Quest

Metalogix® Essentials for Office 365 2.11

Advanced Installation Guide

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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® Essentials for Office 365
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1

Getting Started

This section provides an overview of the steps required to begin using the product.

Requirements

Hardware and Software Requirements

Our desktop tool is a multi-threaded/multi-tasking application. As such, available system memory is the most critical parameter for optimal performance.

Hardware

Component	Minimum Requirement	Recommended
Processor	Intel Core i7	Intel Core i9, X-Series or higher
Memory	16 GB **NOTE**: to increase memory, start Metalogix Essentials for Office 365 - go to Help > Profile Manager > Advanced.	32 GB
Disk Drives	Dual hybrid disk drives C: OS, Program Files, D: Data Files	Dual SSD drives C: OS and Program Files D: Data Files
Network Card	100 Mbps	1Gbps

Operating System Software

- Windows 10 or higher
- Disable anti-virus software or disable scanning of Metalogix Essentials Program, Program Folder, and Data folders.

Essentials Permission Setup

In order to run the Essentials application, you can use a regular user logged into the workstation, or you can run the program as an Administrator.

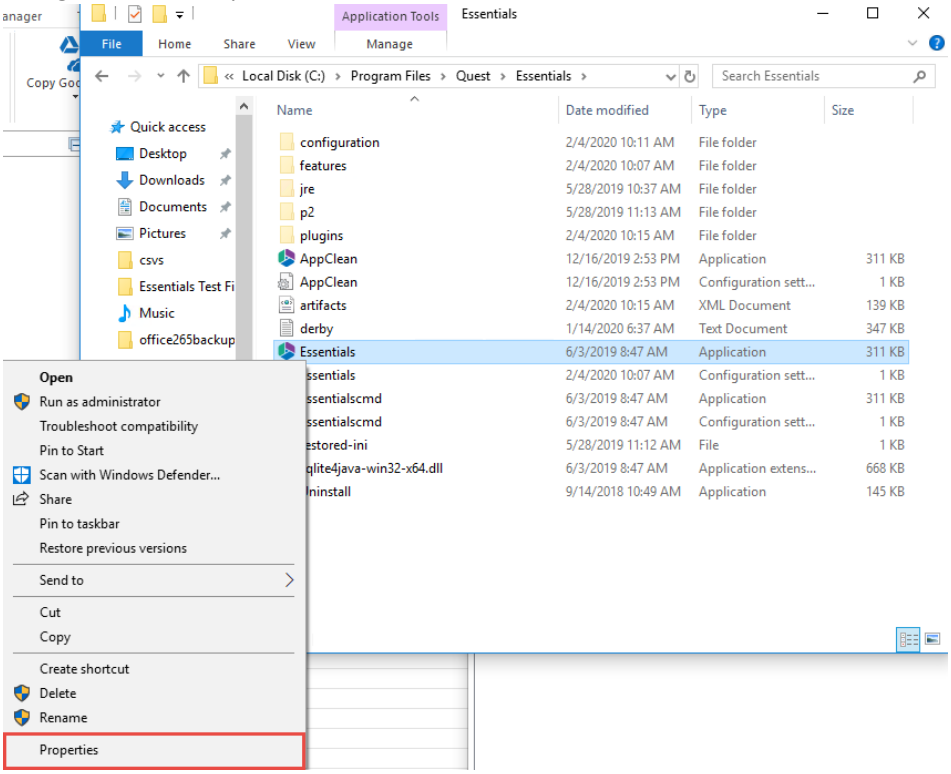
However, you must run the tool as an Administrator when changing settings in the memory management section of the Profile Manager (located on the Advanced tab of the Profile Manager), or when using the automatic updates feature.

NOTE: When running the tool as an Administrator, you may not be able to see your network drives or mapped drives in the connections section. This may occur because the connections were set up while in regular user mode, so when the tool is launched as an admin, the admin user does not have access to the connections.

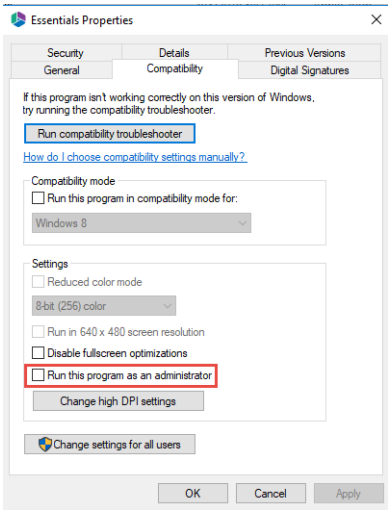
To resolve the issue in the above note, do one of the following:

