

ControlPoint 8.9

for Microsoft 365 Installation Guide



© 2024 Quest Software Inc. ALL RIGHTS RESERVED.

This guide contains proprietary information protected by copyright. The software described in this guide is furnished under a software license or nondisclosure agreement. This software may be used or copied only in accordance with the terms of the applicable agreement. No part of this guide may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of Quest Software Inc.

The information in this document is provided in connection with Quest Software products. No license, express or implied, by estoppel or otherwise, to any intellectual property right is granted by this document or in connection with the sale of Quest Software products. EXCEPT AS SET FORTH IN THE TERMS AND CONDITIONS AS SPECIFIED IN THE LICENSE AGREEMENT FOR THIS PRODUCT, QUEST SOFTWARE ASSUMES NO LIABILITY WHATSOEVER AND DISCLAIMS ANY EXPRESS, IMPLIED OR STATUTORY WARRANTY RELATING TO ITS PRODUCTS INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT. IN NO EVENT SHALL QUEST SOFTWARE BE LIABLE FOR ANY DIRECT, INDIRECT, CONSEQUENTIAL, PUNITIVE, SPECIAL OR INCIDENTAL DAMAGES (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF PROFITS, BUSINESS INTERRUPTION OR LOSS OF INFORMATION) ARISING OUT OF THE USE OR INABILITY TO USE THIS DOCUMENT, EVEN IF QUEST SOFTWARE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. Quest Software makes no representations or warranties with respect to the accuracy or completeness of the contents of this document and reserves the right to make changes to specifications and product descriptions at any time without notice. Quest Software does not make any commitment to update the information contained in this document.

If you have any questions regarding your potential use of this material, contact:

Quest Software Inc.
Attn: LEGAL Dept.
4 Polaris Way
Aliso Viejo, CA 92656

Refer to our Web site (<https://www.quest.com>) for regional and international office information.

Patents

Quest Software is proud of our advanced technology. Patents and pending patents may apply to this product. For the most current information about applicable patents for this product, please visit our website at <https://www.quest.com/legal>.

Trademarks

Quest and the Quest logo are trademarks and registered trademarks of Quest Software Inc. and its affiliates. For a complete list of Quest marks, visit <https://www.quest.com/legal/trademark-information.aspx>. All other trademarks and registered trademarks are property of their respective owners.

Quest® ControlPoint
Updated February 2024
Version 8.9

Contents

Preface	4
System Requirements	5
Using ControlPoint to Manage Multiple Farms and Tenants	8
Prerequisite for Using ControlPoint Services	12
Using Microsoft Modern Authentication with ControlPoint Online	13
First Time Installation and Configuration	14
Installing ControlPoint Online Files	15
Configuring the ControlPoint Online Application	18
Configuring ControlPoint Services	27
Launching ControlPoint Online	30
Upgrading from a Previous Version of ControlPoint Online	31
Removing (Uninstalling) ControlPoint Online	33
Appendix: Configuring IIS if SharePoint is not Installed	37
Troubleshooting	40
ControlPoint Log Files	40
Installation Log (xcControlPoint.log)	40
ControlPoint Administration Log (xcAdmin.log)	40
I am Continually Prompted to Log Into ControlPoint but the Login Never Completes	41
Deployment of ControlPoint Online Configuration Site Fails During Installation	42
Cannot Launch ControlPoint Online After Installation	43

Preface

This guide contains instructions for installing and configuring Quest® ControlPoint for Office365 SharePoint Administration (alternatively called ControlPoint Online). ControlPoint Online is a Web-based application that offers a proactive, integrated solution for managing site collections within a hosted SharePoint environment.

System Requirements

On-Premises/Azure VM Server Requirements

IMPORTANT: To install ControlPoint Online in Azure, you must use a dedicated Azure VM. ControlPoint cannot be installed as an Azure service app.

- **Windows Server 2012 Service Pack 3**, 64-bit, **Windows Server 2016, 2019, or 2022** with the IIS role configured.

NOTE: The server can be either dedicated to ControlPoint Online or shared with other functions.

- **Microsoft SQL Server:** SQL Server 2012, 2014 SP1 (64 bit), 2016, 2019, or 2022 (to host the ControlPoint Services (xcAdmin) database).

NOTE: ControlPoint can use the same SQL Server instance as SharePoint, but it can also use a separate instance or separate server.

- **.NET framework version 4.8** or later (for use by the installer), and **ASP.NET 4.0** or later.

- **TLS version 1.2**

IMPORTANT: O365 does not currently support TLS 1.3 (which is enabled by default in Windows Server 2022) and must be disabled for ControlPoint to Online to run. Refer to the troubleshooting topic [Cannot Launch ControlPoint Online After Installation](#) for details.

- **PowerShell version 3.0** or later.

Account Requirements

- The **account used to install the on-premises components of ControlPoint Online** must be:
 - a member of the local Administrator's group on the machine where ControlPoint Online is installed
 - added to the security server role `sysadmin` in the SQL server that will be hosting the ControlPoint Services (xcAdmin) database
- The account used to **create the ControlPoint Online site and create/register the ControlPoint Online app** (to allow the use of Modern and Multi-Factor Authentication) must be an O365 Global Administrator.
- The **account that will be used to run ControlPoint** (that is the ControlPoint Service Account) must:
 - be a member of the local Administrator's group on the machine where ControlPoint Online is installed

- have a valid **login** for the **SQL server** that will be hosting the ControlPoint Services (xcAdmin) database. (`sysadmin` rights are not required for this account)
- be a **Site Collection Administrator** for each site collection to be managed using ControlPoint.

NOTE: If you will be [configuring ControlPoint Services](#), the account must meet all of the requirements listed above and have permissions to Run as a Service.

ControlPoint User Requirements

ControlPoint users must:

- be any of the following:
 - members of the Site Collection Administrators group in site collection that will host the ControlPoint Configuration site as well as in every Site Collection they will be managing using ControlPoint Online.

OR

- a Global Administrator in the Microsoft 365 tenant.

OR

- SharePoint Administrator in the Microsoft 365 tenant.

IMPORTANT: Global and SharePoint Administrators who are not also Site Collection Administrators can view the entire SharePoint Hierarchy and perform operations on all site collections via ControlPoint but will be unable to access SharePoint content directly.

- use a compatible **Web browser**:
 - Microsoft Edge
 - Mozilla Firefox version 3 or later
 - Google Chrome (latest public release)
 - Microsoft Internet Explorer (IE) version 10 or later

EXCEPTION: When using Internet Explorer build 11.0.9600.18617, report results do not fill the entire results section.

Note that some browsers may have limitations.

SharePoint Requirements

- Prior to ControlPoint Online installation, a site collection must exist in SharePoint Online to host the ControlPoint Online Configuration Site.
- If SharePoint is not installed on the same server as ControlPoint Online, IIS must be configured to allow the ControlPoint Online Configuration Site to run on the server. See [Appendix: Configuring IIS if SharePoint is not Installed](#) for details.

Supported Authentication Methods

ControlPoint Online uses Microsoft Modern Authentication to connect to hosted site collections. Authentication can be based on any of the following methods:

- Separate accounts that are **managed within the hosted environment**

When this method is used, credentials are passed to and must be verified in the hosted environment in order for ControlPoint to be accessed.

OR

- Using **Entra ID**

OR

- Using **Active Directory Federated Services (ADFS)**

When this method is used, ControlPoint will authenticate with the local ADFS and use that identity to communicate with the hosted environment.

IMPORTANT: Currently, ControlPoint users cannot be members of an Microsoft 365 group that was created at the tenant level. The only groups whose members can have permissions in ControlPoint are Security groups.

Using ControlPoint to Manage Multiple Farms and Tenants

If you want to use ControlPoint to manage multiple farms and/or O365 tenants, a copy of the ControlPoint application must be installed on a server in each environment. Each farm has:

- its own Web application and ControlPoint Configuration site
- its own ControlPoint menus (including any customized menus), and
- its own ControlPoint security model, which determines administrators' access to ControlPoint menu items.

You have the option of installing ControlPoint either:

- as **separate, single-farm installations**, which means that each farm has:
 - its own ControlPoint Service (xcAdmin) databases, and
 - its own ControlPoint license activation code
- as a **multi-farm installation**, which means that farms share:
 - the same ControlPoint Service (xcAdmin) database, which allows ControlPoint users to navigate among and operate on other farms and makes it easier to switch from one farm to another from within the ControlPoint application interface, and
 - a common ControlPoint license activation code.

IMPORTANT: Install the same version of ControlPoint on all farms in a multi-farm installation, as updates to the ControlPoint Service (xcAdmin) database may not be compatible with earlier versions.

Factors to Consider When Choosing the Appropriate Installation Type for your SharePoint Environment

The optimal installation type depends on a number of factors, including how your SharePoint environment is configured, the size of your farms, and whether there is connectivity between them.

Single-farm installations are preferable if

- farms are in different domains that do not have a two-way trust relationship
- farms are on different WANs or network segments where bandwidth is limited or connectivity between farms is not maintained
- SQL server resources are limited and scalability of the xcAdmin database is a concern, and/or

- different groups of people are responsible for managing different farms.

If you choose this approach, you will need to bookmark each of the farms if you want to easily switch between them. You will still be able to copy and move sites across farms, but you will have to enter the destination site's url instead of selecting it from a list.

Consider a multi-farm installation if:

- you want to be able to:
 - navigate through and operate on more than one farm using a single application interface
 - run ControlPoint actions and analyses on more than one farm in a single operation, and/or
 - quickly switch between farms from the ControlPoint application interface
- farms are in the same domain or in domains with at least a two-way trust relationship
- farms are on the same WAN or network segment (that is, bandwidth is adequate and connectivity between farms is maintained)
- your SQL server is robust enough that scalability of the xcAdmin database is not an issue
- the same group of people is responsible for managing all farms.

For farms that utilize a common instance of SQL server, you will *need to* perform a multi-farm installation. When installing ControlPoint in this circumstance, be sure to provide a unique name for the content database used by the Web application that hosts the ControlPoint Configuration Site collection for each farm.

You can of course use different installation types to suit the needs of different farms. For example, you may want to use a multi-farm installation for QA and development farms and single farm installations for production farms.

Installation Guidelines

Installation Type	Guidelines
single-farm installations	<ul style="list-style-type: none"> • Contact Quest Support to obtain a license activation code for each additional farm. • For each farm, complete the entire installation process, which includes: <ul style="list-style-type: none"> ▪ specifying the location where you want to create the ControlPoint Service (xcAdmin) database for the farm, and ▪ activating a separate ControlPoint license for each farm.
a multi-farm installation	<ul style="list-style-type: none"> • Install ControlPoint in the first farm, which includes: <ul style="list-style-type: none"> ▪ specifying the location where you want to create the ControlPoint Service (xcAdmin) database that will be shared by all farms, and ▪ activating your ControlPoint license. • For additional farms, perform a complete installation and when you specify the location of the xcAdmin database, be certain to specify the server on which you created the database for the first farm.

