Quest

Metalogix® Replicator 7.4

Quick Start Guide

© 2023 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.

Metalogix® Replicator
Updated September 2023
Version 7.4

Contents

Introduction **4**

Requirements **5**

Hardware Requirements 5
Software Requirements 6
Access Requirements 7

Installation **9**

Downloading the Replicator Installer 9
Installing Metalogix Replicator 9
Running the Replicator Configuration Wizard 10
Installing Replicator on Multiple Farms 17

Configuration **18**

Connecting the First Web Application to the Second Web Applications 18
Connecting the Second Web Application to the First Web Application 19
Mapping SharePoint Content for Replication 21

Next Steps **23**

About **24**

Contact Quest 24
Technical Support Resources 24

1

Introduction

A SharePoint network consists of one or more farms. Each farm is a collection of one or more connected computers. Each farm runs at least one web application. By installing and configuring Metalogix Replicator for SharePoint, you create a Replication Network, which replicates SharePoint content between web applications in your SharePoint environment. You can use Replicator to replicate this content between farms or within the same farm.

As an administrator, this Quick Start Guide will take you through the basic steps required for installation and configuration. Once you have completed all the steps in this guide, you will be able to evaluate the product with the use of our Metalogix Replicator Evaluation Guide.

For more detailed instructions on the installation process, please see the Metalogix Replicator Installation Guide.

Security Certification

All external communications by the Replicator software are Federal Information Processing Standard (FIPS) 140-2 compliant.

2

Requirements

The following tables describe the hardware, software, and access requirements for Metalogix Replicator. If our requirement is equivalent or less restrictive than a SharePoint requirement, then we do not document it here.

Hardware Requirements

Component	Requirement
Processor	Under normal circumstances, the Replicator processor requirements are the same as SharePoint. When replicating large amounts of SharePoint content, Replicator uses a greater amount of CPU capacity. The expected load is comparable to up to 10 full time users accessing the web front end.
Memory	Replicator Basic and Standard editions require at least 1.25 GB of available memory. Replicator Enterprise Edition requires at least 1.5 GB of available memory. Additionally, ensure there is approximately 10 times the size of the largest file you expect to replicate in available memory. For example, if you are using Replicator Standard Edition and expect to replicate files that are 25 MB and smaller, then you should have 1.5 GB (1.25 + 10 x 0.025) of available memory for Replicator.
Disk Space	At least 500 MB of free disk space in the %TEMP % folder of the server where Replicator is installed. At least 20 GB of free disk space in a shared network folder for your Replicator Data Folders. This number is a rough guideline and is affected by how frequently changes occur in your SharePoint environment, how often packages are cleared, and several other Replicator configuration settings.

Component	Requirement
	At least 4 GB of free disk space in SQL Server is required where the SharePoint configuration database is stored.

Software Requirements

Component	Requirement
Operating System	Any of: • Windows Server 2022 • Windows Server 2019 • Windows Server 2016 • Windows Server 2012 R2 • Windows Server 2012 • Windows Server 2008 R2 • Windows Server 2008 • Windows Server 2003 SP1 If you are using Replicator on Windows Server 2003, then you must also install the following from http://download.microsoft.com: • Background Intelligent Transfer Service (BITS) 2.5 or higher • .NET Framework 3.5 or higher
SharePoint	Any of: • Microsoft SharePoint Server Subscription Edition • Microsoft SharePoint Server 2019 • Microsoft SharePoint Server 2016 • Microsoft SharePoint Server 2013 • Microsoft SharePoint Foundation 2013 • Microsoft SharePoint Server 2010 • Microsoft SharePoint Foundation 2010 • Windows SharePoint Services 3.0 • Microsoft Office SharePoint Server 2007 Replicator does not support SharePoint standalone installations. The SharePoint standalone installation option includes a built-in database and restricts your SharePoint environment. Replicator does not support the use of the built-in Network Service account as your SharePoint farm application pool account.
Database	Any of:

Component	Requirement
	• SQL Server 2022 • SQL Server 2019 • SQL Server 2017 • SQL Server 2016 • SQL Server 2014 • SQL Server 2012 • SQL Server 2008 R2 • SQL Server 2008 • SQL Server 2005 Replicator does not support any database installed automatically by the SharePoint installer. See the Metalogix Replicator Advanced Installation Guide for further details.
Ports	Ports 7357 and 7358 must be available for Replicator interprocess communication on the server where you install Replicator. If these ports are not available, then contact Support for further instructions.
Windows PowerShell	If you want to run Replicator administration commands in Windows PowerShell, then you must install PowerShell before installing Replicator.
Remote Differential Compression	To use Differencing Compression with Replicator, you must install the Remote Differential compression feature on both the first web application and second web application servers where Replicator is installed. In Windows Server 2012, 2012 R2, 2008 R2, 2008, and 2016 this can be done from Server Manager. On Windows Server 2003, you must download and install the feature from http://download.microsoft.com.

Access Requirements

Component	Requirement
Installing User	The Replicator installer must be run under a user account that is: • A member of the Local Administrators group on each server in the farm that replicator functionality will be deployed to. • A member of the Central Administration Application Pool. This is usually the Farm Admin account.

