

ControlPoint

Evaluation Guide

April 16, 2018

Copyright

© Metalogix International GmbH., 2008-2018
All rights reserved. No part or section of the contents of this material may be reproduced or transmitted in any form or by any means without the written permission of Metalogix International GmbH.

ControlPoint™ is a trademark of Metalogix International GmbH.

Windows SharePoint Services is either a registered trademark or a trademark of Microsoft Corporation in the United States and/or other countries. Other product and company names mentioned herein may be the trademarks of their respective owners.

Technical Support

For information about Metalogix Technical support visit http://metalogix.com/support.

Technical support specialists can be reached by phone at +1-202-609-9100. The level of technical support provided depends upon the support package that you have purchased. Contact us to discuss your support requirements.

Contents

Introduction **4**

Prerequisites 4

Launching ControlPoint **5**

The ControlPoint Application Interface 5

Running a Site Storage Analysis **8**

Running a Site Permissions Analysis **12**

Running an Orphaned Domain Users Report and Deleting Orphaned Users **15**

Scheduling an Activity by Document Analysis **18**

Duplicating a User's Permissions and Backing Up Permissions **21**

Restoring Site Permissions **26**

Introduction

This document provides new ControlPoint users with the opportunity to evaluate ControlPoint within their own SharePoint environment. It will lead users through a variety of common scenarios, from navigating the interface, running analyses, and performing some value-added actions.

Prerequisites

In order to perform the evaluation scenarios for ControlPoint outlined in this document, you must first install and configure ControlPoint on a Web front end server where SharePoint is installed. See the *Metalogix ControlPoint Quick Start Guide* for details. It is available on the Metalogix website Support Resources page.

Launching ControlPoint

Use one of the following options to start the ControlPoint application.

From your workstation browser:

Enter **http://**<*server_machine_name*>:<*port_number*>/_**layouts/Axceler/xcMain.aspx**.

(The server machine name is the name of the machine on which ControlPoint is installed. 1818 is the default port number for the ControlPoint Web application.)

NOTE: If you are logging in for the first time, complete the login screen using the account that was designated as the ControlPoint Site Collection Administrator account at the time the ControlPoint application was installed.

From the server on which ControlPoint is installed:

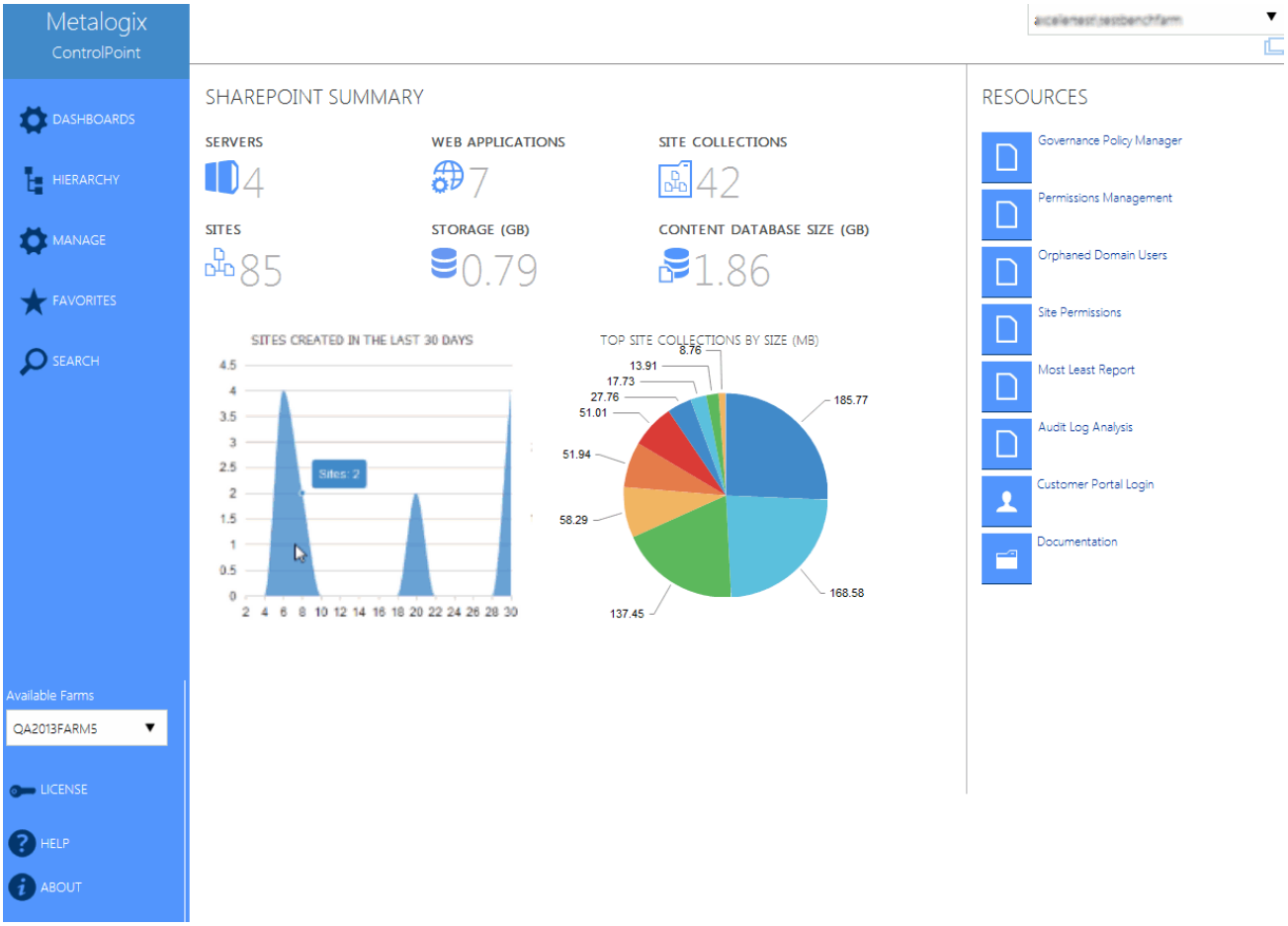
From the Windows Start menu, choose **Programs > Metalogix > ControlPoint > Launch ControlPoint Application**.

The ControlPoint Application Interface

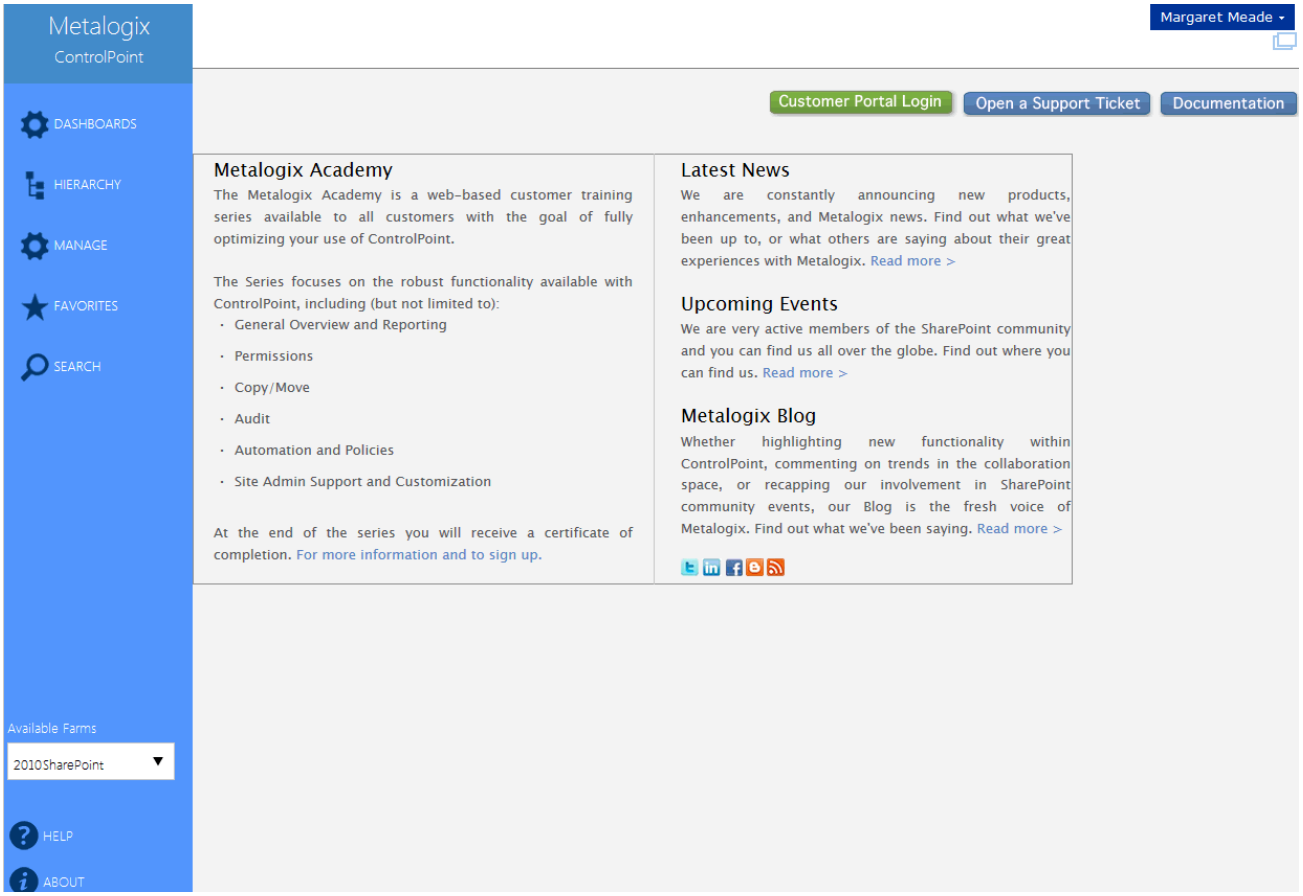
The ControlPoint interface employs a two-frame design. From the left (navigation) frame, you can select the SharePoint object(s) on which you want to operate and available functionality. The right (workspace) pane is where the feature you choose is displayed.

