



# StoragePoint

## Quick Start Guide

Publication Date: [May 22, 2017](#)

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## Contents

<b>Planning the Metalogix StoragePoint Implementation</b>	<b>4</b>
Minimum Server Software Requirements.....	4
<b>Quick Start Guide</b>	<b>6</b>
Setting up Metalogix StoragePoint.....	6
1. Configure the Metalogix StoragePoint System Cache.....	6
2. Configure the Storage and Backup Endpoints.....	7
3. Create one or more Storage Profiles.....	8

# Planning the Metalogix StoragePoint Implementation

## Preparation

Metalogix StoragePoint is installed as a SharePoint solution on a single SharePoint web front-end (WFE), making for simple installation and deployment to the SharePoint farm. This section will outline the necessary software and security prerequisites needed to install Metalogix StoragePoint.

## Minimum Server Software Requirements

### *SharePoint (pick one)*

SharePoint Server 2016 and SharePoint Foundation 2016	
Operating System	Windows Server 2012 R2 or Windows Server 2016
SharePoint Server	SharePoint Server 2016 or SharePoint Foundation 2016
Other Server Software	SQL Server 2014 SP1, 64 bit or SQL Server 2016 RTM
SharePoint Server 2013 and SharePoint Foundation 2013	
Operating System	Windows 2008 R2 Server or Windows 2012 Server
SharePoint Server	SharePoint Server 2013 or SharePoint Foundation 2013
Other Server Software	SQL Server 2008 R2 SP1 Enterprise Edition, SQL Server 2012 Enterprise Edition, or SQL Server 2014 Enterprise Edition
SharePoint Foundation 2010 and SharePoint Server 2010	
Operating System	Windows 2008 Server, Windows 2008 R2 Server or Windows 2012 Server
SharePoint Server	SharePoint Foundation Server 2010, Microsoft SharePoint Server 2010
Other Server Software	SQL Server 2005 64 bit, 2008, 2008 R2 or 2012
	Use of RBS requires SQL Server 2008, 2008 R2, 2012, or 2014 Enterprise Editions
NOTE: For Microsoft SharePoint Server 2010 (MSS), Service Pack 1 or the EBS hotfix must be applied.	
Windows SharePoint Services 3.0 (WSS) or Microsoft Office SharePoint Server 2007 (MOSS)	
Operating System	Windows 2003 or 2008 Server, 64 bit.

SharePoint Server	Windows SharePoint Services 3.0 (WSS)
	Microsoft Office SharePoint Server 2007 (MOSS), Standard or Enterprise
	Service Pack 1 or Higher
Other Server Software	Microsoft .net Framework version 3.5 is required

### *Server Hardware Requirements*

Metalogix StoragePoint does not have any hardware requirements beyond what is prescribed by Microsoft SharePoint. For reference, those can be reviewed here:

2016 - [https://technet.microsoft.com/en-us/library/cc262485\(v=office.16\).aspx](https://technet.microsoft.com/en-us/library/cc262485(v=office.16).aspx)

2013 - <https://technet.microsoft.com/en-us/library/Cc262485.aspx>

2010 - [https://technet.microsoft.com/en-us/library/Cc288751\(v=Office.14\).aspx](https://technet.microsoft.com/en-us/library/Cc288751(v=Office.14).aspx)

2007 - [https://technet.microsoft.com/en-us/library/Cc262485\(v=office.12\).aspx](https://technet.microsoft.com/en-us/library/Cc262485(v=office.12).aspx)

### *Security Requirements*

The User Account used to perform the install must be a SharePoint Farm Administrator.

Also review FileShare and Content Database Rights when a profile is created.

### *Screen Resolution Requirements*

Metalogix StoragePoint requires a minimum screen resolution of 1024 x 768 for optimizing the user interface on the StoragePoint pages that are linked from the main menu on Application Administration in Central Administration.

### *Internet Browser Requirements*

Microsoft Internet Explorer is the recommended browser for use with StoragePoint interface. Other browsers may work, but are not verified as supported for all functions.

### *Temporary Storage Requirements*

The amount of temporary storage needed to support the timer jobs depends on the number of threads being used for the timer job. It is recommended that 10GB per thread, for each timer job running concurrently, be available on the server running the timer job. Most timer jobs can use a Master/Worker configuration to spread this over multiple servers. The temporary storage location can be configured on General Settings or during installation to use something other than the default (%appdata/local/temp).

NOTE: Please see the known issue regarding Distributed File System usage with StoragePoint, in the Known Issues document. This document can be found in the Metalogix folder under Programs.

# Quick Start Guide

## Introduction

The Quick Start Guide is designed to get Metalogix StoragePoint installed and configured on the SharePoint farm, so that evaluation can begin as quickly as possible.

