ControlPoint
for Office 365

User Guide

VERSION 7.6

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Technical Support

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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.

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Getting Started with ControlPoint

Metalogix ControlPoint is a Web-based tool that runs as a SharePoint application and facilitates the management of multiple SharePoint objects (Web applications, site collections, sites, lists, libraries, and items) and users within a SharePoint farm. In addition to enabling you to navigate throughout a SharePoint farm using a single interface, ControlPoint offers a number of powerful search and data analysis tools as well as value-added features not currently available in native SharePoint.

Launching ControlPoint Online

Use one of the following options to launch the ControlPoint Online application.

To log into ControlPoint you must be a Site Collection Administrator for the site collection that hosts the ControlPoint Online Configuration Site.

From your workstation browser:

Enter **http://***<machine_name>*:*<port_number>*/**_layouts/axceler/xcmain.aspx**.

(The server machine name is the name of the machine on which the ControlPoint client application is installed. 2828 is the default port number for the MetalogixOnline application pool.

NOTE: If you are a ControlPoint Application Administrator 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 Online application was installed.

From the machine on which ControlPoint Online has been installed:

1 Log into the server using the account that was designated as the ControlPoint Service Account at the time the ControlPoint Online application was installed.

2 From the Windows Start menu, choose Programs > Metalogix > ControlPoint_Online> Launch ControlPoint Online Application.

The ControlPoint Configuration Site

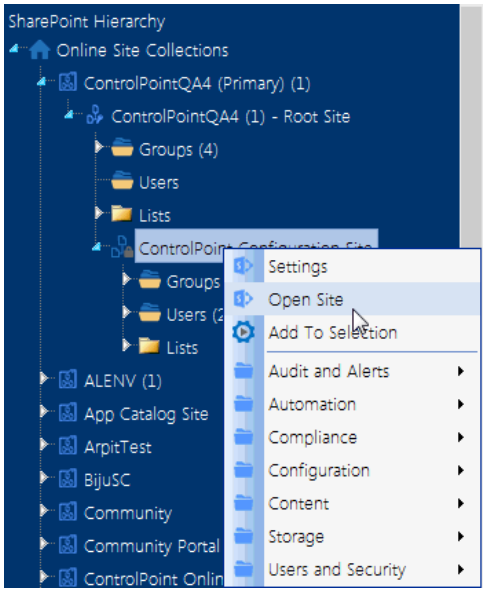
The ControlPoint Configuration site is a SharePoint site that is integral to your ControlPoint Online installation.

This site is used primarily for managing ControlPoint users and permissions and configuring menus that display in the ControlPoint left navigation pane. To manage groups you either need direct rights to manage the groups or be a site collection administrator.

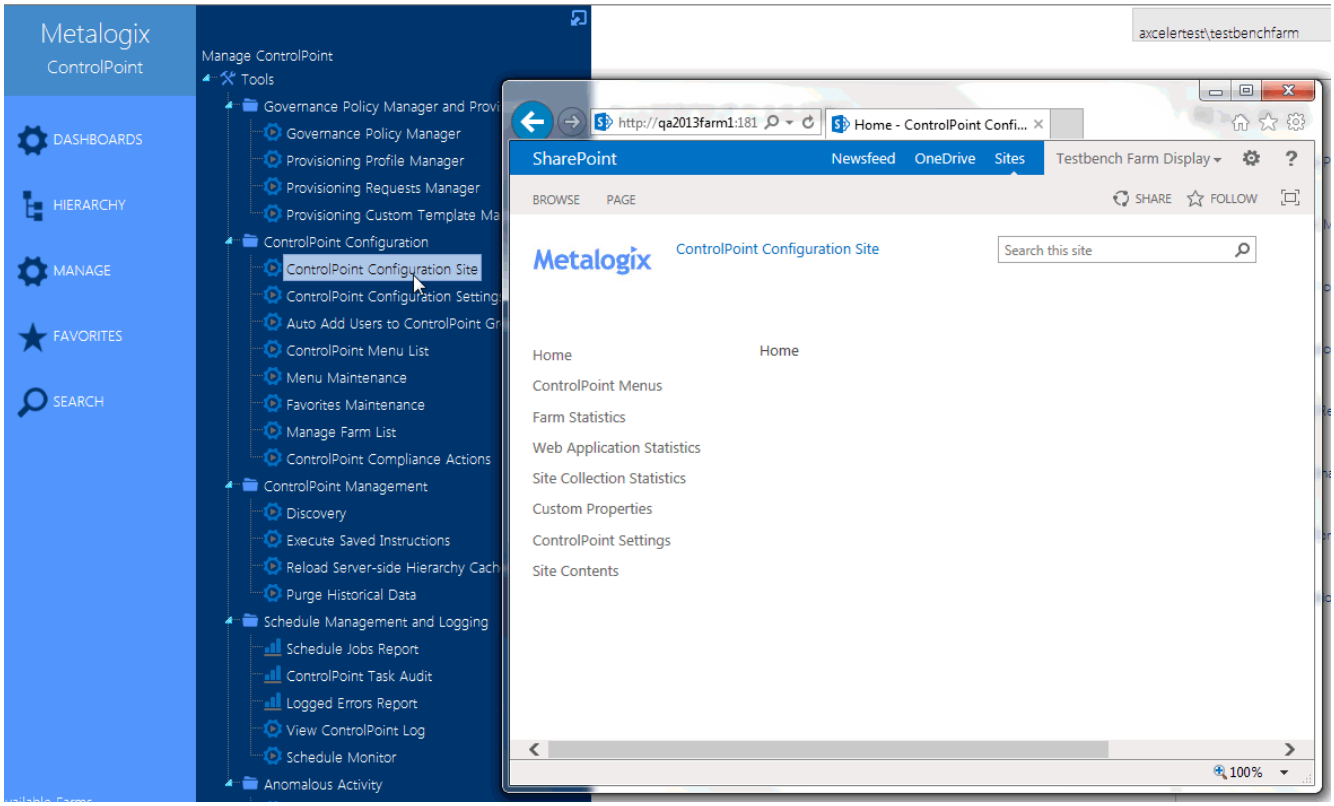
If you are a site collection administrator for the ControlPoint Configuration site collection, you can access the site's administration pages and ControlPoint value-added features from the SharePoint Hierarchy panel. See "ControlPoint Security" for more detail.

If you have sufficient permissions (regardless of whether you are the site collection administrator), you can access the site's home page:

- from the SharePoint Hierarchy panel, by right clicking the ControlPoint Configuration Site - Root Site and choosing Open Site.



- from the Manage ControlPoint panel by choosing ControlPoint Configuration > ControlPoint Configuration Site.



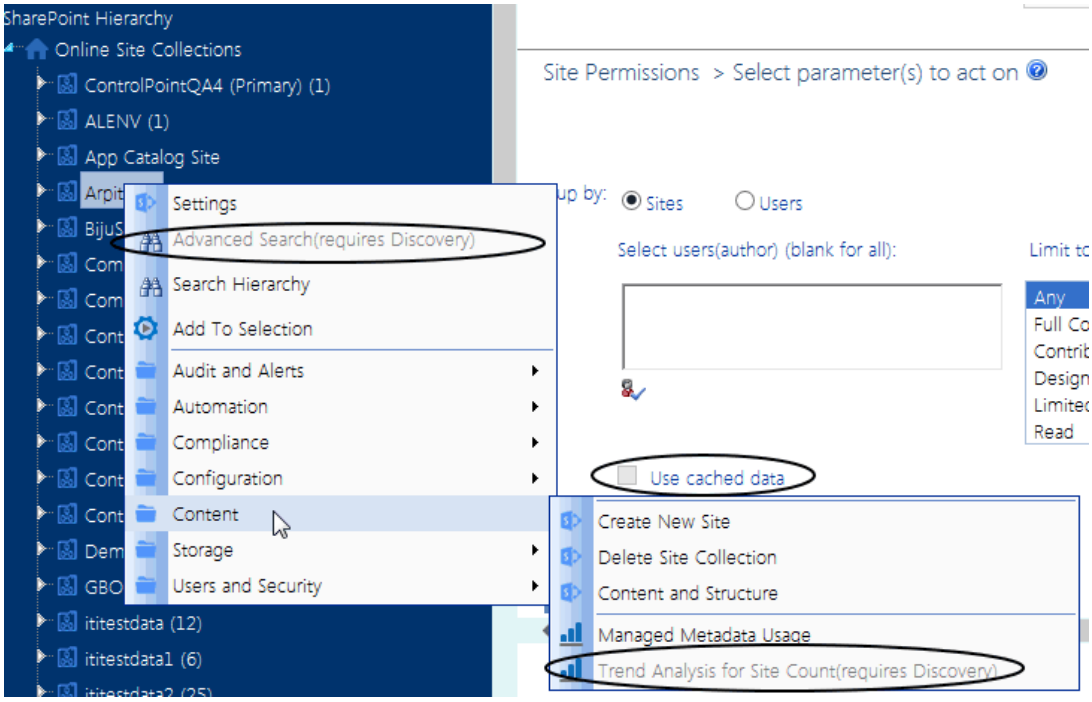
Using Discovery to Collect Information for the ControlPoint Database Cache

Discovery is a background task that collects information and stores it in the ControlPoint Services (xcAdmin) database cache for use in ControlPoint data analysis and reporting.

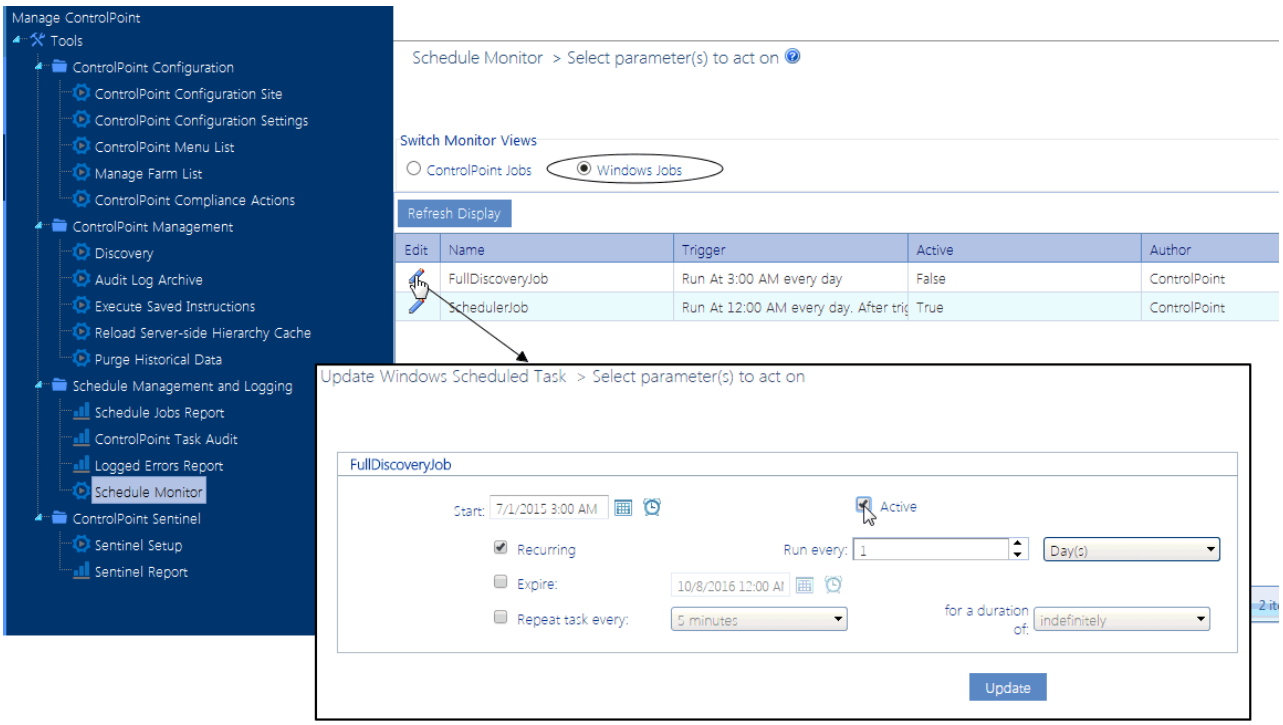
Nightly Full Discovery

As part of the initial configuration of ControlPoint Online, the nightly Full Discovery tasks is created in Windows Task Scheduler on the server where ControlPoint Online is installed.