1. Do not start the tool as an administrator, and insure that no settings are applied by default.

   a. Navigate to the Properties for the Essentials.exe



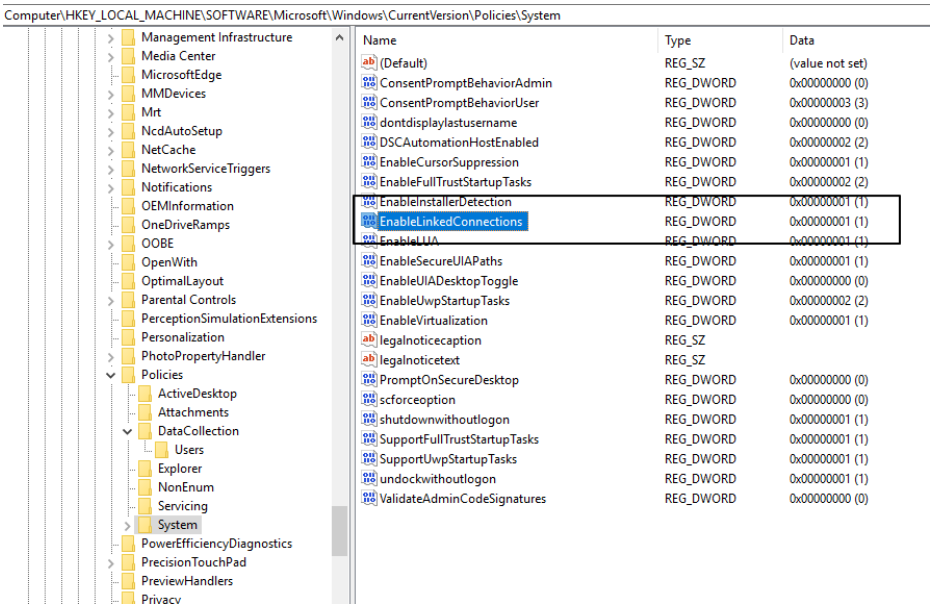
   b. Ensure that under the **Compatability** tab, "Run this program as administrator" isn't selected.



2. Run the Registry Editor (regedit.exe), and locate the following key:

   HKEY_LOCAL_MACHINE/SOFTWARE/Microsoft/Windows/CurrentVersion/Policies/System

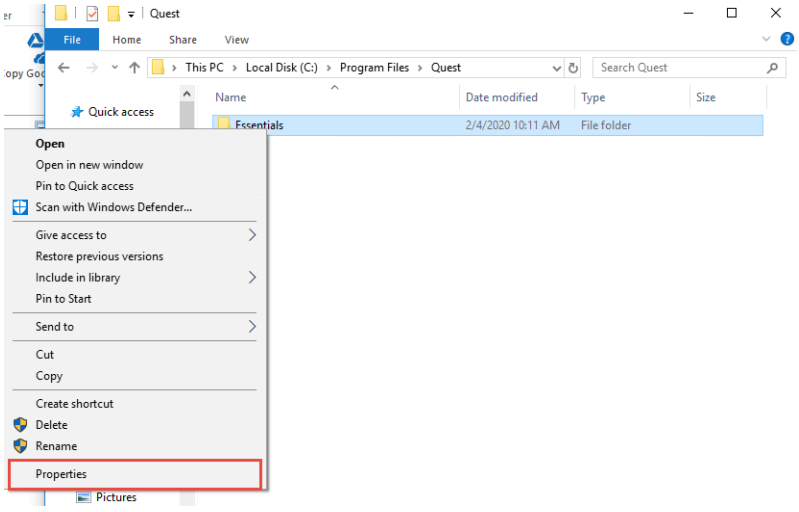
Create a new DWORD(32) with the name EnableLinkedConnections and value 1 and reboot.



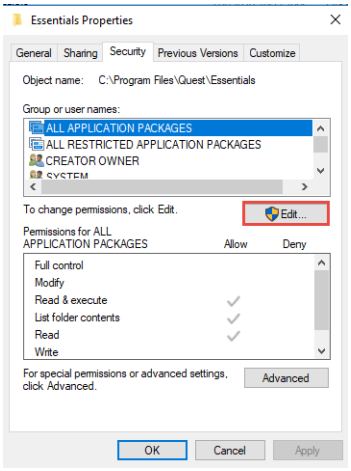
In the event that the tool only successfully launches when run as an admin, this could be occurring because the non-admin user that is launching the tool does not have permissions for the installation folder, to the run tool components, or to the workspace.

This may be caused as a result of various windows security settings and configurations. To resolve this issue, add the non-admin user, directly to the folder security settings.

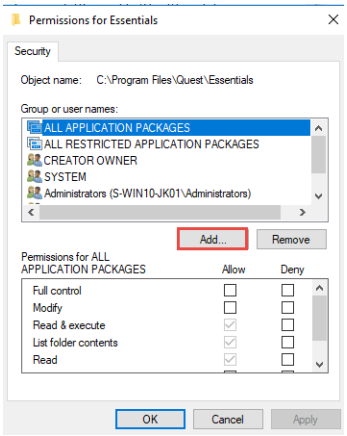
1. Navigate to the folder that contains the Essentials Tool installation folder. Right click and select Properties.