## Setting up Metalogix StoragePoint

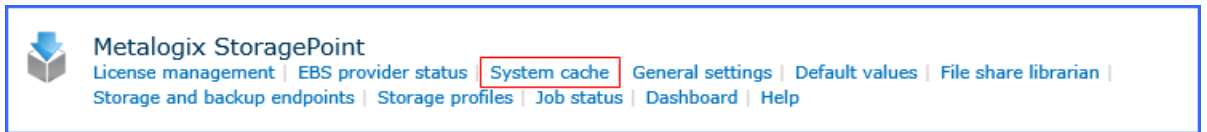
Metalogix StoragePoint is entirely managed within *SharePoint Central Administration* on the *Application Management* page. Once there, the state of the EBS Provider can be changed, the farm-wide storage profile defaults can be configured, and storage profile(s) can be managed.

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

### 1. Configure the Metalogix StoragePoint System Cache

This step will establish the temporary location for BLOBs during Asynchronous operations. If a cloud-based storage platform is being used or any of the additional capabilities associated with asynchronous operations, then this is a required step.

- a. Click System Cache from the StoragePoint menu.



- b. Use the chart below to enter the minimum configuration settings for system cache.

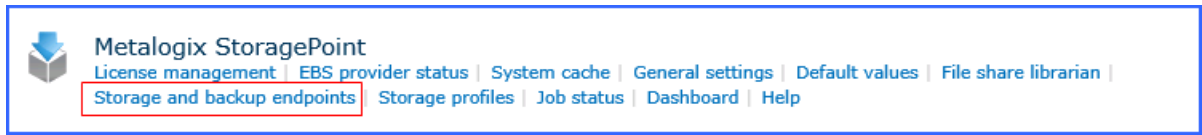
Setting	Value/Options
Endpoint Name	Read-only field for the name of the storage endpoint.
Adapter <input type="text" value="FileSystem"/>	Select FileSystem unless you are confident that another storage device is available for configuration.
<b>Adapter Settings</b> <input type="checkbox"/> Show Connection String Path <input type="text"/>	Enter an adapter-specific connection string in this box; a UNC path to a folder available on the network.
<b>Advanced Adapter Settings</b> <i>(Show)</i>	

- c. Click Save at the bottom of the screen.

## 2.Configure the Storage and Backup Endpoints

This step will create the storage location(s) (endpoints) to which content will be externalized.

- a. Click Storage and backup endpoints from the StoragePoint menu.



- b. Click the Create New Endpoint link.
- c. Use the chart below to enter the minimum configuration settings for the endpoint.

Setting	Value/Options
Name	Enter the unique name of the Storage or Backup Endpoint.
Type Type <input checked="" type="radio"/> Primary <input type="radio"/> Backup Select Primary	<p><i>Primary</i>– this endpoint will be available for externalization when creating storage profiles.</p> <p><i>Backup</i>– this endpoint will be in the Backup Services dropdown on the profile page.</p> <p>The selection is locked down when saving.</p>
Adapter Adapter FileSystem	Select FileSystem unless you are confident that another storage device is available for configuration.
<b>Adapter Settings</b> <input type="checkbox"/> Show Connection String Path <input type="text"/> <b>Advanced Adapter Settings</b> <i>(Show)</i>	Enter an adapter-specific connection string in this box; a UNC path to a folder available on the network.

- d. Click Test Storage Settings.

**Storage Settings**  
Provide general storage settings in this section

Externalize content BLOBs  
Yes

Adapter  
FileSystem

Connection  
path=\\densrv\externalfilestore

*Provide adapter-specific connection attributes. Please refer to the adapter documentation for connection string details.*

Folder Content in BLOB Store  
Yes

Folder Scheme  
YYYY/MM/DD/HH/MM

Compress Content in BLOB Store  
No  
*Content is compressed using the GZip/Deflate method.*

Include Zip Headers  
No

Encryption Method for Content in BLOB Store  
None

Encryption Key Passphrase  
Generate Key  
*Enter a passphrase to be used to generate a key or leave blank to generate a random key. The pass phrase entered is not saved with the profile.*

Encryption Key

Test Storage Settings  
Test Successful.

**Content BLOB Recycle Bin Policy**  
Provide BLOB Recycle Bin policy settings in this section. These settings will dictate how content BLOBs are treated after their associated SharePoint list items are purged from the Recycle Bin.

**Use SharePoint Default** - this setting will cause StoragePoint to delete content BLOBs as list items are purged from the Recycle Bin.

**Use Custom** - this setting will cause StoragePoint to delete content BLOBs X days after they are purged from the Recycle Bin.

