English, either install the SharePoint English language pack, or contact Metalogix Support for additional instructions.
- You may need to do additional setup if you will be
  - Using the Farm Summary report to get server status information from remote servers
  - Using the Silverlight application that implements “Interactive Analysis” (which is accessible from report results)

In either of these cases, see the installation instructions for more detail.

- If you are installing ControlPoint on a SharePoint 2010 system that uses Claims-based authentication, it is simplest to allow the ControlPoint install to create the ControlPoint Web application as a non-Claims application and do not update it to be Claims-enabled – with that configuration, ControlPoint users must use Windows credentials, but will be able to manage web applications and users that use claims. If it is important to allow users of custom claims providers to run ControlPoint, contact Metalogix support for an edition of ControlPoint that supports custom claims providers.
- If you want to use SQL authentication to access the ControlPoint Service Database, you must also create the ControlPoint Web application using SQL authentication; this requires a manual step at the beginning of the install – contact Metalogix support for detailed instructions.
- If you will be using a local account for the Service Account (this is not recommended), you must use a local account to install ControlPoint. Conversely, if you will be using a domain account for the service account, you must use a domain account to install ControlPoint.
- If you will be installing ControlPoint on a Windows Server 2008 or 2012 system, you will need to use Run as Administrator to run the Manage ControlPoint Licenses application.
- When installing ControlPoint to use a Service Account username containing Unicode characters, using the “Browse” button on the “Browse for a User Account” dialog may not always display the Unicode user accounts in the selection list. If this happens, just enter the name in the “User name:” text box. This will allow the installation to continue successfully.

These instructions are intended to cover the most common configurations – please see the Installation Instructions or a more thorough description of the installation process.

## ***Running ControlPoint for the first time:***

You should start by exploring the SharePoint Hierarchy tree - expand items to remind yourself of what Web Applications, Site Collections and Sites are in your farm; observe what lists and libraries exist, what groups are defined and what users have what permissions. Right click on the Farm, Web Applications, Site Collections, Sites and Lists and Libraries to view the menu of actions and analyses. Click on groups and users to manage those items.

Running Discovery is not necessary in order to start using ControlPoint. You can run Discovery immediately if your system can tolerate a moderate slow-down while Discovery runs, or you can allow it to run automatically at night (once the ControlPoint Discovery job has been enabled in SharePoint Central Administration).

Once Discovery has been run, you will be able to run reports that involve "cached" data or reports that include historical data (e.g. trend reports). Until then, generally you can run reports that give you an option for "real-time" analysis, or an option to uncheck "Use Cache data". If you're waiting for Discovery, try a couple of "real-time" reports - browse to a site (either a root site or a sub-site), right click and choose Storage -> Site Lists and Libraries Storage. Also right click and choose Users & Security -> Site Lists Permissions - these will give you flavor of the analyses in ControlPoint.

After Discovery has finished, run the SharePoint Summary report (right-click on the farm in the SharePoint Hierarchy tree). Also after Discovery has completed, you can use Advanced Search, either clicking in the ControlPoint header, or by right-clicking on an element of the hierarchy in the SharePoint Hierarchy.

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