

Metalogix® StoragePoint 6.0.

Evaluation Guide



© 2021 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, the Quest logo, and Metalogix 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.

Legend



CAUTION: A caution icon indicates potential damage to hardware or loss of data if instructions are not followed.



IMPORTANT, NOTE, TIP, MOBILE OR VIDEO: An information icon indicates supporting information.

Contents

Evaluation Guide	4
Introduction	4
Prerequisites	4
Upload and Download a File	4
Bulk Externalize Existing BLOBs	5
Large File Support	9
BLOB Migration	10
Configuring Archiving Rules	11
About Us	15
Contacting Quest	15
Technical Support Resources	15

Evaluation Guide

Introduction

This document provides new StoragePoint users with the opportunity to evaluate StoragePoint within their own SharePoint environment. It will lead users through a variety of common StoragePoint uses such as uploading and downloading a file, bulk externalization of BLOBs, and Single Instance Storage.

Prerequisites

In order to perform the evaluation scenarios for StoragePoint, outlined in this document, you must first install and configure StoragePoint. See the *Metalogix StoragePoint Reference Guide* for detailed instructions about the installation and configuration of StoragePoint. It is available on the [Quest website](#).

The scenarios in this document require your environment to contain the following:

- A doc library containing documents
- System Cache
- Two Primary Endpoints
- An Archive Endpoint
- Storage profile that has a Web Application scope

Upload and Download a File

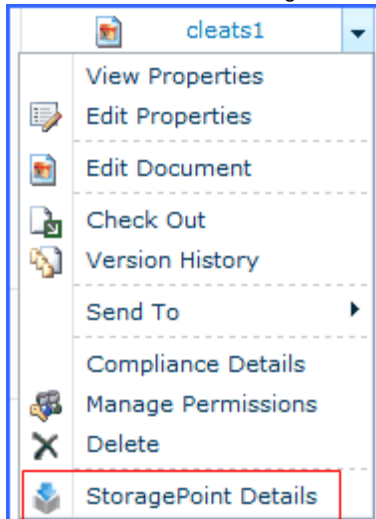
This scenario demonstrates the basic functionality of StoragePoint by uploading a document into SharePoint, confirming the location of the document, and confirming that it can be opened from SharePoint. Use a Microsoft Office document in this scenario as Office documents demonstrate that integration with Microsoft Office continues to function properly.

1. Navigate to a document library within the SharePoint site on which you have configured StoragePoint to externalize BLOBs. If your site does not have a document library, create one now.
2. Upload a document to the Document Library.