2. Navigate to the Security Tab, and select **Edit** group and usernames.

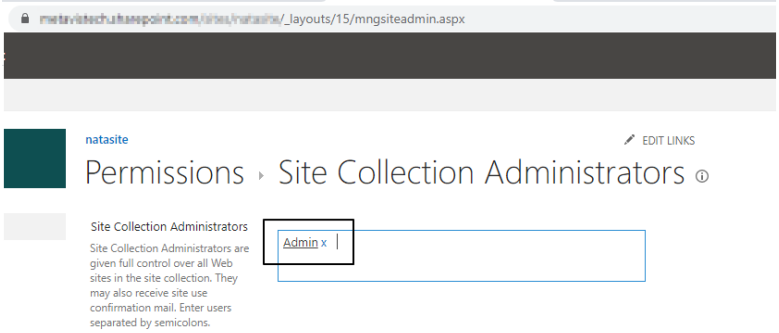


3. Select **Add** and add the non-admin user.



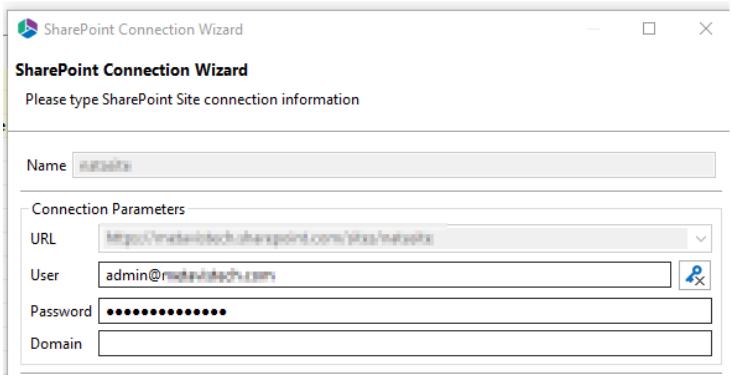
SharePoint Permissions Setup

To work with SharePoint locations, you must set up a valid level of permissions. When you work with individual Sites or Site Collections in the Navigator pane of Essentials, the lowest level of user to connect to a site is a Site contributor. However, this level allows a minimal list of actions (view structure, views, content etc.). With this permissions level, for example, we reconnect to use users who have direct site collection administrator permissions.



When you work in Hyper Migration Mode and do bulk migrations using SharePoint Administrator or Global administrator. An account with less privileges will only be able to perform a limited set of migrations.

The Essentials tool requests certain user roles to start and successfully finish hyper migration or hyper backup jobs. These administrative accounts are required to connect to the tenant level, to each site collection, users OneDrive's, Office 365 groups, Microsoft Teams sites, etc. In order to connect to all of this you must be either a Global Administrator or a SharePoint Administrator. If you use an Exchange Administrator or Billing Administrator, or any other user role, the Migration will fail. This is because Essentials will not be able to access the target site collection in order to upload content and/or the azure job would be restricted by Office 365.



Firewall Permission Setup

URLs that need to be Unblocked

Purpose	URL
Connection to Quest/Metalogix license server	https://license.metalogix.com/license/licenseservice.asmx
Migrating to SharePoint Online	https://login.windows.net https://login.microsoftonline.com
Migrating Nintex Forms and/or workflows to SharePoint Online	https://discovery.nintexO365.com
Location for AutoUpdate	http://www.metavistech.com

OAuth Permissions

The first time that OAuth Authentication is selected when connecting to SharePoint Online, the Metalogix Content Matrix SharePoint Client application must be registered for the tenant. Instructions are available in the Using Office 365 OAuth Authentication section of the user guide.

It is recommended that an account with the **Global Administrator** role be used to register the application, because a Global Administrator can provide consent on behalf of the entire organization. In the event that a Global Administrator does not register the application, users with the **Application Administrator** role can register the application for their own account only.

IMPORTANT: For an Application Administrator, the Metalogix Content Matrix SharePoint Client application records current SharePoint permissions as part of the registration process. Therefore, a

user who registers as an Application Administrator must already have the appropriate permissions to connect and perform migrations using OAuth authentication. For example, at the time of registration, a user who is going to make tenant-level connections must also be a SharePoint Administrator if they want the app to allow them to access to all site collections within the tenant and to be able to Paste as a Site Collection. Similarly, a user who will be migrating Managed Metadata must also be a Term Store Administrator at the time of registration.

Account Permission Requirements

The following table provides an overview of the Account Permission required to perform various operations for and with Essentials.

Operation	SharePoint				
	Global Administrator	**Application Administrator**	**Farm or SharePoint Administrator**	**Site Collection Administrator**	**Term Store Administrator**
Connecting to SharePoint					
Client Side Object Model Connection (Site-level)	✓	-	✓	✓	✓
Office 365 Tenant Connection	✓	-	-	✓	✓
Migration Actions					
Deploying Nintex Apps to SPO	✓	-	-	-	-
Migrating as a Site Collection	✓	-	✓	✓	✓
Transferring Columns into Managed Metadata	✓	-	✓	✓	✓
Content Migrations to SharePoint Online	✓	-	-	✓	✓

OneDrive Account Migrations	✓ With Provisioning	-	-	-	-
SharePoint Migrations	✓	-	✓	✓	✓
SharePoint On-Premises Migration **NOTE:** permissions to access all the content is required	-	-	✓	✓	-