Installation Type	Guidelines
	<p>NOTE: Make sure that all farms in a multi-farm environment are running the same version of ControlPoint.</p>

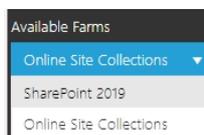
Special Considerations When Using Different Editions of ControlPoint in a Multi-Farm Environment

If all farms in a multi-farm environment have the same edition of ControlPoint (Standard, Non-Standard, or Online) installed, any one of the farms can be the home farm, and all farms will display in the SharePoint Hierarchy, which enables you to perform operations on multiple farms.

However, for multi-farm environments that have different editions of ControlPoint installed, some limitations apply if you want to be able to display multiple farms in the SharePoint Hierarchy and perform multi-farm operations.

If the multi-farm installation ...	Then for multiple farms to display in the SharePoint Hierarchy ...
includes ControlPoint Standard along with Non-Standard and/or ControlPoint Online	a Standard farm must be the home farm.
consists of only Non-Standard and ControlPoint Online	a Non-Standard farm must be the home farm.

NOTE: Regardless of whether or not all farms display in the SharePoint Hierarchy, you will always be able to change the active farm by selecting from the Available Farms drop-down.



Additionally, if you log into a multi-farm environment that includes both ControlPoint on premises and ControlPoint Online, you will be prompted to log into ControlPoint Online using your Microsoft 365 credentials.

The image shows a 'Log In' dialog box with a blue header. Below the header are two input fields: 'User Name:' and 'Password:'. A checkbox labeled 'Remember me next time.' is positioned below the password field. To the right of the input fields is a blue 'Log In' button. Below the dialog box are two more buttons: 'Sign in with Microsoft' and 'Ignore Cloud Farms'.

If you want to load on-premises farms only, you can dismiss the dialog by clicking **[Ignore Cloud Farms]**.

Prerequisite for Using ControlPoint Services

To use Discovery and Sensitive Content Manager services:

- TLS version 1.2 must be enabled on the server where the services are prepared for your environment for using ControlPoint Sentinel e installed

IMPORTANT: O365 does not currently support TLS 1.3 (which is enabled by default in Windows Server 2022) and must be disabled for ControlPoint to Online to run. Refer to the troubleshooting topic [Cannot Launch ControlPoint Online After Installation](#) for details.

AND

- the .NET Framework must be [configured to support strong cryptography](#) (via the Windows Registry setting **SchUseStrongCrypto**).

Refer to the following Microsoft articles for complete details.

- [Transport Layer Security \(TLS\) best practices with the .NET Framework](#)
- [How to enable TLS 1.2](#)

Using Microsoft Modern Authentication with ControlPoint Online

As of version 8.3.1, ControlPoint Online uses [Microsoft Modern Authentication](#) to connect to SharePoint Online. This requires a one-time registration of an app, ControlPoint Online, in Microsoft Azure, and involves the use of SSL certificates both in IIS (which Microsoft requires to secure the ControlPoint application and allows ControlPoint users to authenticate with Microsoft Entra ID).

NOTE: Once the app is registered, the only time it should ever have to be *re*-registered is if the app owner and/or certificate information needs to be changed.

First Time Installation and Configuration

Quest® ControlPoint for Microsoft 365 SharePoint Administration (ControlPoint Online) is installed and runs as a .NET application. During installation:

- a dedicated application pool is created in IIS for the primary ControlPoint Configuration site, which is installed under the root site of a hosted site collection
- the ControlPoint Service database (xcAdmin) is created for configuration information and analysis data

Before You Begin

- The site collection that will host the ControlPoint Configuration Site must exist on the host and be in the English language.
- The machine on which you are installing ControlPoint must meet [System Requirements](#).
- Make sure the machine on which you are installing ControlPoint has access to the Internet if you want to be able to activate your ControlPoint license online.

Have the following information ready (you may wish to record it in the spaces provided):

- The URL for the site collection that will host the primary ControlPoint Configuration Site* and the URL of the SharePoint Administration site hosting the site collection.

ControlPoint Configuration Site Collection URL:

SharePoint Administration Site URL:

*REMINDER: The ControlPoint Configuration Site must be created in an English-language site collection.

- The name and port number that you want IIS to use to manage the ControlPoint Configuration Site (The default port number is 2828, but you can set it to any available value.)

Web Site Name: _____

Port Number: _____

- The account under which you want the application pool for the ControlPoint Configuration Site to run (This is normally a domain account, but if you are running an evaluation version of the product—and the database is on the same machine as ControlPoint—you may use a local account.)

App Pool Service Account: _____

Password: _____

- The email credentials that you want to use as the "from" account for correspondence sent on behalf of ControlPoint.

Local SMTP Server: _____

Email address: _____

- The name of the SQL server that will host the ControlPoint Service (xcAdmin) database, as well as the authentication method to be used:
(This is where the content database for the ControlPoint application will reside.)

Database Server Name: _____

Windows Authentication

OR

SQL Server ID _____ **Password** _____

- **The ControlPoint Online license activation code:** _____
- The Site Collection Administrator account that will be used to create the ControlPoint Configuration Site.

Site Collection Administrator Account: _____

Password: _____

NOTE: If you do not already have a license activation code, contact Quest to obtain one.

First Time Installation and Configuration Process

The ControlPoint Online first time installation and configuration process consists of the following stages:

- [Installing the ControlPoint Online Files.](#)
- [Configuring the ControlPoint Online Application](#) (which includes registering the ControlPoint Online Azure application).
- Optionally, [configuring ControlPoint Services.](#)

Installing ControlPoint Online Files

It is recommended that you temporarily disable virus checkers on all Web front end servers in the farm as they can slow the solution deployment enough to trigger timeout errors.

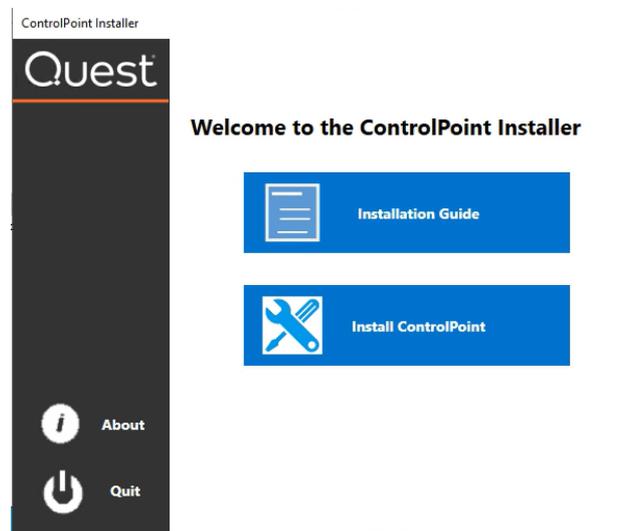
To install ControlPoint Files:

REMINDER: If UAC enabled on your server, you may have to "Run as Administrator."

- 1 Unzip the downloaded zip file then launch the installer (**Quest ControlPoint Installer.exe**).
NOTE: Make sure you keep the entire downloaded folder intact as there are files that are required by the installer.

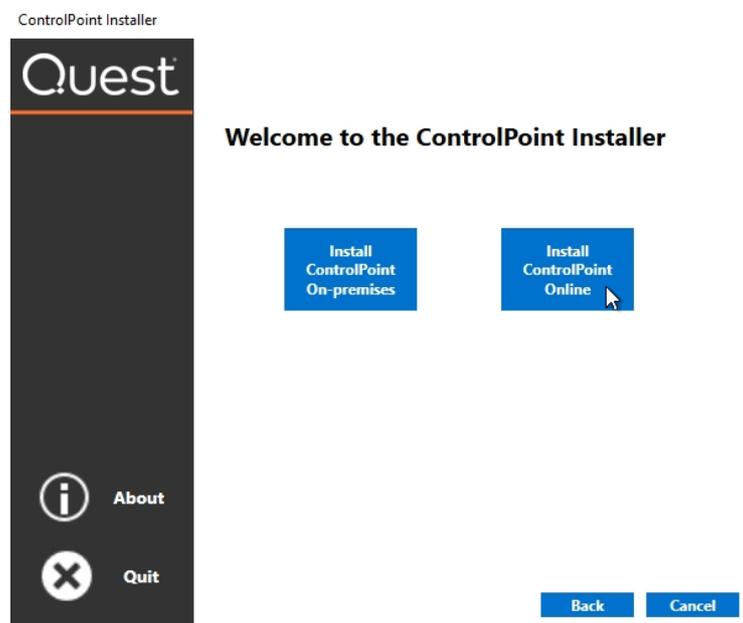
A splash screen displays, followed by the ControlPoint Installer Welcome screen.

- 2 Click **Install ControlPoint**.



The License Agreement dialog displays.

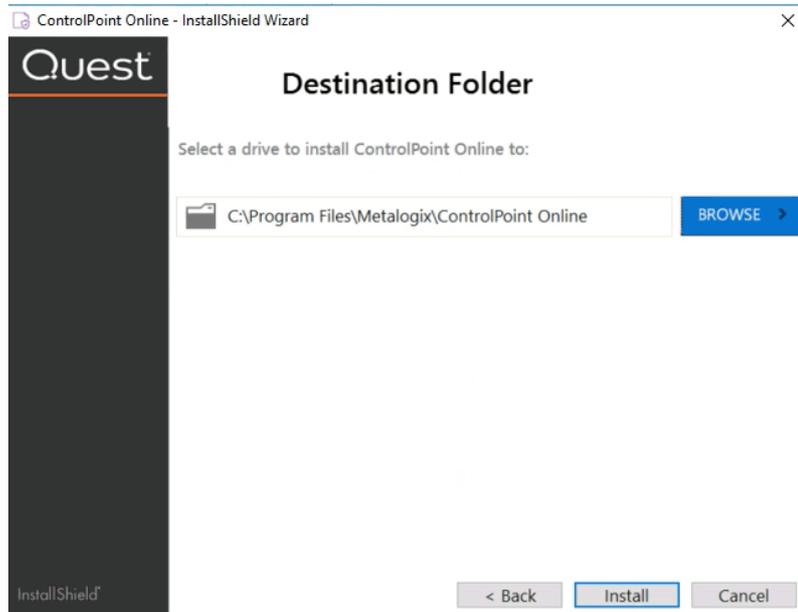
- 3 Read the license agreement. Click **I accept the terms of the license agreement**, then click **[Next]**.
- 4 Select **Install ControlPoint Online**.



NOTE: If SharePoint is not installed or configured on the server, this will be the only selectable option.

- 5 When the ControlPoint InstallShield Welcome dialog displays, click **[Next]**.