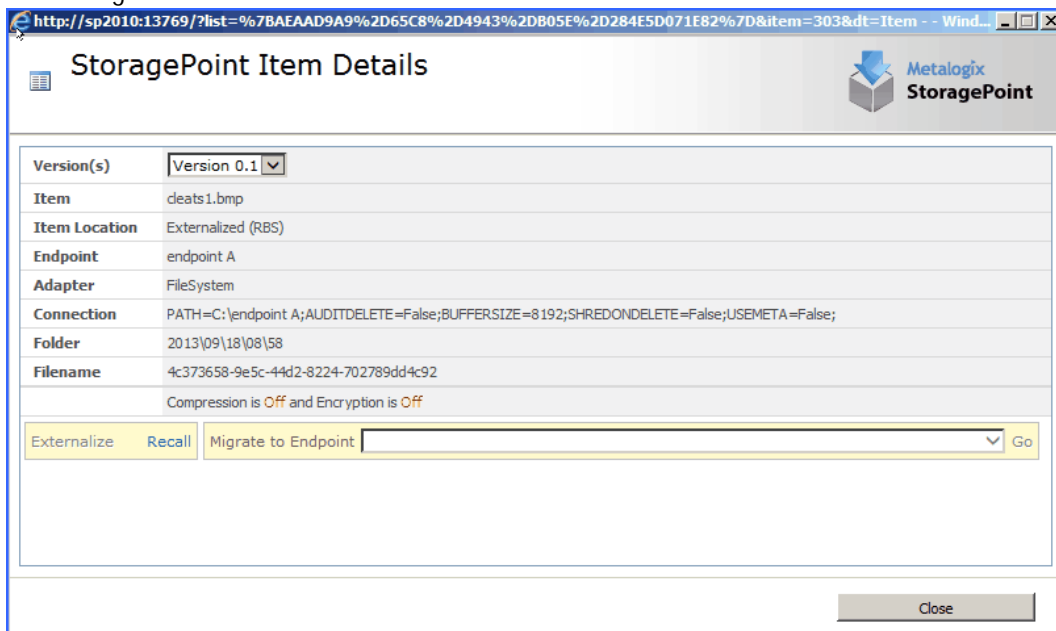
Confirmation

1. Confirm that the document has been offloaded by accessing the Document Context menu and selecting StoragePoint Details. You will need to be logged in as the farm administrator to be

able to access the StoragePoint Details Panel.



2. The StoragePoint Item Details window should indicate that the BLOB has been externalized.



3. Open/download the file from the SharePoint Document Library to confirm that the file is accessible.
4. The file should be accessible and open without error.

In this scenario you:

- ✓ Successfully uploaded a document to a SharePoint document library, found on a site where StoragePoint has been installed and configured.
- ✓ Checked to make sure that the BLOB for the uploaded file was successfully externalized, and the file opened without error after externalization.

Bulk Externalize Existing BLOBs

This scenario demonstrates how to configure the BLOB Externalization job, which will externalize existing BLOBs previously stored within the SharePoint Content Database, prior to installation and configuration of StoragePoint. Externalizing existing BLOBs from the SharePoint Content Database will allow you to shrink your SQL database and reclaim storage previously occupied by large content databases.

To run through this scenario you must have a site that contained docs before a StoragePoint profile was configured.

1. Check StoragePoint Item Details for your existing Documents. The item's location should be Content Database.

http://s6-sp19-wfe1/7list=c7be933d-cf80-40b9-a8db-dc932a3b5611&item=1&dt=Item - StoragePoint It - Internet Explorer

StoragePoint Item Details

Version(s) Version 1.0

Item kayak1.bmp

Item Location Content Database

Endpoint N/A

Adapter N/A

Connection N/A

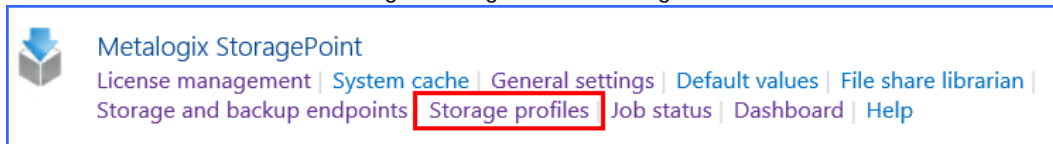
Other N/A

[Externalize](#) [Recall](#) Migrate to Endpoint Go Copy Info

< >

Close

2. Open Central Administration and navigate to Application Management and then Storage Profiles, found under the Metalogix StoragePoint heading.



- Click Jobs for the profile for which you wish to externalize BLOBs.

Storage Profiles ⓘ

Filter Results

Content Externalization
(All)
Activated (4)

Scope
(All)
Web Application (1)
Content Database (3)

Profile Name
(All)
J-L (1)
M-O (1)
S-U (2)

Choose a Storage Profile to edit.

Profile Scope	Profile Name	Active	Advanced Configuration
ContentDb - East1	lib 3 - East_Profile	Yes	Jobs
ContentDb - south2	south 2	Yes	Jobs
ContentDb - South	South CDB	Yes	Jobs
WebApplication - Northwest	NW Web App	Yes	Jobs

■ [Create New Profile](#)

[Close](#)

- On the Job Configuration page, scroll down to the StoragePoint BLOB Externalization section and from the “on Server” dropdown list, select the web front end server on which you wish to run the job.

