

ControlPoint 8.9

**Quick Start 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 <a href="https://www.quest.com/legal">https://www.quest.com/legal</a>.

#### **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 <a href="https://www.quest.com/legal/trademark-information.aspx">https://www.quest.com/legal/trademark-information.aspx</a>. All other trademarks and registered trademarks are property of their respective owners.

Quest<sup>®</sup> ControlPoint Updated February 2024 Version 8.9

## **Contents**

Preface	4
System Requirements	5
Server Requirements	5
Installation and Service Account Requirements	7
Compatible Browsers	8
First Time Installation and Configuration	9
Installing ControlPoint Files	11
Performing a Pre-Installation Validation Check	14
Configuring the ControlPoint Application and Deploying SharePoint Solutions	15
About Us	26
Contacting Quest	26
Technical Support Resources	26

## **Preface**

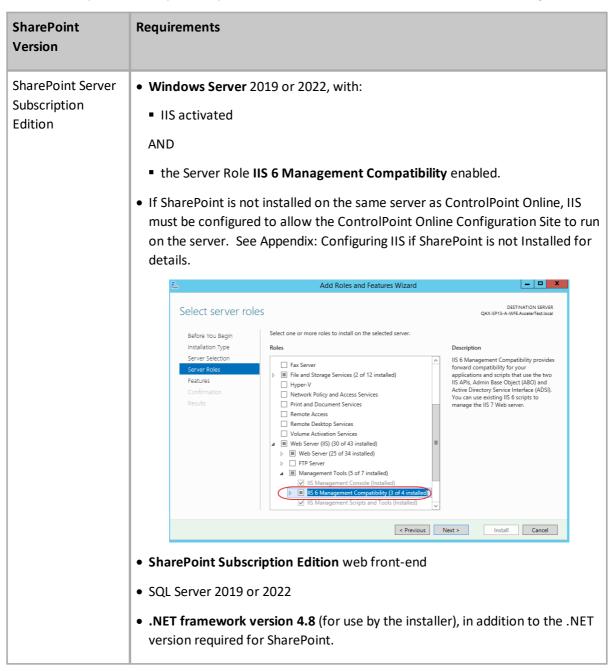
This Quick Start Guide will take you through the basic steps required for installation and configuration of Quest® ControlPoint, a Web-based application that offers a proactive, integrated solution for SharePoint administration, security, and governance. Once you have completed all the steps in this guide, you will be able to evaluate the product with the use of our *ControlPoint Evaluation Guide*.

NOTE: This guide applies specifically to the installation of ControlPoint for SharePoint on premises farms. If you are installing ControlPoint to manage SharePoint Online in an Microsoft 365 tenant environment, refer to the *ControlPoint for Microsoft 365 Installation Gu*ide.

## **System Requirements**

## **Server Requirements**

The server requirements depend on your version of SharePoint, as described in the following table.



SharePoint Version	Requirements	
	Windows Server 2016, 2019, or 2022 with:      IIS activated  AND      the Server Role IIS 6 Management Compatibility enabled.      Select server roles      Select server roles      Select server roles      Select server selection     Server Selection     Server Selection     Server Selection     Features     Confirmation     Features     Confirmation     Features     Pint and Document Services     Pint and Document Services     Pint and Document Services     Pint and Document Services     Remote Decision Services     Web Server (15) (30 of 43 installed)     Pint Server     Medical Services     Remote Decision Ser	
	Microsoft SQL Server: SQL Server 2016, 2019, or 2022      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 (for use by the installer), in addition to the .NET version required for SharePoint.	
SharePoint 2016	Windows Server 2012 R2 (64-bit) or 2016 with IIS activated.      SharePoint 2016 web front-end.	
	NOTE: To run ControlPoint Activity analyses in a SharePoint 2016 Server environment, SharePoint Usage must be enabled.	
	Microsoft SQL Server: SQL Server 2014 SP1 (64 bit) or 2016	
	NOTE: ControlPoint can use the sam e SQL Server instance as SharePoint, but it can also use a separate instance or separate server.	
	.NET framework version 4.8 (for use by the installer), in addition to the .NET version required for SharePoint.	
SharePoint 2013	Windows Server 2012 (64-bit), with IIS activated.	