If ControlPoint was installed for the first time with version 5.3 or higher, the nightly Discovery job is disabled by default, as are operations and parameters that rely on cached data collected by Discovery.



You can activate the Nightly Full Discovery task and change the default start time and/or frequency via the Schedule Monitor Windows Jobs view.



See also Updating Full Discovery and Scheduler Windows Jobs

Running Discovery from the ControlPoint Application Interface

A manual Discovery can also be run from the ControlPoint application interface, which can be useful:

- when you want to update the ControlPoint cache for specific site collections only without having to run a more resource-intensive Full Discovery.
- for site collections that have been excluded from the Full Discovery process. For example, exceptionally large site collections can greatly increase the Full Discovery run time. Site collections containing such sites may be excluded from the Full Discovery process and scheduled to run less frequently. Details on how to exclude Web applications and/or site collections from Full Discovery can be found in the *Metalogix ControlPoint for Office 365 Administration Guide*.

NOTE: You can run Discovery only on site collections for which you are a Site Collection Administrator.

By default, operations that rely on data collected by Discovery are disabled. Once Discovery is run, these operations can be enabled via the ControlPoint Setting **DiscoveryEnabled**. Refer to the *ControlPoint for Office 365 Administration Guide* for details.

To run Discovery from the ControlPoint application interface:

1 From the Manage ControlPoint panel choose ControlPoint Management > Discovery.

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

If you want run a...	Then ...
Full Discovery	do not modify the Selection section.
	REMINDER: Only site collections for which you have Site Collection Administrator privileges will be included in the scope of the action.
Partial Discovery	select the site collection(s) on which you want to run Discovery, using the procedure for Changing Your Selection.
	NOTE: The Partial Discovery will include all site collections that you explicitly select, regardless of whether they have been excluded from the nightly Full Discovery process.

3 Either:

- run the Discovery immediately (by clicking the [**Run Now**] button).

OR

- schedule the Discovery to run on a one-time or recurring basis (see Scheduling a ControlPoint Operation).

The ControlPoint Interface

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

Whenever you log into ControlPoint or refresh your browser, the right pane displays a dashboard which includes:

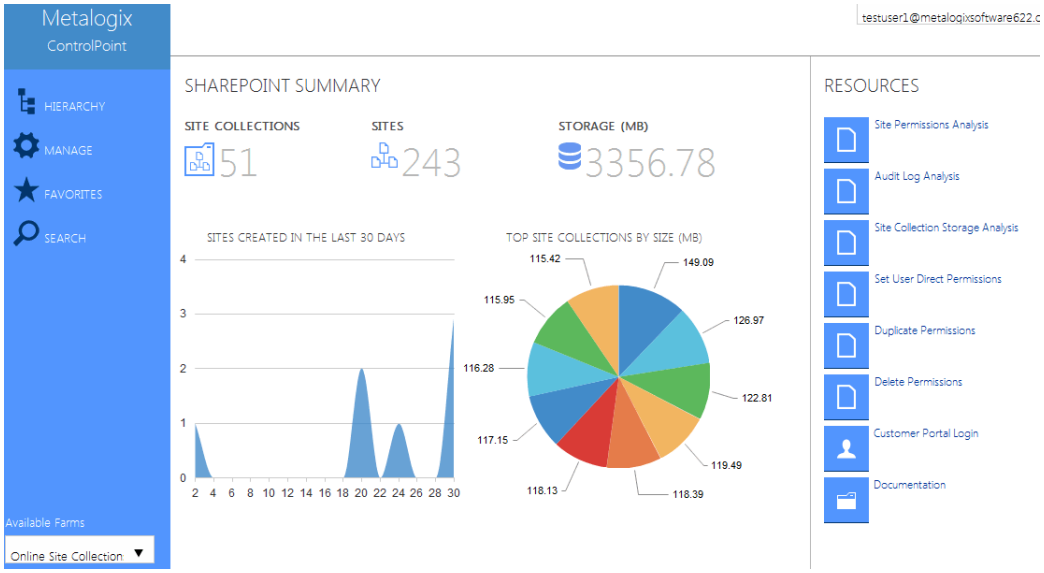
- statistical information about your SharePoint farm

NOTE: This information is updated whenever you log in, as well as whenever the ControlPoint application pool is restarted. Data stays cached for sixty minutes. If you log in again after sixty minutes, the data is refreshed.

Data	Source
SharePoint Summary	If Discovery has been run, the data is taken from the ControlPoint Service (xcAdmin) database; if Discovery has not been run, the data is taken directly from SharePoint.
Sites Created in the Last 30 Days	The data is taken from SharePoint Search engine. NOTE: If for some reason Search engine is not configured to provide the data, the chart will not display.
Top Site Collections by Size	The data is taken from the SharePoint Search engine. ControlPoint security trimming applies. That is, you will see the top ten site collections that you have access to regardless of whether they have been configured for ControlPoint.

- quick links to some of ControlPoint's most powerful functionality:
  - the Site Permissions Analysis, which lets you examine the permissions that users have for selected sites
  - the Audit Log Analysis, which lets you view selected events written to the SharePoint Audit Log
  - the Site Collection Storage Analysis, which provides storage statistics for selected site collections
  - the Set User Direct Permissions action, which lets you grant users direct permissions to one or more SharePoint sites, lists/libraries, and/or items
  - the Duplicate User Permissions action, which lets you copy the permissions of one SharePoint user to one or more others
  - the Delete User Permissions action, which lets you delete SharePoint user permissions from one or more site collections/sites
- links to the Metalogix Customer Portal as well as ControlPoint user documentation on the Metalogix website.

If a ControlPoint operation is launched from the dashboard,you must select the object(s) on which to perform the operation using the Change Selection option.



Icons

ControlPoint uses the following icons to identify items that display in the left navigation pane.

Icon	Description
	The SharePoint virtual **Farm**
	A ControlPoint **Search** feature See Also Searching for SharePoint Sites.
	A grouping of **SharePoint items** (such as lists, groups, or users)
	A SharePoint **Site collection** NOTE: Icons for which you are not a site collections administrator will appear grayed out.
	A Site collection's **root site**
	A SharePoint **Site** or **Subsite** whose permissions are **inherited** from its parent

Icon	Description
	A SharePoint **Site** or **Subsite** whose permissions are **unique** (or not inherited)
	The node under which **OneDrive (Personal) Site Collections** are displayed.
	A **OneDrive (Personal) Site Collection** To optimize SharePoint Hierarchy load time, OneDrive site collections are excluded by default. To use ControlPoint to manage these site collections, ControlPoint Site Collection Administrators must explicitly choose to include them. (Keep in mind that doing so may significantly increase SharePoint Hierarchy load time, especially if there are a large number of OneDrive site collections in your environment.) Contact Metalogix Support for details.
	A SharePoint **List** NOTE: Variations of this icon are used to represent different types of lists (Document Libraries, Calendars, Announcements, and so on).
	SharePoint **Users**
	SharePoint **Groups**
	A **ControlPoint** value-added **action**
	A **SharePoint page**
	A ControlPoint value-added **(Visual Analytics) analysis**.

ControlPoint Left Navigation Panels

The standard ControlPoint left navigation frame consists of the following tabs:

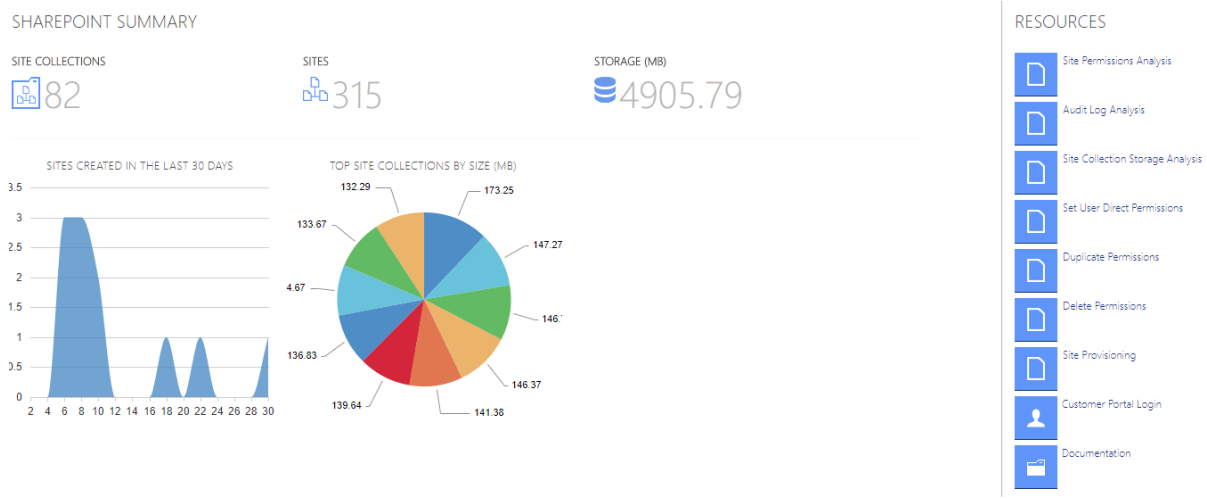
- **Hierarchy**
- **Manage**
- **Search Hierarchy**

Dashboards

ControlPoint dashboards provide graphical overviews of targeted data in your SharePoint environment.

SharePoint Summary Dashboard

The SharePoint Summary dashboard contains the following information:



- statistical information about your SharePoint farm

NOTE: This information is updated daily, when the ControlPoint application pool is restarted, typically after the ControlPoint Scheduler timer job has run. If the Scheduler timer job is disabled, data retrieval begins when the first request is made to ControlPoint.

Statistical information comes from the following sources.