StoragePoint BLOB Externalization

Provide StoragePoint BLOB Externalization timer job settings in this section. This timer job will externalize the content BLOBs for existing items in SharePoint.

Schedule this process to run:

12 AM 00

on Server S6-SP19-WFE1


[Advanced Job Settings \(Show\)](#)

[Clear](#) [Analyze & Estimate](#) [Externalize Now](#)

- Click the “Show” link next to “Advanced Job Settings” in order to set up notifications. Enter the number of processing threads to use during job execution. It will default to one thread per

processor core if no value is supplied.

Schedule this process to run:

 12 AM 00

on Server

Advanced Job Settings *(Hide)*

with Processing Threads
If blank, will default to one thread per processor.

in Job Role
*Standalone is the default and will process all work in a single Job.
Controller will coordinate work across one or more worker WFE's.*

Send Completion Notice:
☒ Always ☐ Only when errors occur

To:
☐ Default notification contacts

Additional Contacts

Provide a semi-colon delimited list of e-mail addresses.

6. Click the Analyze and Estimate button to display an estimate of the space savings that will result from running the externalize job.

7. Click the Externalize Content Now button in order to run the job immediately. Once you click this, you will see a time stamp for your externalization job, and a link to open the Job Status page if you want to watch the job complete.

Externalization job will run on 10/18/2021 at 7:31 PM
(Job Status)

Confirmation

Check StoragePoint details for pre-existing documents, the item's location will now be "Externalized (RBS)."

In this scenario you:

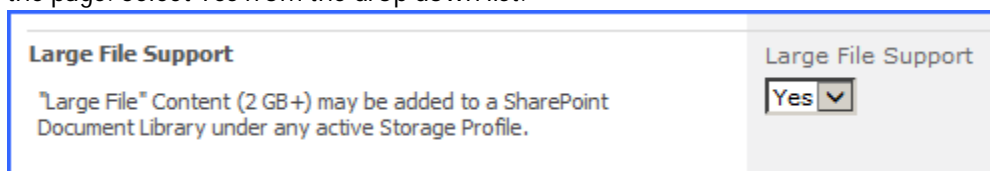
- ✓ Successfully ran the timer job to externalize BLOBs for the documents that existed on your web application prior to the installation and configuration of StoragePoint.

Large File Support

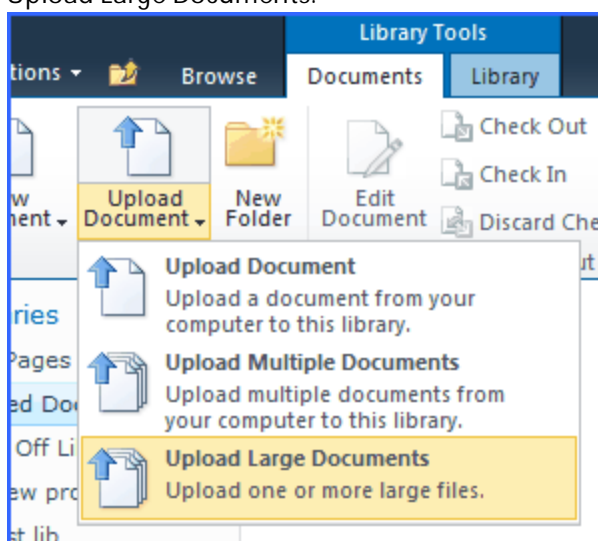
This scenario demonstrates StoragePoint's capability to upload and store files larger than the maximum upload size limit set for the web application, using Large File Support. In order to complete this scenario, you must have a file that is larger than the web application's upload size limit, to upload to your document library.