Component	Requirement
	• "Db_owner" of the SharePoint Config DB in SQL Server, as well as a "dbcreator", "securityadmin", and member of the "public" role. This applies to all servers in the farm running either the Windows SharePoint Services Web Application service, or the Microsoft SharePoint Foundation Web Application service.
Application Pool Accounts	If you have different application pool accounts for Central Administration and your web applications, then add the user to the SharePoint configuration database and grant them the "public" role. This is done because permissions are copied from the SharePoint configuration to the replicator databases. Although this change can be done manually after installing Replicator, it is much simpler to grant these permissions prior to installation.
Server Access	HTTP or HTTPS access to all replication servers, without proxies requiring a separate login.
SharePoint Access	Access to the Windows SharePoint Services SQL servers, via NTLM or Kerberos.
Firewalls	If there is a firewall separating the farms, then you must configure the firewall to allow servers in one farm to access a web front end in the other farm.
Activation	Replicator activates your license key during its installation by contacting a Quest server. Replicator will periodically refresh the activation as it runs. For customers without an Internet connection or who want to review the information that is being sent to Quest, offline activation is available. Installations using offline activation must be manually refreshed every 365 days. For more information, see the Register-ReplicatorLicenseOffline command in the *Replicator Command Line Reference Guide*.
Replicator Service	The user you run replication services under must be a Central Administration Application Pool user.

3

Installation

This section provides an overview of the steps required for the basic installation of Metalogix Replicator.

Downloading the Replicator Installer

To download Replicator and prepare the setup files for installation:

Download Replicator from the Quest website: https://support.quest.com/Metalogix-Replicator/download-new-releases

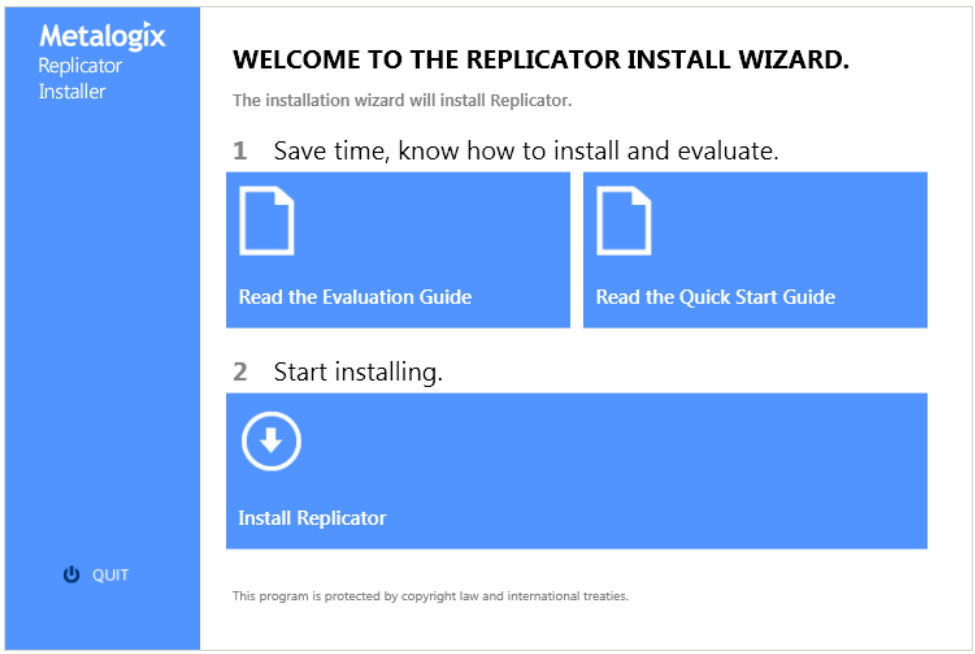
Extract the Replicator installer from the file you downloaded. In most cases you can right-click on the file and select Extract All.

Installing Metalogix Replicator

To install Replicator files:

1. From the directory where you extracted the installer, run **Metalogix Replicator for SharePoint** to start the setup process. The exact file name depends on your operating system architecture.

2. The welcome page allows you to open the Evaluation Guide and/or the Quick Installation Guide for further information about Replicator. To proceed with installation click **Install Replicator**. This will launch the Replicator Installer.



3. At the welcome screen, click **Next**.
4. At the License Agreement screen, review the agreement, select one of the choices, and click **Next**. If you do not accept the agreement, then you must click Cancel and exit the installer.
5. On the Installation Folder screen, select the default**.** Click **Next**.
6. On the Ready to Install the Program screen, click **Install** to start installing Replicator.
7. After the installer finishes, select **Launch the Replicator Configuration Wizard** and click **Finish**.

Replicator is now installed on the server. You will now need to run the Replicator Configuration wizard to complete the installation and integration of Replicator with SharePoint.

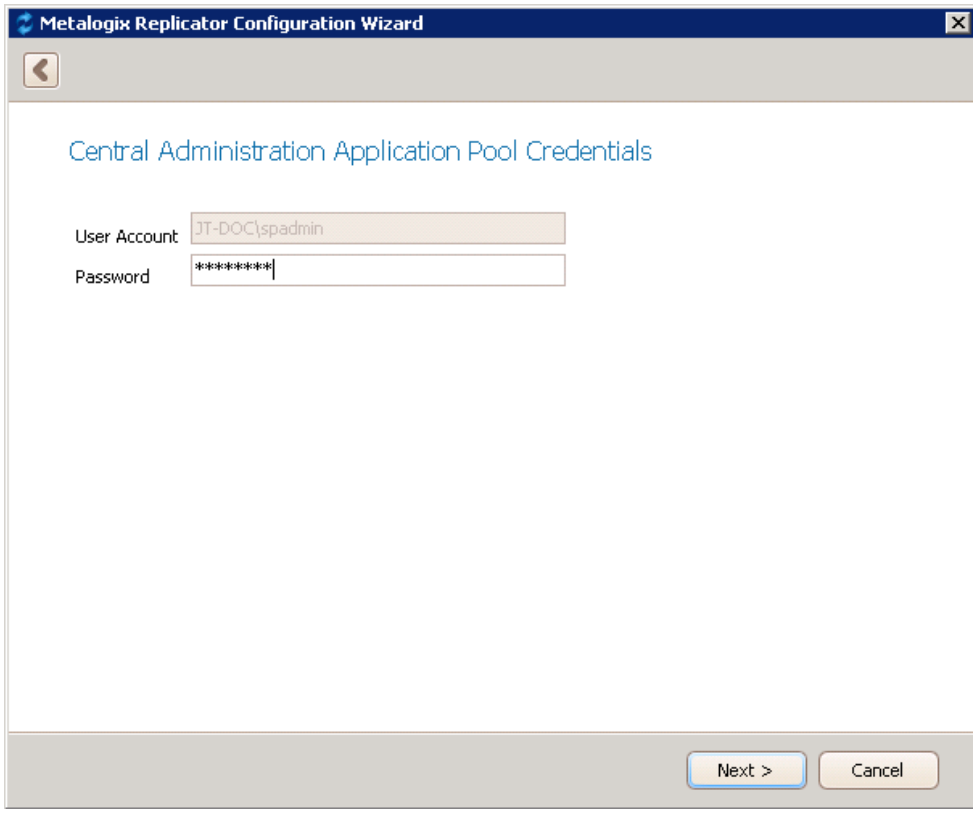
Running the Replicator Configuration Wizard