Data	Source
SharePoint Summary	If Discovery has been run, the data is taken from the ControlPoint Service (xcAdmin) database; if Discovery has not been run, the data is taken directly from SharePoint.
Site Collections Created in the Last 30 Days	The data is taken from SharePoint Search engine. NOTE: If for some reason Search engine is not configured to provide the data, the chart will not display.
Top Site Collections by Size	The data is taken from SharePoint. ControlPoint security trimming applies. That is, for each site collection to which the logged in user does not have access, the chart displays the message

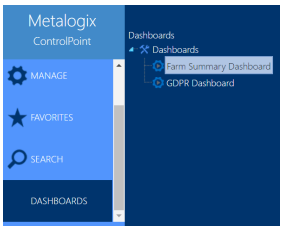
Data	Source
	"Site Collection not available," but shows the size.

- 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.

If a ControlPoint operation is launched from the dashboard, you must select the object(s) on which to perform the operation using the Change Selection option.

To access the SharePoint Summary dashboard:

From Dashboards panel, choose Dashboards > Farm Summary.



GDPR Dashboard

If your organization is subject to General Data Protection Regulation (GDPR) compliance, the GDPR dashboard provides an overview of how your organization is using ControlPoint to manage regulation-sensitive areas of your SharePoint environment.

GDPR dashboard statistics are populated based on usage of the following functionality:

- SharePoint Audit Settings
- Sensitive Content Manager
- ControlPoint Sentinel

To access the GDPR Dashboard:

From the Dashboards panel, choose Dashboards > GDPR Dashboard.

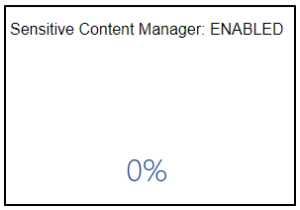
The GDPR Dashboard displays the following information:

- the **Number of Site Collections** in your tenant.
- If your organization uses Sensitive Content Manager:
  - **Number of Active PII Audit Reports** represents the number of site collections that have a Sensitive Content Manager job scheduled to be scanned, or have at least one scan job currently running.

- **Sensitive Objects Scanned in SharePoint** shows the number of documents determined to contain sensitive content compared to all items scanned within a given month.
- the **Sensitive Content Manager: ENABLED** donut graph shows the following percentages:
  - The **light blue** section represents the percentage of site collections containing content for which at least one scan has been performed PLUS site collections that have at least one Active PII Audit Report.

    NOTE: This percentage is also the number that displays inside the donut graph.
  - The **medium blue** section represents the percentage of site collections containing content for which at least one scan has been performed.
  - the **dark blue** section represents site collections that have had no Sensitive Content Manager activity.

  If you have never used Sensitive Content Manager (or your ControlPoint license does not include it), this section will always display 0%.



- If your organization uses ControlPoint Sentinel, **Anomalous Events Detected** represents the number of deviations in document views and downloads from individual users' "typical" daily usage patterns
- **Sites with Auditing Enabled** represents the percentage of site collections within your SharePoint tenant for which *all* audit settings are enabled.

  NOTE: If *any* of the site collection audit settings are not enabled the site collection will not be counted in this percentage.

SharePoint Hierarchy

When Hierarchy is selected in the left navigation frame, you can access the core functionality for managing your SharePoint environment. The navigation tree is designed so that you can visualize the hierarchy of the farm, including:

- the site collections, sites, and subsites managed by ControlPoint Online
- within each site, its associated lists, groups, and individual users.

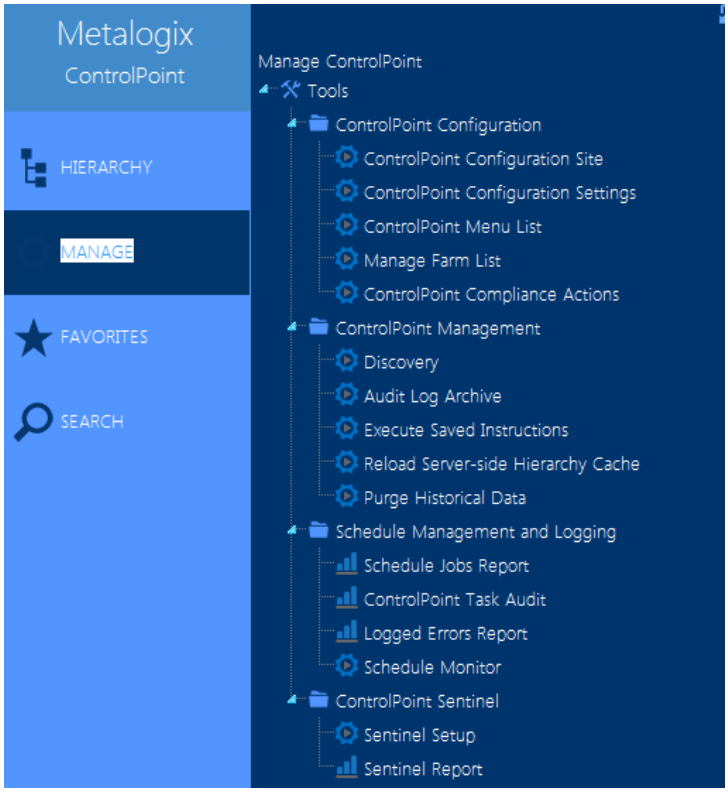
NOTE: Only site collections for which you are a Site Collection Administrator are visible.

From most levels of the hierarchy you can invoke a right-click menu and access SharePoint pages and ControlPoint value-added features.

Manage ControlPoint

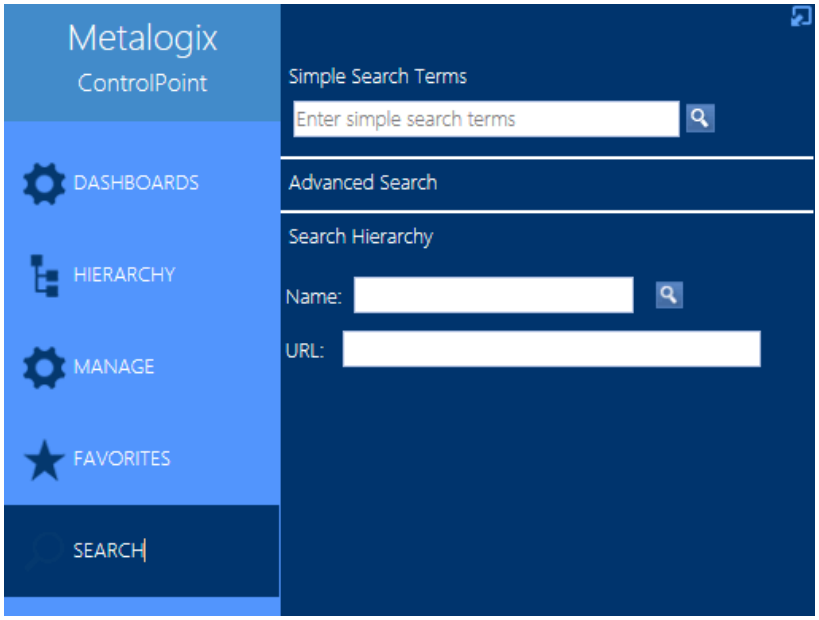
When the Manage tab is selected from in the left navigation frame you can access:

- tools for executing and reporting on ControlPoint operations, and
- depending on your permissions, tools for Managing ControlPoint Configuration and Permissions.



Search

When Search is selected in the left navigation frame, you can easily locate site collections, sites, and subsites within your SharePoint Farm.



You can access this menu directly or from any of the Search Hierarchy links within the SharePoint Hierarchy panel. For more detail, see Searching for SharePoint Sites.

Displaying ControlPoint Menus in a Ribbon

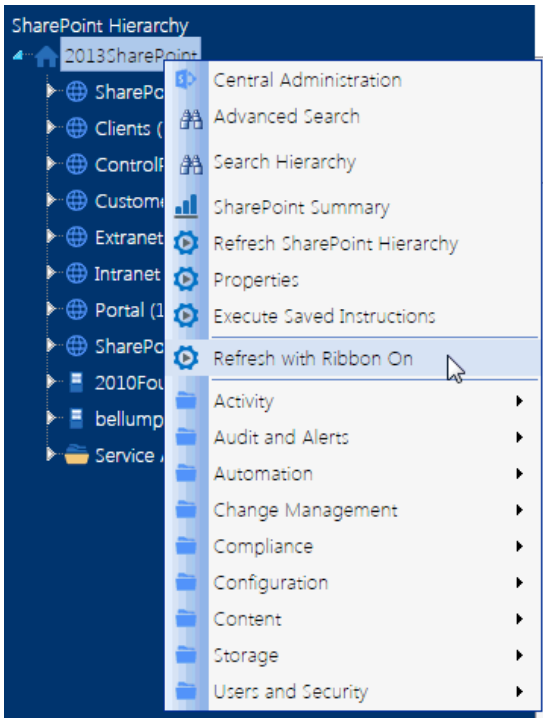
By default, ControlPoint is configured to allow menus to be displayed as right-click context menus in the left navigation frame and ribbon-style menus in the application header. (ControlPoint Application Administrators can, however, configure the application to allow only one or the other.)

NOTE: Whenever you change how menus are displayed, the ControlPoint application will automatically restart.

To display (hide) the ribbon:

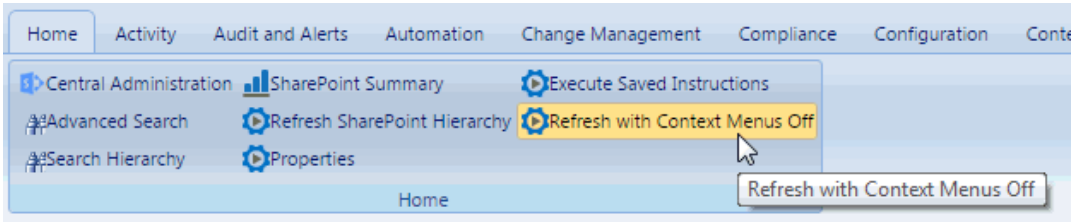
If you are using Internet Explorer 8 or 9, turn Compatibility View OFF to ensure the ribbon will render properly.

From the SharePoint Hierarchy farm node, right-click and choose Refresh with Ribbon On (Off).



To display (hide) context menus:

From the ribbon Home tab, choose Refresh with Context Menus On (Off).



The ControlPoint Application Header

The bottom of the left navigation frame contains:

- The **Available Farms** drop-down that identifies the farm currently being managed and, in a multi-farm installation, lets you select a different farm to administer.

  Note that only farms that share the same ControlPoint Service database will be available from the drop-down.

  NOTE: Initially, the list includes the names of all farms that have been configured to share the same ControlPoint Service database. However, after the first server interaction (for example, when a ControlPoint action or analysis is initiated), the list may be trimmed to display only farms that are currently active.

- Access to information **About** ( ) the ControlPoint application, including version information
  - 

NOTE: **Last Patch** reflects the date of the last software update provided by Metalogix. **Last Install** reflects the last full build of that version released by Metalogix.

- A link to ControlPoint online **Help** ( ).

Opening a ControlPoint Workspace in a New Window or Tab

You can create a dedicated workspace for a particular task by opening it in a separate window or tab (depending on your browser version). This enables you to navigate to other areas of the ControlPoint interface without having to navigate *away* from a task in progress. You can even create workspaces to manage multiple ControlPoint operations simultaneously.

NOTE: You invoke the workspace after you have selected a function, but before you have entered data, taken an action, or displayed results. (That is, the new workspace will only display a function in its initial state.)