If you are using ControlPoint with SharePoint 2013 or later, whenever you log into ControlPoint or refresh your browser, the right pane displays a dashboard which includes:

- statistical information about your SharePoint farm
- quick links to some of ControlPoint's most powerful functionality
- links to the Metalogix Customer Portal as well as ControlPoint user documentation on the Metalogix website.


Metalogix
ControlPoint
DASHBOARDS
HIERARCHY
MANAGE
FAVORITES
SEARCH
Available Farms
QA2013FARM5
LICENSE
HELP
ABOUT
SHAREPOINT SUMMARY
SERVERS
4
WEB APPLICATIONS
7
SITE COLLECTIONS
42
SITES
85
STORAGE (GB)
0.79
CONTENT DATABASE SIZE (GB)
1.86
SITES CREATED IN THE LAST 30 DAYS
Sites: 2
TOP SITE COLLECTIONS BY SIZE (MB)
8.76
13.91
17.73
27.76
51.01
51.94
58.29
137.45
168.58
185.77
RESOURCES
Governance Policy Manager
Permissions Management
Orphaned Domain Users
Site Permissions
Most Least Report
Audit Log Analysis
Customer Portal Login
Documentation

For SharePoint 2010 and 2007, the right pane displays the Metalogix ControlPoint Cafe site, an online community where you can find announcements of new versions, critical patches, or other information that may be useful to users of ControlPoint, as well as access to the Metalogix Customer Portal.



Running a Site Storage Analysis

The first analysis we will run is a Site Storage Analysis, which provides storage statistics for one or more selected sites, including the distribution of storage usage among sites within the selected scope.

To run a site storage analysis:

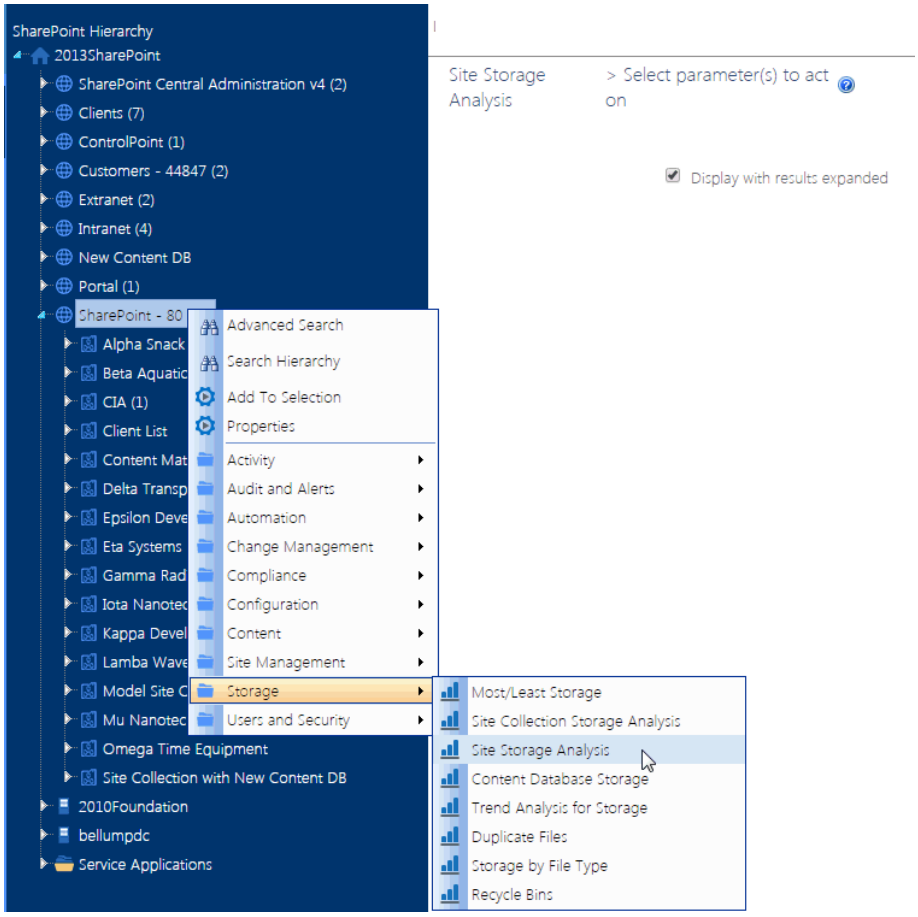
1 In the left navigation frame, select the Hierarchy tab, then In the SharePoint Hierarchy, expand the Web application( ) containing a Site Collection that, ideally, contains between ten and 20 sites. (Note that the number in the parentheses to the right of each object indicates the total number of objects that are *immediate children* of that object.)

In keeping with ControlPoint security trimming , if you are a SharePoint Farm Administrator, all of the Site Collections within the Web applications display in the tree. Those for which you are not a Site Collection Administrators will appear greyed out.



If you are not a Farm Administrator, Site Collections for which you are not an Administrator will be absent from the tree altogether—although the number that displays to the right of the Site Collection name identifies the *total* number of sites within the collection, regardless of whether you have access to all of them.

2 Right-click, and from the menu choose Storage > Site Storage Analysis.



Note that you may see menu items that are greyed out. These items rely on the ControlPoint Discovery operation, which collects information about your SharePoint farm and stores it in the ControlPoint Services (xcAdmin) database. Once Discovery is run, these menu items can be enabled.

3 Click the **Display with results expanded** box.

4 Click **[Run Now].**

The Site Storage analysis consists of two sections: **Sites** and **Size Distributions**

The Sites section lists the sites within the site collection, along with statistics for the number of **Sites**, **Lists** and **Files**, **Size** in **KB**, and **% of Quota** set for the site collection that is being used by the site. (If a quota was not set for the site collection this column will display N/A.)

Metalogix

Site Storage Analysis

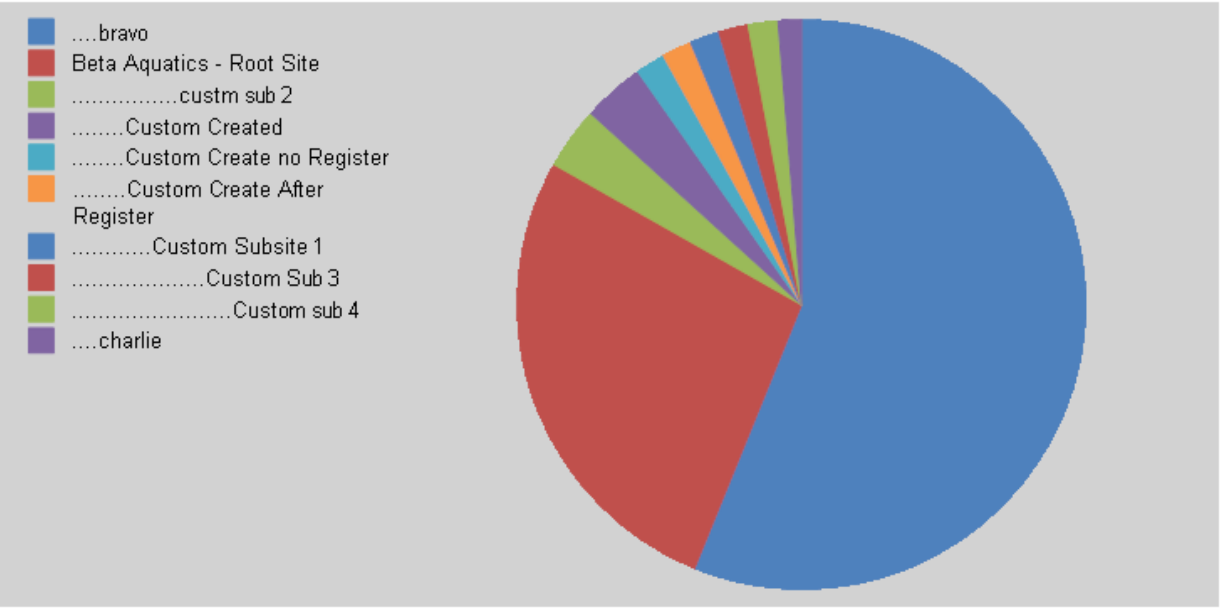
bellum\adm
8/29/2014 10:

Select Site	Sites	Lists	Size (KB)	% of Quota
SharePoint - 80				
Select Beta Aquatics - Root Site (http://2010foundation/sites/beta)	17	19	4,602.63	4.49
Select ....bravo (http://2010foundation/sites/beta/bravo)	3	7	9,556.05	9.33
Select .....Custom Created (http://2010foundation/sites/beta/bravo/custom)	1	6	598.69	0.58
Select .....Custom Subsite 1 (http://2010foundation/sites/beta/bravo/custom/custom1)	1	1	287.59	0.28
Select .....custm sub 2 (http://2010foundation/sites/beta/bravo/custom/custom1/custom2)	1	6	598.71	0.58
Select .....Custom Sub 3 (http://2010foundation/sites/beta/bravo/custom/custom1/custom2/Custom3)	1	1	287.59	0.28
Select .....Custom sub 4 (http://2010foundation/sites/beta/bravo/custom/custom1/custom2/Custom3/custom4)	0	1	287.59	0.28

The bottom of this section shows the total number of sites and lists and the combined size of the sites within the scope of your analysis.

	(http://2010foundation/sites/beta/yankee)			
Select	....zulu (http://2010foundation/sites/beta/zulu)	0	7	223.27	0.22
		26	157	20608.67	

The **Size Distribution** section consists of a pie chart that depicts the distribution of the storage space being used among the top ten sites within the scope of your analysis.



In this scenario you:

- ✓ Learned about ControlPoint security trimming.
- ✓ Initiated an operation for an object in the SharePoint Hierarchy.
- ✓ Ran a ControlPoint analysis interactively

Running a Site Permissions Analysis

We will now run a Site Permissions analysis on the same Site Collection.

To run a site permissions analysis:

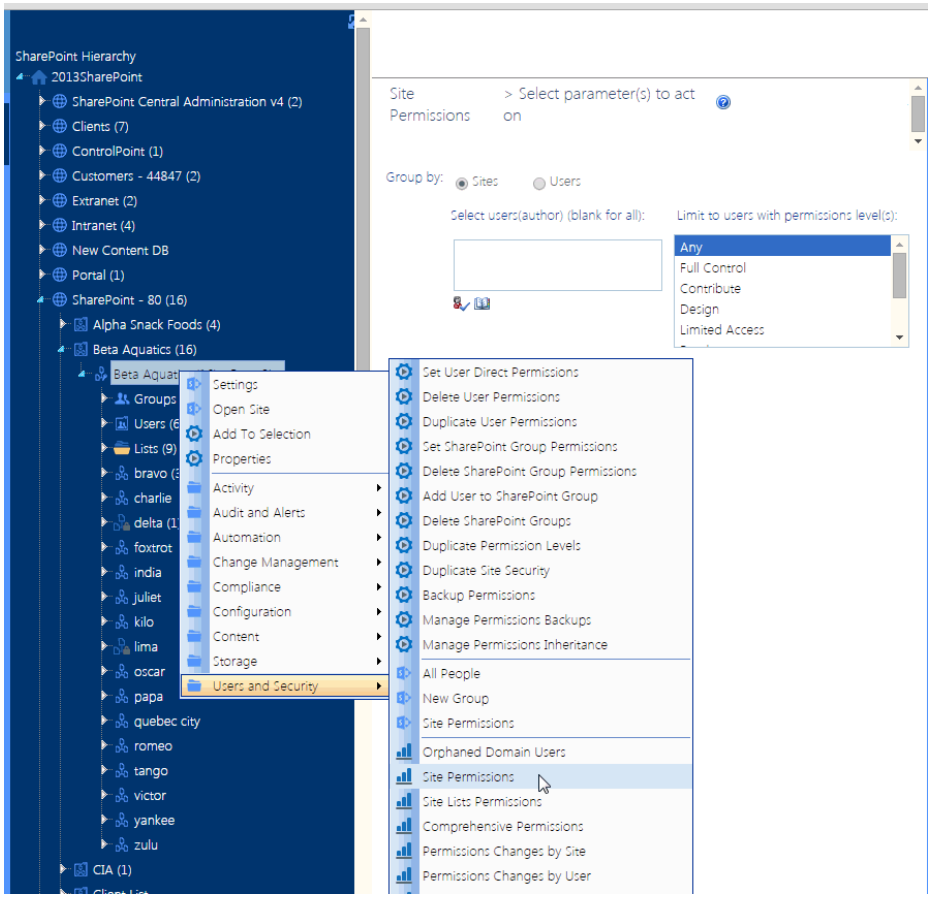
1 Expand the Site Collection to display its subsites.
Notice that a site may be identified by one of the following icons:

- a site collection's root site

- a site whose permissions are inherited from its parent.

- a site whose permissions are unique (not inherited)

2 Right-click and choose Users and Security > Site Permissions.



3 Run the analysis on all users within the Site Collection using the following parameters:

- Change the **Group by**: selection to **Users**
- Expand the **Advanced Parameters** section and make sure the following Parameters are checked:
  - **Calculate Total Users with Permissions**

- **Show unique permissions only** (this parameter will filter out permissions that are *inherited* from a parent site)

Note that, since the analysis is being run on real-time (not cached) data, you can also choose to **Include users with AD group membership** and/or **Include AD Group Members table**, which requires a live call to Active Directory. In this scenario, however, we will leave these options unselected and instead view Active Directory Group membership via a link in analysis results..

4 Click **[Run Now]**.

Analysis results include users with permissions granted through Web Application policies as well as to sites within the scope of your analysis.

Total Users with Permissions includes Web application Service Accounts, users granted permissions through Web application policies, Site Collection Administrators, and users within Active Directory groups to which the ControlPoint Service Account has access.



Metalogix — Site Permissions by User — 12/1/2014 6:11:52 PM — bellum\administrator

Parameters:

Cached: False
Users: Report does not include Active Directory group members
Unique Permissions: Show Unique Permissions only
Limit to users with permissions level(s): Any

Farm Name	Total current users with permissions
2013SharePoint	12

Web Application Policies

User / Web App. / Zone			Admin	Auditor	System	Full Control	Full Read	Deny Write	Deny All	Other
2010foundation\administrator	SharePoint - 80	(All Zones)	+	+		+				
axcelertest\testbenchinstall	SharePoint - 80	(All Zones)	+	+		+				
bellum\administrator	SharePoint - 80	(All Zones)	+	+		+				

User Rights *** - site security not inherited

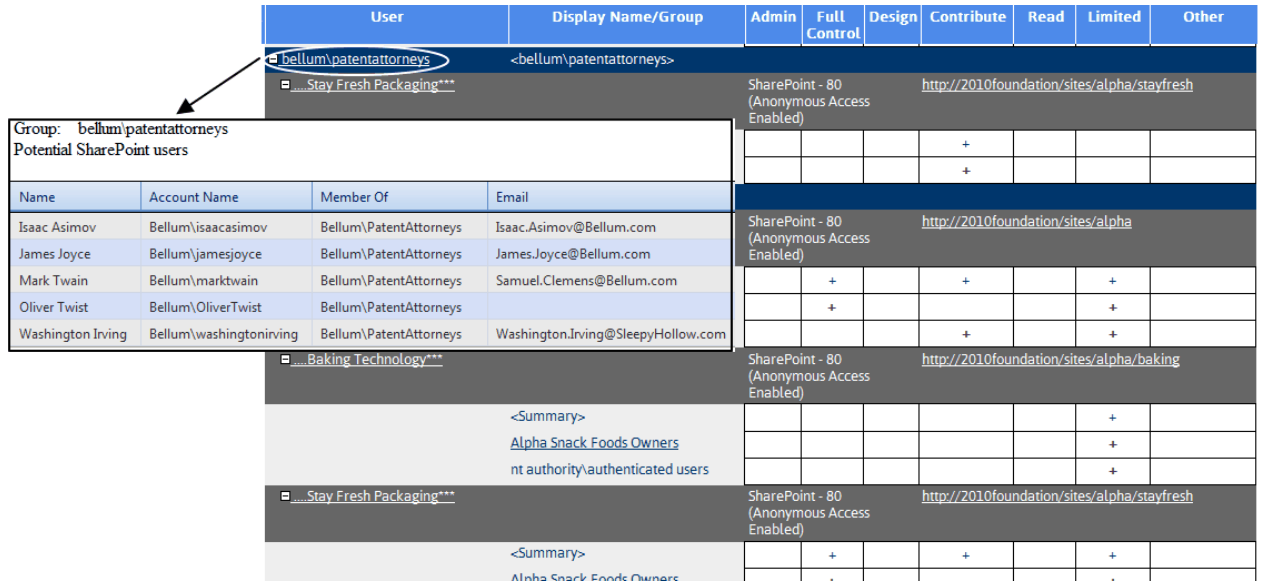
Select	User	Display Name/Group	Admin	Full Control	Design	Contribute	Read	Limited	Other
	bellum\administrator	<bellum\administrator>							
Select	Beta Aquatics	SharePoint - 80 (Anonymous Access Enabled) http://2010foundation/sites/beta							
		<Summary>	+	+					
		<Direct>	+						
		Beta Aquatics Owners		+					
	bellum\development	<bellum\development>							
Select	Beta Aquatics	SharePoint - 80 (Anonymous Access Enabled) http://2010foundation/sites/beta							
		<Summary>		+				+	
		<Direct>		+				+	
	bellum\haroldpotter	Harold Potter							
Select	Beta Aquatics	SharePoint - 80 (Anonymous Access Enabled) http://2010foundation/sites/beta							
		<Summary>					+		
		Beta Aquatics Visitors					+		