The Replicator Configuration Wizard integrates Metalogix Replicator into your SharePoint farm. To complete the wizard:

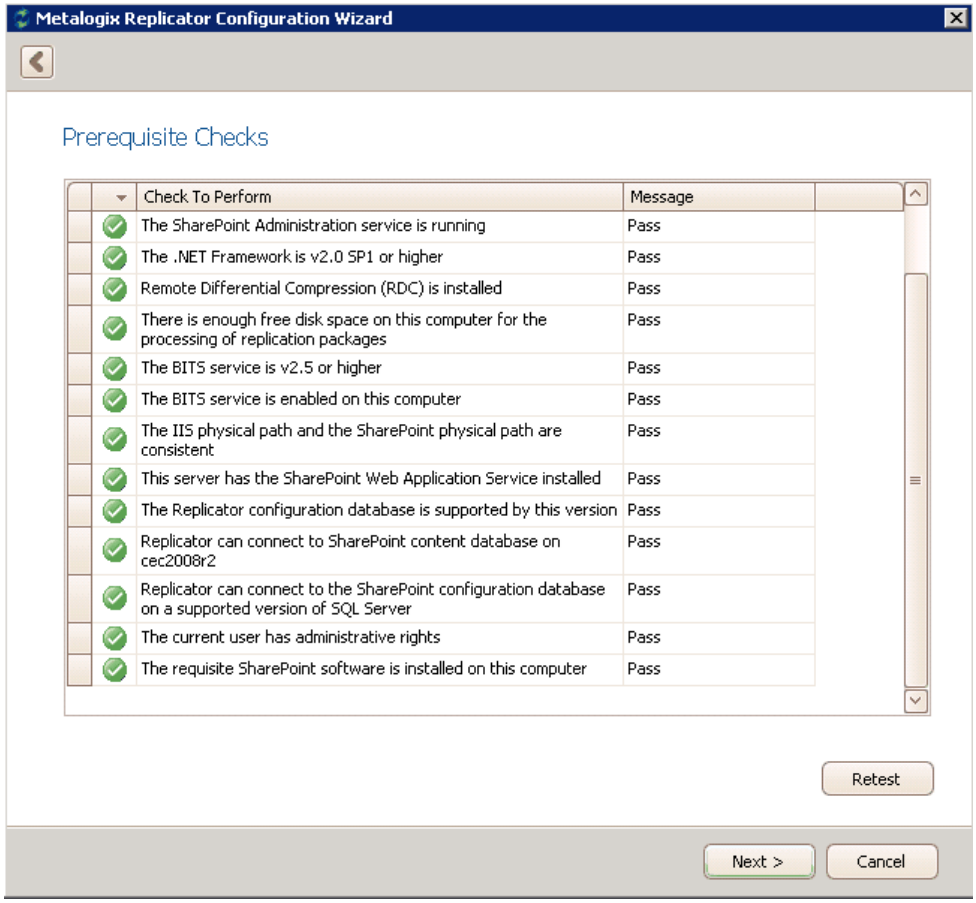
If you launched the configuration wizard automatically after installing Replicator, then you can skip this step. To manually launch the configuration wizard, from the Windows Start menu, select **All Programs**, **Metalogix**, **Replicator**, and then **Replicator Configuration Wizard**.