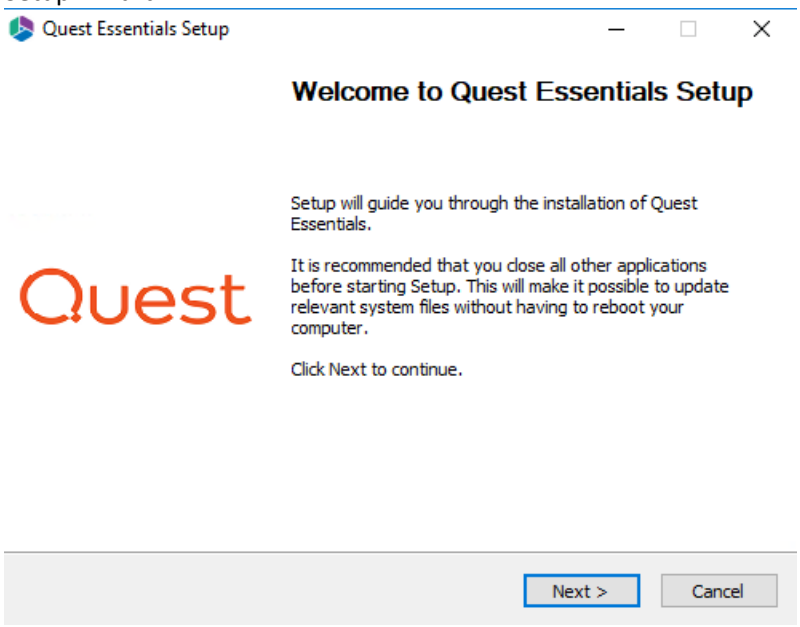
Installation

The Essentials Setup Wizard is launched once the installation process is begun.

The actual features and modules available to the user are controlled via the activation code.

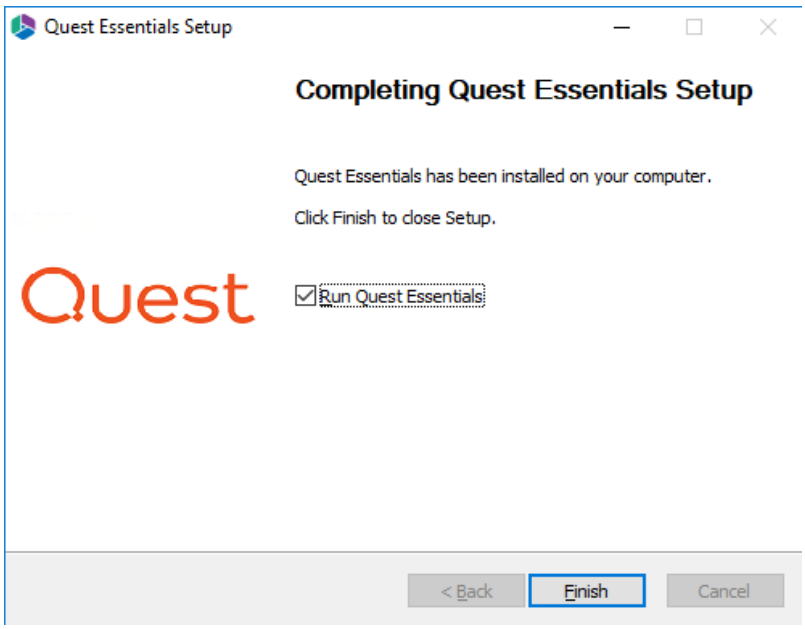
Installing the Essentials console:

1. Download the Metalogix Essentials installer here: https://support.quest.com/Metalogix-Essentials-for-Office-365/download-new-releases.
2. Once you have selected and downloaded the Bit version that is appropriate for your computer, run the installer by opening the downloaded package. This will open the Metalogix Essentials Setup Wizard.



3. Click **Next** to begin the installation process.
4. Agree to the Terms in order to proceed to the next step.
5. Select the location for the product Installation. Click **Next**.

6. If you have the "Run Metalogix Essentials" option selected, then the application will automatically start once the Wizard has completed Installation. Click **Finish** to complete installation.



7. The next step is to activate the product. Please see the Product Activation

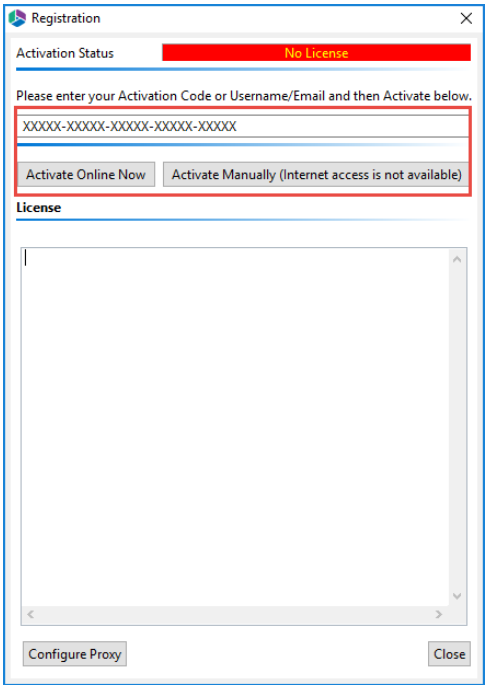
NOTE: The installer will download the entire application. The amount of time this takes depends on the speed of your connection and host computer.