Detailed information about a user include how the permissions were granted (for example, directly or through a SharePoint group).

Note that custom permissions levels, if any, display in the Other column.

Select	User	Display Name/Group	Admin	Full Control	Design	Contribute	Read	Limited	Other
Select	....lima***		SharePoint - 80 (Anonymous Access Enabled)			http://2010foundation/sites/beta/lima			
		<Summary>					+		
		Beta Aquatics Visitors					+		
	bellum\isaacasimov	Isaac Asimov							
Select	Beta Aquatics		SharePoint - 80 (Anonymous Access Enabled)			http://2010foundation/sites/beta			
		<Summary>		+		+	+	+	Policy Test
		<Direct>				+		+	
		bellum\development		+				+	Policy Test
		Beta Aquatics Visitors					+		

To view Active Directory group membership (in a separate window or tab), click the Active Directory group link.



In this scenario you:

- ✓ Learned how sites are visually represented in the SharePoint Hierarchy, based on its permissions model.
- ✓ Changed default parameters used for the analysis.
- ✓ Worked with analysis results.

Running an Orphaned Domain Users Report and Deleting Orphaned Users

If you have (or think you have) users with permissions in SharePoint that are no longer in Active Directory, you can run an Orphaned Domain Users Report to identify them.

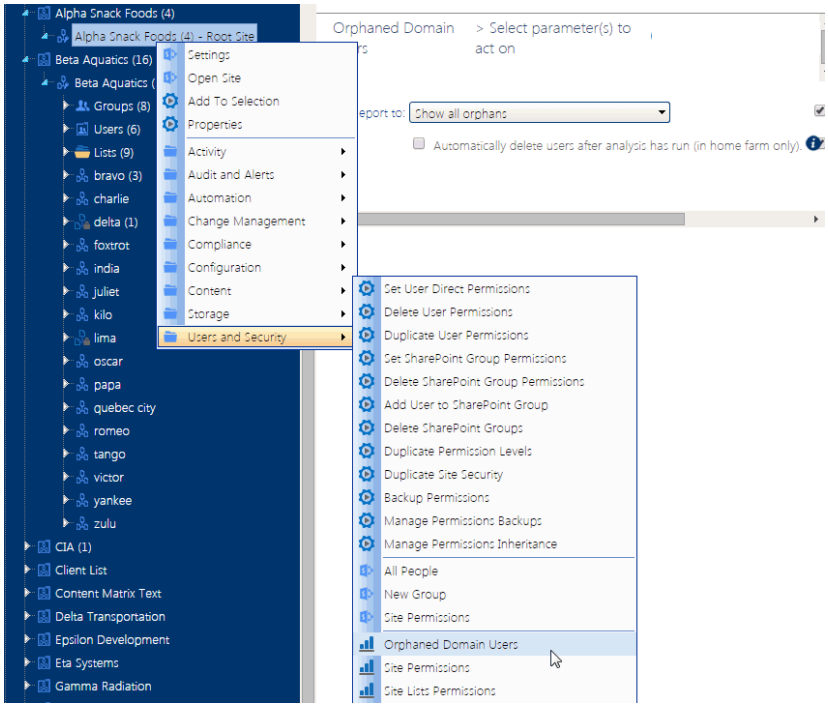
NOTE: You can also choose to have ControlPoint automatically submit a Delete User job to the ControlPoint scheduler. The job will be scheduled to run 30 minutes after the analysis has finished processing and will delete all users returned by the analysis. This is useful if, for example, you want to run the report on a large scope and/or on a recurring basis to keep your environment "cleaned up."

To run an Orphaned Domain User Report:

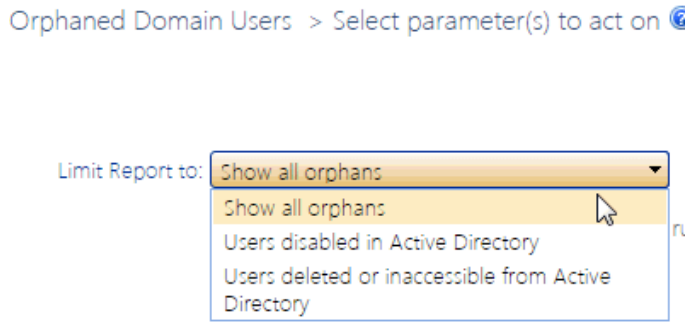
1 Select an object in the SharePoint Hierarchy which you believes contains "orphaned" users.

TIP: The identification of orphaned users can be an intensive process—especially the first time it is performed—as ControlPoint must query Active Directory for each user with permissions to a site, sometimes in more than one domain. The smaller the scope you choose, the more quickly the report will be completed. Therefore, it is recommended that for evaluation purposes you run the report on a limited scope. (Note that, if you use ControlPoint to run an Orphaned Domain Users on a regular basis in order to keep your environment "cleaned up," it will run increasingly more quickly.)

2 Right click and select Users and Security > Orphaned Domain Users.



Note that you have the option of limiting your results only to users who are either disabled in or have been deleted from Active Directory. For this scenario we will keep the default option, **Show all orphans**, so that both types of users will be included.



3 If you want to exclude objects whose permissions are inherited, make sure **Show unique permissions only** is checked.

TIP: This option is especially useful if your primary objective is to delete orphaned users, because your result set will be more targeted. (You can not delete permissions directly from an object that has inherited permissions.)

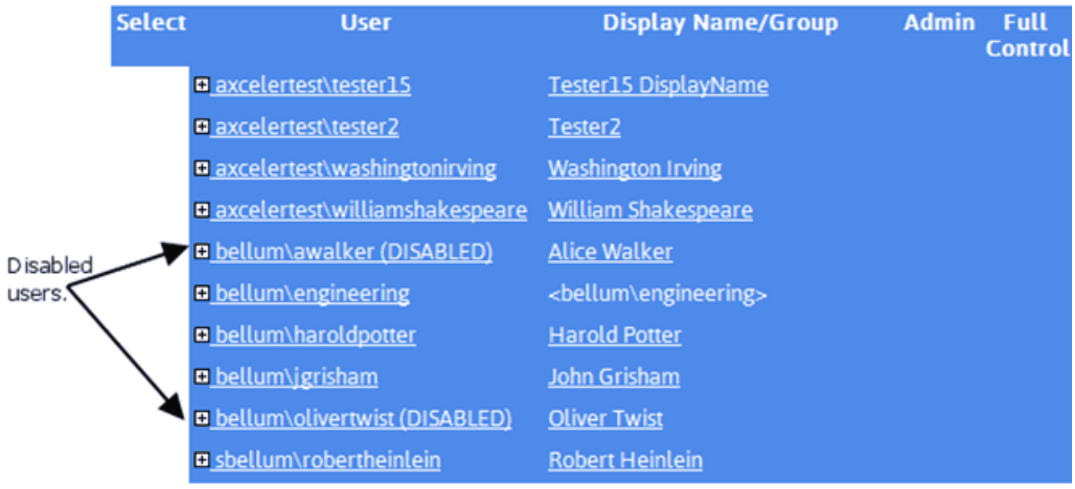
4 For this scenario, uncheck the **Display with results expanded** box.



5 Click **[Run Now].**

The top level of the analysis displays all of the "orphaned" users within the scope of your analysis.

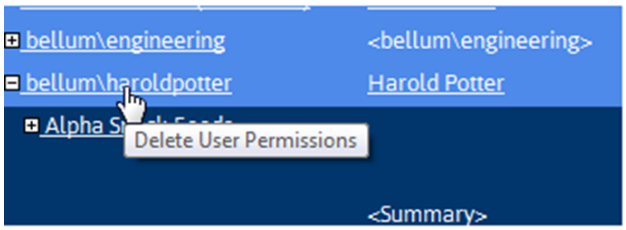
Note that users who are *disabled* in Active Directory are flagged.