SharePoint Version	Requirements	
	SharePoint 2013 (Foundation or Server) web front-end.	
	NOTE: To run ControlPoint Activity analyses in a SharePoint 2013 Server environment, SharePoint Usage must be enabled.	
	Microsoft SQL Server: SQL 2012, or 2014	
	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 (for use by the installer), in addition to the .NET version required for SharePoint.	

### **Installation and Service Account Requirements**

- The account used to install ControlPoint:
  - must be a member of the local Administrator's group on the machine where it is installed
  - must be a Farm Administrator, and
  - should be added to the security server role sysadmin in:
    - the SQL server(s) used for SharePoint content databases, and
    - the SQL server used for the ControlPoint Services (xcAdmin) database.
- The account that will be used to *run* ControlPoint (that is the Service Account of the Web Application that hosts the ControlPoint Configuration Site) must be:
  - a member of the local Administrator's group on all of the Web front-end machines in the farm.
  - a Farm Administrator.
  - a domain account if any database resides on a different server(s) from the server on which you will be installing ControlPoint.

#### **IMPORTANT NOTES:**

- The account used to install ControlPoint and the ControlPoint Service Account must both be
  either local or domain accounts. This is necessary to enable the installer to verify the
  existence of the Service account. If the server on which you are installing ControlPoint is not
  your database server (that is, your databases reside on a different server), then the Service
  Account must be a domain account.
- In accordance with SharePoint Best Practices, the ControlPoint Service Account should not be the SharePoint Farm Account (that is, the account used to run Central Administration), as the performance of some ControlPoint operations may be negatively impacted.
- If you will be configuring ControlPoint Discovery and/or SCM Services, the Service Account must meet all of the requirements of the ControlPoint Service Account, as well as permission

## **Compatible Browsers**

ControlPoint users must use a compatible Web browser:

• Microsoft Internet Explorer (IE) version 10 or later, running in Compatibility View

#### NOTES:

- With IE 10:
  - ControlPoint must be run with the 'AutoComplete User names and passwords on forms' option disabled.
  - When launching ControlPoint from a server, IE Enhanced Security Configuration (ESC) on that server mustbe off.
- When using Internet Explorer build 11.0.9600.18617, report results do not fill the entire results section.
- Microsoft Edge
- Mozilla Firefox (latest public release)
- Google Chrome (latest public release)

# First Time Installation and Configuration

Within each farm being managed, ControlPoint is installed and runs as a .NET application. Typically, it uses its own Web application (ControlPoint) which creates its own content database, but it can be installed into an existing Web application.

The ControlPoint installer also creates a separate Service database (xcAdmin) for configuration information and analysis data. This Service database may be installed either on the same database server as all other SharePoint databases or on a separate server.

## IMPORTANT: Using ControlPoint with Claims-Based Authentication

Even if your SharePoint farm uses Claims-based authentication, the ControlPoint Web application is created as a non-Claims-enabled application and should be left as a non-Claims-enabled application. If the ControlPoint Web application is Claims-enabled after installation, ControlPoint actions and analyses may fail to operate properly. In this scenario, you may want to use the option to install into an existing Web application (i.e., a Non-Standard installation). See the ControlPoint *Advanced Installation Guide* for details.

#### **Before You Begin**

- The machine on which you are installing ControlPoint must meet <u>System Requirements</u>.
- Make sure the machine on which you are installing ControlPoint has access to the Internet, which
  is necessary to permit activation of your ControlPoint license and to download the .NET
  framework, if necessary.
- Have the following information ready (you may wish to record it in the spaces provided):
  - The ControlPoint Service Account—that is, the account under which the ControlPoint Web application will 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.)