If Large File Support is enabled, the Unused BLOB Cleanup job scans all content for orphaned BLOBs. If a Site Collection has recently been deleted, SharePoint doesn't delete it until the Gradual Site Delete timer job has been run. The Unused BLOB Cleanup job may return errors until the deleted site collection is removed by SharePoint. It is recommended that you run the Gradual Site Delete timer job manually, after deleting a Site Collection.

1. Navigate to SharePoint Central Administration.
2. Navigate to Application Management and then to General Settings found under Metalogix StoragePoint.
3. Scroll down on the General Settings page. "Large File Support" is located closer to the end of the page. Select Yes from the drop down list.

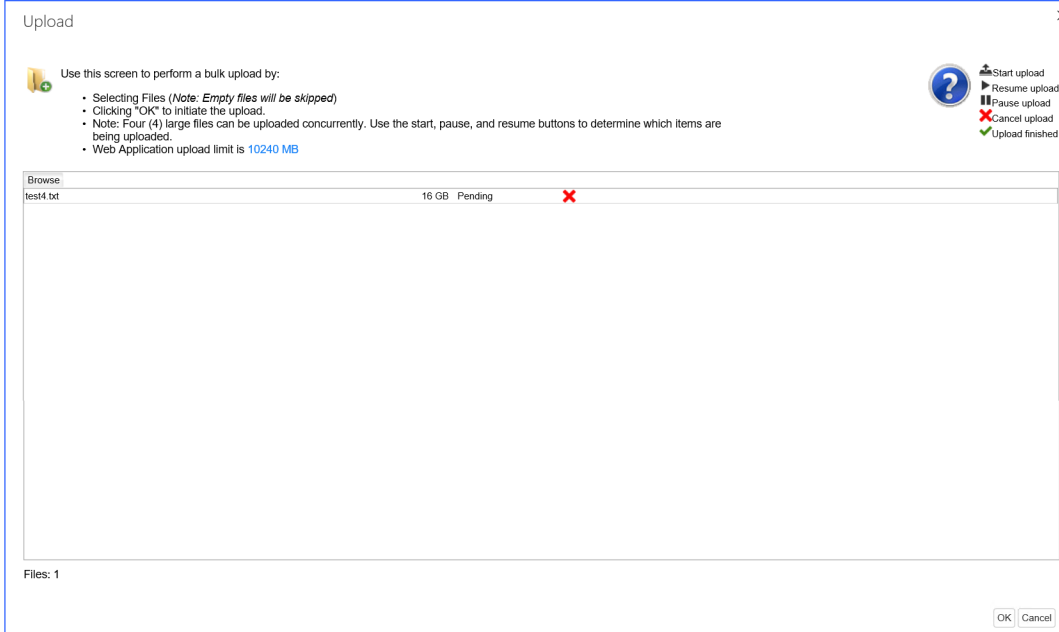


4. Click Save to save your setting changes.
5. Navigate to a SharePoint Document Library where you have access to upload files.
6. A user who has access to upload files in a Document Library will see an option to upload large files with a different type of interface. This tool is only available in the SharePoint Document Libraries.
7. On SharePoint 2010, from the Documents tab, in the Upload Document dropdown, click Upload Large Documents.



On SharePoint 2013, in the Files tab, click Upload Large Documents.

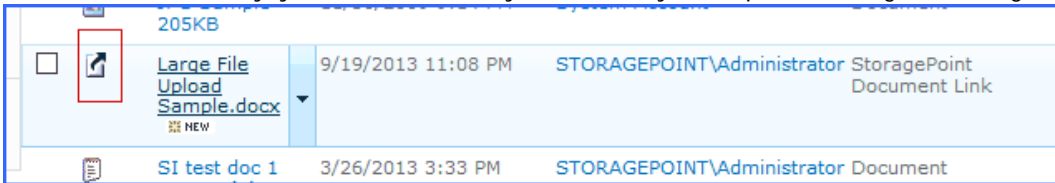
- A new window opens. Drag files from the Windows Explorer onto this page and click OK.



Your file will now be uploaded.