Product Activation

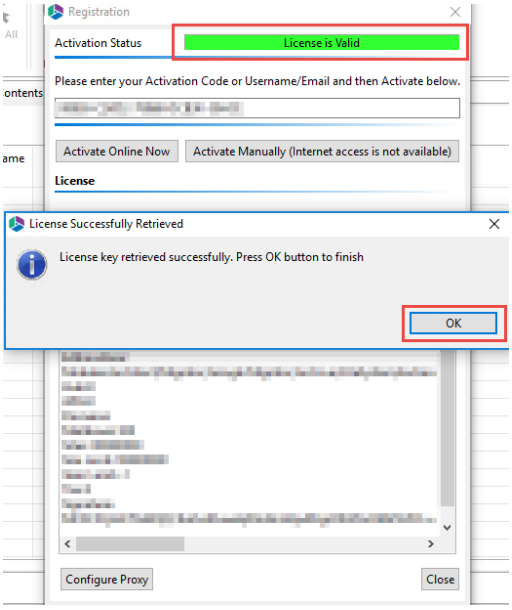
After purchasing Metalogix Essentials, you will receive an email with the link to the product download and the activation code to activate the product. If you did not receive such an email please contact us: www.quest.com/contact.

1. Once installation has been completed, upon starting the Essentials application for the first time, you will be presented with a Registration Screen. Enter your activation code in the allowed space, and select your choice of activation method. For **Activate Now** proceed to step 2. Go to the following section for instructions on how to Activate Manually (used if you do not have

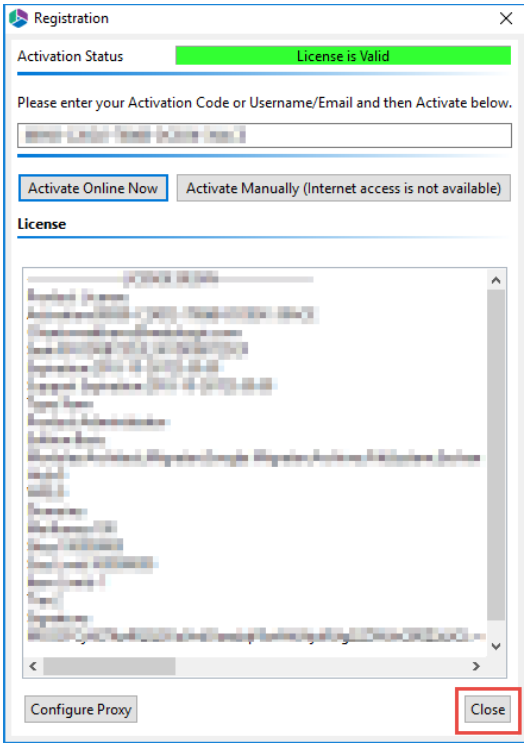
internet access).



2. The license should appear in the License box and the Activation Status bar should turn green and display "License is Valid". You will also receive a message stating that your License key has been retrieved successfully. Click **Ok**.



3. After this click the **Close** button and proceed to the product.

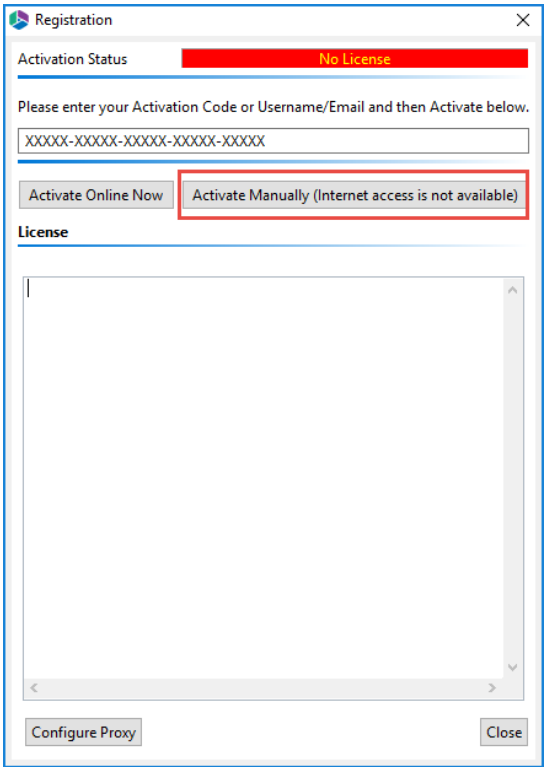


Activate Manually

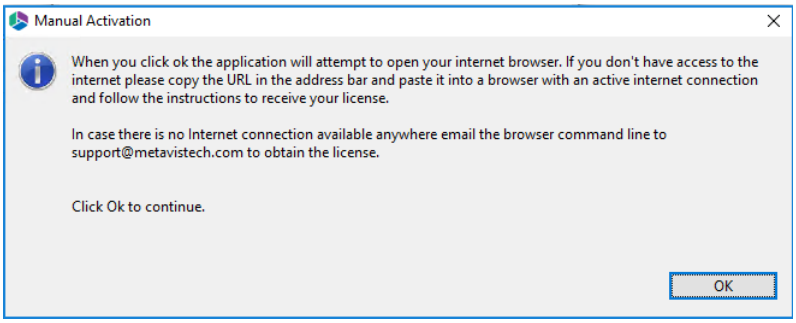
After purchasing Metalogix Essentials, you will receive an email with the link to the product download and the activation code to activate the product.

1. Once installation has been completed, upon starting the Essentials application for the first time, you will be presented with a Registration Screen. Enter your activation code in the allotted

space, and select to **Activate Manually**.

