

# Metalogix<sup>®</sup> 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<sup>®</sup> Essentials for Office 365 Updated September 2022 Version 2.11

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# **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	32 GB
	<b>NOTE</b> : to increase memory, start	
	Metalogix Essentials for Office	
	365 - go to Help > Profile	
	Manager > Advanced.	
Disk Drives	Dual hybrid disk drives	Dual SSD drives
	C: OS, Program Files, D: Data Files	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.

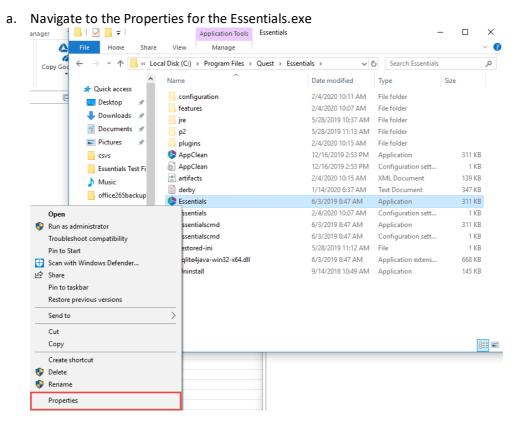
However, you must run the tool as an Administrator when changing settings in the memory

management section of the Profile Manager (located on the Advanced tab of the Profile Manager), or when using the automatic updates feature.

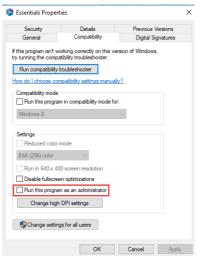
**NOTE:** When running the tool as an Administrator, you may not be able to see your network drives or mapped drives in the connections section. This may occur because the connections were set up while in regular user mode, so when the tool is launched as an admin, the admin user does not have access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



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

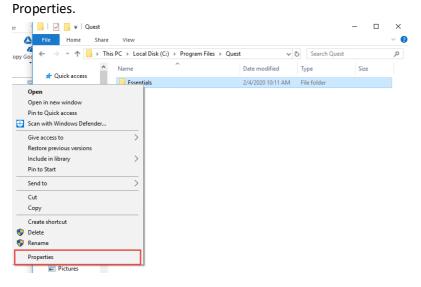
puter\HKE	Y_LOC	AL_MACHINE\SOFTWARE\Microso	ft\Wir	ndows\CurrentVersion\Policies\System		
	>	Management Infrastructure	^	Name	Туре	Data
	>	Media Center		ab (Default)	REG_SZ	(value not set)
	-	MicrosoftEdge		8 ConsentPromptBehaviorAdmin	REG DWORD	0x00000000 (0)
	>	MMDevices		ConsentPromptBehaviorUser	REG DWORD	0x0000003 (3)
	>	Mrt		n dontdisplaylastusername	REG DWORD	0x00000000 (0)
	>	NcdAutoSetup		B DSCAutomationHostEnabled	REG DWORD	0x0000002 (2)
	2	NetCache		Rise EnableCursorSuppression	REG DWORD	0x00000001 (1)
	>	NetworkServiceTriggers		8 EnableFullTrustStartupTasks	REG DWORD	0x00000002 (2)
		Notifications		EnableInstallerDetection	REG DWORD	0x00000001 (1)
		OEMInformation		EnableLinkedConnections	REG DWORD	0x00000001 (1)
		OneDriveRamps OOBE			REG DWORD	0x00000001 (1)
	12	OpenWith		88 EnableSecureUIAPaths	REG DWORD	0x00000001 (1)
		OptimalLayout		Bill EnableUIADesktopToggle	REG DWORD	0x00000000 (0)
		Parental Controls		Bill EnableUwpStartupTasks	REG_DWORD	0x00000002 (2)
		PerceptionSimulationExtensions		Right EnableOwpstartup lasks	-	
		Personalization		5	REG_DWORD	0x0000001 (1)
		PhotoPropertyHandler		ab legalnoticecaption	REG_SZ	
	1	Policies		ab legalnoticetext	REG_SZ	
	Ť	ActiveDesktop		8 PromptOnSecureDesktop	REG_DWORD	0x0000000 (0)
		Attachments		200 scforceoption	REG_DWORD	0x0000000 (0)
		✓ DataCollection		🗱 shutdownwithoutlogon	REG_DWORD	0x0000001 (1)
		Users		8 SupportFullTrustStartupTasks	REG_DWORD	0x0000001 (1)
		Explorer		8 SupportUwpStartupTasks	REG_DWORD	0x0000001 (1)
		NonEnum		🐯 undockwithoutlogon	REG_DWORD	0x0000001 (1)
		Servicing		3 ValidateAdminCodeSignatures	REG_DWORD	0x0000000 (0)
		> System				
		PowerEfficiencyDiagnostics				
		PrecisionTouchPad				
	ΤĹ.	PreviewHandlers				
		Privacy				

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

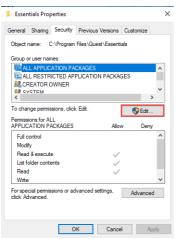
In the event that the tool only successfully launches when run as an admin, this could be occurring because the non-admin user that is launching the tool does not have permissions for the installation folder, to the run tool components, or to the workspace.