1. On the Welcome screen, click **Next**.

2. On the Central Administration Application Pool Credentials screen, enter the password for the farm account.

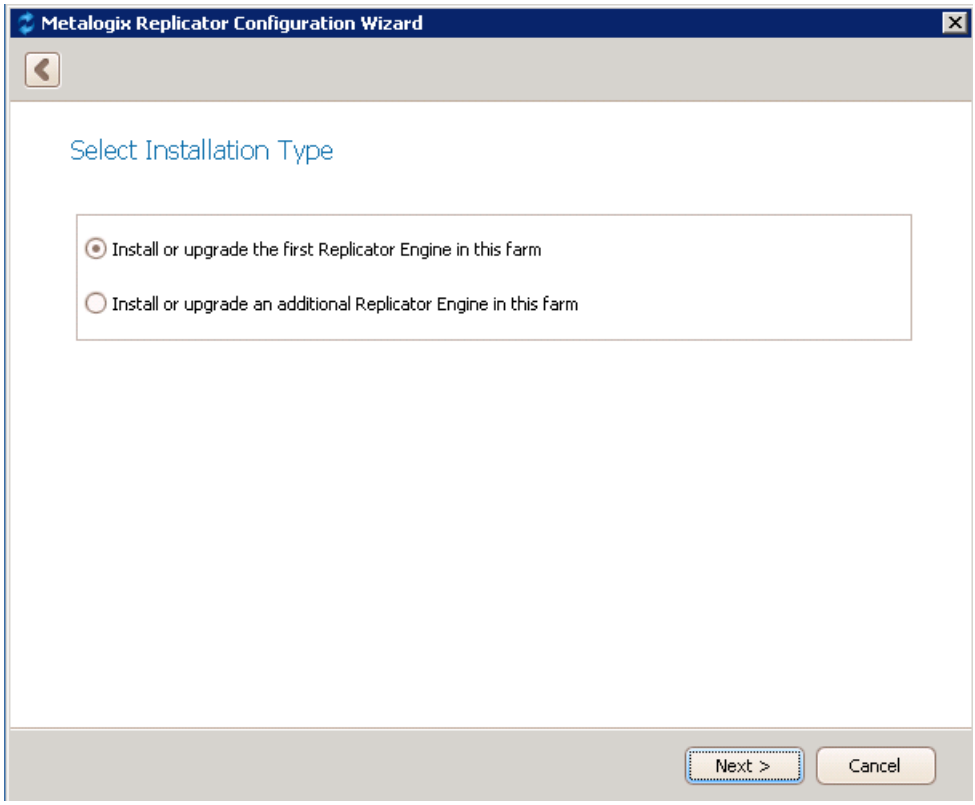


3. On the Prerequisite Checks screen, the configuration wizard tests your environment to ensure Replicator will run properly. Review the messages and click **Next** to continue.



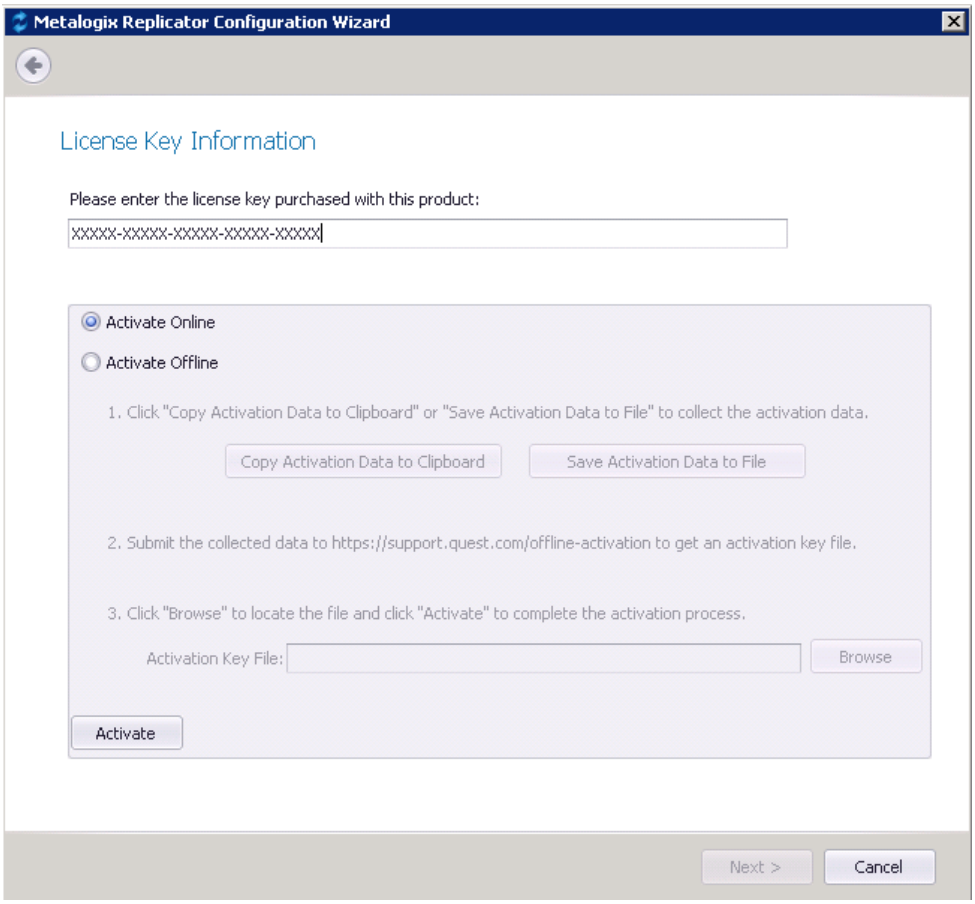
4. On the Select Installation Type screen, select **Install or upgrade the first Replicator Engine in this farm** and click **Next**. If you have already installed Replicator on another server in this

farm, then select the other option instead.