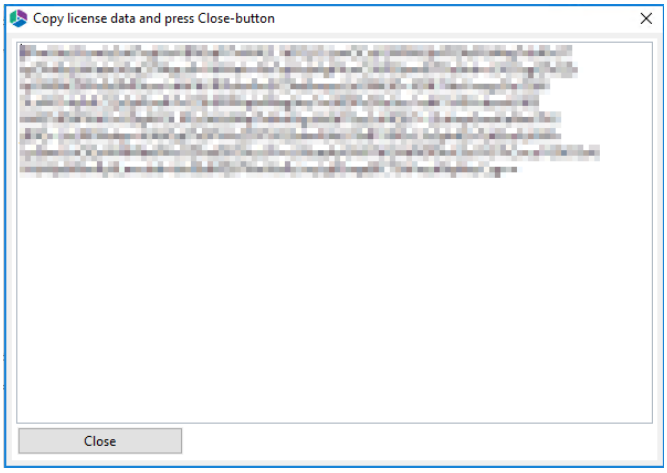


2. You will be presented with a window that details the instructions on how to obtain your license manually in the case that the machine on which Essentials has been installed does not have access to the internet.

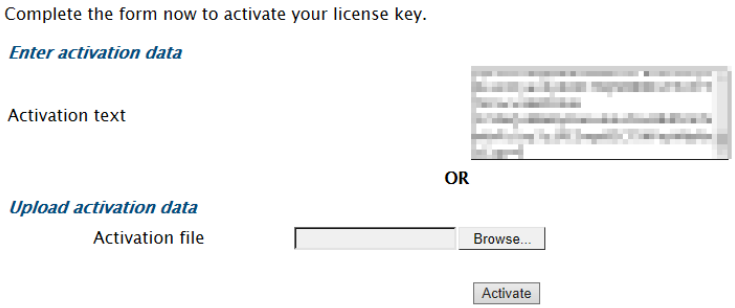


3. As is displayed in the above screen shot, upon clicking **Ok**, your internet browser will be opened, if you do not have access to the internet, then simply copy the URL in the address bar and paste it into the browser of a machine with an active internet connection. This will give you access to your license data.

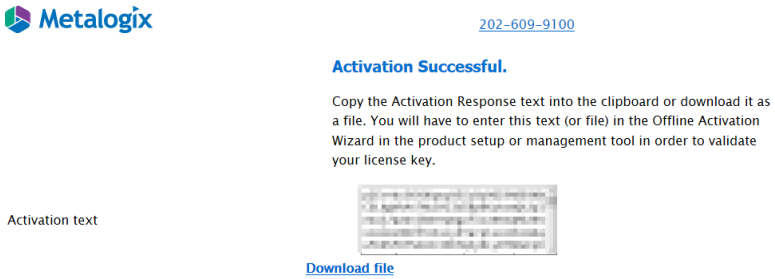
4. Select all the license data and copy it, then click **Close**.



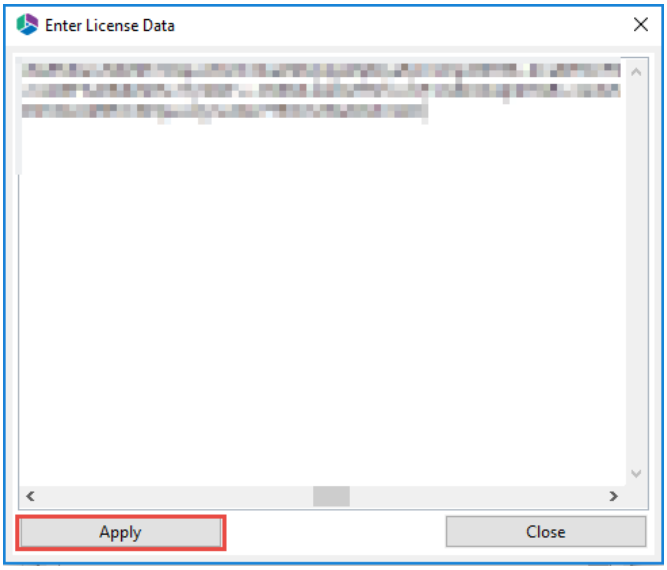
5. Once you have copied the license data, and closed the license data window, you will be redirected to the Offline Activation page. Paste the license data into the area marked Activation Text. Click **Activate**.