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



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



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

Permissions for Essentials				
Security				
Object name: C:\Program Files\	Quest\Essentials			
Group or user names:				
E ALL APPLICATION PACKAG	ES	*		
CREATOR OWNER	TION PACKAGES	;		
Administrators (S-WIN10-JK0	1\Administrators)	~		
<		>		
	Add	Remove		
Pemissions for ALL APPLICATION PACKAGES	Add Allow	Remove Deny		
APPLICATION PACKAGES		Deny		
APPLICATION PACKAGES Full control		Deny		
APPLICATION PACKAGES Full control Modify		Deny		
APPLICATION PACKAGES Full control Modify Read & execute		Deny		
APPLICATION PACKAGES Full control Modify Read & execute List folder contents		Deny		
APPLICATION PACKAGES Full control Modify Read & execute List folder contents		Deny		

### **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.

A meta	vietechulturepoint.com/liities/nati	/_layouts/15/mngsiteadmin.aspx	
	natasite Permissions	<ul> <li>Site Collection Administrat</li> </ul>	edit links
	Site Collection Administrators Site Collection Administrators are given full control over all Web sites in the site collection. They may also receive site use confirmation mail. Enter users separated by semicolons.	Admin ×	]

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.

🕭 SharePoint Connection Wizard — 🗆 🗙					
	Connection Wizard				
Please type	SharePoint Site connection information				
Name 💵	2673				
Connectio	n Parameters				
URL	https://metaviotech.oharepoint.com/sites/natasite			$\sim$	
User	admin@n=datation			₽×	
Password	•••••				
Domain					

### **Firewall Permission Setup**

### URLs that need to be Unblocked

Purpose	URL
Connection to Quest/Metalogix license	https://license.metalogix.com/license/licenseservice.as
server	mx
Migrating to SharePoint Online	https://login.windows.net
	https://login.microsoftonline.com
Migrating Nintex Forms and/or workflows	https://discovery.nintexO365.com
to	
SharePoint Online	
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.

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

OneDrive Account Migrations	✓ With Provisioning	-	-	-	-
SharePoint Migrations	✓	-	✓	✓	$\checkmark$
SharePoint On-Premises Migration <b>NOTE:</b> 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.

👂 Quest Essentials Setup	– 🗆 X
	Welcome to Quest Essentials Setup
	Setup will guide you through the installation of Quest Essentials.
Quest	It is recommended that you close all other applications before starting Setup. This will make it possible to update relevant system files without having to reboot your computer.
	Click Next to continue.
	Next > Cancel

- 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.

🔖 Quest Essentials Setup	- 🗆 ×
	Completing Quest Essentials Setup
	Quest Essentials has been installed on your computer. Click Finish to close Setup.
<u> </u>	
Quest	Run Quest Essentials
	< <u>B</u> ack <u>F</u> inish Cancel

- 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.

 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).

legistration	×
Activation Status	No License
Please enter your Activat	ion Code or Username/Email and then Activate below.
XXXXX-XXXXX-XXXXX-X	0000X-X000X
Activate Online Now	Activate Manually (Internet access is not available)
License	
1	^
<	>
Configure Proxy	Close

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**.

5	Registration X						
All	Activation Status	License is Valid					
ontents	Please enter your Activ	ation Code or Username/Email and then Acti	vate below.				
ame	Activate Online Now	Activate Manually (Internet access is not	available)				
🚯 Lice	ense Successfully Retriev	ed	×				
0	License key retrieved s	successfully. Press OK button to finish					
			ОК				
	Configure Proxy						

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

🤌 Registration	×
Activation Status	License is Valid
	ion Code or Username/Email and then Activate below.
Activate Online Now	Activate Manually (Internet access is not available)
License	
CONS Analysis in part Analysis in part and an analysis in the analysis in the second second and the second second second and the second second second and the second second second second second second second and the second secon	
Configure Proxy	Close

### **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.

🕭 Registration	×							
Activation Status	No License							
Please enter your Activat	ion Code or Username/Email and then Activate below.							
XXXXX-XXXXX-XXXXX-X	XXXX-XXXXX							
Activation Status     No License       Please enter your Activation Code or Username/Email and then Activate bel       XXXXX-XXXXX-XXXXX-XXXXX       Activate Online Now       Activate Online Now       Activate Manually (Internet access is not available)								
	, , , , , , , , , , , , , , , , , , , ,							
1	^							
<	×							
	-							
Configure Proxy	Close							

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.