Account:		
Password:		

 Depending on whether you want the installer to create a new Web application for the ControlPoint Configuration Site or create it in an existing Web application:

recommended that you <i>not</i> install ControlPoint on Port 80, as you may encounter complications during setup. If you are using host headers and want to redirect Co	
to a port that is currently in use (including Port 80), you can do so after installing the application.)	
Port Number:	
The SharePoint Content Database Server Name:	
(This is where the content database for the ControlPoint Web application will resi	de.)
OR	
<ul> <li>The name of the existing Web application that you want to use to host the Control Configuration Site.</li> </ul>	lPoint
Web Application Name:	
The user name and (optionally) email address of the primary ControlPoint Applicatio	n
Administrator. (This individual will be set as the initial Site Collection Administrator i	n the
ControlPoint site collection).  ControlPoint Application Administrator Account Name:	
The Name of the SQL server that will host the ControlPoint Service database, as well authentication method to be used:	l as the
Database Server Name:	
Windows Authentication	
OR	
SQL Server ID Password	
The ControlPoint license activation code:	
NOTE: If you do not already have a license activation code, contact Quest to obtain of	one.

– For a new Web application, the port number that you want the ControlPoint Web application

to use. (The default is 1818, but you can set it to any available value. It is strongly

#### **First Time Installation and Configuration Process**

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

- A. Install the ControlPoint files.
- B. Registering the ControlPoint Online Azure Application.
- C. Configure the ControlPoint application and deploy SharePoint solutions.
- D. Configuring the ControlPoint Online Application.

E. Optionally, configuring ControlPoint Services.

NOTE: If you are using ControlPoint to manage multiple farms, you must complete the entire installation and configuration process for each farm.

### **Installing ControlPoint 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.

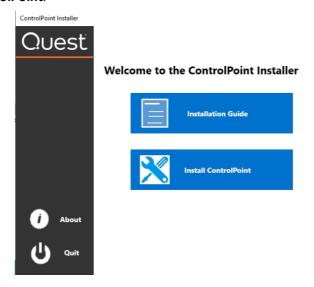
#### To install ControlPoint Files:

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

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.

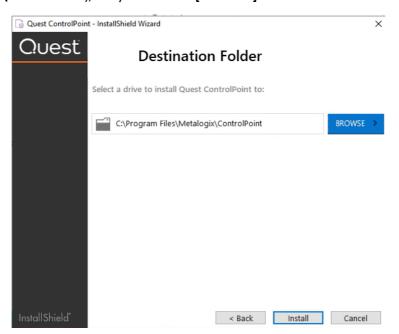
- 3 Read the license agreement. Click I accept the terms of the license agreement, then click [Next].
- 4 Click Install ControlPoint On-premises.



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

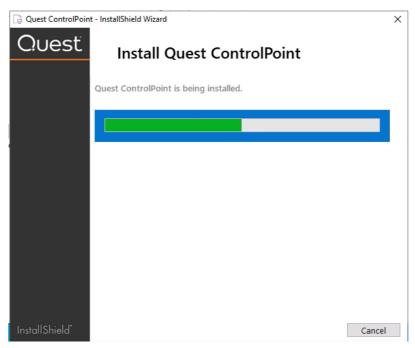
The InstallShield Wizard specifies a default install directory (C:\Program

Files\Metalogix\ControlPoint), but you can click [BROWSE] and select a different one.

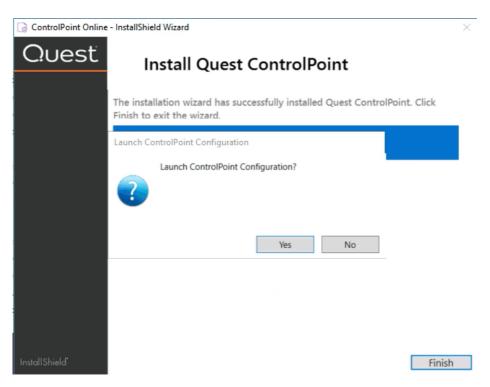


NOTE: This directory is where the installer will place the files needed to complete the installation. If you choose to change the default directory, you should *not* use the SharePoint hive.