To open a ControlPoint workspace in a new window or tab:

1 Select the object(s) on which you want to perform an operation.

2 Choose the applicable menu option.

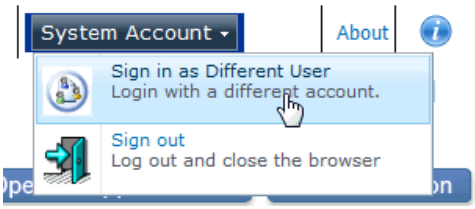
3 From the ControlPoint application header, click the Clone Work Area icon ( ).

Signing Into ControlPoint as Another User

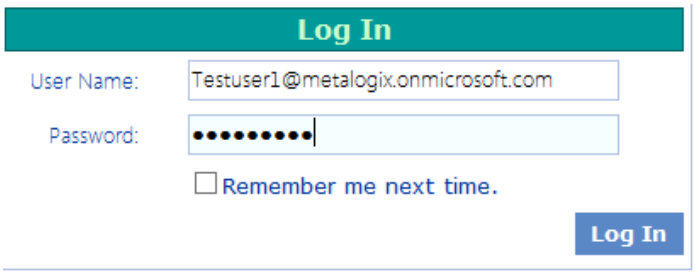
If you have sufficient permissions, you can sign into ControlPoint as a different user, with the access levels and menu permissions that have been set up for that user on the ControlPoint Configuration site. This feature is useful if you want to log into ControlPoint from a workstation other than your own.

To sign into ControlPoint as a different user:

1 From the user name drop-down in the ControlPoint application header, choose Sign in as Different User.



2 Enter the new log in credentials in the Connect to [*server*] dialog.



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

If you ...	Then ...
check **Remember my password**	the new account credentials will: • display in the ControlPoint application header, and • be used for: ▪ all ControlPoint functionality (searches, actions, and analyses), and ▪ SharePoint pages accessed from within ControlPoint. WARNING: If you use this option to log into another user's workstation, remember to ensure that the password is properly cleared when you are finished, either by logging in as the workstation user with "Remember my password" checked, or by using browser functions to clear saved passwords.
leave **Remember my password** unchecked	• the new account credentials will: ▪ display in the ControlPoint application header, and ▪ be used for all ControlPoint functionality (searches, actions, and analyses), and

If you ...	Then ...
	• the account credentials associated with the original workstation login may continue to be used for SharePoint pages accessed from within ControlPoint. If you use this option and want to access a SharePoint page under the new account credentials, you can, of course, use the Sign In as a Different User option from within the SharePoint page.

Selecting Objects on Which to Perform a ControlPoint Operation

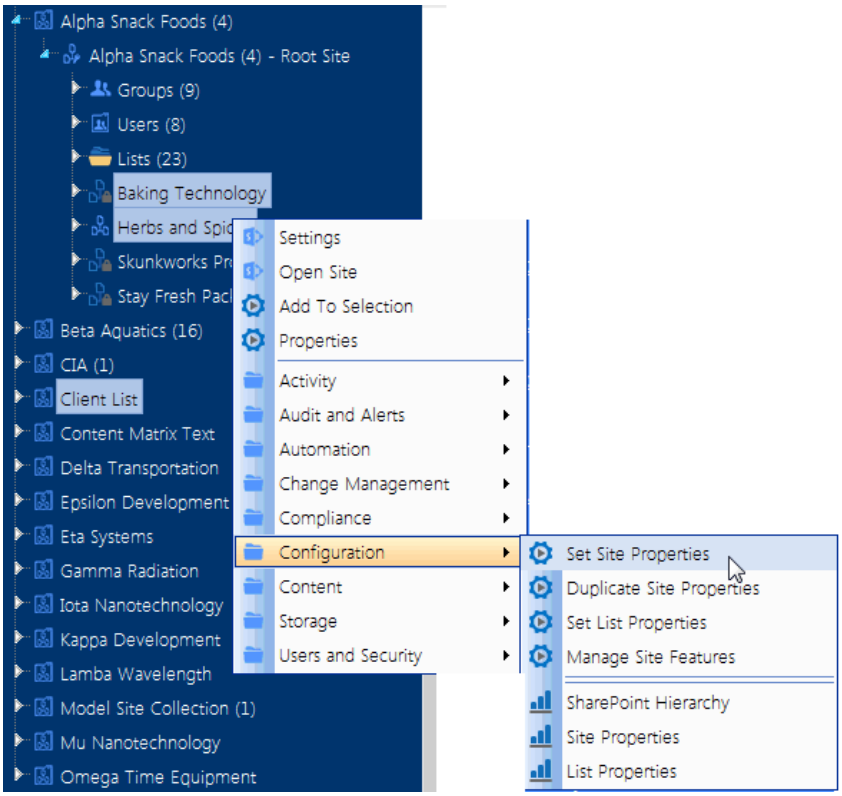
Selecting Objects from the SharePoint Hierarchy, Favorites, or Search Hierarchy Panel

From the SharePoint Hierarchy, Favorites, or Search Hierarchy panel, you can select one or more objects on which to perform a ControlPoint search, action, or analysis. You can select the entire farm, individual site collections, sites, lists, and/or users.

To select multiple objects, hold down either the [**Ctrl**] or [**Shift**] key and left-click on each item you want to include in your selection. (To clear all selected object(s), left-click on any item that is *not* currently selected.)

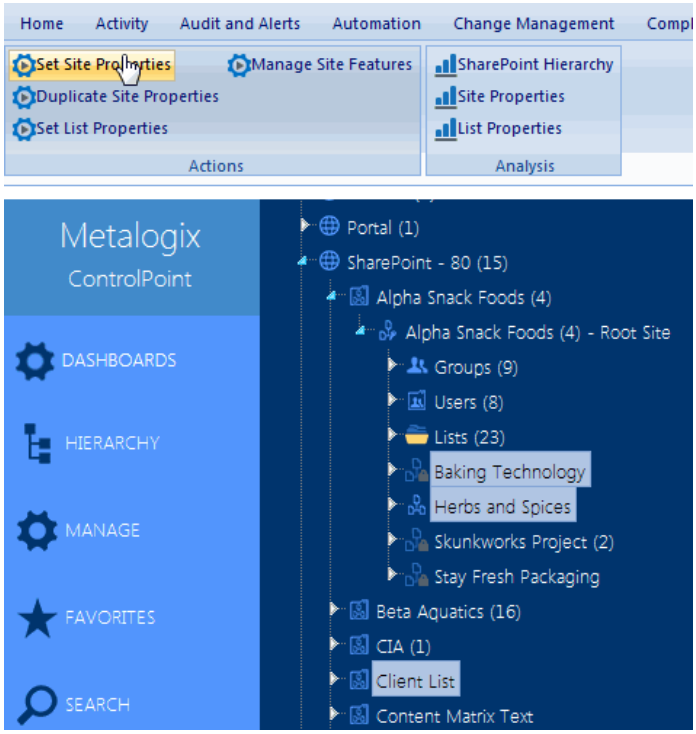
After selecting the object(s):

- if context menus are enabled, right-click to display a menu from which you can choose the operation you want to perform.



OR

- if the ribbon is enabled, select from the appropriate tab in the ribbon and choose the operation you want to perform.



NOTE: The level of the hierarchy from which you select the object(s) determines the options available and the scope of the operation. For example, you can select objects at different levels of the hierarchy if the operation allows it. If you attempt to select objects from different levels when an operation does not allow it (for example, you have selected both site collections and sites then try to initiate a Site Collection Property Report), only the relevant objects will apply. Similarly, if you select multiple objects then choose an option that is only valid for a single object (such as copying or moving a site), only the object on which you right-click will apply.

If you selected an operation that can be performed on *items* within a list, select the list(s), choose the operation, then follow the procedure for Selecting List Items on Which to Perform a ControlPoint Operation.

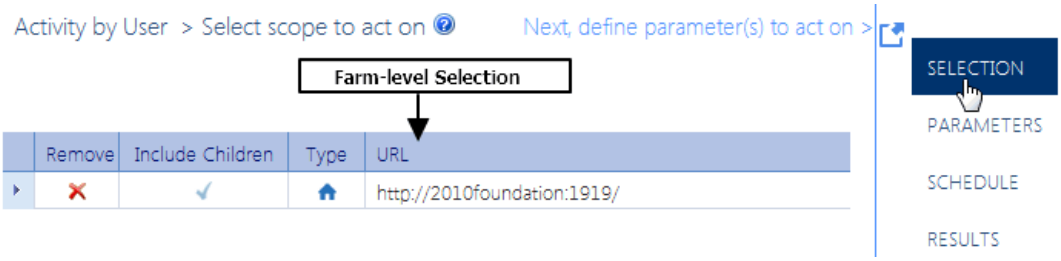
Selecting Items from Search or Data Analysis Results

You can also select one or more objects on which to perform an operation from simple/advanced search or data analysis results. For details, see Acting on Search or Data Analysis Results.

The Workspace Selection Section

Once you have initiated a ControlPoint operation, the object(s) you selected display in the **Selection** section of the workspace. Information that displays in the Selection table includes an icon identifying the item's **Type** (that is, farm, Web application, site collection, or site/subsite) and the **URL**

Generally, if you selected at the farm, Web application, or site collection level, all child items are included by default, as indicated by a check mark ( ) in the **Include Children** column. Because these items are simply "containers" for the actual sites and subsites on which you want to perform the operation (that is, for most operations you cannot act on these items themselves), the assumption is that if you selected at one of these levels you intended to include all children.



Changing Your Selection

After selecting objects on which to perform a ControlPoint operation, you can add or remove objects using the Change Selection feature.

NOTE: If you chose an operation designed to work on a single object (such as Copy/Move), the Change selection option will not be available.

You can also add individual objects to your current selections using the Add to Selection menu item. See Adding Objects from the SharePoint Hierarchy to Your Selection.