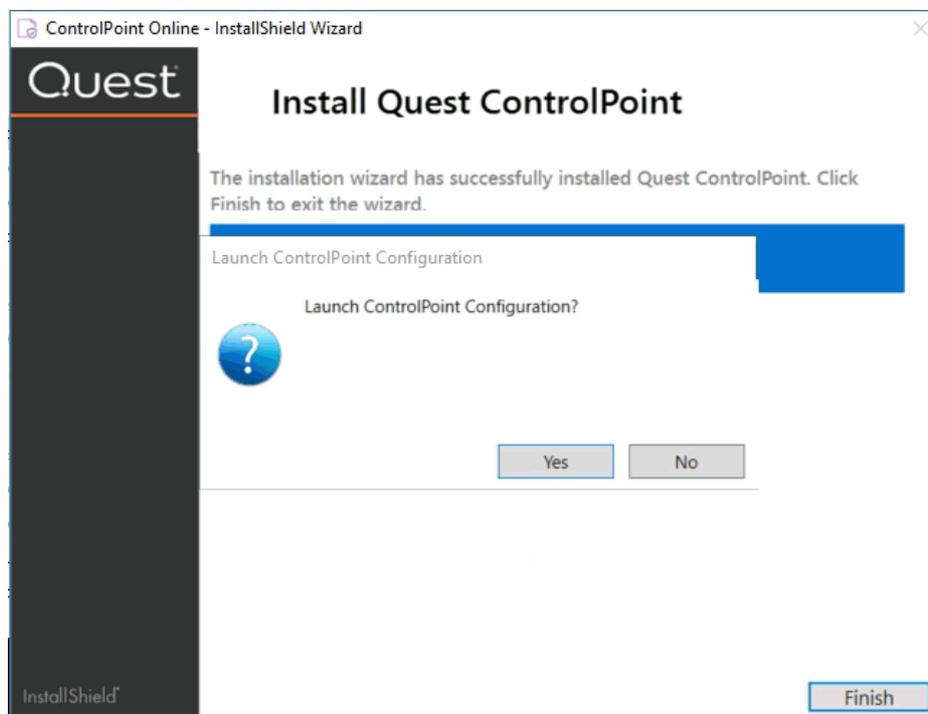
The InstallShield Wizard specifies a default install directory (**C:\Program Files\Metalogix\ControlPoint Online**), but you can click **[BROWSE]** and select a different one.



NOTE: This directory is where the installer will place the files needed to complete the installation.

6 Click **[Install]**.

The Configuration Wizard installs the ControlPoint files to the specified Destination Folder. When completed, a pop-up displays asking whether you want to configure ControlPoint.



NOTE: If you want to configure the ControlPoint Online application at a later time, click **[No]**. You can launch the ControlPoint Online Configuration Wizard from the Start menu or a Desktop shortcut.

- 7 Click **[Finish]**.

Configuring the ControlPoint Online Application

Summary of ControlPoint Configuration Process

The ControlPoint Configuration Wizard carries out the following tasks:

- ControlPoint Online Application registration:** To allow the use of Microsoft Modern Authentication, an app called ControlPoint Online is registered in Azure.
- Account validation:** Authenticates the account that will be used to create the ControlPoint Online Configuration site and creates/registers the ControlPoint Online app. This also allows for the use of Multi-Factor Authentication (MFA).
- ControlPoint Installed Components check.**
- ControlPoint License validation:** Checks the validity of the license key you enter as well as the terms of the license.
- ControlPoint Service database creation:** Creates the ControlPoint Service database (xcAdmin) on the selected database server. This database is where administrative information and cached data used for analysis and reporting is collected. (Note that in a multi-farm installation, this database is shared among farms.)
- Creation of ControlPoint Online application pool, website, and virtual directory in IIS.**
- ControlPoint Online website configuration.**

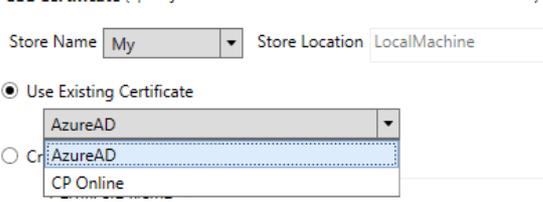
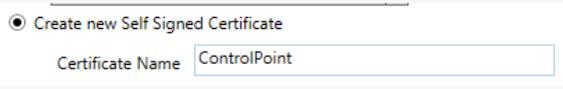
NOTE: If you change the host name, the Configuration Wizard will also create the bindings in IIS, update the redirect URI in the registered ControlPoint Online Application, and updates the ControlPoint Setting 'Inbound ControlPoint Url' to use the host header.
- License Activation:** Activates your ControlPoint license.
- Windows Service Configuration (optional):** If you elect to use server-side Windows Services for Discovery and/or Sensitive Content Manager, installs and configures the service(s) you selected.

To configure the ControlPoint Online application:

- 1 Use the information in the following table to determine the appropriate action to take..

If ...	Then ...
you are starting directly from the ControlPoint installer (that is, after performing the install you chose to Launch ControlPoint Online Configuration	go to the next step.
after installing ControlPoint you chose to configure at a later time (that is, after performing the install you chose not to Launch ControlPoint Online Configuration	double-click the ControlPoint Online Configuration desktop icon.

- 2 To create the ControlPoint Online application in Microsoft Azure for modern authentication:
 - a) Select the applicable **M365 Service Endpoint: Global (Default), GCC, or GCC High**.
 - b) Enter the information for the certificate that will be used to authenticate to Entra ID.

If you want to ...	Then ...
use an existing certificate	<ul style="list-style-type: none"> • Select a Store Name from the drop-down. <p>The Use Existing Certificate drop-down will be populated with available certificates in the selected store.</p> <ul style="list-style-type: none"> • Make sure Use Existing Certificate is selected, then select a certificate from the drop-down.  <p>NOTE: If the ControlPoint Installer cannot find a Certificate in the store, this option will be disabled.</p>
create a new <i>self-signed</i> certificate (default option)	<p>Select Create new Self Signed Certificate, then enter a Certificate Name.</p>  <p>The ControlPoint installer will create a self-signed certificate file in the local machine root store.</p>

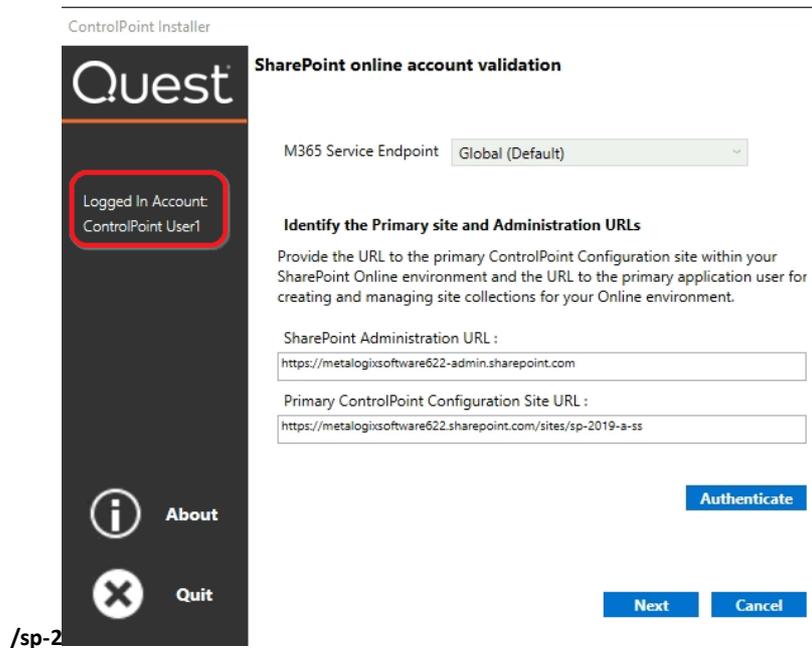
- c) Click **[Register]** then, when the registration is complete click **[Next]**.
- d) Click **[Consent]** to be redirected to the Azure application Consent screen.
- e) Read the permissions that the app requires then click **[Accept]**.
- 3 When a pop-up with the message that the registration was successful displays, dismiss it then click **[Next]**.

The SharePoint online account validation dialog displays.
- 4 Provide the following information:
 - For **SharePoint Administration URL**, the url of the primary page for configuring the hosted SharePoint environment.
 - For **Primary ControlPoint Configuration Site URL**, the url of the hosted site collection in which the ControlPoint Configuration site will be created.
- 5 Click **[Authenticate]**.

You will be prompted once again to sign into the Microsoft Azure portal, this time for account authentication.

Remember that the signed-in account must be both a Global Administrator and a Site Collection Administrator for the site collection that will host the ControlPoint Online Configuration site.

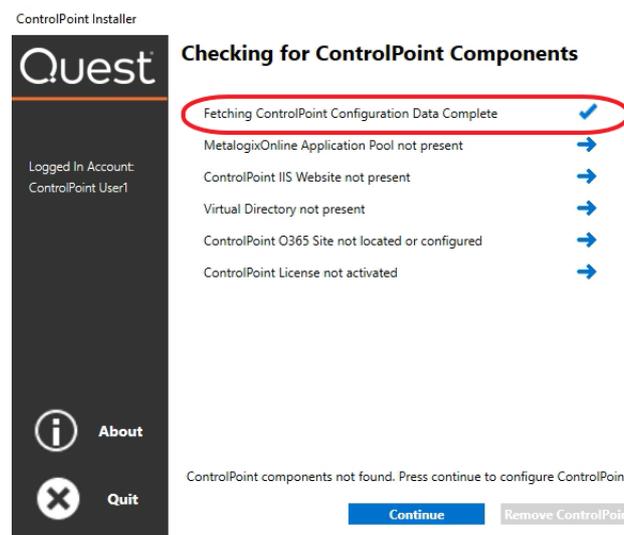
If the authentication is successful, the Office 365 account will display as the **Logged In Account** for the remainder of the installation.



6 Click **[Next]**.

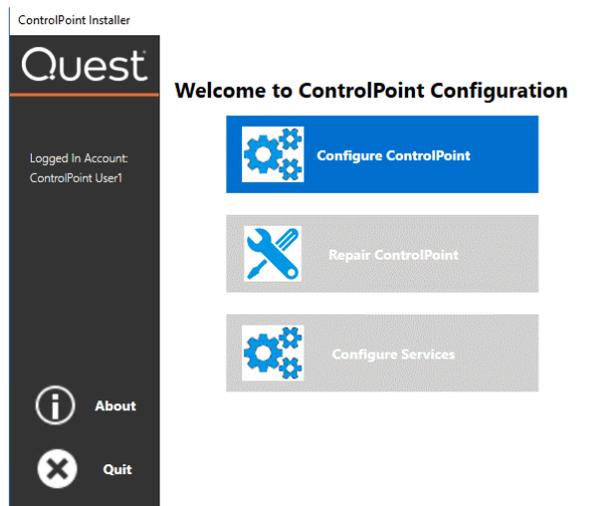
The installer checks your environment for the presence of installed components.