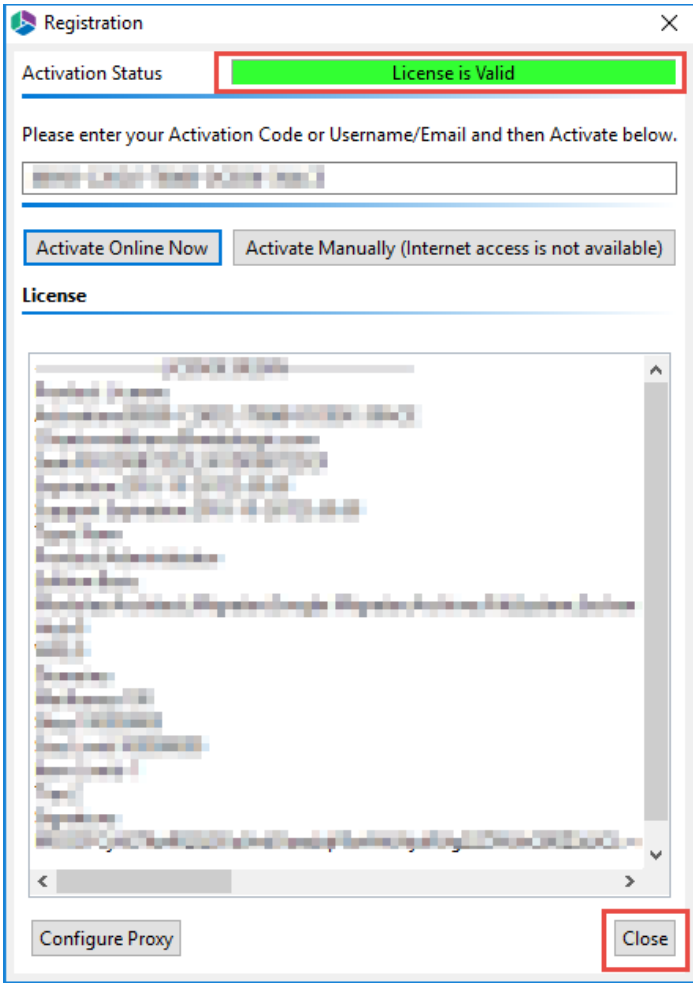
6. If activation was successful you will be redirected to the successful activation page. Here you must either copy the Activation Text.



7. Return to the Essentials Registration Screen. An Enter License Data window will have opened, paste the activation text here, and select **Apply**.



8. The license should appear in the License box and the Activation Status bar should turn green and display "License is Valid". Your license has been activated, you may now click **Close** and use the Essentials console.



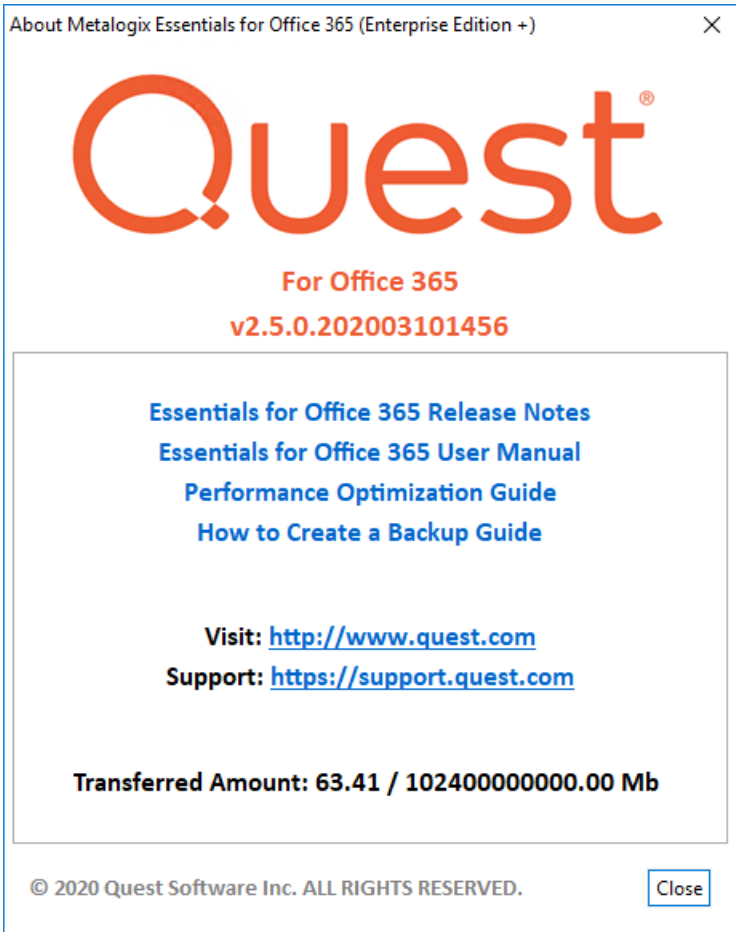
Starting the Application

The first time the application is started, you will need to enter the supplied Activation Code.

If you have not received an activation code, please contact the sales team www.quest.com/contact.

For detailed instructions on Activating the product, please visit the Product Activation section.

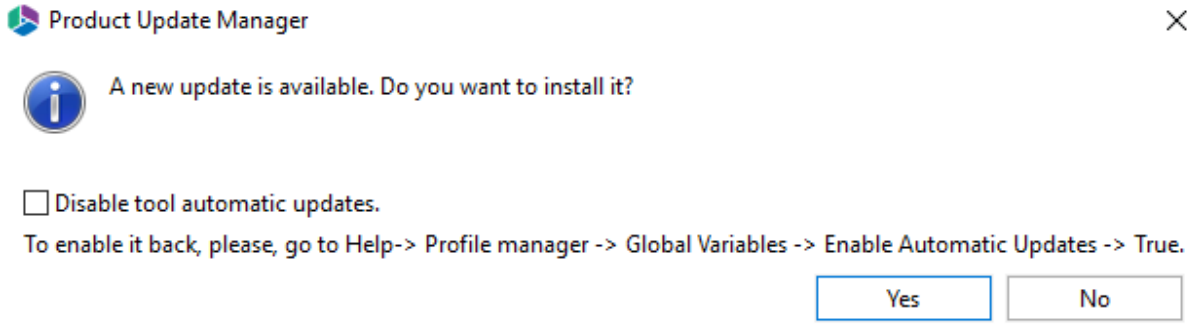
After activation, a Splash screen is available with your installation version number, and links to all the documentation, the Quest Website, as well as our Support site. You can select **Close** and begin using the application.