Confirmation

- In the document library, you will see an entry in the library; an aspx file linking to the large file.



- Click the name of the file and you will then be prompted to open the document or save it.
- Select Open or Save to verify that the large document is the one you uploaded.

In this scenario you:

- ✓ Enabled uploading for large documents.
- ✓ Uploaded a large document to ensure that the feature does in fact upload the document.

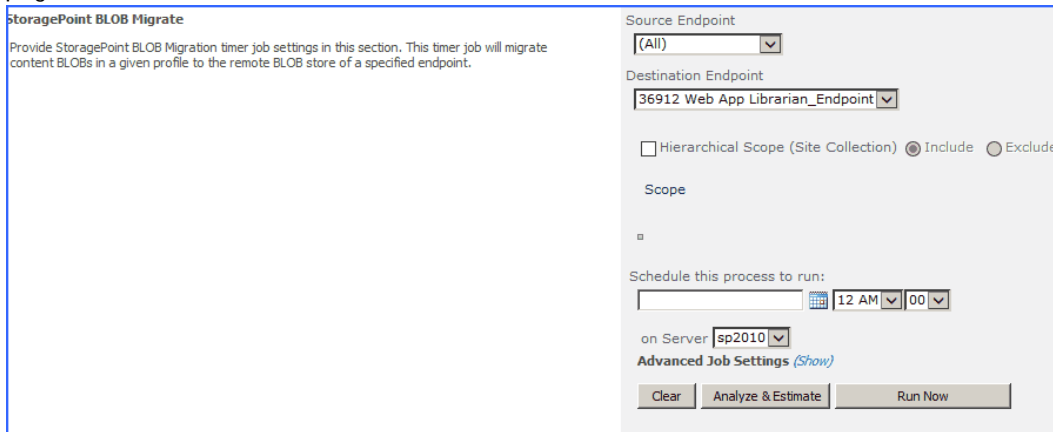
BLOB Migration

This scenario demonstrates the configuration and execution of a BLOB Migration job. The BLOB Migration job moves the BLOBs from one or more Source Endpoints associated with the storage profile to a single Destination Endpoint. Even though all storage endpoints are available, only BLOBs associated with the storage profile will be migrated.

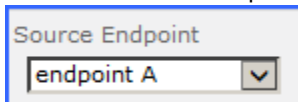
This scenario requires that you have another storage endpoint set up to use as a destination for migration.

- Navigate to Central Administration, Application Management.
- Navigate to Storage Profiles under the Metalogix StoragePoint section.
- Click Jobs for the profile for which you wish to configure BLOB migration.
- Note the Timer Job Scope (at the top of the page) of the Storage Profile selected.

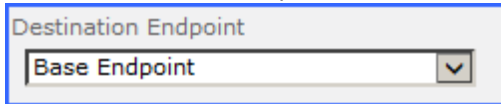
5. "StoragePoint BLOB Migrate" is located approximately half way down the Job Configuration page.



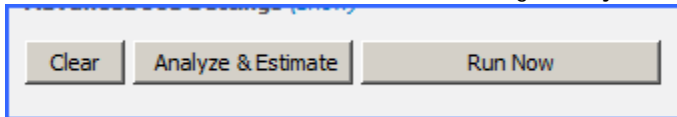
6. Select the Source Endpoint (where the BLOBs are moving FROM) from the dropdown.



7. Select a Destination Endpoint (where the BLOBs are moving TO) from the dropdown.



8. Click the Run Now button to run the bulk migration job immediately.



Confirmation

1. Check your Destination Endpoint in windows explorer to see whether the BLOBs from the Source Endpoint have been migrated.
2. Go to the documents of the site collection to verify the current location of the BLOB from the StoragePoint details menu.

In this scenario you:

- ✓ Configured a BLOB migration job and successfully migrated BLOBs over from a source endpoint to a destination endpoint.