🕭 Man	ual Activation	х			
0	When you click ok the application will attempt to open your internet browser. If you don't have access to the internet please copy the URL in the address bar and paste it into a browser with an active internet connection and follow the instructions to receive your license.				
	In case there is no Internet connection available anywhere email the browser command line to support@metavistech.com to obtain the license.				
	Click Ok to continue.				
	ОК				

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**.

Complete the form now to activate your license key.

Enter activation data

Activation text

OR

Upload activation data
Activation file
Browse...

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**.

🤌 Enter License Data		×
And the state of the second se	1.000	^
<	>	~
Apply	Close	

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.

🤌 Registration		Х
Activation Status	License is Valid	
	tion Code or Username/Email and then Activate	below.
Activate Online Now	Activate Manually (Internet access is not avail	able)
	1. Table - CORDAN - SHACK 1. Table - CORDAN - SHACK 1. SHACK - SHACK - SHACK 1. SHACK - SHA	
<		>
Configure Proxy		Close

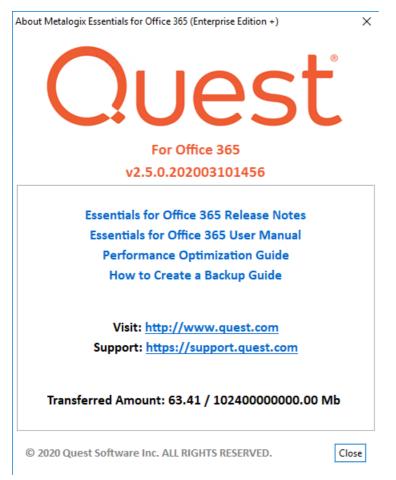
## **Starting the Application**

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.

Product Update Manager



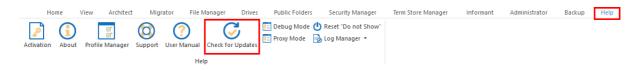
A new update is available. Do you want to install it?

Disable tool automatic updates.

To enable it back, please, go to Help-> Profile manager -> Global Variables -> Enable Automatic Updates -> True.

Yes	No
-----	----

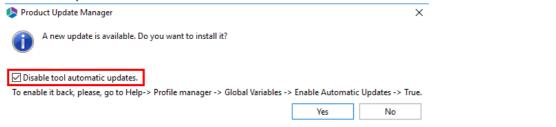
You can also access the auto-update feature through the Help tab within the product by selecting **Check for Updates**.



**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.

Hon	ne	View Architect	Migr	ator File N	lanager Drives	Public Folder	s Security Manager	Term Store Manager	Informant	Administrator	Backup	Help
		Profile Manager			Check for Updates	Proxy Mode	Cog Manager ▼					
				Hel	n							

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.

Settings			$\rightarrow$						
General	• Your Settings will be saved for future operations.								
	Invalid Characters and Invalid file extension	Global Variables Settings							
Connection	Forbidden Chars: Mappin	gs Default User Account:							
Migration	Forbidden Folder and Files Names: Mappin	gs Max. Threads for Copy: 5							
Email Notification	Memory Settings	Max. terms while loading: 10000							
Advanced	Total Memory Detected (GB): 7	Page Encoding: UTF-8							
	Total Memory Usage: 80%	V Template Encoding: UTF-8 V							
	Configured Memory (GB): 4 Apply	ADFS 2.0 Expiration(Minutes): 0							
		#Attemts for target site: 100							
	Password Management	Enforce MS Office Metadata:							
	Change master password Reset password cache	Embedded Webparts mode:							
	Password Encryption:	Enable Automatic Updates:							
	Enter new Password:	For SharePoint On-Premise Only							
	Confirm Password: *****	Query Delay: -1							
	Encrypted Password: WSfhEbEyEKYOjYGpRSVGLL1fAz69DT6OzaKr4K3WTnOx Encrypted Password:	t Query Chunk Size: 2000							
	Update Password in all existing Script Jobs	Authentication Preference: NTLM V	1						
	Update Source Password Update Target Password	For Connectivity Timeout: 60							
Reset to Defaults		For Outlook Exchange Only	].						

## 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.

# 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<sup>™</sup>.

### 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 <a href="https://support.quest.com">https://support.quest.com</a>. 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

About

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