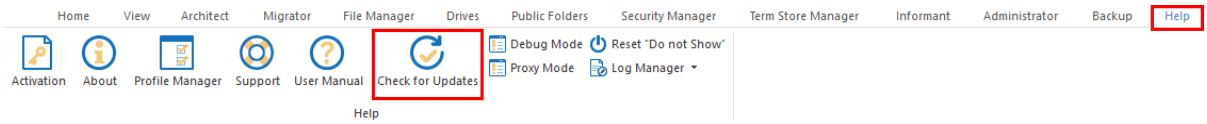
Auto-Update Feature

Auto-Updates is a feature available within Metalogix Essentials that allows users to have updates, that are made to the application by our development team, automatically installed on their machines. This feature can be disabled or enabled, as per your personal preference.

When starting up the Essentials program as an administrator, the Product Update Manager will pop up when new updates are available. You can choose to install the update, or decline to do so.



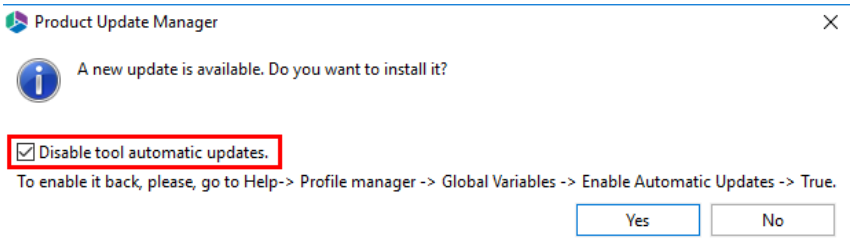
You can also access the auto-update feature through the Help tab within the product by selecting **Check for Updates**.



NOTE: The Auto Update feature is not supported for versions below 2.3

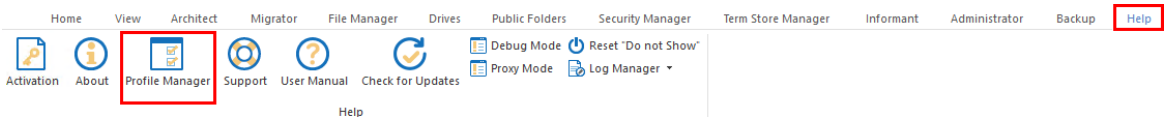
Disabling and Enabling the Auto-Update Feature

The auto-update feature can be disabled in the Product Update Manager by selecting the "Disable tool automatic updates".

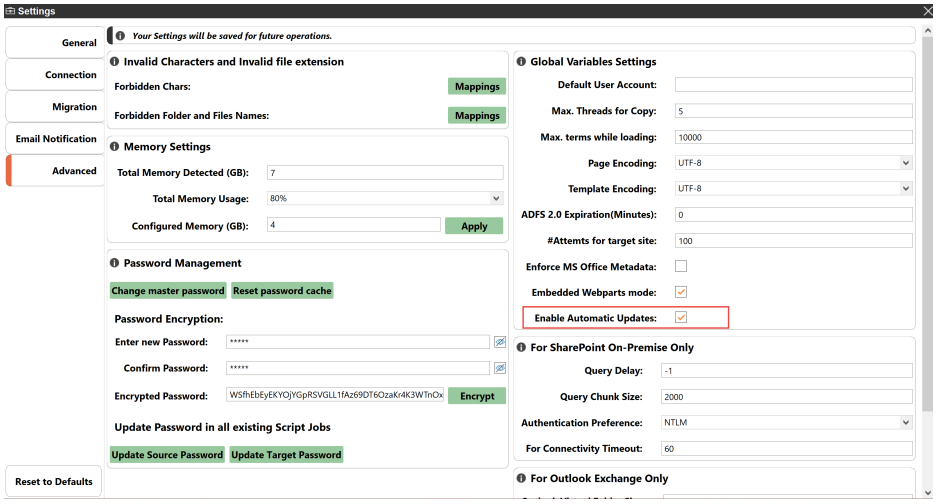


The auto-update feature can also be disabled in the Profile Manager by doing the following:

1. On the Help tab of Essentials, click Profile Manager.



2. Navigate to the Advnaced section of the Profile Manager, and setting the Enable Automatic Updates feature to "False" to disable, and "True" to enable.



Uninstall

To uninstall Metalogix, navigate to the application's installation directory *(the default location is "C:\Program Files (x86)\Quest\Essentials" or "C:\Program Files\Quest\Essentials"*) and double click on the Uninstall.exe file. This will generate a wizard to begin the uninstall process.

To remove the application's workspace (the location where logs and application configuration is stored), navigate to the user home directory of the account that is licensed to use the product (for example, C:\Users\[Username]). In this location, find and delete the directory named "Essentials". If more than one account was licensed for the product on this computer, there will be additional "Essentials" directories in the respective user home directories which must also be deleted.

Metalogix Essentials for Office 365 has now been completely uninstalled.

2

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.

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 discussion

- Chat with support engineers online
- View services to assist you with your product