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 application at a later time, click **[No]**. You can launch the ControlPoint Configuration Wizard from the Start menu or a Desktop shortcut.

7 Click [Finish].

#### **Next Steps**

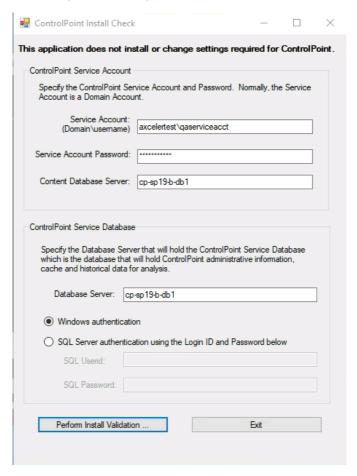
It is strongly recommended that you perform a <u>pre-installation validation check</u> before <u>Configuring the ControlPoint Application and Deploying SharePoint Solutions</u>.

## **Performing a Pre-Installation Validation Check**

After installing ControlPoint files, but before configuring ControlPoint for the first time, it is strongly recommended that you run the ControlPoint Install Check, which is located in the following folder: C: \Program Files\Metalogix\ControlPoint\Support\PreinstallValidation. When you run this utility (by double-clicking ControlPointInstallCheck.exe), you are prompted to enter the following information:

- ControlPoint Service Account name and password
- SharePoint Content Database Server name
- ControlPoint Service Database Server name.

NOTE: If UAC is enabled, it may be necessary to Run as Administrator.



When you click [Perform Install Validation], the utility verifies that key system requirements are met. At the conclusion of the verification check, a summary of results displays.



If any errors are reported in the Validation Summary, you can correct them before attempting to configure ControlPoint.

# Configuring the ControlPoint Application and Deploying SharePoint Solutions

After ControlPoint file are installed the application must be configured.

#### **Summary of ControlPoint Configuration Process**

The ControlPoint Configuration Wizard carries out the following tasks:

- A. **Validates License**: Checks the validity of the license key you enter as well as the terms of the license.
- B. **Creates ControlPoint Service database:** 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.)
- C. Creates ControlPoint Web application (if applicable): If you choose to have the installer create a new Web application to host the ControlPoint Configuration site collection, installs the ControlPoint Web application within SharePoint, which includes the creation of a content database for the Web application.
- D. **Creates ControlPoint Site Collection**: Creates the ControlPoint Configuration Site Collection within the ControlPoint Web application or an existing Web application (depending on the option you choose), and assigns an initial Site Collection Administrator.

NOTE: If you change the host name, the Configuration Wizard will also create the bindings in IIS, create alternate access mappings in Central Administration, and update the ControlPoint Setting 'Inbound ControlPoint Url' to use the host header.

- E. **Deploys ControlPoint WSPs to your SharePoint farm**: Installs the ControlPoint application features, which includes:
  - installation of ControlPoint menus and the ControlPoint Settings list into the ControlPoint Configuration Site, and
  - creation of the IIS Virtual Directory on the Web front-end server.

NOTE: As is the case with other SharePoint Solution deployments, upon completion all running application pools will be recycled.

F. Activates License: Activates your ControlPoint license.

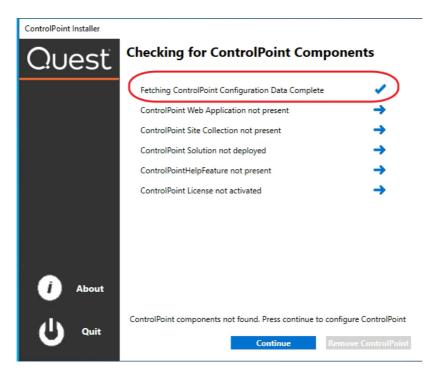
#### To configure the ControlPoint application:

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

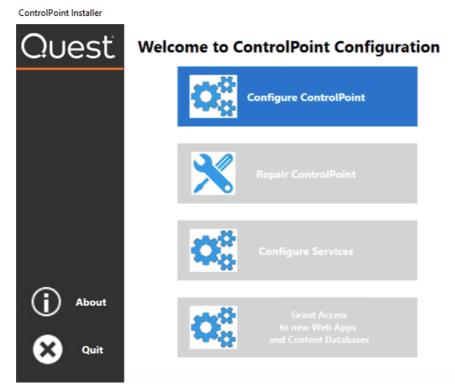
If	Then
you are starting directly from the ControlPoint installer (that is, after performing the install you chose to Launch ControlPoint Configuration	go to the next step.
after installing ControlPoint you chose to configure at a later time (that is, after performing the install you chose not to Launch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

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

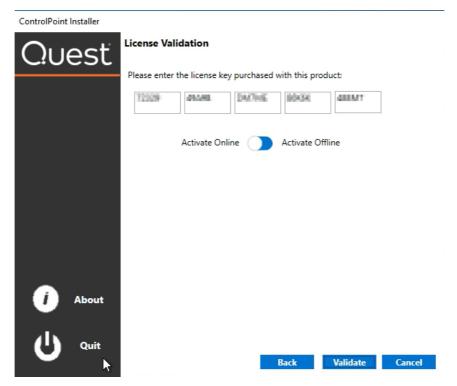
NOTE: For a first time installation, once the components check is complete only the Fetching ControlPoint Configuration Data box should be checked (). All other options will appear with a right-facing arrow. ()



- 2 Click [Continue].
- 3 Click Configure ControlPoint.



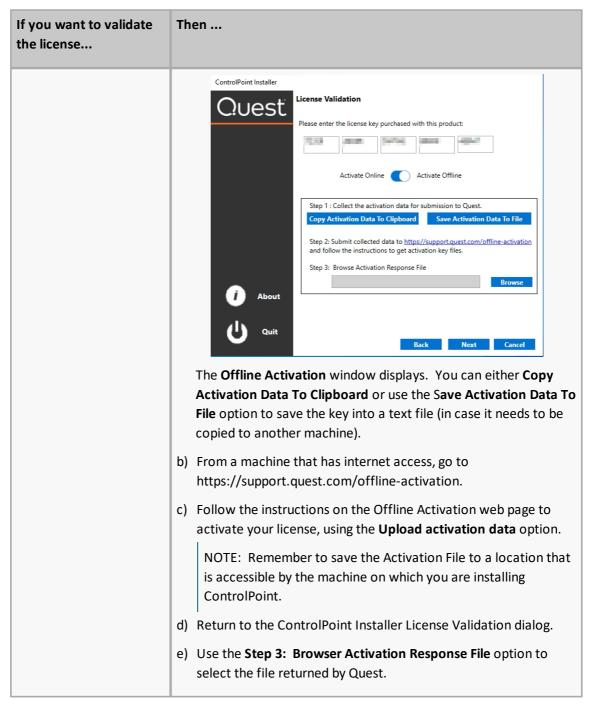
4 Enter the license key provided by Quest.



5 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.

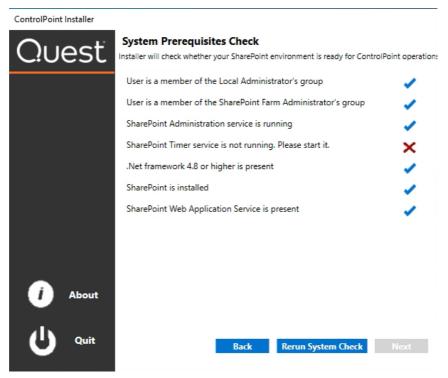


#### 6 Click [Validate].

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

7 Dismiss the pop-up and click [Next].

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



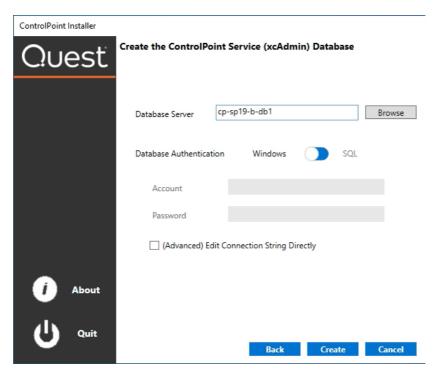
NOTE: If you fix the problem immediately, you can then **Rerun the System Check**. If you choose to **Quit** and fix the problem at a later time, the next time you launch the ControlPoint Configuration Wizard, it will start from the beginning.