Configuring Archiving Rules

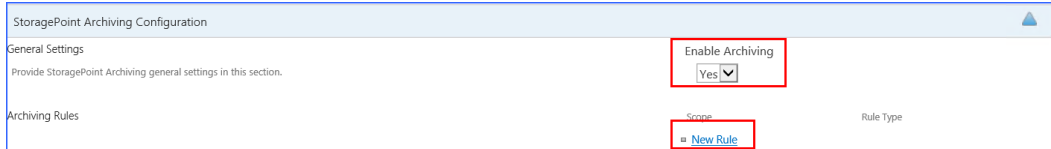
This scenario demonstrates the configuration of Archiving rules.

Only one rule can be created per scope. The archiving scope cannot be broader than the profile scope.

You must have a second endpoint in order to complete this scenario.

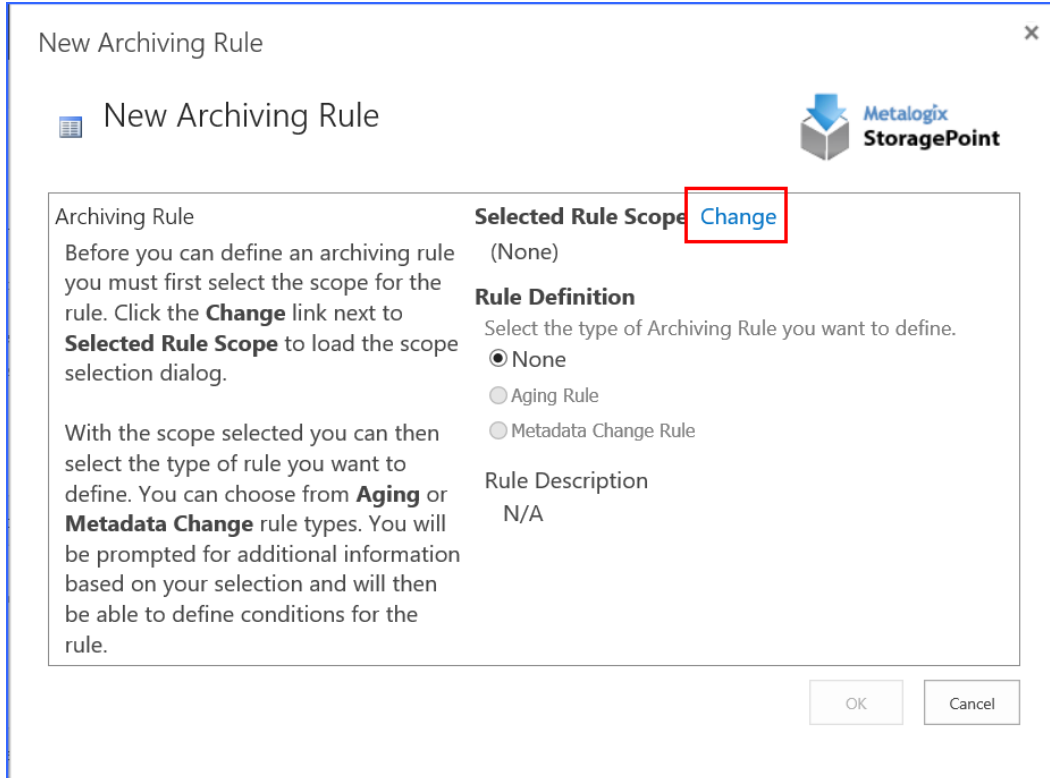
1. Navigate to Central Administration, Application Management.
2. Navigate to Storage Profiles, found under the Metalogix StoragePoint section.
3. Click on the link to open the profile.
4. Scroll down to the Archiving Configuration section and expand.