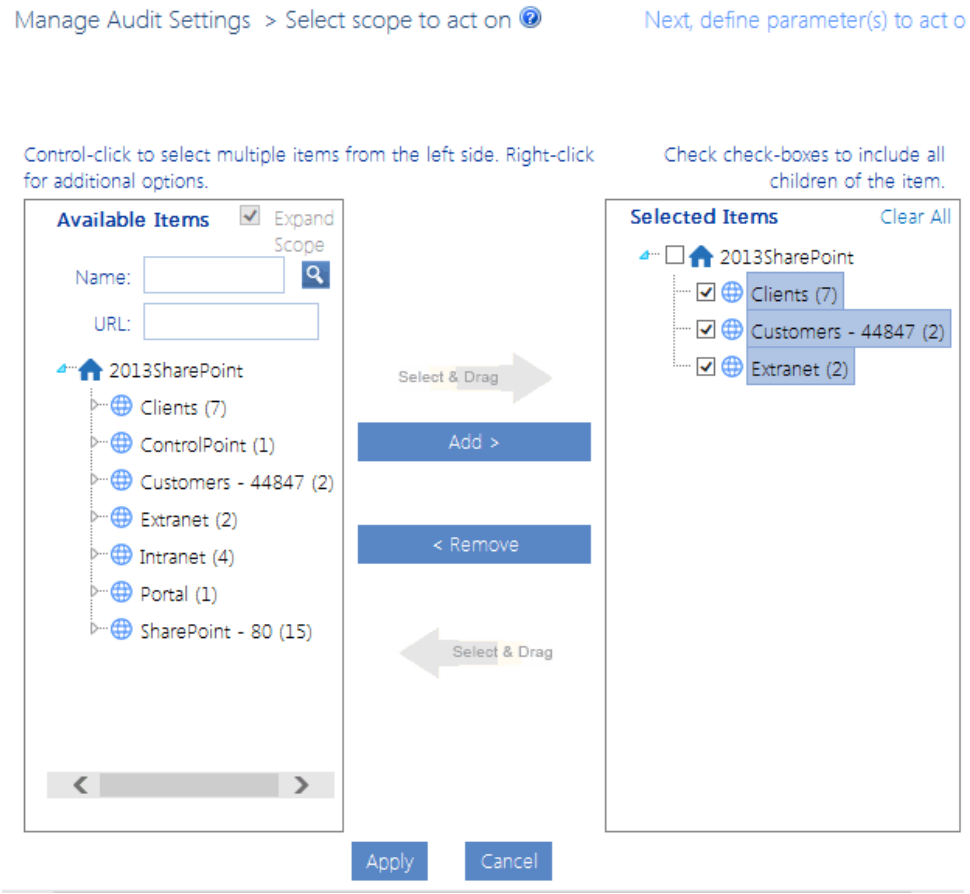
To access the Change Selection pane:

In the Selection section of the work area, click the **Change selection** icon ( ).

The Change Selection pane displays, which consists of two sections:

- the **Available Items** section lists all of the objects available for selection (as determined by the scope of your original selection)
- the **Selected Items** section lists currently-selected objects.

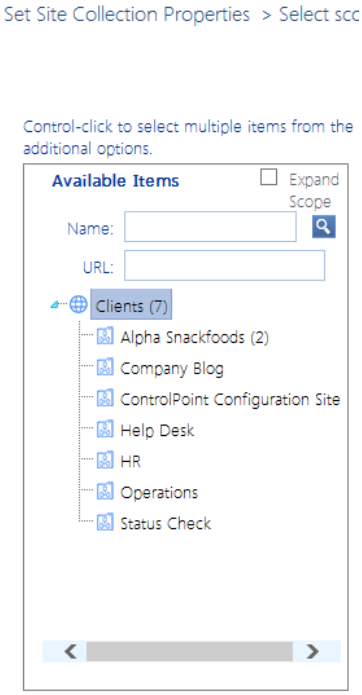
Typically, all child items (site collections, sites, and subsites) are included in the scope by default, as indicated by a check mark to the left of the item in the Selected Items section.



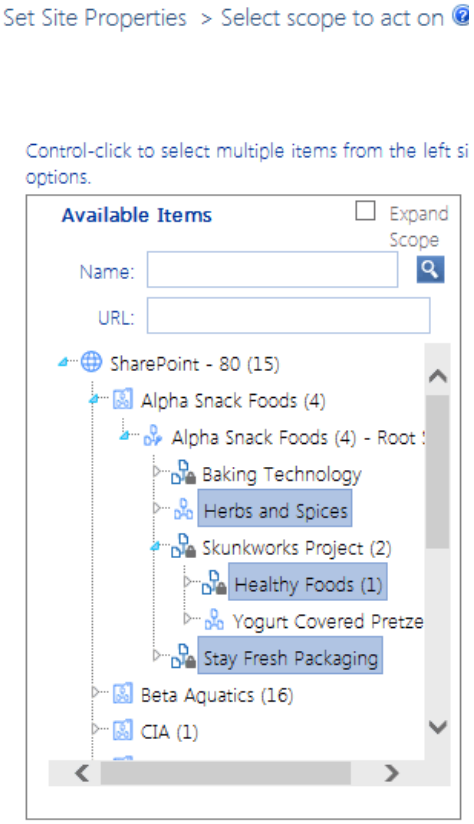
The level to which you can drill down in the Available Items list depends on the action that you want to perform.

EXAMPLES:

If you chose **Set Site Collection Properties** which, by definition, applies only to site collections, you cannot drill down beyond the site collection level.



- If you chose **Set Site Properties**, you can drill-down and select individual sites within the collection.



To modify the list of available items:

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

If you want to ...	Then ...
expand the scope of available items to encompass the farm	check the **Expand Scope** box. NOTE: If you originally selected the farm, multiple Web applications, or site collections within multiple Web applications, Expand Scope is checked by default and all available items in the farm display.
narrow the scope of available items	• enter a full or partial site **Name** and/or **URL** , and • click the magnifying glass icon (). NOTE: By default, ControlPoint uses real-time data for this type of hierarchical search. However, to enable faster searches in large environments, ControlPoint Application Administrators can configure the application to use cached data for hierarchical searches.

To modify the Selected Items list:

1 Uncheck the "include all children" box to the left of each object whose scope you want to modify.

2 In the **Available Items** list, select each object that you want to include. Use the information in the following table for guidance.

If you want to ...	Then ...
select multiple items individually	hold down the [**Ctrl**] or [**Shift**] key and highlight each item you want to add.
immediately add an item and all of its children to the Selected Items column	highlight the item, then right-click and choose Add Item and All Children.
select an item and its immediate children (for example, a site collection and its root site only)	highlight the item, then right-click and choose Highlight Immediate Children. (If objects are grouped into a folder, you must first expand the folder.) TIP: You can use this option as a time-saver if you want to add most, but not all of the selected child items. After highlighting the item you can then individually *de-select* those that you want to exclude.

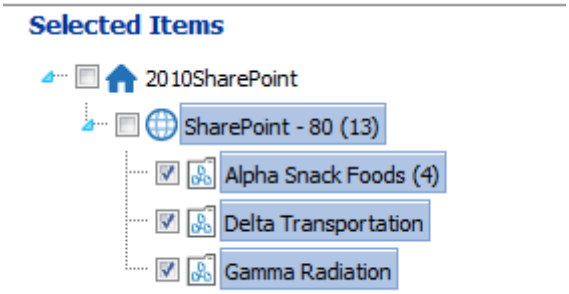
3 To add the highlighted item(s) to the selection list, do one of the following:

- drag and drop the item(s) to the Selected Items column. ControlPoint will automatically place them in the correct location in the tree.

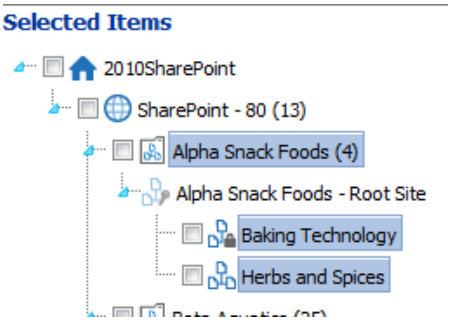
OR

- click the [**Add**] button.

Note that if a checkbox displays to the left of a selected item (indicating that you want to include *all* child items), those child items do not display explicitly in the Selected Items list.



If you uncheck this box then add child items using the procedure above, however, each item you add *will* display explicitly in the list.



To remove items from the Selected Items list:

1 In the Selected Items list, highlight each item that you want to remove. Hold down the [**Ctrl**] or [**Shift**] key to highlight multiple items individually.

2 Either:

- drag and drop the items to the **Available Items** column.

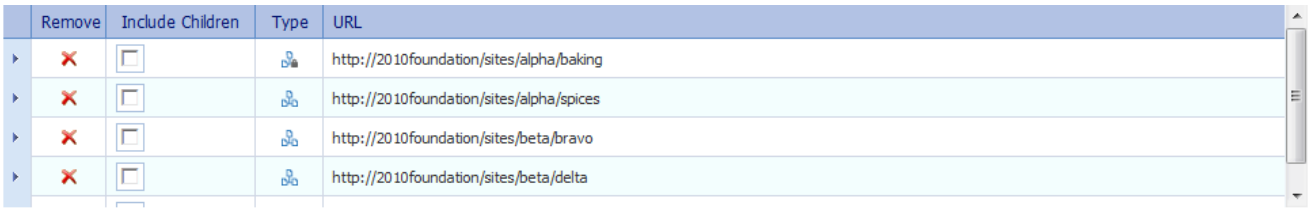
OR

- click the [**Remove**] button.

Applying changes to the selection list:

When you have finished updating the Selected Items list, click [**Apply**].

The Customize Selection pane is closed and the Selection list is updated to reflect your changes.



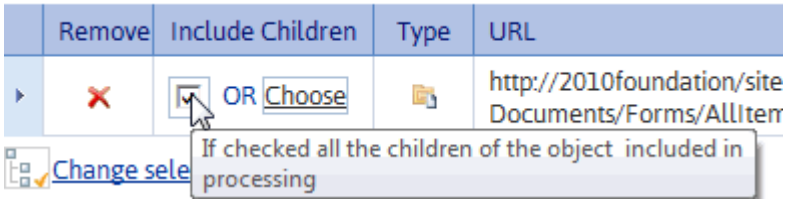
Selecting List Items on Which to Perform a ControlPoint Operation

Some ControlPoint operations can be performed on individual items within a list or library. If the option to act on folders/items is available, a **Choose** link displays in the Include Children column for the list. (If you do not select individual folders/items, the operation will be performed on the list itself.)

NOTE For a multi-farm operation, you can only choose items from lists in the home farm. For lists in remote farms, the operation can only be performed on the list itself

To include both the list itself and all of its child items:

In the Selection section, check the **Include Children** checkbox.

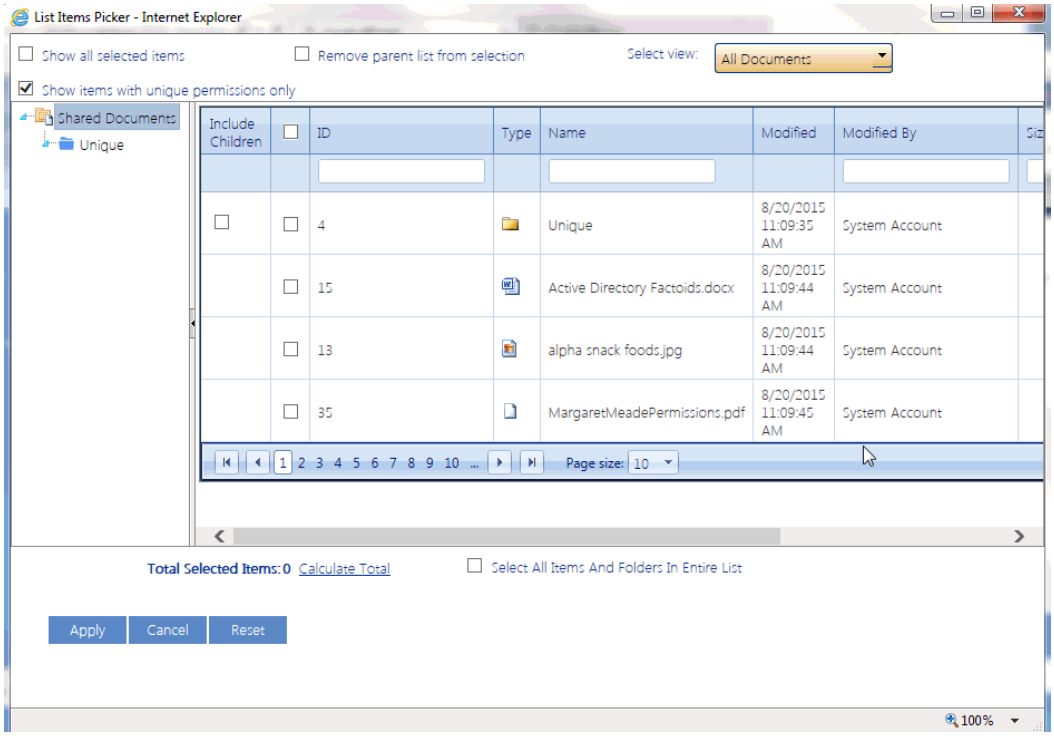


NOTE: The Include Children checkbox will not be visible if the operation requires that you select items explicitly. (Copy/Move List Items is a notable example).