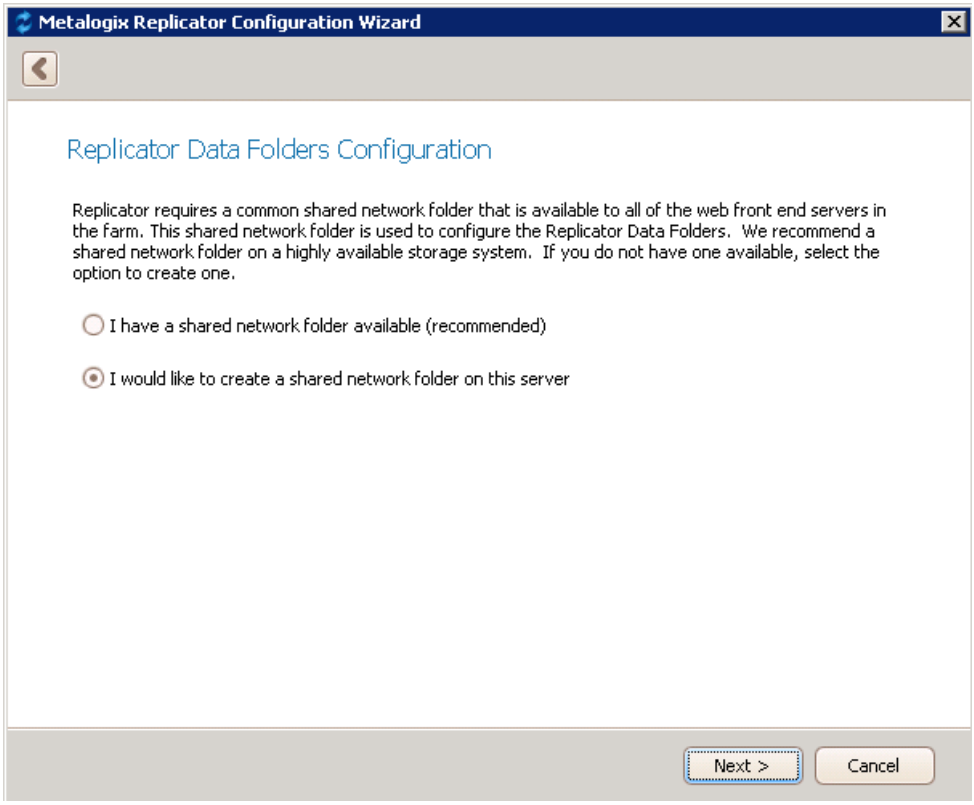


5. On the License Key Information screen, enter your license key and select Activate Online and click **Activate** and **Next**. If you wish to Activate Offline, then please see the Metalogix

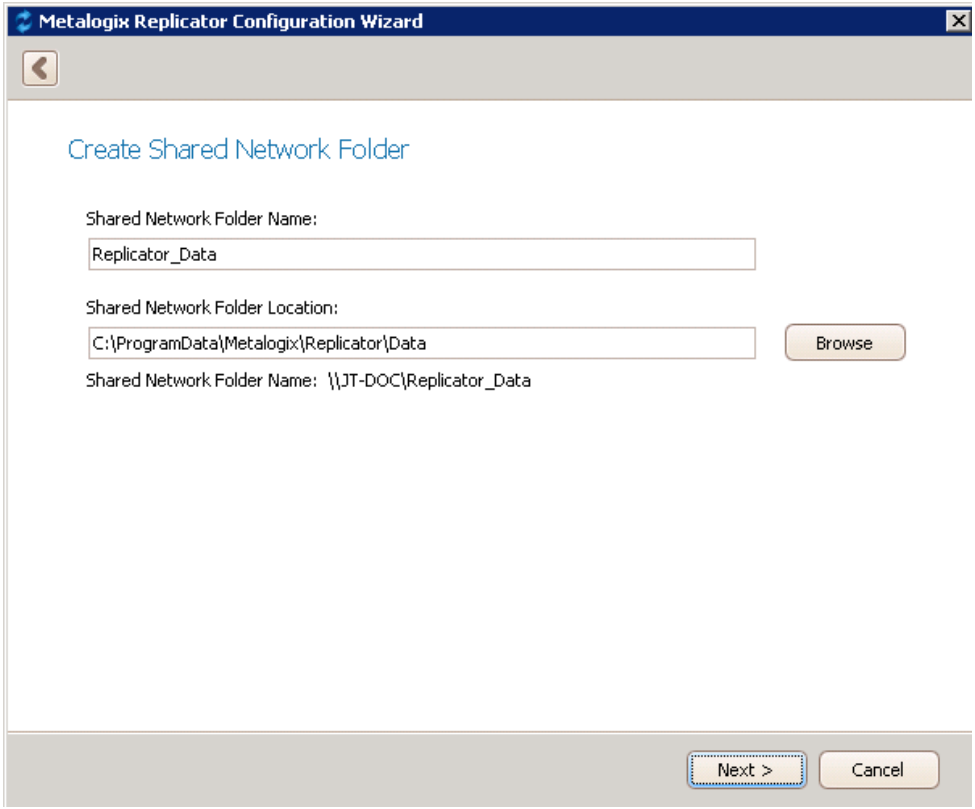
Replicator Advanced Installation Guide for details.



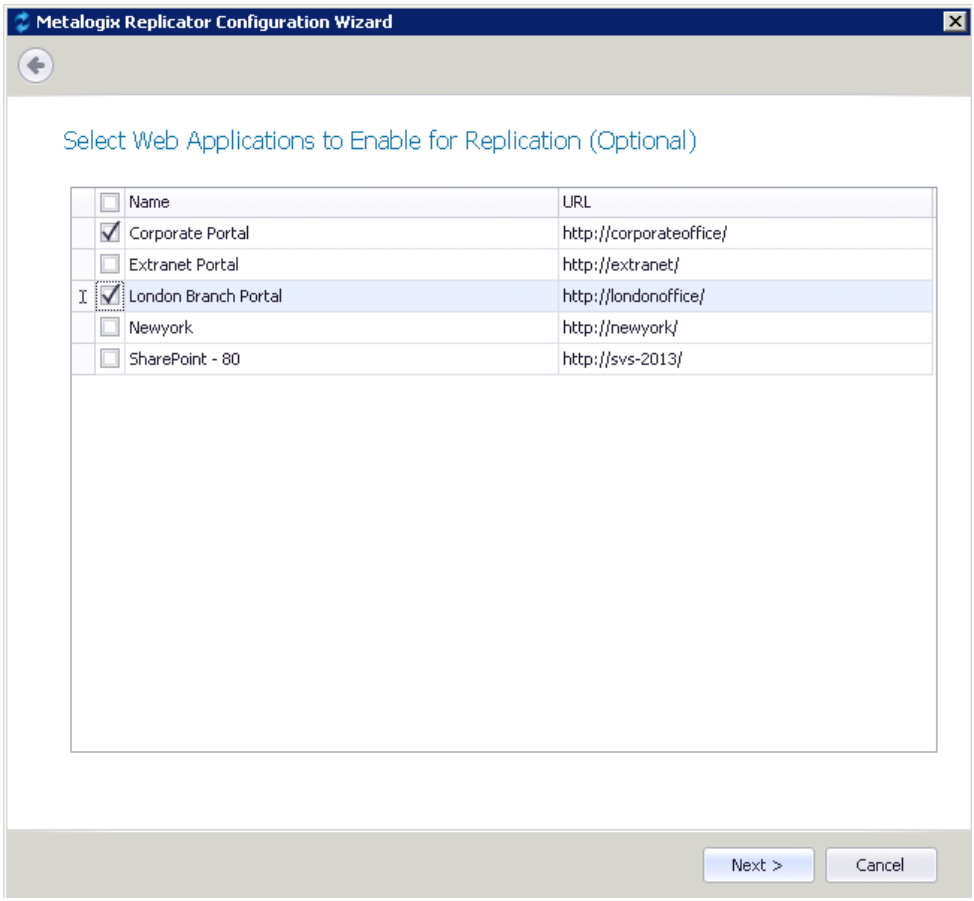
6. On the Replicator Data Folders Configuration screen, select **I would like to create a shared network folder on this server** and click **Next**.