Expand a User name to see more detail about that user's permissions.

User	Display Name/Group	Admin	Full Control	Design	Contribute	Read	Limited
bellum\awalker (DISABLED)	Alice Walker						
bellum\engineering	<bellum\engineering>						
bellum\haroldpotter	Harold Potter						
Alpha Snack Foods		SharePoint - 80 (Anonymous Access Enabled)			http://2010foundation/sites/alpha		
	<Summary>						
bellum\jgrisham	John Grisham						
Alpha Snack Foods		SharePoint - 80 (Anonymous Access Enabled)			http://2010foundation/sites/alpha		
	<Summary>			+			
	Marketing			+			

Note that, as an alternative to creating a scheduled job to delete all users identified as orphaned (as described previously), from analysis results you have the option of initiating a ControlPoint Delete User action for an individual user.



In this scenario you:

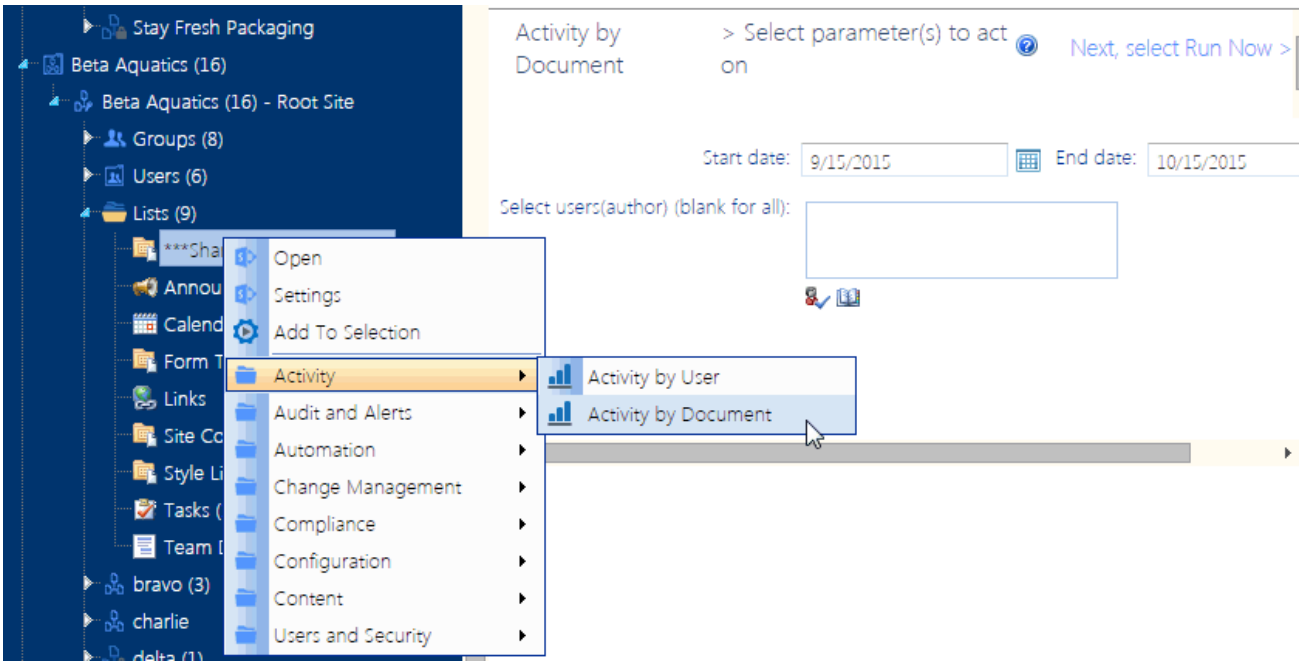
✓ Learned that you can initiate a follow-on ControlPoint action from analysis results.

Scheduling an Activity by Document Analysis

In this scenario, we will schedule an Activity by Document analysis to run at a designated time and have output posted to a SharePoint document library.

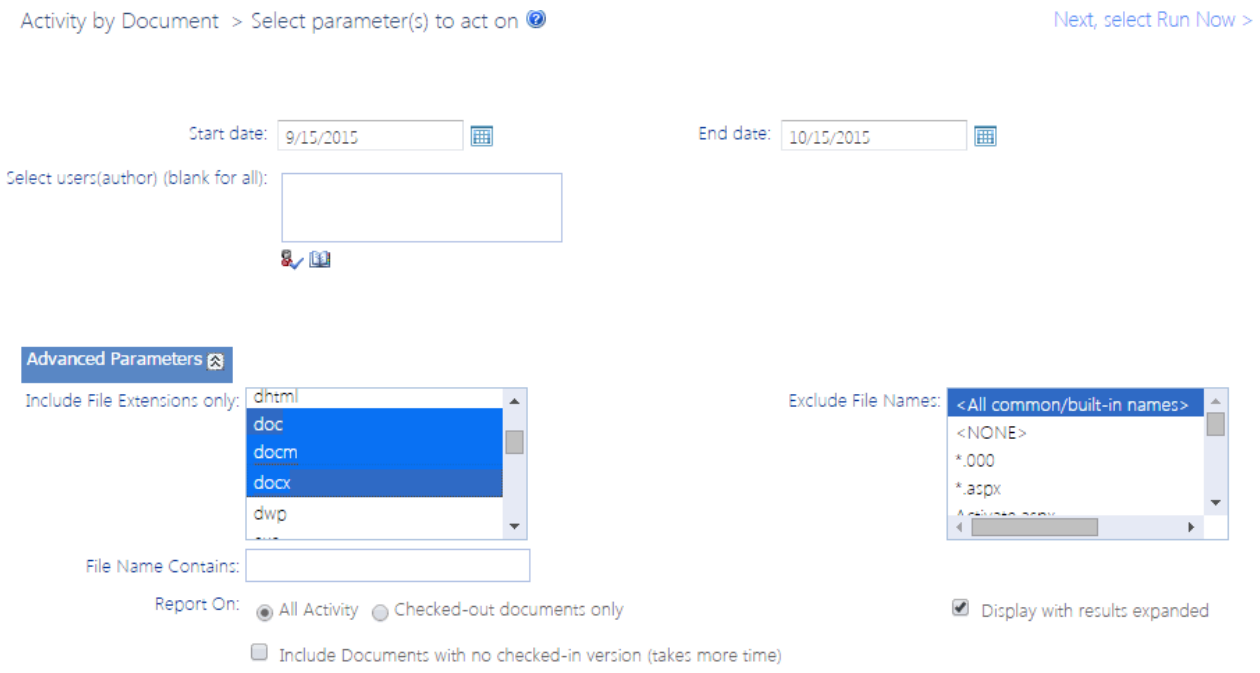
To schedule an Activity by Document Analysis:

1. Expand a site within the current site collection, then expand the Lists folder. Highlight a document library within that folder, right click and choose Activity > Activity by Document.



2 For Parameters:

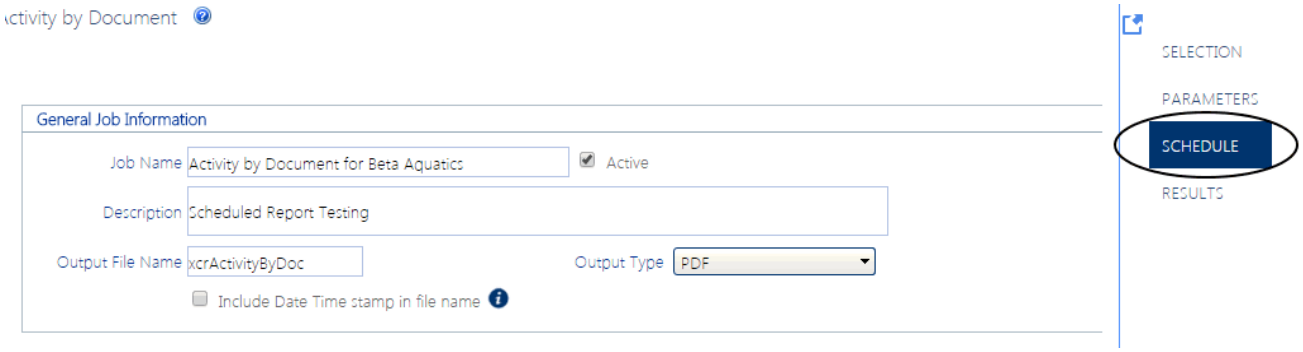
- Keep the default **Start date** and **End date**.
- Expand the Advanced Parameters section and from **the Include File Extensions only** list box, select the following (document) file types:
  - doc
  - docm
  - docx
  - pdf
- Check the **Display with results expanded** box.