Use SharePoint Default  
Use Custom  
0 Days

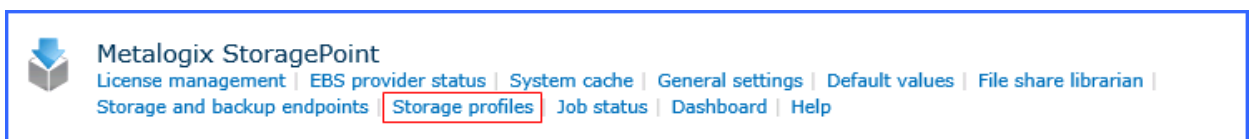
Delete Save Cancel

- e. Click Save at the bottom of the screen.

### 3. Create one or more Storage Profiles.

This step will create the storage profile(s) that will dictate how BLOBs are externalized. Profiles can be scoped by web application, content database, and/or site collection.

- a. Click Storage Profiles from the StoragePoint menu.



- b. Enter a unique Name for the Storage Profile.
- c. In the Profile Scope section of the page, select the scope of the storage profile – Web Application.



<b>Profile Name</b>	Name <input type="text"/>
<b>Profile Scope</b> Choose <b>Web Application</b> and then select a Web Application to create, update, or delete a Web Application-specific storage profile.  Choose <b>Content Database</b> and then select a Content Database to create, update, or delete a Content Database-specific storage profile.  Choose <b>Site Collection</b> and then select a Site Collection to create, update, or delete a Site Collection-specific storage profile.	<input checked="" type="radio"/> Web Application <a href="#">Change</a> No Selection  <input type="radio"/> Content Database No Selection  <input type="radio"/> Site Collection No Selection

- d. Click the Change link next to your scope selection.
- e. Web Application you will be presented with a web application selection dialog.
- f. Click the name of the web application for which you want to create a storage profile. You will return to the profile page.
- g. SharePoint 2010 users – select RBS.

<b>Externalization Type</b>  <b>RBS (Remote BLOB Storage) and EBS (External BLOB Storage) are mechanisms provided by Microsoft, for partners to be able to utilize the underlying storage capabilities of SharePoint.</b>  Microsoft will stop supporting EBS in SharePoint 2013. Only EBS type profile can be created for Site Collection scope.	<input checked="" type="radio"/> Use Remote BLOB Storage (RBS) <input type="radio"/> Use External BLOB Storage (EBS)
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- h. Use the charts below to enter the minimum configuration settings for the profile.

<b>Storage Endpoints</b> The <b>Endpoint Selection Mode</b> 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 <b>Endpoint Write Mode</b> 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 <b>Asynchronous</b> 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 <input type="text" value="Yes"/>  Endpoint Selection Mode <input type="text" value="Synchronous"/>  Storage Endpoints <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 colspan="5" style="text-align: center;"><a href="#">Add Endpoint</a></td> </tr> </tbody> </table>	#	Endpoint	Write Mode	Online?	Filter	<a href="#">Add Endpoint</a>				
#	Endpoint	Write Mode	Online?	Filter							
<a href="#">Add Endpoint</a>											

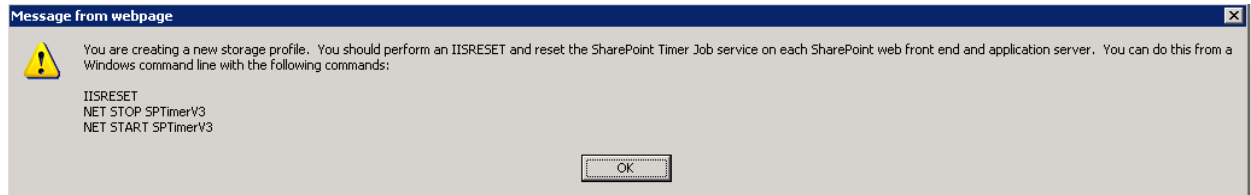
Storage Setting	Value/Options
Endpoint Selection Mode <input type="text" value="Synchronous"/>	Asynchronous for greater endpoint filtering options.

- i. Click Add Endpoint to select an existing endpoint.

Endpoint	Select the endpoint that was created in task 2.
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- j. Click OK to complete the Endpoint configuration for this profile.

- k. Click the Save button to save the storage profile.
- l. You will see a window about performing an IISRESET when creating a new storage profile. Click OK and be sure to perform the commands shown, after the save is complete.



The page will be locked until the operation is complete. This operation can take several minutes. There may also be a page for entering the database master key encryption, and a page may display showing service accounts that should be checked for permissions, if a FileSystem endpoint was used. You will be returned to the Storage Profiles page with the newly-created storage profile showing up in the list.

It is recommended that you also go through the Evaluation Guide to better understand how StoragePoint can be further configured and best utilized.