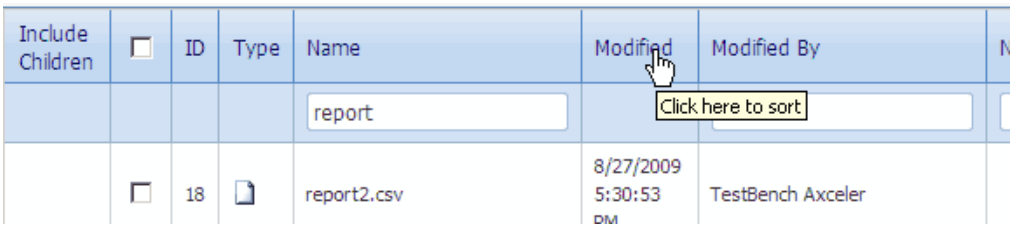
To specify folders and items to include (with or without the list itself):

1 Click the **Choose** link to display the List Item picker.

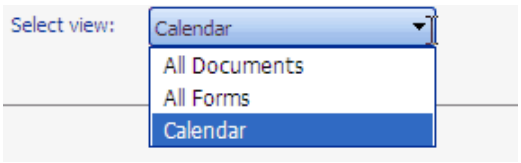
A pop-up window displays all of the items at the top level of the list hierarchy. If you want to display items within folders and subfolders, click the folder in the tree in the left pane. (You can drag the border between the left and right pane to resize, or click the arrow to open/close the left pane).



You can sort or filter list items by most of the column headers.



If more than one view has been defined for a list or folder, you can select a different view from the **Select view** drop-down.



2 Use the information in the following table to determine the appropriate action(s) to take.

If you want to include ...	Then ...
items with both inherited and non-inherited permissions	uncheck the **Show items with unique permissions only** box.

If you want to include ...	Then ...
	NOTE: If you leave this box checked, only items with unique (non-inherited) permissions will display.
all items and folders	check the box in the header. NOTE: When you check this box and your selection includes folders, only the folder itself will be selected, not its children.
selected items and folders within the root of the list	check each item and folder that you want to include. NOTE: If you check a box immediately to the left of a folder, only the folder itself will be selected, not its children.
all items within a folder	check the **Include Children** box to the left of the folder.
individual items within a folder	in the left pane: • expand the folder, and • select the item(s) you want to include.

NOTE: Normally, as you select items, the **Total Selected Items** value is updated automatically. Exceptions are if you check the box in the header to select all items then deselect items individually or if you select items by highlighting rows instead of explicitly clicking checkboxes. For both of these cases, you will need to click the **Calculate Total** link to update this value.

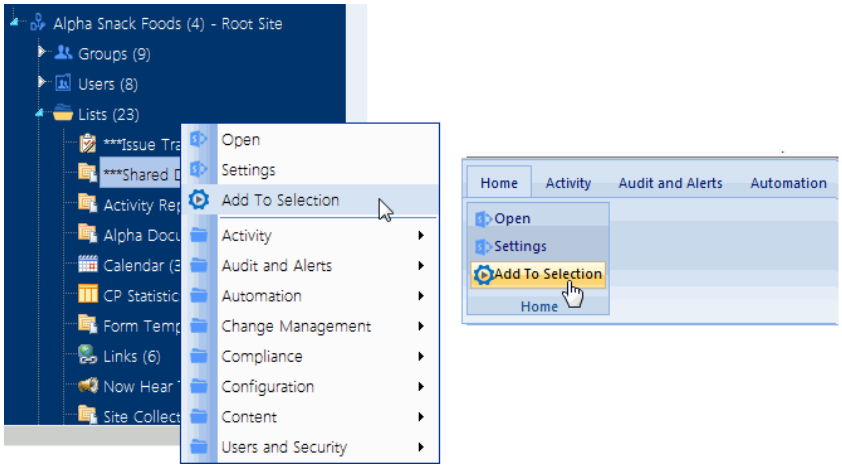
3 If, after you have finished selecting items you want to trim the list to display *only* selected items, check the **Show All Selected Items** box.

4 If you want to exclude the list itself (that is, perform the operation only on item(s) *within* the list, check the **Remove Parent List from Selection** box.

5 When you have finished, click [Apply].

Adding Objects from the SharePoint Hierarchy to Your Selection

After you have initiated a ControlPoint operation from the SharePoint Hierarchy, you can easily add objects to your selection using the Add to Selection menu option.



EXCEPTIONS:

You cannot add an object to your selection if the operation:

- has not yet been chosen from the menu
- is already within the scope of your selection (for example, you are attempting to add a site collection within a Web application that has already been selected)
- is not relevant for the object (for example, you initiated a Site Permissions analysis then attempted to add a list to your selection)
- can only be performed on a single object (such as a copy or move action).

NOTE: If you attempt to add an object to an operation that can only be performed on a single object, it will *replace* the object that was originally selected.

Saving and Re-Using a SharePoint Object Selection

If you frequently perform ControlPoint operations on the same set of SharePoint objects, you can save your selection to a local drive or network file share as an XML file. You can then upload the file on an as-needed basis, and eliminate the need to select the same set of objects whenever you perform a ControlPoint operation.

Only objects that are valid for the current operation will be included in the scope. For example:

- If your selection includes list items and you initiate an operation that is not valid for list items, those items will be excluded from scope.

- If you initiate an operation that can only be performed on a single object, the option to upload a selection from XML will not be available.

Generally, a selection saved on one farm cannot be uploaded to a different farm.

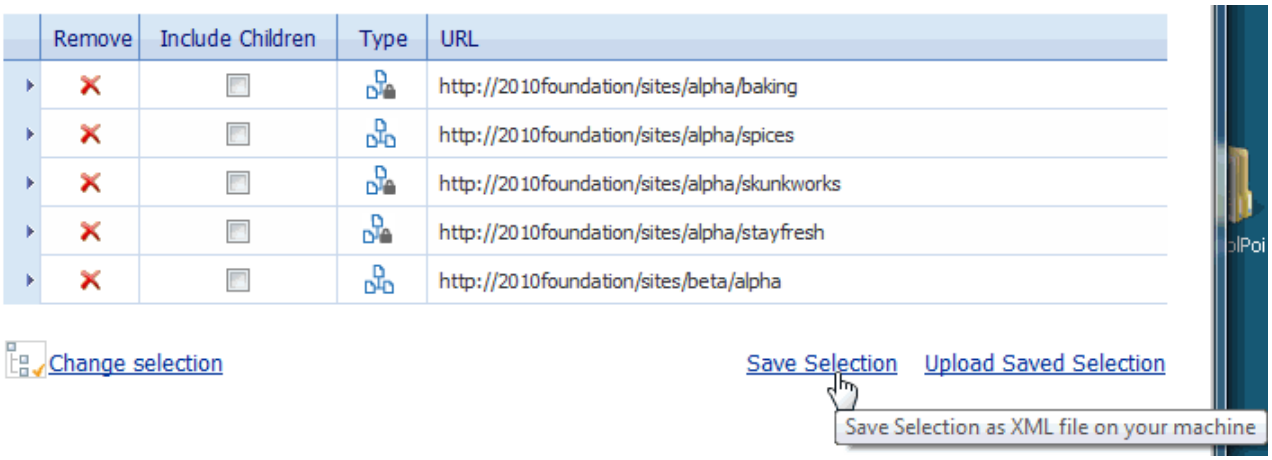
EXCEPTION: In a multi-farm environment, if a saved selection include items from more than one farm and you have initiated a ControlPoint operation that can act on multiple farms, it can be uploaded to any farm involved in the operation.

Once you have initiated an operation then upload a selection from XML, you have the option of replacing the current selection with the selection in the XML file or adding to it. It is important to note, however, that if you chose to *add to* the current selection and one group of objects is within the scope of the other (for example, the saved selection includes objects within the scope of the existing selection), the larger scope will be applied.

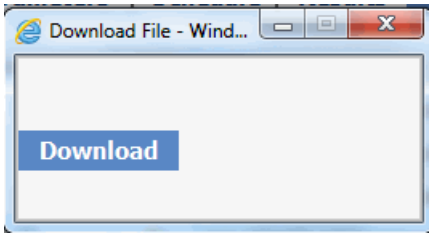
To save a selection to an XML file:

1 Initiate a ControlPoint operation for the selection you want to save.

2 In the Selection pane, click the **Save selection** link.



The Download File dialog displays.



3 Click [**Download**] to display the File Download dialog.

4 Click [**Save**] then save the file to the local or network location of your choice.

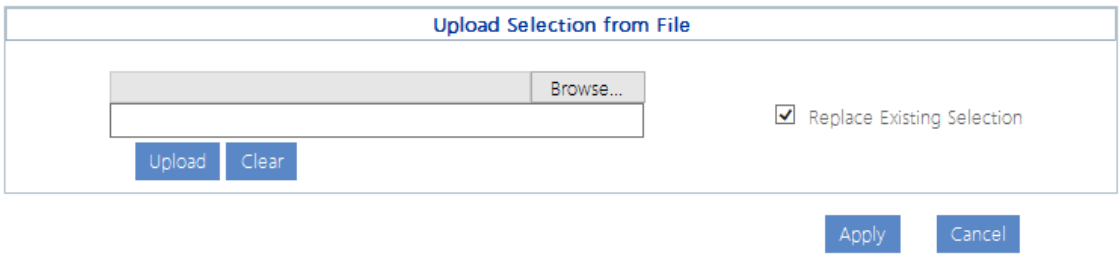
NOTE: It is recommended that you change the default file name, Selection.XML, to a name that is unique and descriptive.

5 When the file has finished saving, click [**Close**] to dismiss the open dialogs.

To upload a selection from an XML file:

1 Initiate the ControlPoint operation you want to perform.

2 In the Selection section, click the **Upload Selection** link.



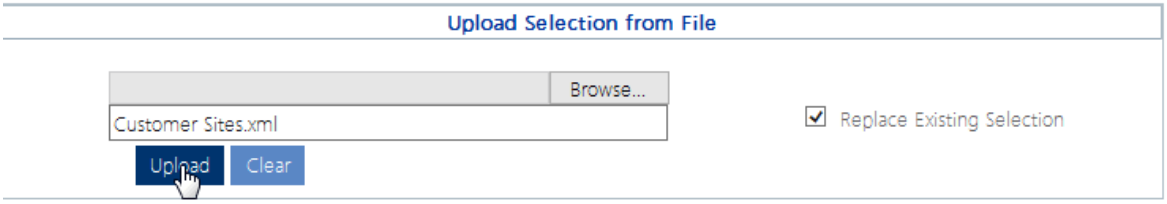
3 Click [**Browse]** and navigate to the file you want to upload.