NOTE: For a first time installation, once the components check is complete only the Fetching ControlPoint Configuration Data box should be checked (✓). All other options will appear with a right-facing arrow. (→)

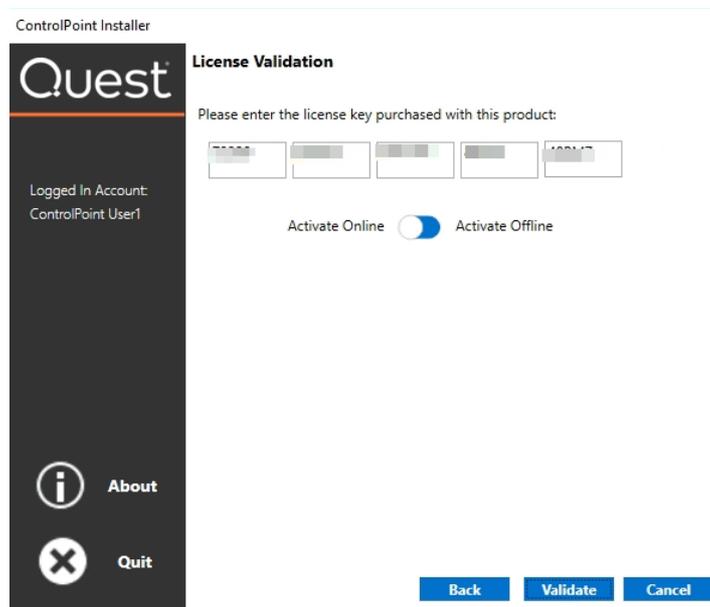


7 Click **[Continue]**.

- 8 Click **[Configure ControlPoint]**.



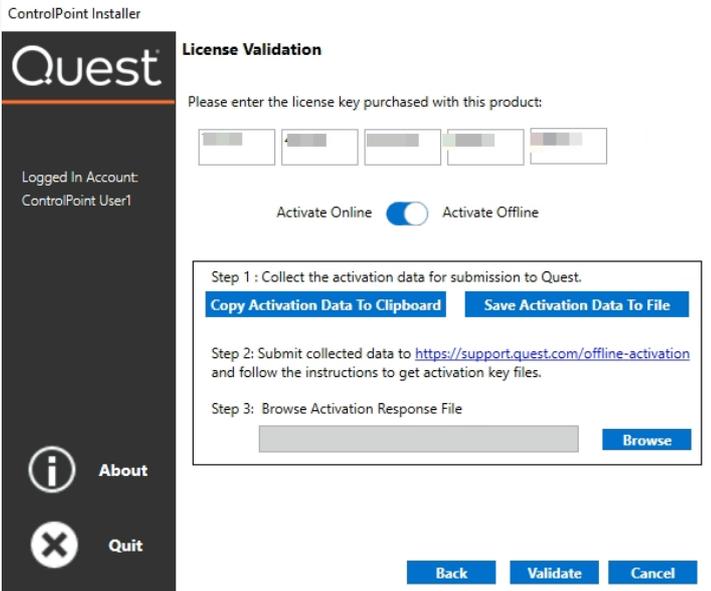
- 9 Enter the license key provided by Quest.



10. Use the information in the following to determine the appropriate **License Validation** option to select.

NOTE: Most systems can use the Online activation method as long as the system has internet access. If you are unable to use the online activation method due to security settings or lack of internet access, the Offline activation option can be used. This option will still require some internet access, but allows for the authentication to be done from another machine that is not as restricted by security or has a connection to the internet.

If you want to validate the license...	Then ...
online	accept the default option (Activate Online).
offline	a) Select Activate Offline .

If you want to validate the license...	Then ...
	 <p>The Offline Activation window displays. You can either Copy Activation Data To Clipboard or use the Save Activation Data To File option to save the key into a text file (in case it needs to be copied to another machine).</p> <ol style="list-style-type: none"> From a machine that has internet access, go to https://support.quest.com/offline-activation. Follow the instructions on the Offline Activation web page to activate your license, using the Upload activation data option. <p>NOTE: Remember to save the Activation File to a location that is accessible by the machine on which you are installing ControlPoint.</p> <ol style="list-style-type: none"> Return to the ControlPoint Installer License Validation dialog. Use the Step 3: Browser Activation Response File option to select the file returned by Quest.

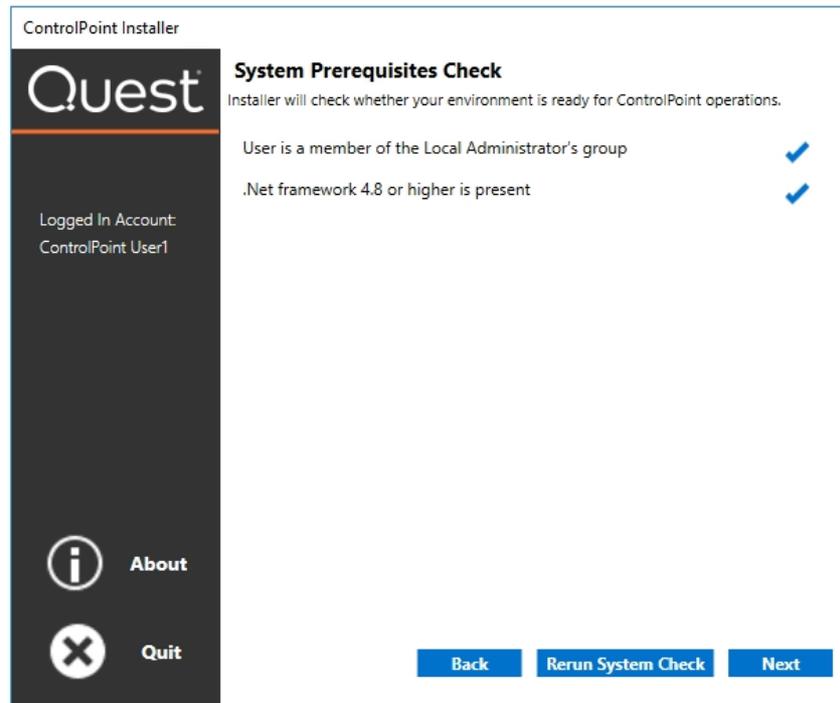
11 Click **[Validate]**.

If the license is validated successfully a License Validation pop-up displays the terms and current status of the license.

12 Dismiss the pop-up and click **[Next]**.

The System Prerequisite check begins. Any item that fails the check is identified by a red **X**.

NOTE: If you fix the problem immediately, you can then **Rerun the System Check**. If you choose to **Quit** and fix the problem at a later time, the next time you launch the ControlPoint Configuration Wizard, it will start from the beginning.



13 When all system prerequisites checks have completed successfully, click **[Next]** to display the IIS Configuration dialog.

14 Complete the dialog as follows:

- a) For **Web Site Name**, if different from the default (ControlPoint Online), enter the name that you want IIS to use to manage the site.

NOTE: The name that is entered in this field is for IIS purposes only. The name of the site will appear in SharePoint and ControlPoint under the name ControlPoint Configuration Site.

- b) For **Port number**, either:

- accept the default value (2828)

OR

- enter a different, unused Port number.

- c) For **Host Name**, if different from the default (the machine name), enter the host header (alias) that will be used.

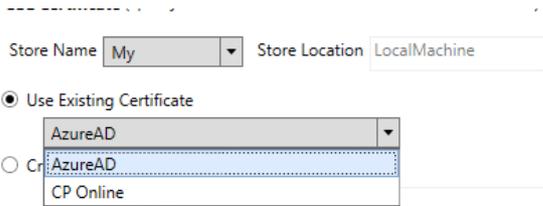
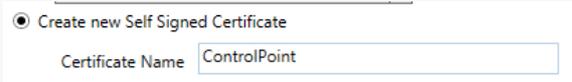
NOTE: If a host header is entered, the installer will also create the bindings in IIS.

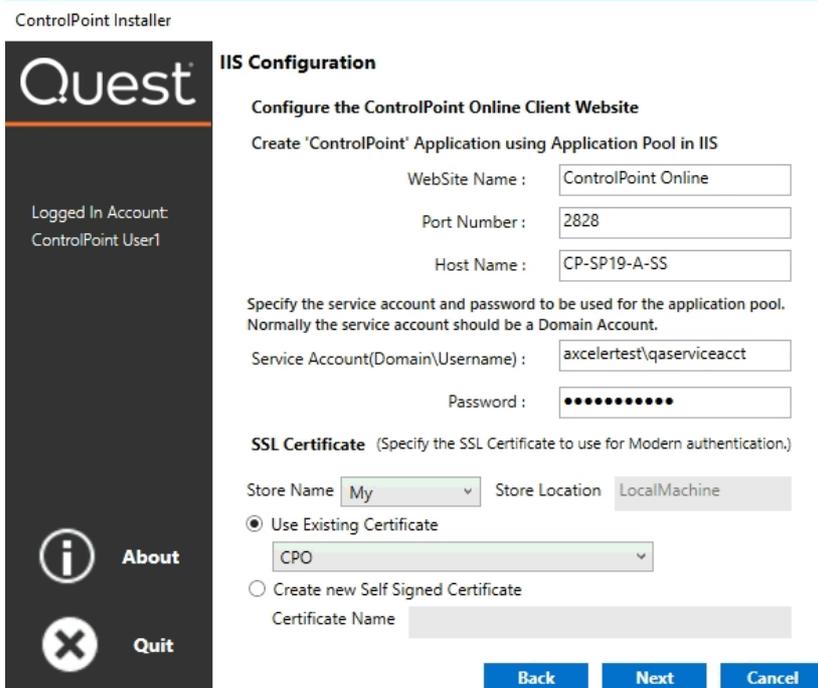
- d) Enter the name and password of the Service Account under which you want the application pool that will host the ControlPoint Configuration Site to run.

REMINDER: If your databases reside on a different server, then the Service Account must be a domain account.

- e) For **SSL Certificate** (which Microsoft requires to secure the ControlPoint application), use one of the options described in the following table.

NOTE: The certificate must be located in either the Personal or WebHost store.

If you want to ...	Then ...
use an existing certificate	<ul style="list-style-type: none"> • Select a Store Name; either My (for the Personal Store) or WebHosting, from the drop-down. <p>The Use Existing Certificate drop-down will be populated with available certificates in the selected store.</p> <ul style="list-style-type: none"> • Make sure Use Existing Certificate is selected, then select a certificate from the drop-down.  <p>NOTE: If the ControlPoint Installer cannot find a Certificate in the Store, this option will be disabled.</p>
create a new <i>self-signed</i> certificate (default option)	<p>Select Create new Self Signed Certificate, then enter a Certificate Name.</p>  <p>The ControlPoint installer will create a self-signed certificate file in the local machine Personal store.</p>



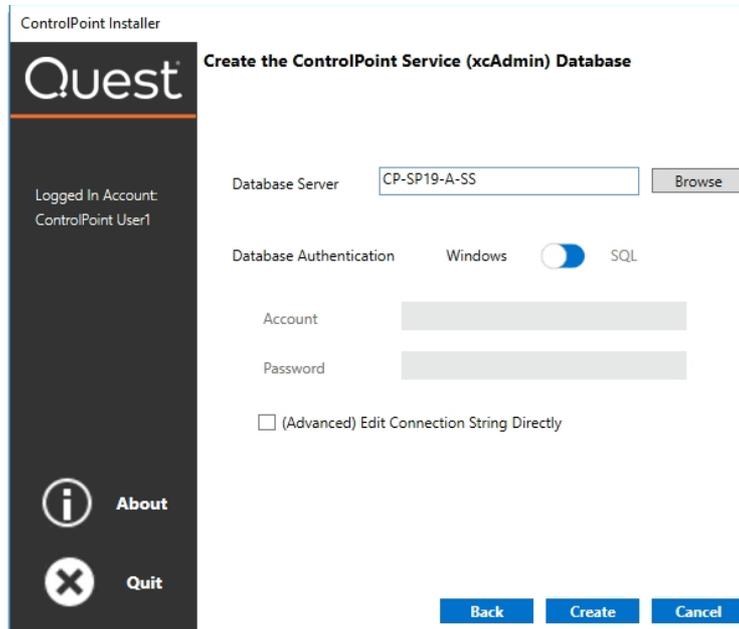
15 Click **[Next]** to display the Create the ControlPoint Service (xcAdmin) Database dialog.