1 Click the **Schedule** tab.

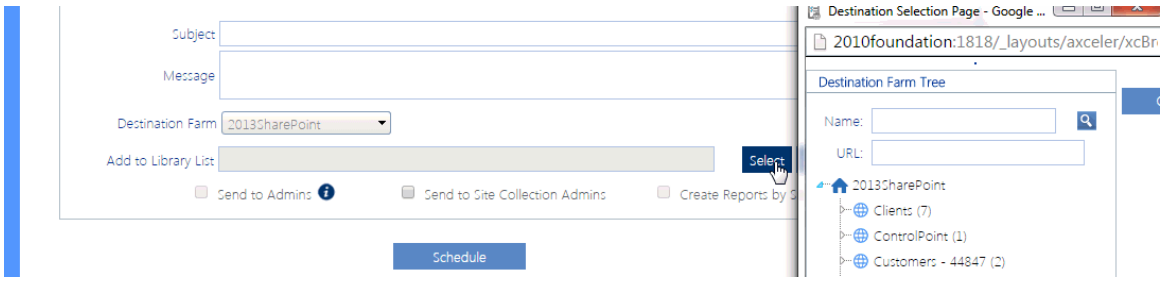
2 Enter a **Job Name** and **Description**.

3 Keep the default Output Type (PDF).



4 In the **Distribution Details** section, specify the SharePoint library to which you want to have analysis results posted as follows:

a) For **Add to Library or List**, click **[Select]** to display the Destination Selection Page.

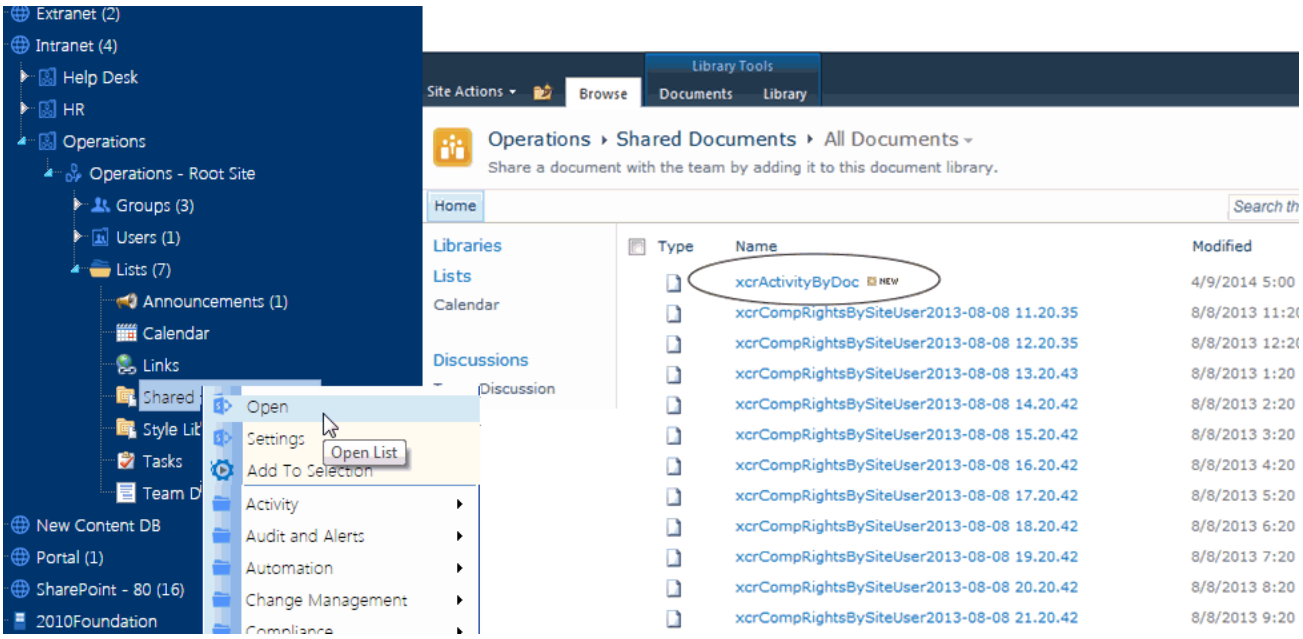


b) From the **Destination Farm** tree, drill down to the library where you want to post analysis results.

c) Highlight the library then click **[OK]**.

d) Click [**Schedule**].

You can view the status of the job via the Scheduled Monitor. Once the Status of the job is **Retired**, you can retrieve results from the document library you specified when you created the job. You can navigate to the library directly from the ControlPoint application interface.



In this scenario you:

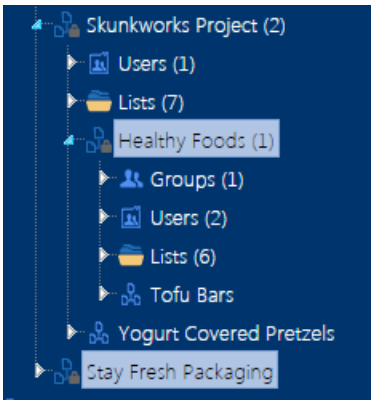
- ✓ Scheduled a ControlPoint analysis.
- ✓ Reviewed the status of the scheduled job in the Schedule Monitor.
- ✓ Opened a SharePoint library from the ControlPoint application interface.

Duplicating a User's Permissions and Backing Up Permissions

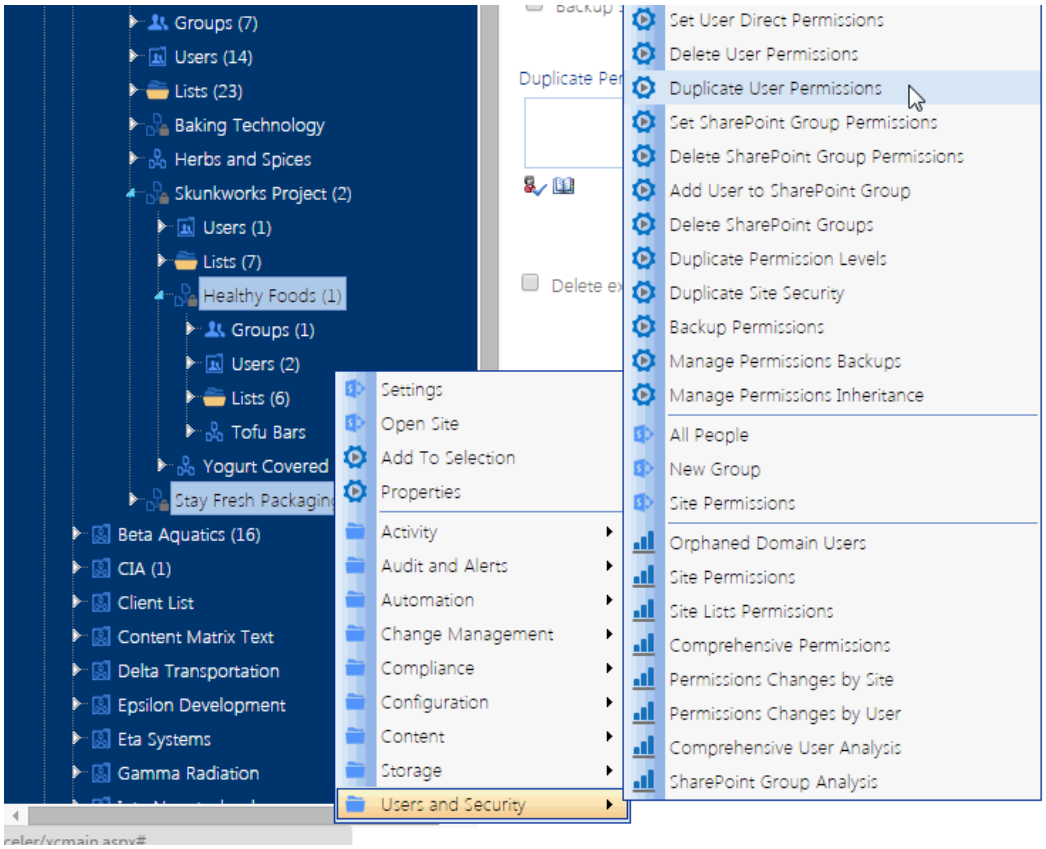
In this scenario, we will duplicate the permissions of a selected user to another user. This operation is useful if, for example, a user has left the company and you want to transfer that user's permissions to his/her replacement. We will perform this operation on two sites with unique permissions. As part of the operation, we will back up existing permissions so that we can restore them to their original state.

To Duplicate a User's Permissions:

1. In the SharePoint Hierarchy, select a site with unique permissions (identified by the icon) , then hold down the CTRL key to select an additional site.