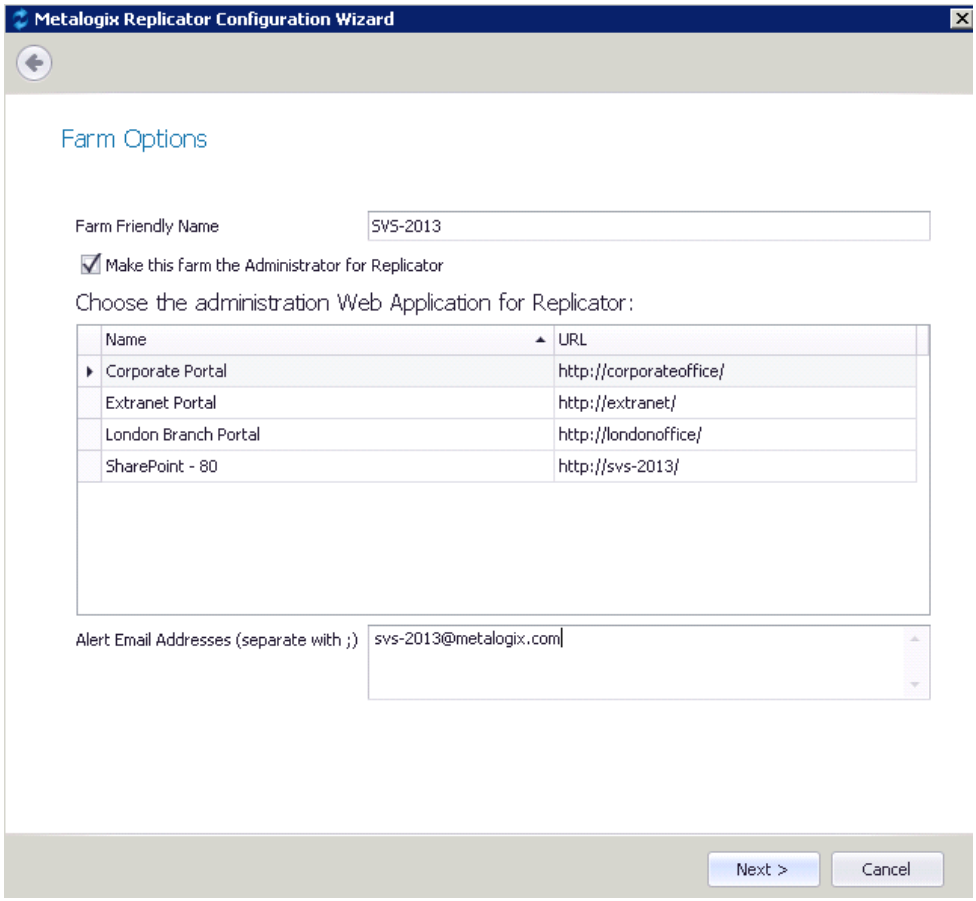
7. On the Create Shared Network Folder screen, click **Next**.



8. On the Select Web Application to Enable screen, select at least two web applications that you wish to enable for replication. Click **Next**.



9. On the Farm Options screen you can do the following:



- Give your farm a farm friendly name
- Select whether you would like to make this farm the administrator for Replicator.
- Choose the administration Web Application.
- Specify the email addresses that you would like Replicator email alerts to be sent to.

Click **Next**.

10. On the Installation Options screen, click **Start**.
11. Once the Install and Deploy of solutions has completed, click **Next.**
12. Once the Configuration Confirmation is completed, click **Next.**
13. Click **Finish** to complete the configuration wizard.

Installing Replicator on Multiple Farms

If you are configuring replication between two farms, then repeat these steps to install Replicator on the second farm.

4

Configuration

This section will guide you through the quickest way to configure Replicator, so that you can begin the evaluation process. This process assumes you are configuring replication between two web applications. The web applications can be on the same farm or on different farms. If the web apps are on different farms you will have to repeat the installation process on the second farm before proceeding with these steps.

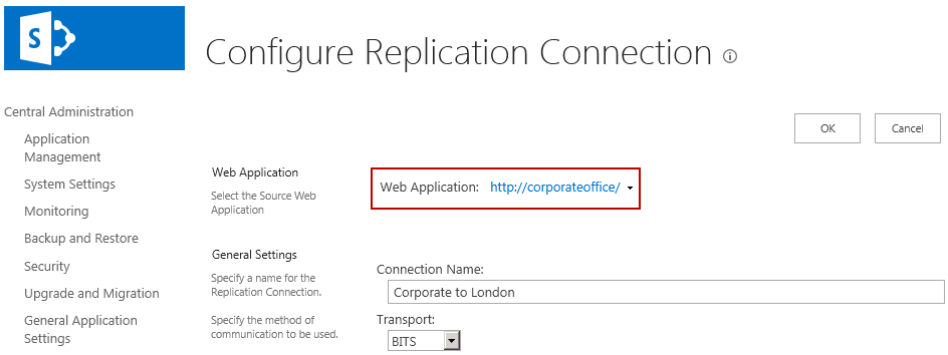
Connecting the First Web Application to the Second Web Applications

The following steps will allow you to connect your first web application to your second web application:

1. On the Central Administration Application Management page, under Metalogix Replicator, click **Manage replication connections**.