16 Specify the **Database Server** where you want to host the ControlPoint Service (xcAdmin) database:

- enter the server name

OR

- click [**Browse**] to choose a different database server.



17 If you want to view, update, and/or test the xcAdmin database connection string

- a) Click the **(Advanced) Edit Connection String Directly** box.

NOTE: If you are choosing to reuse an existing xcAdmin database, you will be unable to *update* the connection string and the field will be disabled. If you need to update the connection string after completing the installation, you can do so by updating the parameter `<connectionStrings>` in the **CPConfiguration.exe.config** file. Refer to the *ControlPoint for Microsoft 365 Administration Guide* for details.



IMPORTANT: Update the connection string *only* if your SQL connection requires the addition of one or more custom keywords. For example, if you are using authentication with encryption and a self-signed server certificate, you would need to add **Encrypt=yes;TrustServerCertificate** to the string. Refer to the Microsoft article [Using Connection String Keywords with SQL Server Native Client](#) for more information.

- b) Click [**Test Connection.**].

Note that if the connection is not successful, the parameter that caused it to fail will be identified.

- 18 Click **[Create]** (or if you are using an existing xcAdmin database, **[Update]**). After the Configuration Wizard has successfully created the new database (or updated an existing database), click **[Continue Installation]** then click **[Next]**.
- 19 Enter the email information for the **O365 Email Address** or **Local Email Address** (including local SMTP Server Address) that will be used as the "from" account for any correspondence sent on behalf of ControlPoint.

ControlPoint Installer

Quest

Logged In Account:
ControlPoint User1

About

Quit

Email Information

ControlPoint Online Email Information

Please identify the email information to be used as the (From:) account for email sent on behalf of ControlPoint Online

ControlPoint Online Email Information

O365 Email Address Local Email Address

SMTP Server Address:

Email Address :

Next Cancel

ControlPoint Installer

Quest

Logged In Account:
ControlPoint User1

About

Quit

Email Information

ControlPoint Online Email Information

Please identify the email information to be used as the (From:) account for email sent on behalf of ControlPoint Online

ControlPoint Online Email Information

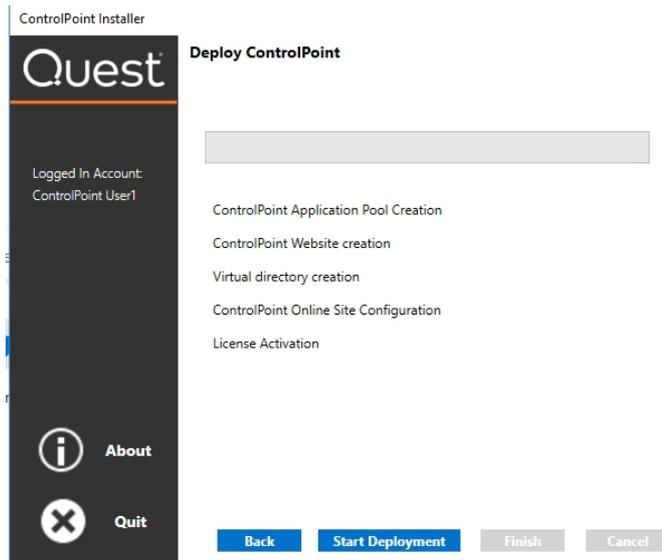
O365 Email Address Local Email Address

SMTP Server Address:

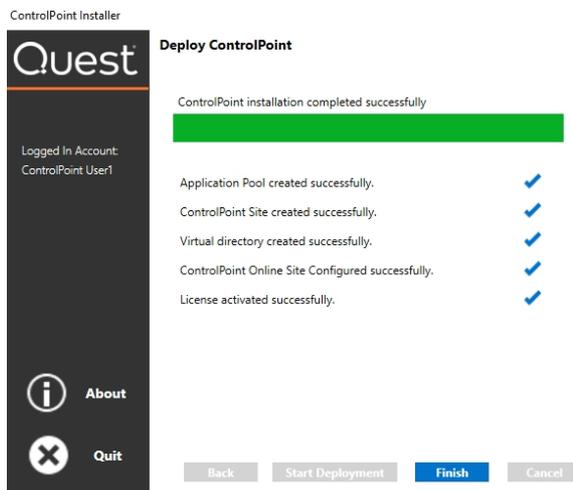
Email Address :

Next Cancel

- 20 Click **[Next]** to display the Deploy ControlPoint dialog.



21 Click **[Start Deployment]**.



22 When the deployment has successfully completed, click **[Finish]**.

23 If you want to configure Discovery and/or SCM services, click **[Yes]** and follow the instructions for [Configuring ControlPoint Services](#).

NOTE: You can also configure services at a later time by launching the installation from the Start menu or desktop shortcut.

Configuring ControlPoint Services

Toward the end of ControlPoint configuration process you have the option to configure the following Windows service(s):

- The **ControlPoint Discovery Service**, which collects data and stores it in the ControlPoint Services (xcAdmin) database cache for use in ControlPoint data analysis and reporting.

AND/OR

- If Sensitive Content Manager is installed in your environment, **ControlPoint Sensitive Content Manager (SCM) Services** will allow you to use it within ControlPoint:

- as a means of checking for:
 - Content Analysis (CA) jobs ready to be uploaded from ControlPoint to Sensitive Content Manager for scanning.

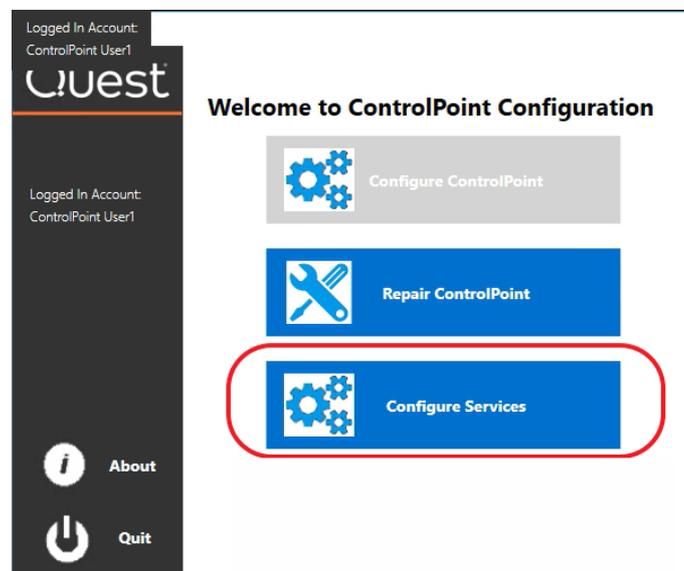
AND

- Scan results ready to be downloaded from Sensitive Content Manager to ControlPoint for further action.

AND

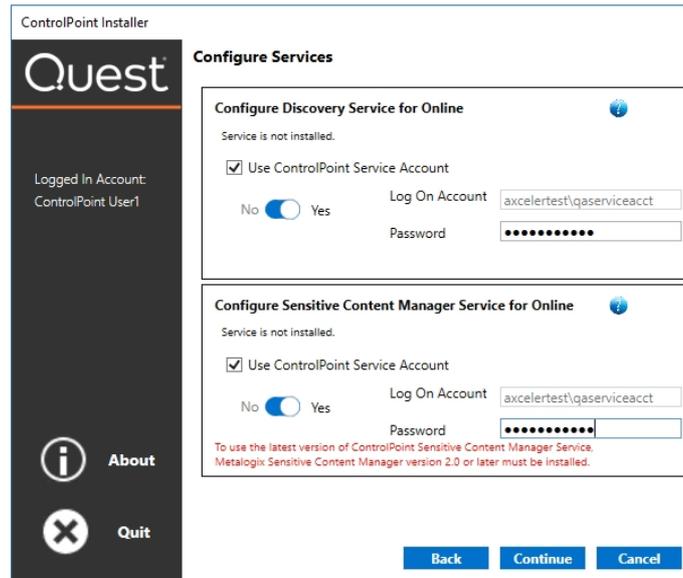
- Because they support multi-threading, SCM Services are especially suited to very large content analysis jobs.

NOTE: If you want to configure services at a later time, you can do so by launching the Configuration Wizard from the server on which ControlPoint is installed (using the same on premises and O365 login accounts used to install the ControlPoint application). After you have verified the Wizard has finished checking installed components, select **Configure Services**.



To configure ControlPoint Services:

- 1 On the Configure Services dialog, select the service(s) you want to configure.



IMPORTANT:

- The Service Account must meet all of the requirements of the ControlPoint Service Account, as well as permission to Run as a Service.
- Keep in mind that the latest version of ControlPoint Sensitive Content Manager Service will only work with version 2.0 or later of Sensitive Content Manager.

2 Click **[Continue]**.

3 Click **[Start Deployment]**.

The installer deploys the selected Windows service(s).