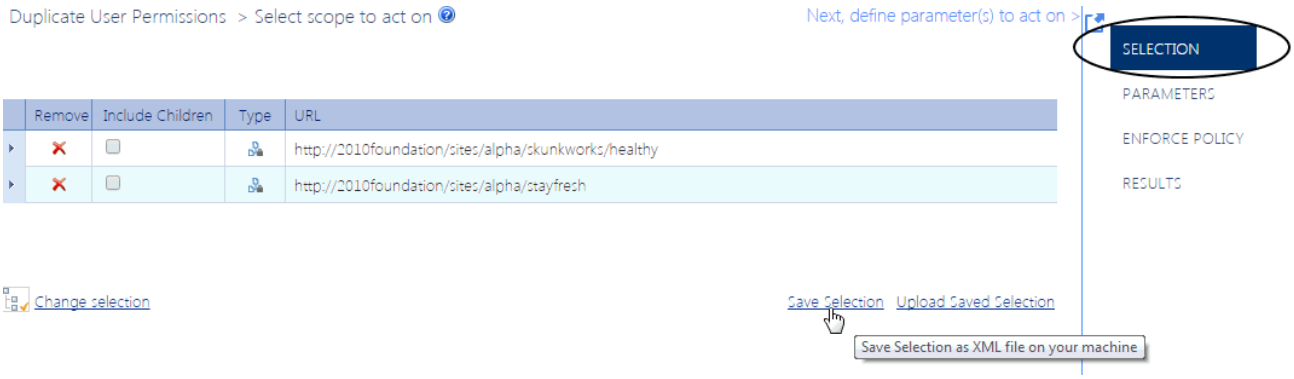
2. Right-click on either site and choose Users and Security > Duplicate User Permissions.



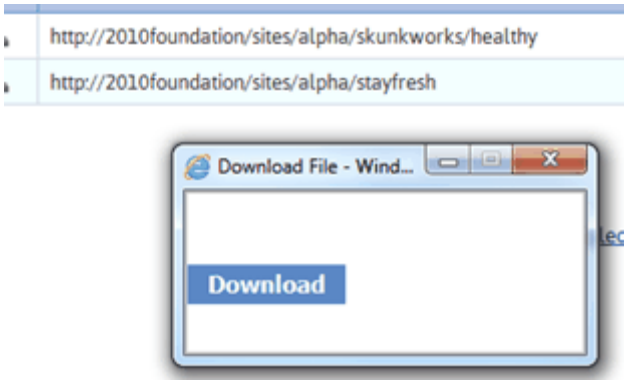
3. We will save our selection—so that we can quickly retrieve it when it comes time to restore permissions—as follows:

   a) Click the **Selection** tab.

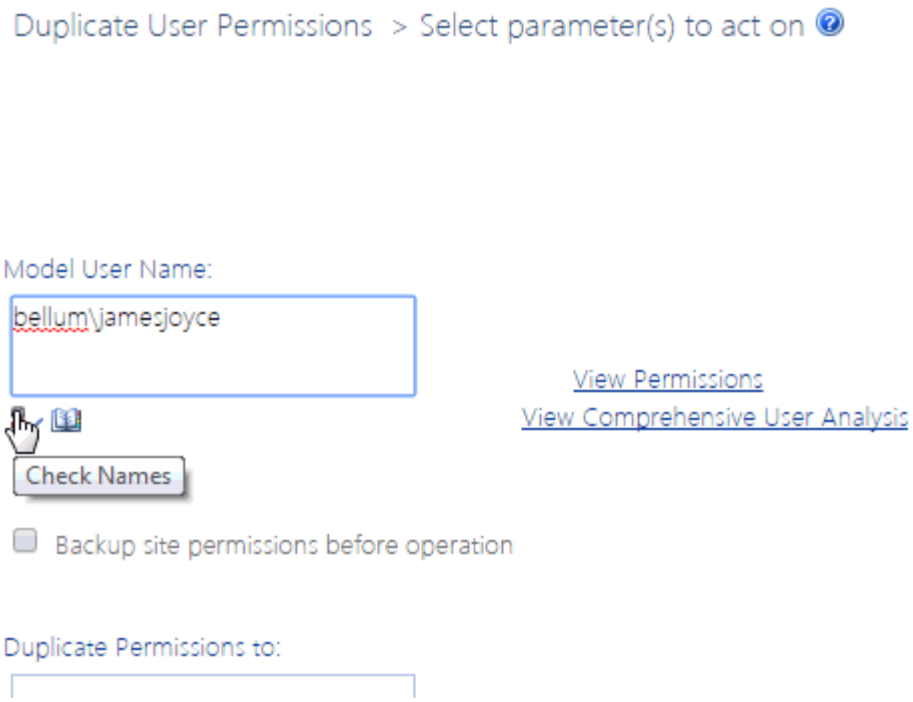
   b) Click the **Save Selection** link to display the Download File tab.



   c) Click **[Download]** then save the file to your desktop.



4. Click the **Parameters** tab.
5. To select the user whose permissions you want to duplicate:
   d) In the **Model User Name** field, enter a *full* user account name (for example, *domain\username* or *service provider:username*):
   e) Click the Check Names icon ( ) or press **[Ctrl] k** to validate the user name.



   f) If you want to review the permissions that the model user has for the selected scope, click the **View Permissions** link to generate a real-time Site Permissions analysis.

6 Check the **Backup site permissions before operation** box.



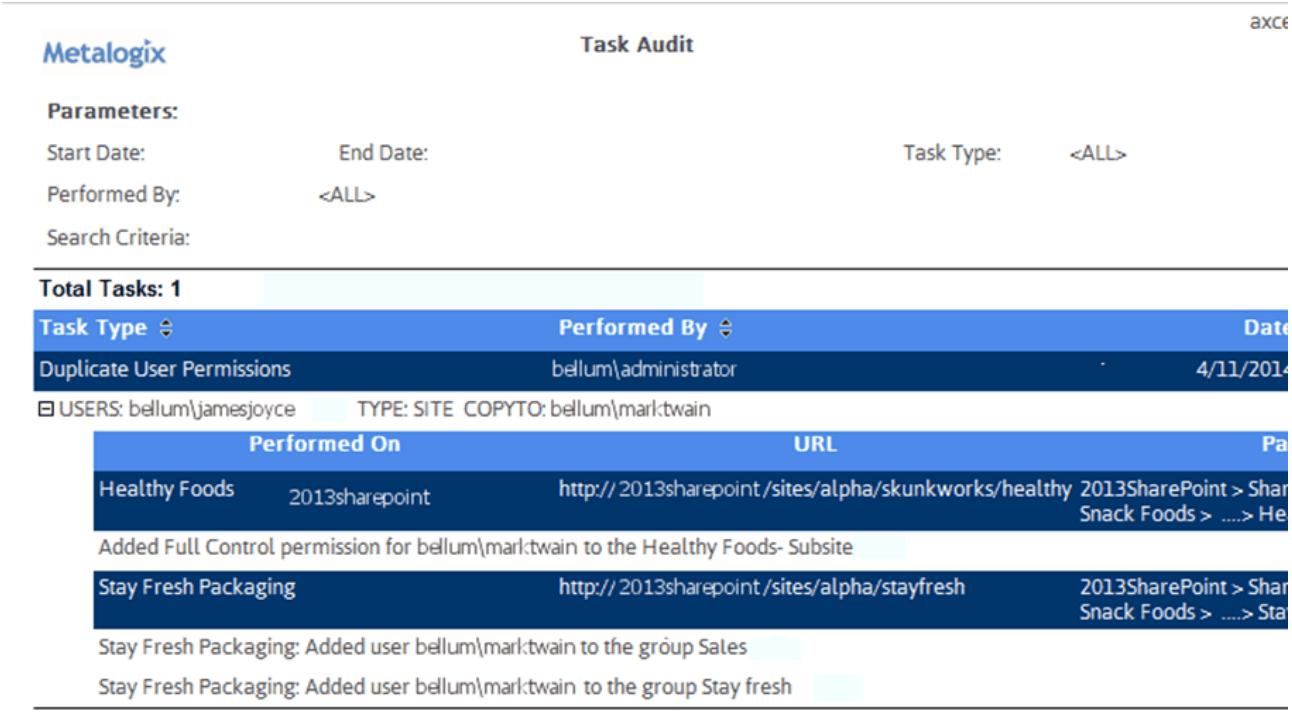
This option will enable you to restore the permissions to what they were before the operation.

7 For Duplicate Permissions to, enter the name of each target users using the method described in Step 2.



8 Click **[Run Now]**.

The progress of the operation is recorded at the top of the workspace. When completed, a ControlPoint Task Audit, which details the operation, is generated. (You can also review Task Audits for past operations via the Manage ControlPoint > ControlPoint Task Audit menu option.)



(At this point, if you want to verify that the permissions have been added, you can run a real-time Site Permissions analysis for just the target users.)