4 The path to the file displays in the field to the left of the [Browse] button.

5 Click [**Upload**] to move the file path to the field below.

6 If you want the uploaded selection to **Replace Existing Selection**, check this box.

NOTE: If you leave this box unchecked, the uploaded selection will be *appended* to the current selection.



7 Click [**Apply**].

Selecting Users on Which to Perform a ControlPoint Action or Analysis

When you initiate a ControlPoint action or analysis that involves SharePoint users, the Parameters section of the workspace includes the standard SharePoint "People Picker" for selecting the user(s) you want to include.

If you initiate an operation by selecting one or more users from the SharePoint Hierarchy, the People Picker will be pre-populated with the selected user(s).

You can:

- perform the operation on all SharePoint users (by leaving the People Picker blank)

OR

- select one or more individual users.

Selecting Individual Users

Enter the name of one or more users on which you want to perform the action or analysis. Separate each user name with a semicolon (;). Enter a *full* user account name (for example, *domain\username)*, then click the Check Names icon ( ) or press [Ctrl] k to validate the user name.

Depending on the action or analysis you are performing, ControlPoint may or may not allow invalidated users to be included in the operation. For example, you cannot add a user to a site unless the user's existence in the provider database can be validated. However, you can *delete* or *report on* an unvalidated user's permissions from a site, because it is reasonable to assume that a user who has been granted permissions to a SharePoint site may no longer exist in the provider database(s), as in the case of a terminated employee or a former customer.

Operations that Include Two People Pickers

When a ControlPoint action includes both a source and a target People Picker, such as Duplicate User Permissions, Delete User Permissions (when permissions are reassigned) and Migrate Users, additional rules and restrictions for user selection apply. Refer to the operation-specific topic in this guide for details.

Refreshing the SharePoint Hierarchy

Whenever you take an action that updates the SharePoint Hierarchy (such as adding or deleting a site, changing user permissions, and so on), you can immediately view changes in the SharePoint Hierarchy navigation tree by using the SharePoint Hierarchy menu option.

NOTE: This option is a faster, more efficient alternative to using the browser's refresh button if you want to update only the SharePoint Hierarchy navigation tree rather than the entire page or active workspace. It is important to note, however, that when you refresh the SharePoint Hierarchy, the browser's cache of previously-accessed items will be cleared (that is, the next time you access an item, ControlPoint will have to take the time to reload it).

To refresh the SharePoint Hierarchy:

In the SharePoint Hierarchy panel, right-click on the farm name and choose Refresh SharePoint Hierarchy.

In a multi-farm environment, each SharePoint Hierarchy is refreshed independently, from its own menu.

NOTE: When you refresh the SharePoint Hierarchy, any changes to ControlPoint menus will be viewable as well.

Reloading the Server-Side Hierarchy Cache

If the ControlPoint Application Administrator has configured ControlPoint to load site collections in the SharePoint Hierarchy from a server-side cache rather than in real-time, you can reload the server-side cache on an as-needed basis (for example, if a site collection has just been added or deleted) as follows:

From the Manage ControlPoint tree, choose ControlPoint Management > Reload Server-side Hierarchy Cache.

CAUTION: A reload of the server-side cache is a resource-intensive process that may affect application performance for *all* ControlPoint users.

This action will have no effect if the ControlPoint Configuration Setting PRELOADSITECACHE is set to **false**.

After reloading the server-side cache, you will need to refresh the SharePoint Hierarchy to clear the browser-side cache as well.

Searching for SharePoint Sites

The ControlPoint search functionality is designed to complement that used by native SharePoint.

The SharePoint search focuses on content (documents, users, and so on) based on metadata and/or words within the content. The ControlPoint search focuses on finding SharePoint sites based on their properties.

ControlPoint lets you:

- locate SharePoint sites by **entering simple search terms** or using an **Advanced Search**, and
- find a SharePoint site within the context of the ControlPoint SharePoint Hierarchy using the **Search Hierarchy** function.

A search can also be used to locate objects in the Change Selection pane and the various object pickers used throughout ControlPoint.

TIP: For locating sites within a very large farm, consider using the ControlPoint search functionality as a time-saving alternative to browsing through the SharePoint Hierarchy.

Performing a Simple or Advanced Search

To locate sites within your SharePoint environment, you can perform either:

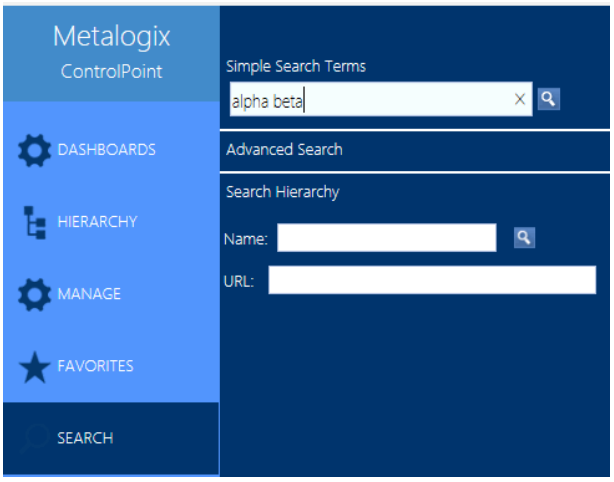
- a **simple search** (by entering a full or partial site name or url), or
- an **advanced search** (by selecting from a variety of criteria on which to base your search).

NOTE: Simple and advanced searches use cached data collected by the Discovery job. This means that it will take less time to process than a hierarchy search, which uses real-time data. However, the search results will be as current as the time of the last Discovery run.

To perform a simple search:

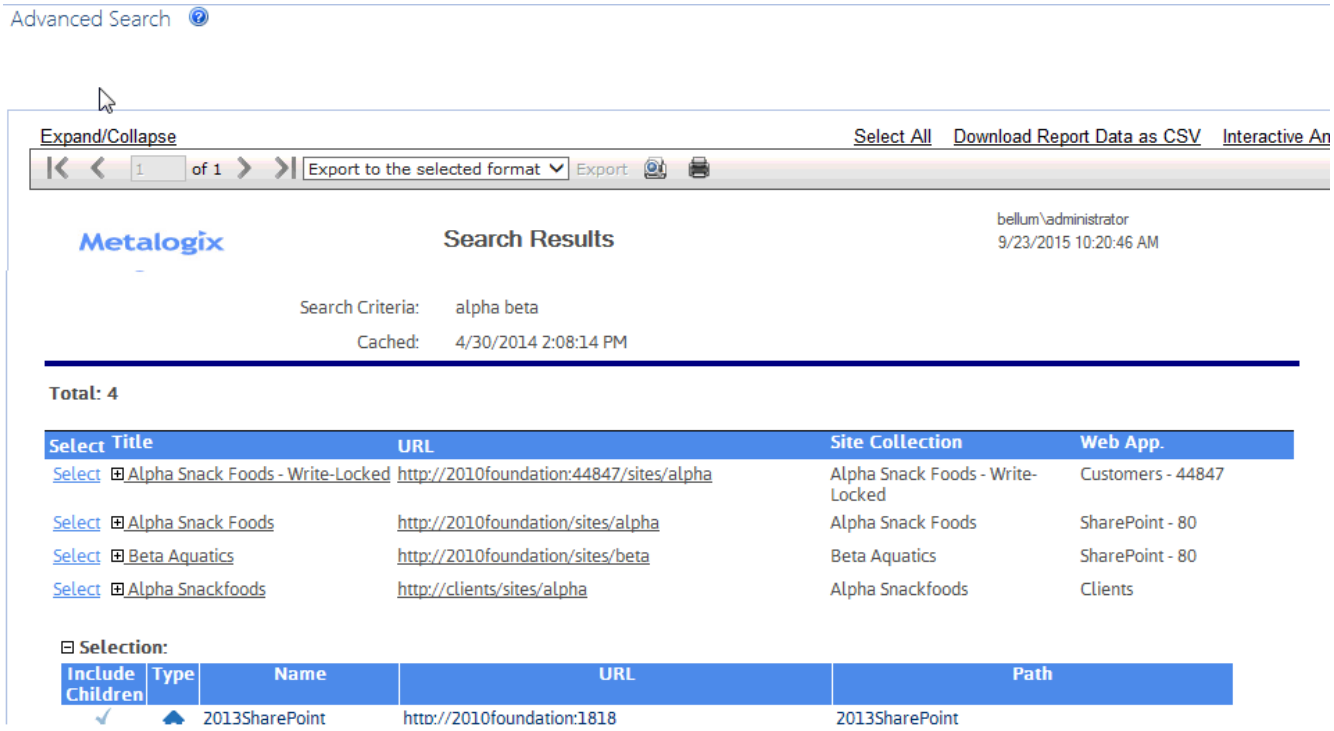
1 From the left navigation frame choose **Search**.

2 Enter a full or partial site name in the **Simple Search Terms** box.



3 Click the magnifying glass icon ( ).

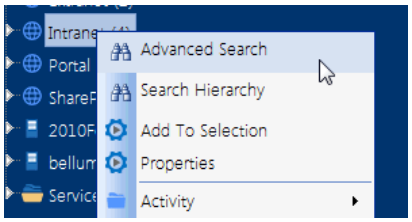
NOTE: Results will include sites that match *any* part of the text string that you entered.



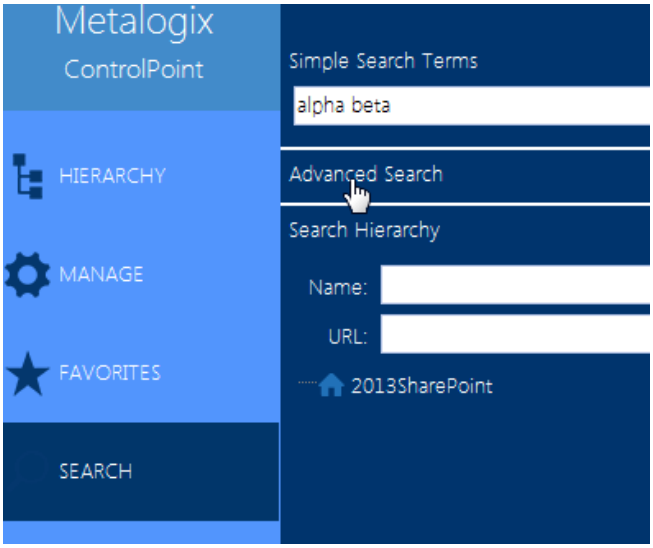
To perform an advanced search:

1 Use one of the following options:

- From the SharePoint Hierarchy or Search Hierarchy results, select the object(s) on which you want to perform your search. Right-click and choose Advanced Search.