5. Set "Enable Archiving" to Yes. Click New Rule to create a new archiving rule.



The image shows the 'StoragePoint Archiving Configuration' dialog box. It has two tabs: 'General Settings' and 'Archiving Rules'. In the 'General Settings' tab, there is a checkbox labeled 'Enable Archiving' with a dropdown menu showing 'Yes' selected. In the 'Archiving Rules' tab, there is a 'Scope' dropdown menu with 'New Rule' selected. A red box highlights the 'New Rule' link in the 'Scope' dropdown.

6. Click the Change link to select the scope (i.e. site collection, site, list, or content type).



The image shows the 'New Archiving Rule' dialog box. It has a title bar 'New Archiving Rule' and a close button. Below the title bar, there is a 'New Archiving Rule' section with a list icon. To the right of this section is the 'Metalogix StoragePoint' logo. Below the logo, there is a 'Selected Rule Scope' section with a 'Change' link. Below the 'Change' link, there is a 'Rule Definition' section with a dropdown menu showing 'None' selected. Below the 'Rule Definition' section, there is a 'Rule Description' section with 'N/A' displayed. At the bottom right, there are 'OK' and 'Cancel' buttons. A red box highlights the 'Change' link in the 'Selected Rule Scope' section.

7. Drill down in the hierarchy to select the scope, and click OK. Your selection will be displayed under the Selected Rule Scope option.
8. Select the type of Rule Definition, Metadata Change Rule. This rule captures changes in an item's metadata and triggers the content to be moved to different storage endpoint(s). Click

the New Condition link.

New Archiving Rule

Metalogix StoragePoint

Archiving Rule

Before you can define an archiving rule you must first select the scope for the rule. Click the **Change** link next to **Selected Rule Scope** to load the scope selection dialog.

With the scope selected you can then select the type of rule you want to define. You can choose from **Aging** or **Metadata Change** rule types. You will be prompted for additional information based on your selection and will then be able to define conditions for the rule.

Selected Rule Scope [Change](#)

Web Application = SharePoint - 80
Content Database = places
Site = http://s6-sp19-wfe1/sites/Michigan
Web = http://s6-sp19-wfe1/sites/Michigan

Rule Definition

Select the type of Archiving Rule you want to define.

☐ None
☐ Aging Rule
☒ Metadata Change Rule

Rule Description

This rule captures changes in an item's metadata and triggers the content to be moved to different storage endpoint(s).

Define your metadata change rule conditions(s)

Condition	Endpoint
New Condition	

OK Cancel

9. From the "Select a Property" dropdown, choose the Title property. The selections in this dropdown list will change based on the scope selection made on the Archiving Rule dialog.
10. The "Select an Operator and Enter/Select a Value" fields will update accordingly. Make your operator Contains and then enter "Archived" in the text field.
11. Select your archive endpoint from the Destination Endpoint dropdown.

12. Click OK to finish setting up the rule.

New Metadata Change Rule Condition

New Metadata Change Rule Condition

Definition

Select a Property

Title

Select an Operator and Enter/Select a Value

Contains Archived

Operation

Specify what destination endpoint content will be moved to if this condition is met.

Select the Destination Endpoint

EP1 (FileSystem) Edit New

OK Cancel

13. Click Save on the Profile page.
14. Click Ok when the Process Existing screen pops up.
15. Change the title of an existing document in a document library within the rule's scope, adding "Archived" to the title.
16. Navigate to General Settings in Central Administration, Application Management, in the Metalogix StoragePoint section.
17. Navigate to the "Content Migrator" section and run the job by pressing Process Queued Content Now.

Confirmation

Check StoragePoint Details for the document you just added to make sure that the rule was processed and the document was sent to your specified endpoint.

In this scenario you:

- ✓ Enabled Archiving and configured an Archiving Rule.
- ✓ Tested the Archiving rule by making a change to a document that met the conditions of the Metadata Archiving rule and confirmed that the BLOB is stored in a different endpoint.

About Us

Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit www.quest.com.

Contacting Quest

For sales or other inquiries, visit www.quest.com/contact.

Technical Support Resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <https://support.quest.com>

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product