In this scenario you:

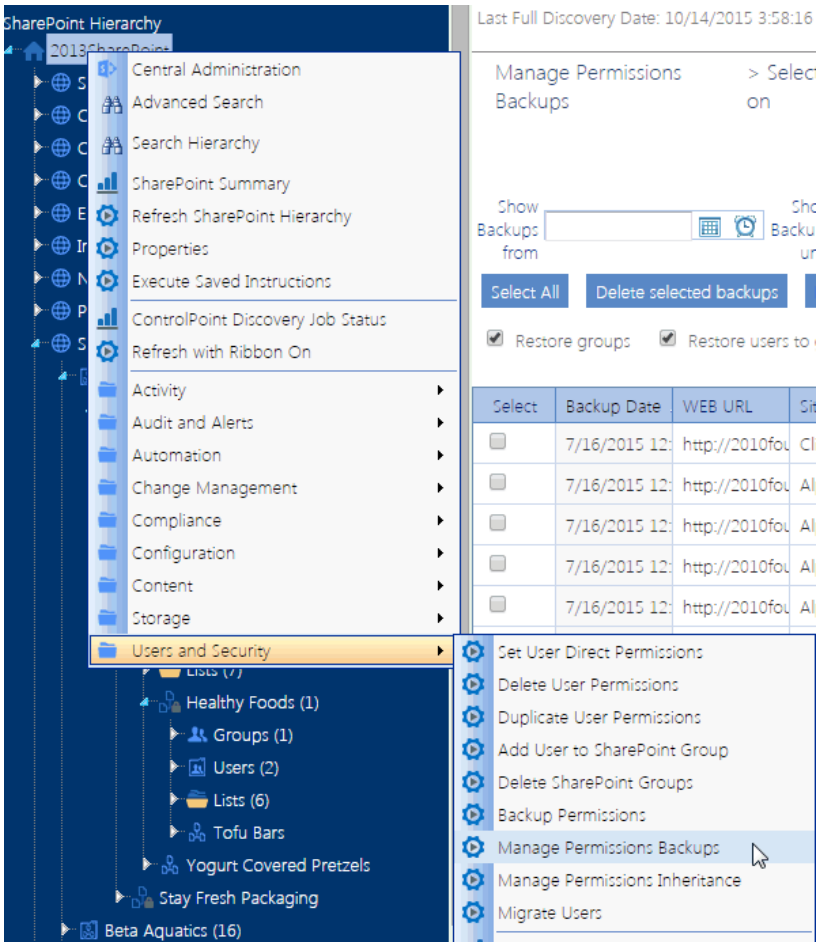
- ✓ Initiated a ControlPoint operation for multiple objects.
- ✓ Saved a selection for reuse.
- ✓ Performed an action on specific users.
- ✓ Backed up site permissions.
- ✓ Generated a ControlPoint Task Audit

Restoring Site Permissions

In this scenario, we will restore permissions from the backups we created before running the Duplicate User Permissions operation.

To restore site permissions:

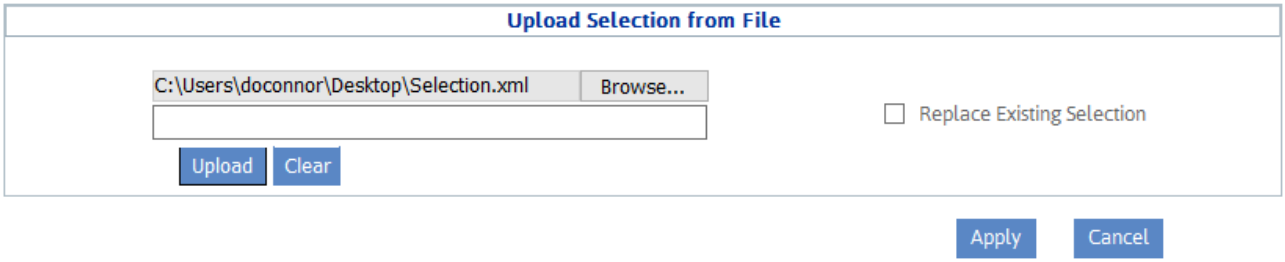
1. Select any object within the SharePoint Hierarchy and choose Users and Security > Manage Permissions Backups.



2. Retrieve the saved selection we used for the Duplicate User Permissions operation as follows:
   a) Click the **Selection** tab.
   b) Click the **Upload Saved Selection** link.

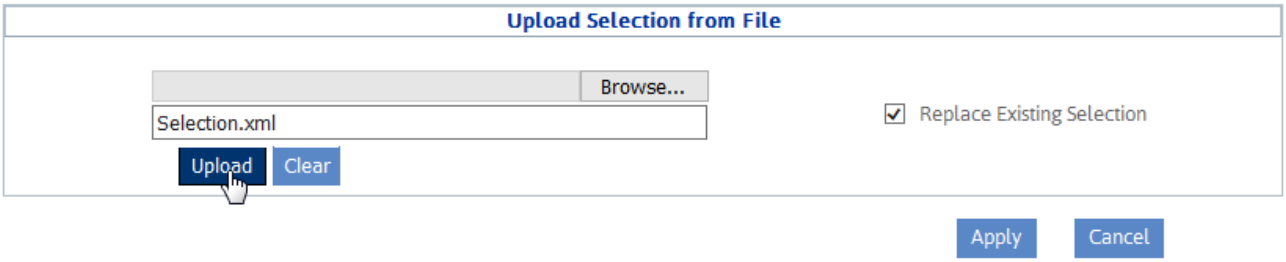


c) Click **[Browse]** and retrieve the file from your desktop.



d) Check the **Replace Existing Selection** box**.**

e) Click **[Upload].**

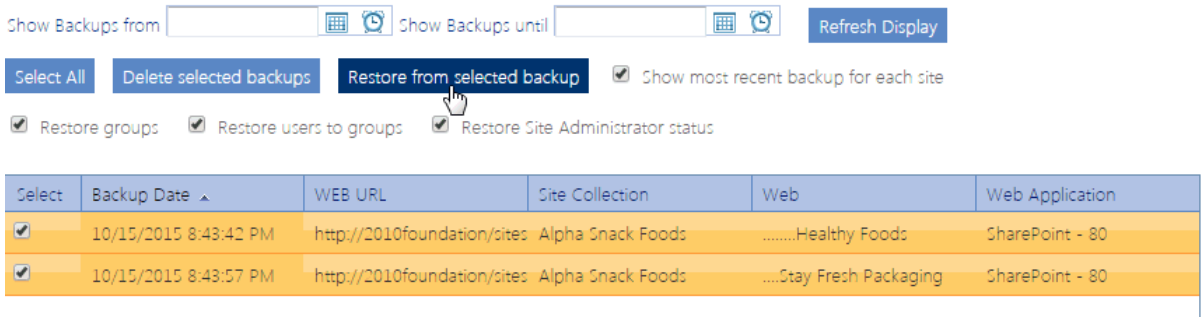


f) Click **[Apply]**.

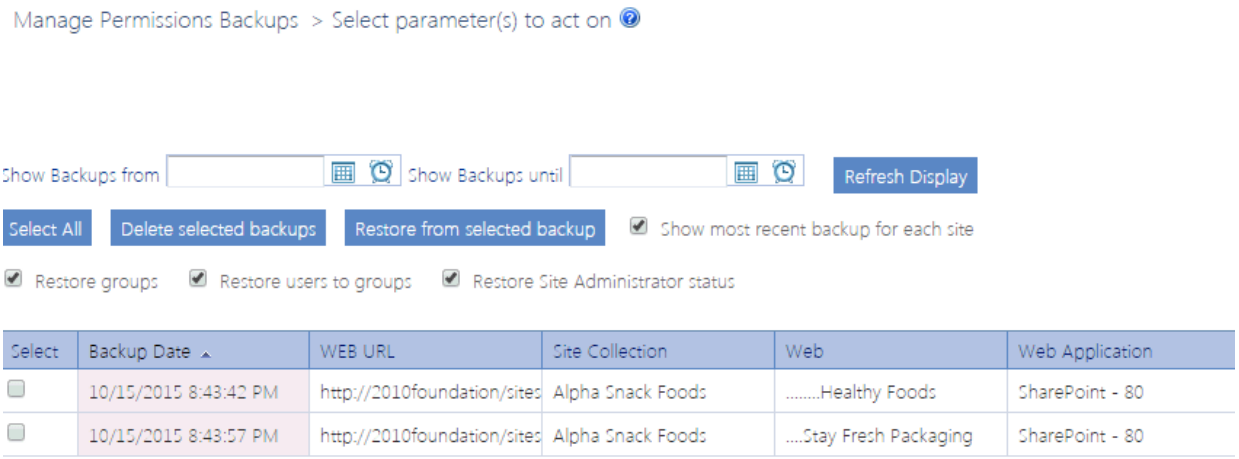
1 Return to the Parameters tab.

2 Click **[Refresh Display].**

Note that a separate backup was created for each individual site within the selected scope.



3 To restore permissions for all sites, click **[Select All]** then **[Restore from selected backup]**.



In this scenario you:

- ✓ Reused a saved selection.
- ✓ Restored permissions from a backup.