4 When the services have been successfully deployed, click **[Finish]**.

Additional Setup Requirement for the ControlPoint Discovery Service

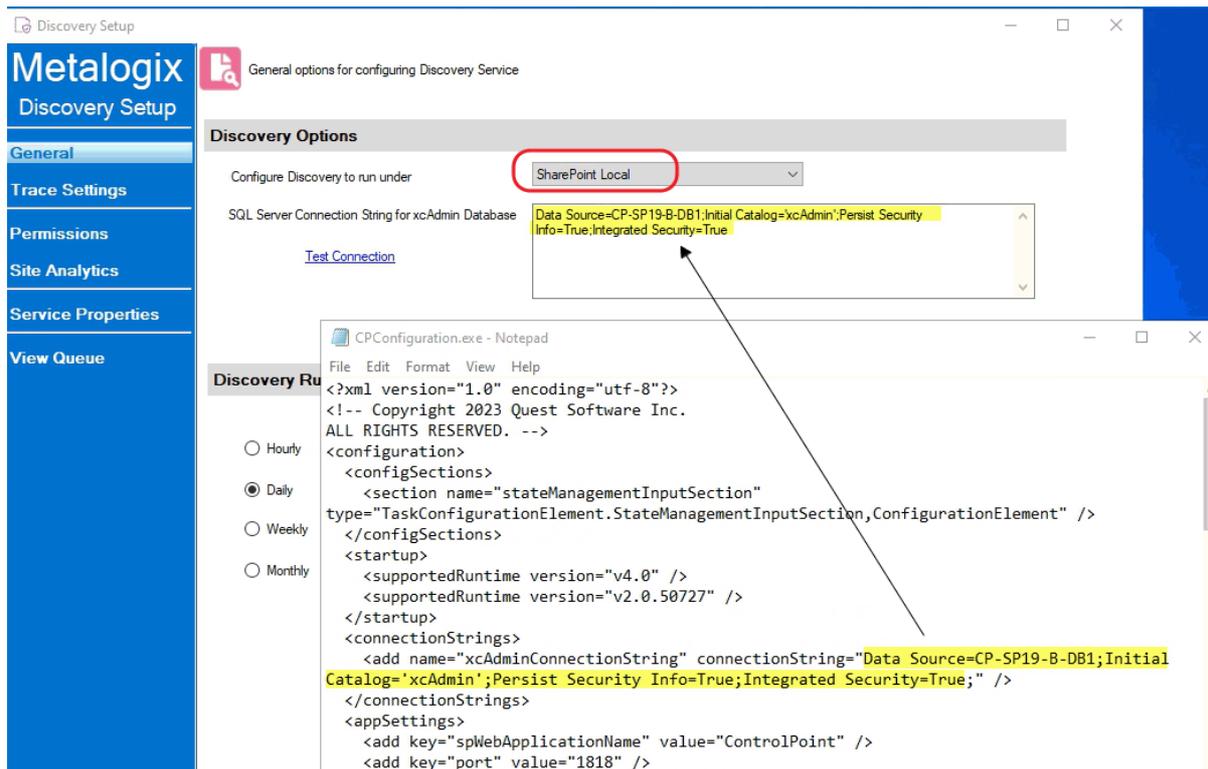
Before you can use the ControlPoint Discovery Service for the first time, you must also perform the following configuration tasks on the General tab of the Discovery Setup application (located, by default, in the folder `C:\Program`

`Files\Metalogix\ControlPointOnline\ControlPointFeatures\Services\Discovery`):

- For **Configure Discovery to run under**, select **SharePoint Local**, and
- Add the **SQL Server Connection String for xcAdmin Database**.

NOTE: You can copy the Connection String from the file **CPConfiguration.exe.config**, located, by default, in the folder `C:\Program`

`Files\Metalogix\ControlPointOnline\ControlPointFeatures`. Use the portion of the string that starts with the words **Data Source** and ends with **Integrated Security = <value>**.



You can also change a service's default settings from its Setup application. Refer to the *ControlPoint for Microsoft 365 Administration Guide* for complete details.

IMPORTANT: Before Services Can be Run:

Before you can run Discovery and Sensitive Content Manager services, make sure that:

- TLS version 1.2 is enabled on the server where the services are installed

AND

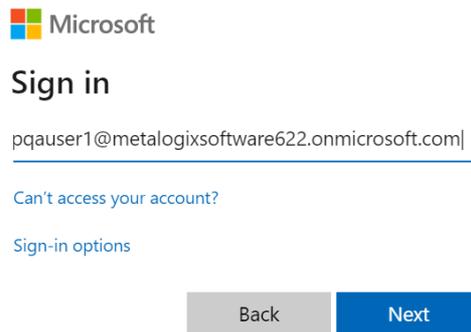
- the .NET Framework is [configured to support strong cryptography](#) (via the Windows Registry setting **SchUseStrongCrypto**).

Refer to the following Microsoft articles for complete details.

- [Transport Layer Security \(TLS\) best practices with the .NET Framework](#)
- [How to enable TLS 1.2](#)

Launching ControlPoint Online

To use ControlPoint Online, you must be a Site Collection Administrator for the site collection that hosts the ControlPoint Online Configuration Site. Upon launching ControlPoint, you will first be prompted to authenticate with Microsoft Online using your O365 account credentials.



IMPORTANT: If you are using Internet Explorer or Edge and the Sign in dialog continually prompts for your account without proceeding to the Password prompt, refer to the topic [I am Continually Prompted to Log Into ControlPoint but the Login Never Completes](#).

If that authentication is successful, a token will be returned to ControlPoint Online, which will then determine if the account is a valid ControlPoint Online user.

Use one of the following options to launch the ControlPoint Online application.

From your workstation browser:

Enter **`https://<machine_name>:<port_number> or <host_header_name>/_layouts/axceler/xcmain.aspx`**.

(The server machine name is the name of the machine on which the ControlPoint client application is installed. 2828 is the default port number for the ControlPoint Online application pool.)

From the machine on which ControlPoint Online has been installed:

- 1 Log into the server using the account that was designated as the ControlPoint Service Account at the time the ControlPoint Online application was installed.
- 2 From the Windows Start menu, choose **Programs > Metalogix > ControlPoint_Online > Launch ControlPoint Online Application**.

Upgrading from a Previous Version of ControlPoint Online

Upgrading from an earlier version of ControlPoint Online is same as that [First Time Installation and Configuration](#), with the following exceptions:

- After installing the new files, you will be given the option to **Upgrade ControlPoint**.
- The license key, ControlPoint Service (xcAdmin) database, and ControlPoint Configuration site will be

retained and updated.

- You will be unable to overwrite the ControlPoint Service Account or connection string.

NOTE: If you need to update the connection string after an upgrade, you can do so via the ControlPoint Configuration Setting SQL Server Connection String for xcAdmin Database (xcAdmin ConnectionString). Refer to the *ControlPoint Administration Guide* for details.]

Additional caveats depend on the version you are upgrading from, as described in the following table.

If you are upgrading from version ...	Then ...
8.6 or earlier	if you previously ran Discovery using the Windows Scheduled Task to run (which has been removed as of version 8.7), you will need to configure the Discovery Service .
8.4 or earlier	if you are upgrading ControlPoint Sensitive Content Manager Service, version 2.0 or later of Sensitive Content Manager must be also be installed if you want to continue to use it.
8.1 or earlier	Discovery and Sensitive Content Manager Services will be recreated in the folder C:\Program Files\Metalogix\ControlPoint Online\ControlPointFeatures\Services, and all settings will be preserved.
8.3.0 or earlier	to use Microsoft Modern Authentication you will also be required to to: <ul style="list-style-type: none">• specify an SSL certificate to use in IIS AND <ul style="list-style-type: none">• register the ControlPoint Online app.
8.0 or earlier	installed files, which formerly resided in a folder called AxcelerFeature, will be placed in a folder called ControlPoint Features.

Removing (Uninstalling) ControlPoint Online

Use the following procedure if you want to remove ControlPoint Online installed components.

Note that you will have the option to either retain or remove the following components:

- **ControlPoint Services (xcAdmin) database.** You may want to keep this database if, for example, you plan to reinstall ControlPoint at a later time or want to archive the data. Remember to retain the xcAdmin Database if you are using ControlPoint in a multi-farm environment and want to continue to use it to manage other farms.
- **ControlPoint OnlineConfiguration Site and ControlPoint Online Azure Application.**

When removing installed components:

Make sure that you:

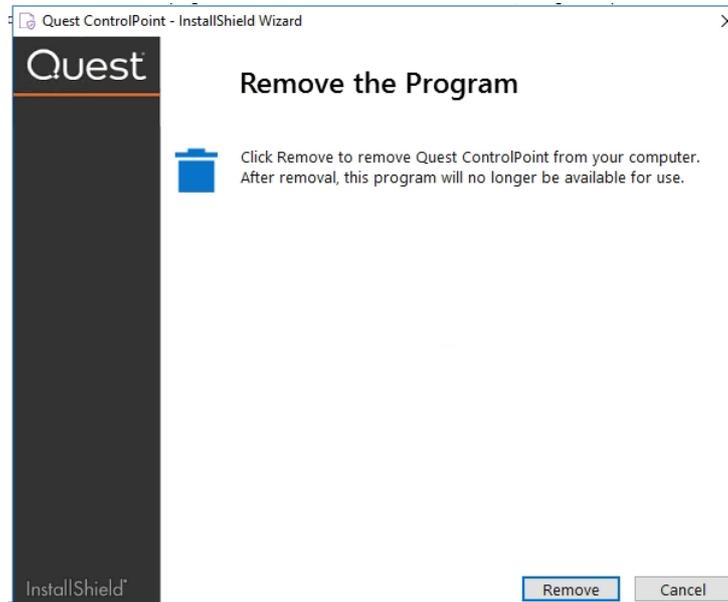
- run the installer on the server on which the original installation was performed, and
- log in using the account from which the original installation was run.

To launch the installer:

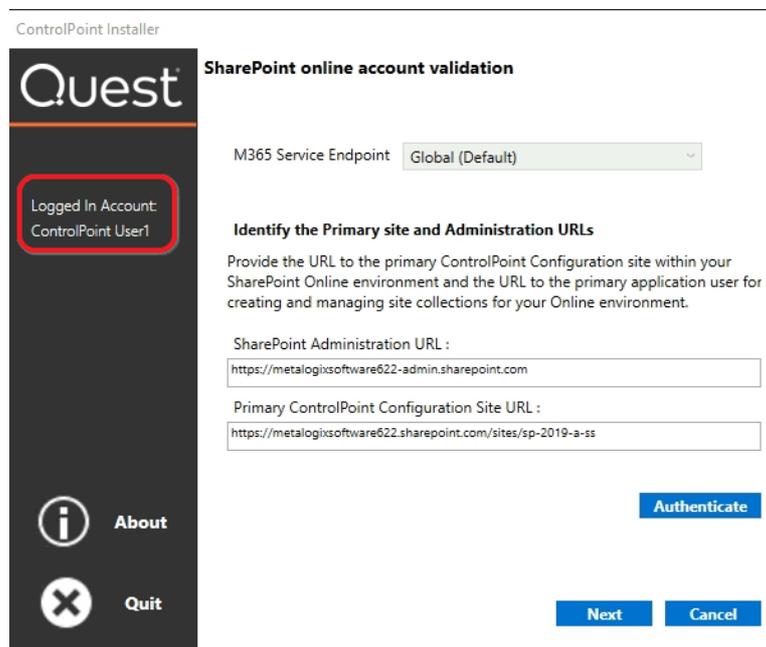
From the Control Panel Programs and Features select **Quest ControlPoint** (or, if you are uninstalling version 8.8 or earlier, **Metalogix ControlPoint**) and choose **Uninstall**.