2. On the Manage Replication Connections page, click **Add Connection**.

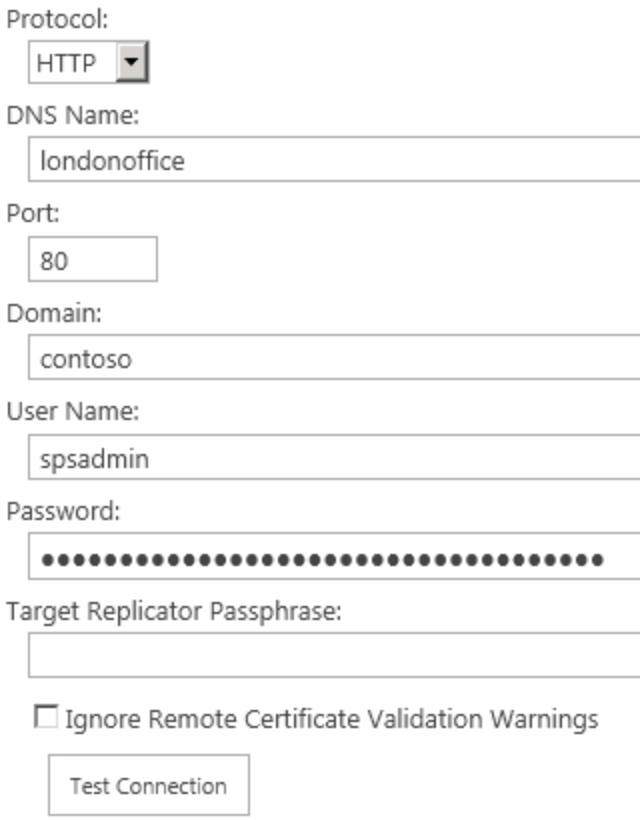
3. On the Configure Replication Connection page, in the **Web Application** field, select the correct URL for the first web application.



4. Under **Connection Name**, enter a name to describe this connection. Since you will create two connections for each pair of web applications, we suggest you indicate the direction of each connection in its name.

5. Under **Target Web Application**, enter the connection properties and account information for a SharePoint administrator on the second web application. Do **not** enter anything in the Target Replicator Passphrase field as you did not set a passphrase for the second web

application.



6. Click **Test Connection** to verify the information you entered. If the test succeeds, then continue with the next step. If it does not, then correct the reported error and test the connection again.

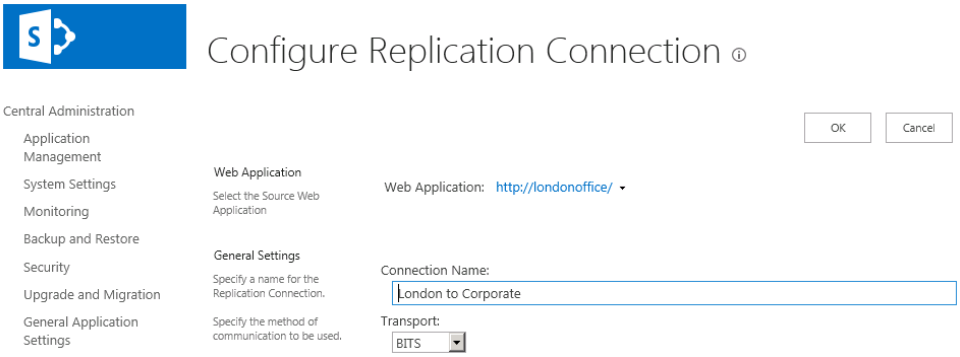
Click **OK** to save this change and return to the Manage Replication Connections page. The new connection is listed on this page.

Connecting the Second Web Application to the First Web Application

The following steps will allow you to create a return connection from the second web application to the first web application:

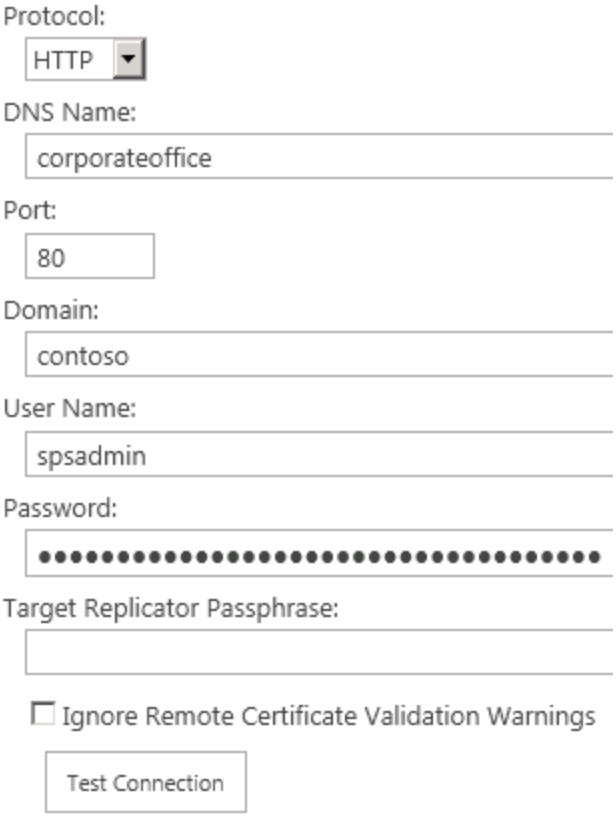
1. On the Central Administration Application Management page, under Metalogix Replicator, click **Manage replication connections**.
2. On the Manage Replication Connections page, click **Add Connection**.