- 8 When all system prerequisites checks have completed successfully, click [Next] to display the Create the ControlPoint Service (xcAdmin) Database dialog.
- 9 Specify the **Database Server** where you want to place the ControlPoint Service (xcAdmin) database:
  - enter the server name

OR

click [Browse] to choose a different database server

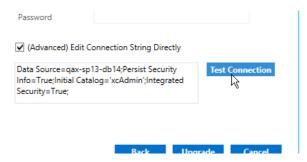
If you are installing on an additional farm in a multi-farm installation, make sure you specify the server on which the xcAdmin database has been created for the first farm. (If the database you specified has already been created, you will be asked whether you want to use it.)



NOTE: If you are using SQL Express for development or evaluation purposes, the Database Server instance name is typically entered as <server\_machine\_name>\SQLExpress.

- 10 Specify the authentication method you want to use. (If you select SQL Server authentication, you will be prompted to enter the **Account** and **Password**.)
- 11 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, do so via the ControlPoint Setting **SQL Server Connection String for xcAdmin Database**. Refer to the *ControlPoint Administration Guide* for details.

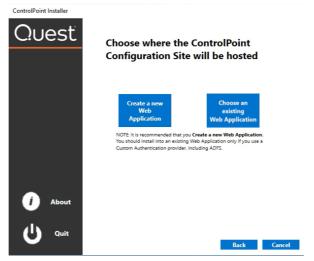


**IMPORTANT:** Update the connection string *only* if your SQL connection requires the addition of one or more custom keywords. For example, if you are using authentication with encryption and a self-signed server certificate, you would need to add **Encrypt=yes;TrustServerCertificate** to the string.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

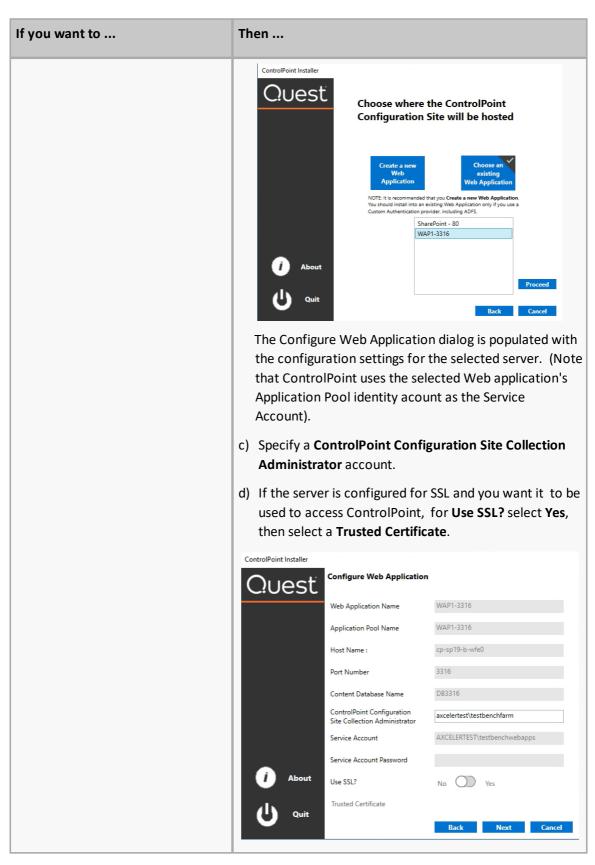
- 12 Click [Create].
- 13 After the installer has created the new database, click [Next].
- 14 Use the information in the following table to determine the appropriate action to take to **Choose** where the ControlPoint Configuration Site will be hosted.