To remove (uninstall) ControlPoint Online:

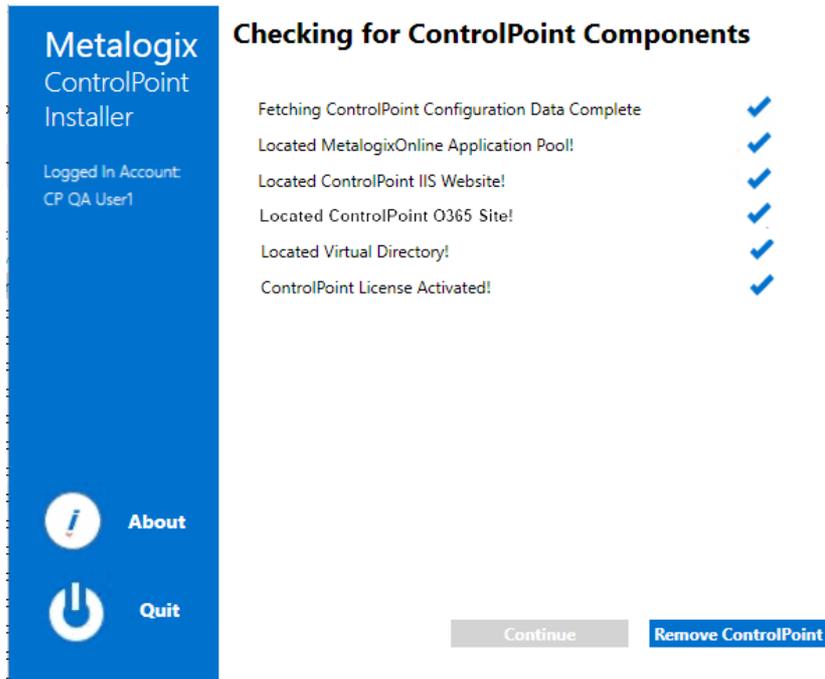
- 1 From the Remove Program dialog click **[Remove]**.



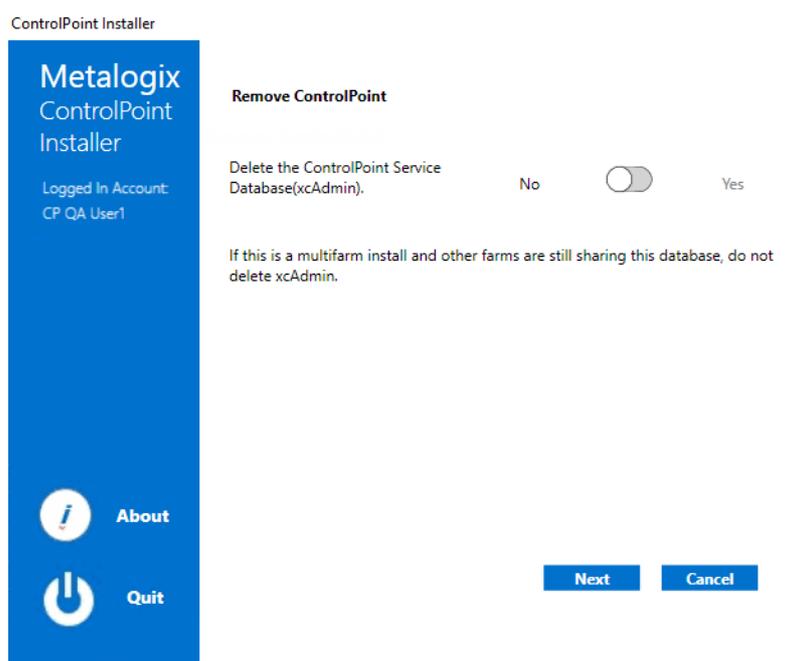
2. Complete the **SharePoint online account validation dialog** and authenticate using the Microsoft 365 account used at the time ControlPoint was installed (which must be a Global Administrator for the tenant).



The installer checks for ControlPoint Components.



3 When the Component check has been completed successfully, click **[Remove ControlPoint]**.



4 Use the information in the following table to determine the appropriate option to select for **Delete the ControlPoint Service Database (xcAdmin)**.

If ...	Then ...
<ul style="list-style-type: none"> you are using ControlPoint in a multi-farm environment and want to continue to use it to manage other farms OR	for Delete the ControlPoint Service Database (xcAdmin) , select No .

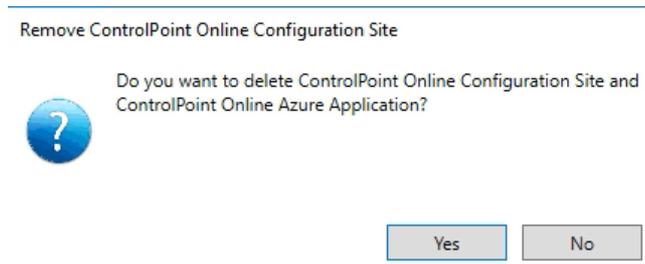
If ...	Then ...
<ul style="list-style-type: none"> • you plan to reinstall ControlPoint in your environment 	
<ul style="list-style-type: none"> ▪ you are permanently removing ControlPoint from a single-farm environment <p>OR</p> <ul style="list-style-type: none"> ▪ you have a multi-farm installation of ControlPoint and you want to permanently remove the application from all farms 	for Delete the ControlPoint Service Database (xcAdmin) , select Yes .

5 Click **[Next]**.

NOTE: If you have configured the ControlPoint SCM Service and/or Discovery Service, you will then be prompted to **Remove ControlPoint's services**. Note that the only selectable option is **Yes** (that is, these services cannot be retained if the ControlPoint application is not also installed).

6 Click **[Remove]**.

7 Use the information in the following table to determine the appropriate option to select for **Remove ControlPoint Online Configuration Site and ControlPoint Online Azure application** prompt.



If ...	Then ...
you plan to reinstall ControlPoint in your environment and you want to retain any customizations as keep the ControlPoint Online Azure application and associated consents	click [No] .
you are permanently removing ControlPoint and/or you do not want to retain customizations or the ControlPoint Online Azure application	click [Yes] .

8 Click **[Complete]** to begin the ControlPoint Uninstallation.

9 When the *The program unistall is complete.* message displays, click **[Finish]**.

10 Once the ControlPoint Unistallation process has finished, click **[Complete]**.

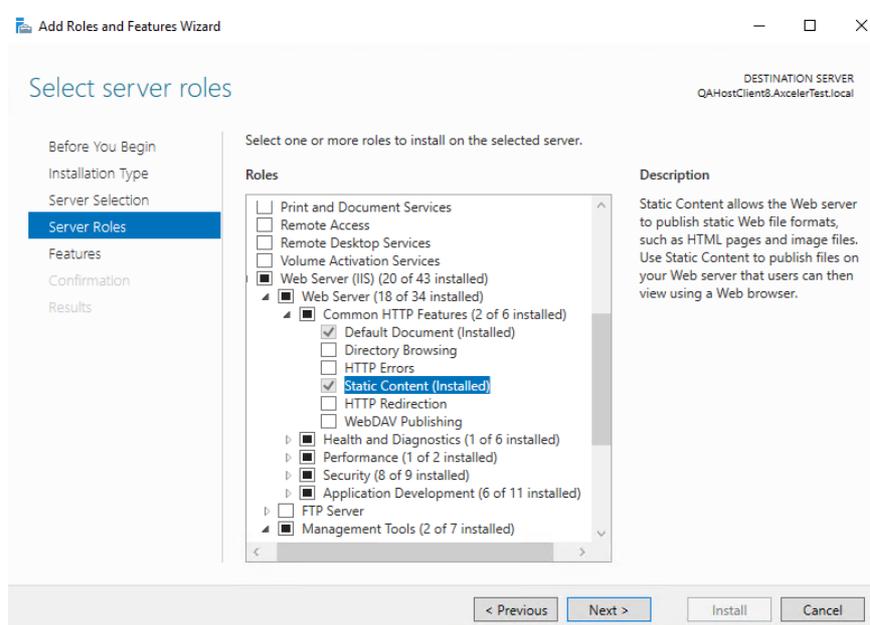
11 When the *The program unistall is complete.* message displays, click **[Finish]**.

Appendix: Configuring IIS if SharePoint is not Installed

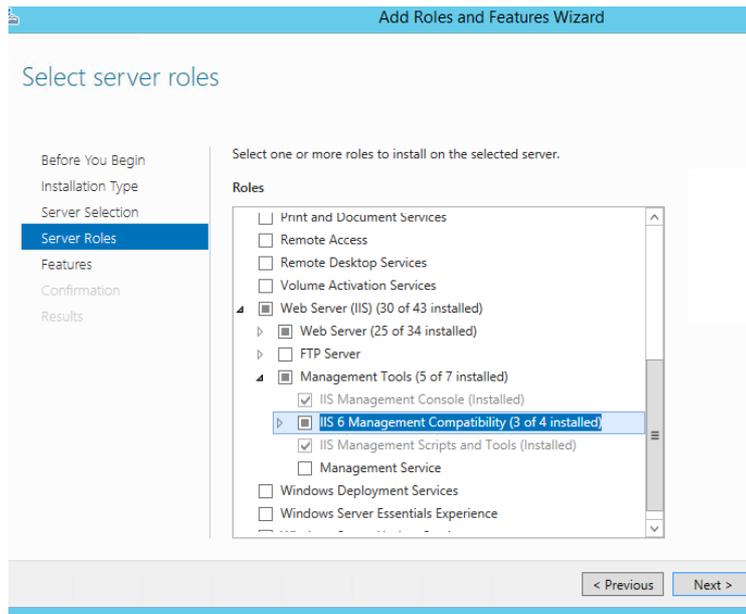
It is not required that SharePoint be installed to use ControlPoint Online. However, if SharePoint is *not* installed, IIS must be configured to allow the ControlPoint Online Configuration Site to run on the server, as described below.

To configure IIS for ControlPoint Online if SharePoint is not Installed:

- 1 On the server where ControlPoint Online is installed, open Server Manager and choose **Manage > Add Roles and Features**.
- 2 Select **Server Roles**.
- 3 Make sure that the following options are selected:
 - **Web Server (IIS) - Web Server - Common HTTP Features - Static Content**