3. On the Configure Replication Connection page, in the **Web Application** field, select the correct URL for the second web application.



4. Under **Connection Name**, enter a name to describe this connection. Since you will create two connections for each pair of web applications, we suggest you indicate the direction of each connection in its name.

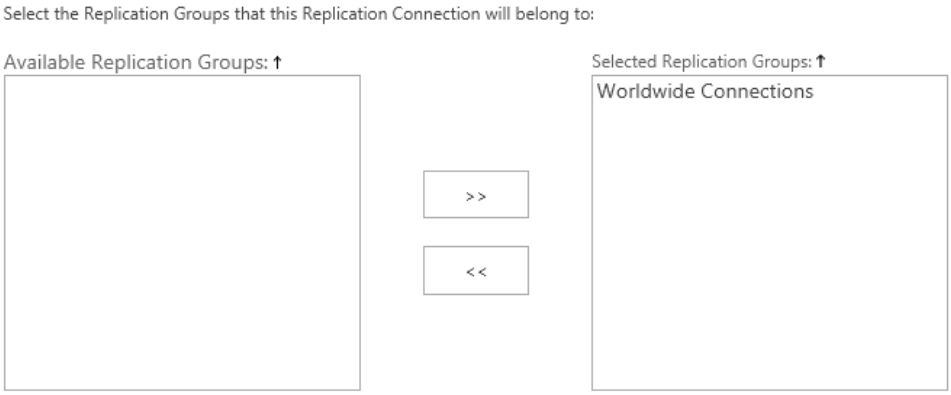
5. Under **Target Web Application**, specify the credentials for an account that can authorize this connection on the second web application, such as a local or domain administrator.



6. Click **Test Connection** to verify the information you entered. If the test succeeds, then continue with the next step. If it does not, then correct the reported error and test the connection again.

7. To configure bidirectional replication, under **Replication Groups**, ensure that Worldwide Connections is in the Selected Replication Groups. To configure one way replication to this

web application, move Worldwide Connections out of the Selected Replication groups.



Click **OK** to save this change and return to the Manage Replication Connections page. The new connection is listed on this page.

Mapping SharePoint Content for Replication

A Replication Map Family specifies the SharePoint content you want to replicate and its schedule. To create a Map Family:

1. Open Central Administration for the first web application in a browser window.
2. Click **Application Management**.
3. Under Metalogix Replicator, click **Manage Map Families**.
4. On the Manage Map Families page, click **Add Map Family**
5. On the Configure Map Family page, in the **Web Application** field, select the correct URL for the first web application.

6. Under **Map Family Name**, enter a name to describe this map family.
7. Under **Map Family Scope**, select Web Application. This configures the Map Family to replicate all changes at the web application level and lower in the SharePoint hierarchy.
8. Click **OK** to create the Map Family. After you click OK, the Configure Replication Map Settings page opens.
9. On the Configure Replication Map Settings page, you can specify the specific events to replicate and also the connections in your Replication Group to push changes from this web application to the target. Click **OK** to return to the Manage Map Families page.

Replicator will automatically replicate this Map Family to the second web application and enable it for any Replication Connections in the same Replication Group. If you left Worldwide Connections as a Selected Replication Group, then this map family will replicate changes made to either web application bi-directionally.

If you deselected Worldwide Connections then this Map Family will only replicate changes made on the first web application to the second web application. Changes made to the second web application will not be replicated back to the first.

5

Next Steps

Now that you have completed the installation of Replicator, feel free to proceed to the Metalogix Replicator Evaluation Guide. The Evaluation Guide will provide you with a detailed overview of various scenarios you can work through in order to evaluate Replicator.

Please also see the following Metalogix Replicator documentation for various details. They can all be found in the zip file you received with Metalogix Replicator.

Product and Concepts Guide

The Product and Concepts Guide provides a high-level overview of Metalogix Replicator and describes new features introduced in this release.

Installation Guide

The Installation Guide guides you through the Metalogix Replicator Lifecycle for installing, configuring, and operating Replicator. After completing this guide you will have a working Replication Network where changes made on one web application are automatically replicated to the other.

Evaluation Guide

The Evaluation Guide guides you through various Metalogix Replicator scenarios, provided for the purpose of reviewing Replicator within your own SharePoint environment. Prospective Clients are encouraged to use this guide to test Replicator.

Reference Guide

The Reference Guide describes the operations and user interface available to replication administrators through the SharePoint Central Administration and Site Administration pages.

Command-line Reference

The Command-line Reference describes the Command Prompt and Windows PowerShell commands you can use to configure and maintain your Replication Network.

Scenario Guides

Scenario Guides describe specific product features and how to implement and configure them for your SharePoint environment.

6

About

We are more than just a name. We are on a quest to make your information technology work harder for you. That is why we build community-driven software solutions that help you spend less time on IT administration and more time on business innovation. We help you modernize your data center, get you to the cloud quicker and provide the expertise, security and accessibility you need to grow your data-driven business. Combined with Quest's invitation to the global community to be a part of its innovation, and our firm commitment to ensuring customer satisfaction, we continue to deliver solutions that have a real impact on our customers today and leave a legacy we are proud of. We are challenging the status quo by transforming into a new software company. And as your partner, we work tirelessly to make sure your information technology is designed for you and by you. This is our mission, and we are in this together. Welcome to a new Quest. You are invited to Join the Innovation™.

Our brand, our vision. Together.

Our logo reflects our story: innovation, community and support. An important part of this story begins with the letter Q. It is a perfect circle, representing our commitment to technological precision and strength. The space in the Q itself symbolizes our need to add the missing piece — you — to the community, to the new Quest.

Contact 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 wh o 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