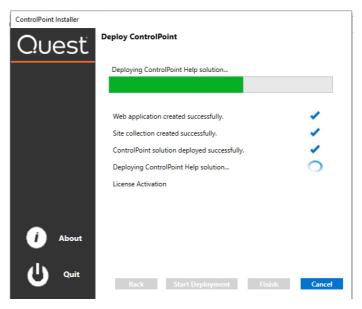
NOTE: It is recommended that you *always* Create a new Web Application, unless special circumstances apply.

If you want to	Then
create a new Web application to host the ControlPoint Configuration Site Collection	<ul> <li>a) Select Create a new Web Application.</li> <li>b) 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 create both the alternate access mappings in Central Administration and bindings in IIS.     </li> <li>c) For Port, either         <ul> <li>accept the default value (1818)</li> </ul> </li> <li>OR</li> <li>enter a different, unused Port number. (It is strongly recommended that you not install ControlPoint on Port 80, as you will encounter complications during setup. If you are using host headers and want to redirect ControlPoint to a port that is currently in use (including Port 80), you can do so after completing the installation.</li> </ul>

If you want to	Then
	d) If different than the default (the currently logged in account), specify the <b>Service Account</b> under which you want the ControlPoint Web application to run.
	REMINDER: If your databases reside on a different server, then the Service Account must be a domain account.
	e) For <b>Content Database Name</b> , either
	<ul><li>accept the default value (WSS_CONTENT_CONTROLPOINT)</li></ul>
	OR
	<ul> <li>enter a different content database name</li> </ul>
	f) Specify a ControlPoint Configuration Site Collection Administrator account and Service Account, and enter the Service Account Password.
	g) If the server is configured for SSL and you want it to be used to access ControlPoint, for <b>Use SSL?</b> select <b>Yes</b> , then select a <b>Trusted Certificate</b> .
create the ControlPoint	ControlPoint Installer  Courst  Web Application Name  Application Pool Name  ControlPoint  Host Name:  ControlPoint  Host Name:  ControlPoint Configuration  Site Collection Administrator  Service Account  Service Account  Service Account Password  Use SSL?  Trusted Certificate  ControlPoint Configuration  Select Choose an existing Web Application.  Cancel  ControlPoint  Back  Next  Cancel  Cancel  Cancel  ControlPoint  Back  Mext  Cancel  ControlPoint  About  Use SSL?  Trusted Certificate  ControlPoint  Back  Next  Cancel  ControlPoint  About  Back  ControlPoint  ControlPoint  About  ControlPoint  Back  Mext  Cancel  ControlPoint  Back  ControlPoint  ControlPoint  ControlPoint  Application  About  Cancel  ControlPoint  Back  ControlPoint  ControlPoint  Application  Application  ControlPoint  Back  ControlPoint  ControlPoint  ControlPoint  ControlPoint  Application  Application  ControlPoint  Back  Cancel  ControlPoint  ControlPoint  ControlPoint  ControlPoint  Application  Application  Application  ControlPoint  ControlPoint  Application  Application  Application  ControlPoint  ControlPoint  ControlPoint  Application  Application  Application  Application  Applicatio
Configuration Site Collection in an existing Web application	b) Select an existing Web application from the list, then click [Proceed].

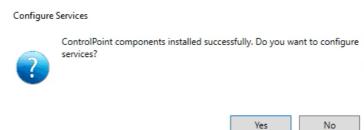


- 15 Click [Next].
- 16 Click [Start Deployment].



17 When the deployment has completed, click [Finish].

The Configure Services dialog displays, asking if you want to configure services.



18 If you want to configure services immediately, click **[Yes]** and continue with Configuring ControlPoint Services.

NOTE: You can also configure services at a later time by launching the Configuration Wizard from the server on which ControlPoint is installed.

19 Click **[No]**, as It is not necessary to configure services for evaluation purposes. (Details for configuring ControlPoint Services can be found in the *ControlPoint Advanced Installation Guide*.

## **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 Microsoft 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 <a href="https://www.quest.com/contact">www.quest.com/contact</a>.

### **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