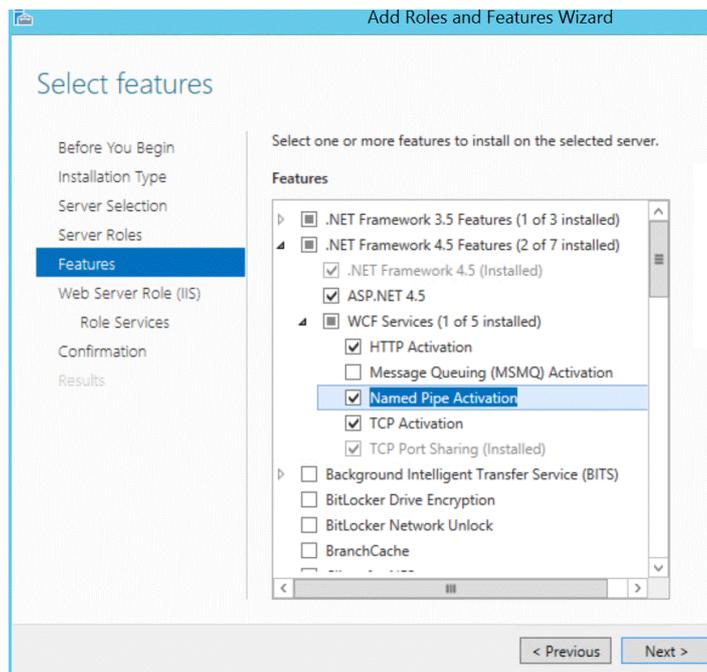


- **Web Server (IIS) - Management Tools - IIS 6 Management Compatibility**



4 Select **Features**.

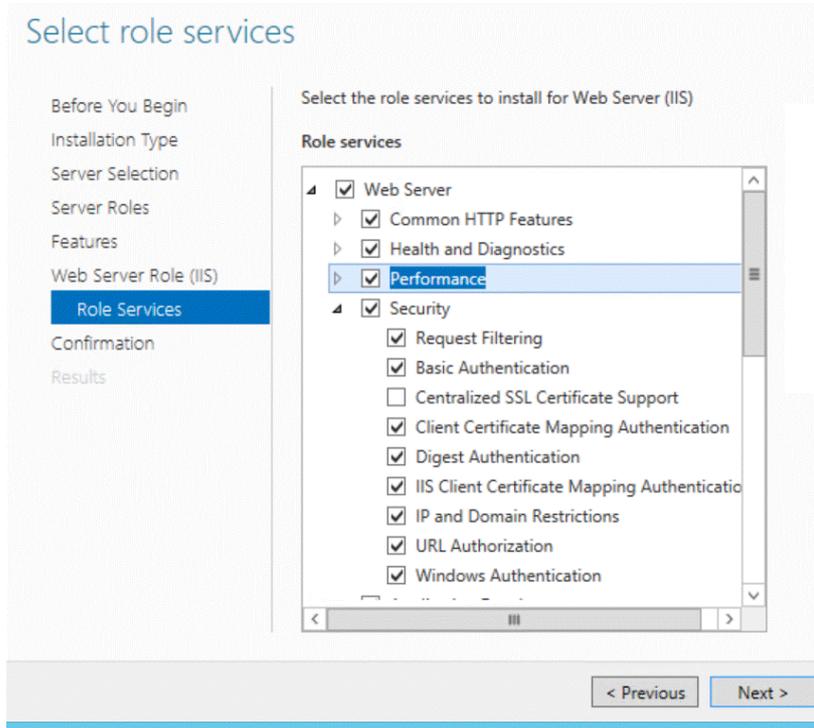
5 Make sure **.NET Framework 4.5 Features - Named Pipe Activation** is selected.



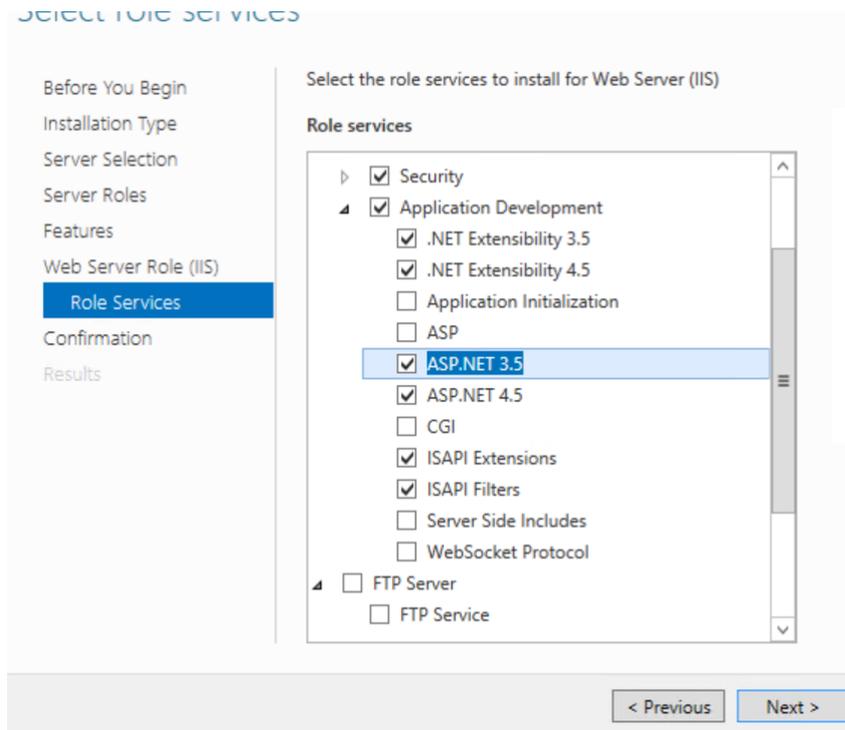
6 Select **Role Services**.

7 Make sure the following options are selected:

- **Web Server - Performance**



▪ **Application Development - ASP.NET 3.5**



Troubleshooting

ControlPoint Log Files

There are log files that can help in troubleshooting ControlPoint issues.

NOTE: If you cannot diagnose your issue using the information in this guide and need to contact [Quest Technical Support](#), have any applicable log file(s) readily available to help the Technical Support Specialist better assist you.

Installation Log (xcControlPoint.log)

The following installation log files are located on the machine on which ControlPoint was installed for the farm, in the directory `C:\Program`

`Files\Metalogix\ControlPoint\ControlPointFeatures\Logs`:

- `RollingAppenderDebugInfo` tracks the progress of the installation.
- `RollingAppenderWarnErrorFatal.txt` and `log.txt` record errors encountered during the installation.

ControlPoint Administration Log (xcAdmin.log)

`xcAdmin.log`:

- is the log file where the following information is recorded:
 - ControlPoint application errors
 - the progress of both nightly and interactive Discovery jobs, and
- is accessible from the machine on which ControlPoint was installed for the farm, in the following directory: `C:\Program Files\Metalogix\ControlPoint Online\Layouts\Axceler\Log`

I am Continually Prompted to Log Into ControlPoint but the Login Never Completes

Issue

With Internet Explorer or Edge, when attempting to log into ControlPoint using Modern Authentication, either for the first time or after the browser session expires, I am continually prompted to log in but the login never completes successfully.

Resolution

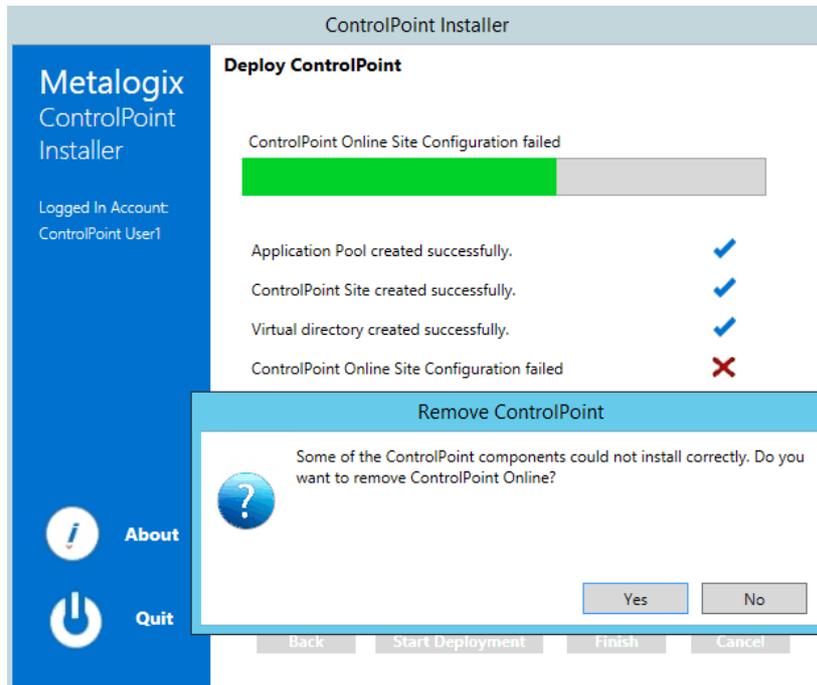
This issue does not occur with Chrome. However, if you want to continue to use Internet Explorer or Edge, use the information in the following table to resolve the issue.

If you are using ...	Then ...
Internet Explorer	change Internet Options > Security options as follows: 1 Add https://login.microsoftonline.com to the Trusted Sites. 2 Add the ControlPoint URL to the Trusted Sites. 3 Change the Custom Level as follows: a) Select Local Intranet . b) Click [Custom level...]. c) Enable the Websites in less privileged web content zone can navigate into this zone option.
Edge	upgrade to the latest version of Edge. https://www.microsoft.com/en-us/edge NOTE: This is a Microsoft Known Issue.

Deployment of ControlPoint Online Configuration Site Fails During Installation

Issue

During ControlPoint Online installation, the following error occurs:



Possible Reason

The operating system is not using TLS version 1.2 by default.

Resolution

Enable TLS version 1.2 on the server. Refer to the following Microsoft articles for complete instructions.

- [Transport Layer Security \(TLS\) best practices with the .NET Framework](#)
- [How to enable TLS 1.2](#)

Cannot Launch ControlPoint Online After Installation

Issue

After installing ControlPoint Online, I cannot successfully launch the application.

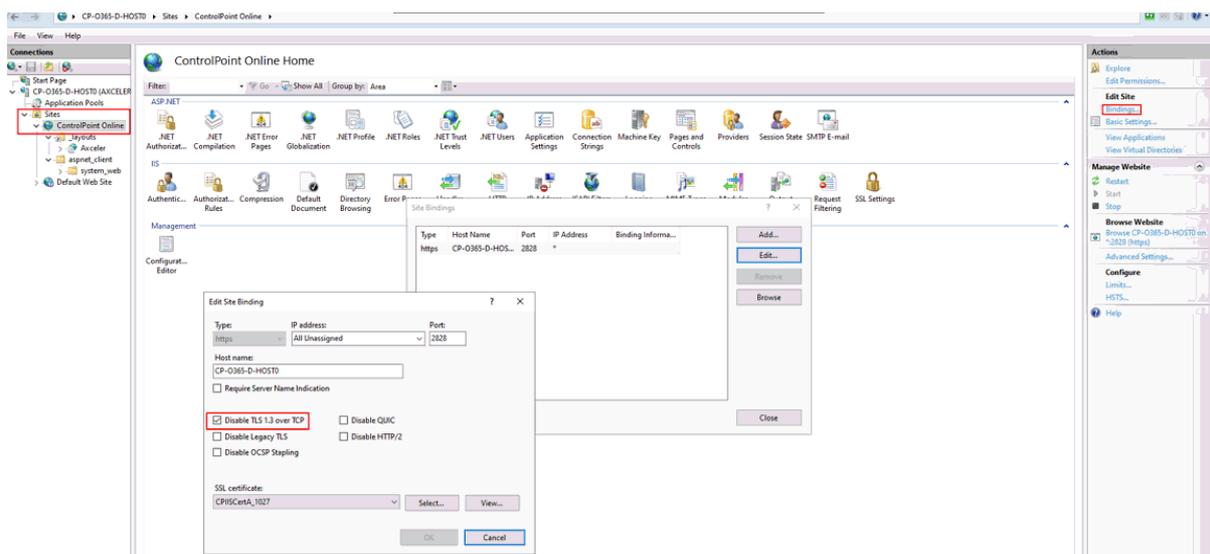


Possible Reason

TLS 1.3 is enabled on the server. (TLS 1.3 is enabled by default on Windows Server 2022 but is not yet supported for O365).

Resolution

1. Launch IIS Manager
2. Navigate to **Sites > ControlPoint Online**
3. Click on **Bindings** then click on **Edit** to edit the site bindings
4. Check the **Disable TLS 1.3 over TCP** box then click **OK**.



5. Refresh your ControlPoint Online session.