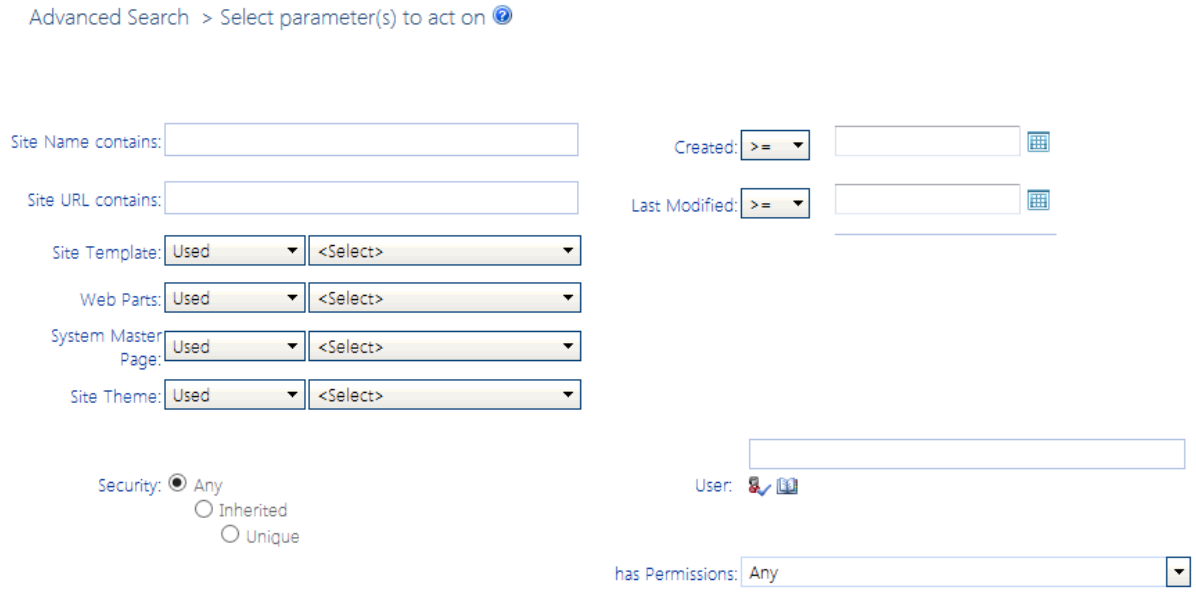


- From the left navigation frame Search tab, choose Advanced Search.



NOTE: When you initiate your search from anywhere within the SharePoint Hierarchy, the scope of the search will be limited to sites within that level of the hierarchy. When you initiate the search from the Search tab, the search will include all matching sites within the farm.

2 In the Parameters section, select/enter the criteria you want to use to narrow your search.



You can:

- enter a full or partial **Site Name** and/or **Site URL**

  NOTE: If you enter a **Site URL**, only the URLs of sites within the SharePoint farm for which you have management permissions will be included in the search. Links from a page in the farm to other sites in the farm or content outside the farm will *not* be searched. In addition, unlike the simple search, if you enter more than one word in the name field, the full string *as you typed it* must occur within a site name for it to display in the results.

- select one or more site attributes:
  - **Site Template Used** or **Not Used**
  - **Web Parts Used** or **Not Used**
  - **System Master Page Used** or **Not Used**, and/or
  - **Site Theme Used** or **Not Used.**

  NOTE: Because the search uses cached data, the drop-down lists for the above attributes are populated with items that are current as of the last time Discovery was run and contain values that have actually been used within the selected scope.

- specify one or more site parameters, by selecting the appropriate operator (>=, <=, or =) and entering a value for:
  - Created date, and/or
  - Last **Modified** date.

select a **Security** level that is currently in use in the site's "has permissions" field.

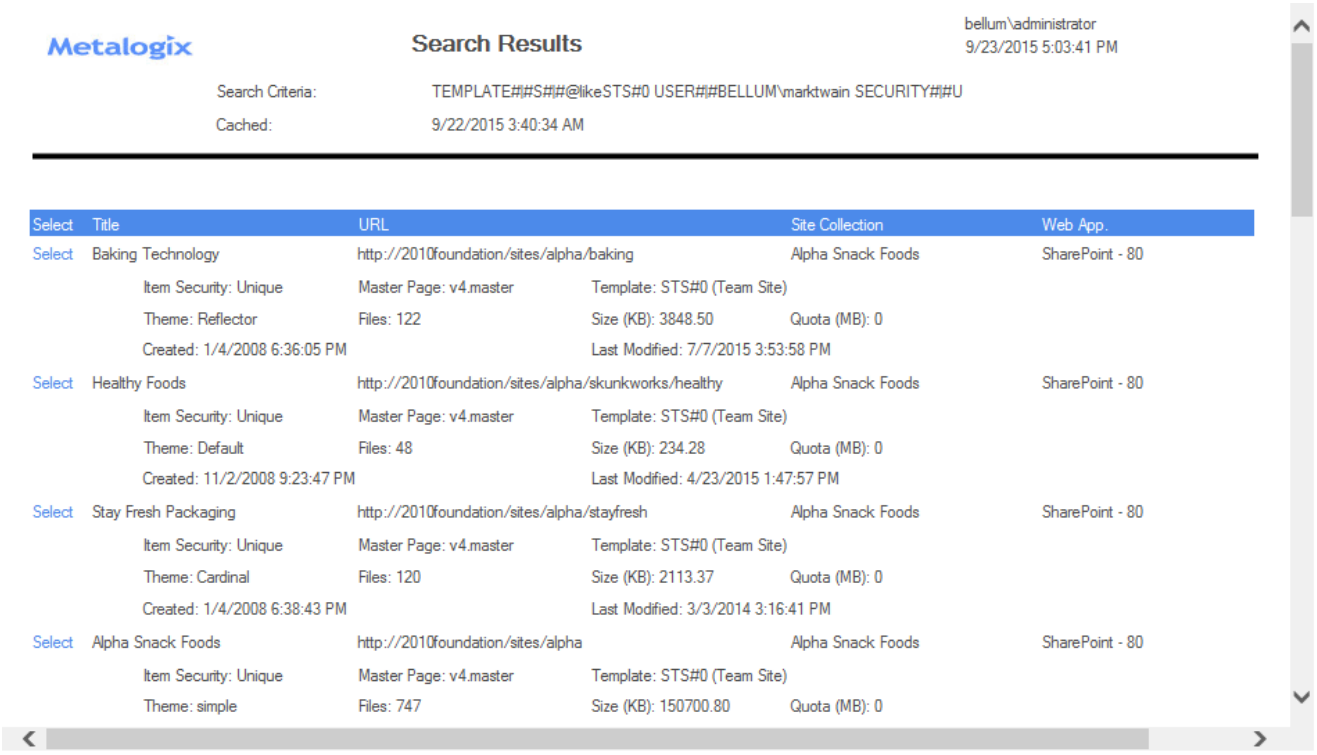
- select whether you want to find sites which have permissions that are either **Inherited** or **Unique**.
- find sites for which a specific user has permissions; by selecting a user.

  You can, optionally, further narrow your search by locating only those sites for which the user or group **has permissions** at a specific level.

If you have a SharePoint Server farm and the ControlPoint Application Administrator has defined Custom Properties, you can locate sites that have been assigned specific Custom Properties via the Set Site Properties action. (This section does not display for SharePoint 2007 or for 2010/2013 Foundation farms.)

NOTE: The search will return only those sites that meet *all* of the criteria you specify, including **Not Used** criteria. For example if you are searching for sites that do not use the Team Site template and do not use the Cardinal theme, only sites which use neither will be included in results.

All of the sites that meet the criteria you specified display in the Search Results.



If you want to initiate a new search or change search criteria, first click [**Reset**] to clear the contents of the Advanced Search window.

Working with Simple or Advanced Search Results

All simple and advanced search results pages include a standard header and footer, in addition to search results detail.

Search Results Toolbar

ControlPoint search results pages employ a report toolbar that contains page navigation, zoom, find, export, and print capabilities.

Search Results Header

The search results header sections contains summary information, including the search criteria used, as well as the scope of the search (as determined by the level at which the search was initiated).

The Cached field displays the date and time that the cache was last refreshed via the Discovery task. The search results are current as of that date and time.

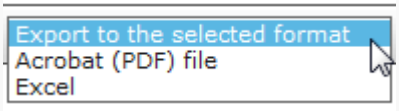
Search Results Footer Information

The search footer contains the following information:

- the name of the administrator who generated the search (which can be useful if search results are exported or printed and distributed, since the content of the search reflects that administrator's permissions)
- the number of pages in the search (you can scroll through multi-page search results from the results toolbar in the search results header), and
- the date and time when the search results were generated.

Acting on Search Results

From search results you can perform any of the actions described in the following table.

If you want to ...	Then ...
print search results	from the results toolbar: a) Click the Print Preview icon ( ). b) Click the print icon ( ). (Printed results will contain only the data that is currently expanded.)
export search results	choose an **Export to the selected format** option from the drop-down, then click the **Export** link. 

If you want to ...	Then ...
	.NOTE: If you export to Excel, all data will be exported, regardless of whether it is expanded. If you export to an Acrobat (PDF) file, only data that is currently expanded will be exported.
download raw analysis result data to a CSV file that can be imported into another program for further examination	click the **Download Report Data as CSV** hyperlink in the results toolbar.  This option differs from the csv option in the Export... drop-down in that it provides all of the raw data (including object GUIDs and internal field names, for example) used to create the results. This may be useful for troubleshooting or for more in-depth analysis.
perform a ControlPoint action or analysis within the current workspace	use the procedure for Acting on Search or Data Analysis Results.

Searching within the SharePoint Hierarchy

Use the Search Hierarchy feature to locate sites within the ControlPoint SharePoint Hierarchy.

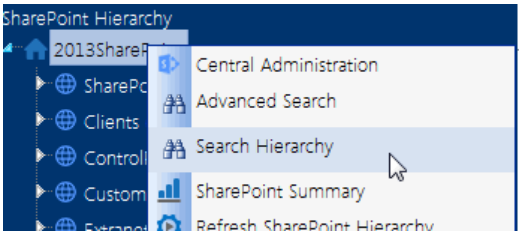
This feature is a useful alternative to the SharePoint Hierarchy for navigating through a large farm

You can initiate a SharePoint Hierarchy search from various locations in the SharePoint Hierarchy panel, as well as from the Search Hierarchy panel. The scope of the search is determined by the location in the hierarchy from which it was initiated. That is, if you initiate the search at the farm level or directly from the Search Hierarchy menu, all matching sites within the farm will display. If you initiate the search at the Web application level, results will be limited to matching sites within the Web application, and so on. In a multi-farm environment, you can only search the home farm.

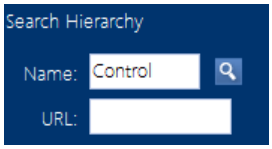
NOTE: By default, the Search Hierarchy feature uses real-time data. However, to enable faster searches in large environments, ControlPoint Application Administrators can configure the application to use cached data for hierarchical searches.

To perform a hierarchy search:

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

If you want to initiate your search from ...	Then ...
within the SharePoint Hierarchy panel	from the appropriate level of the hierarchy, right-click and choose Search Hierarchy. 
the Search Hierarchy panel	From the left navigation header, choose Search.

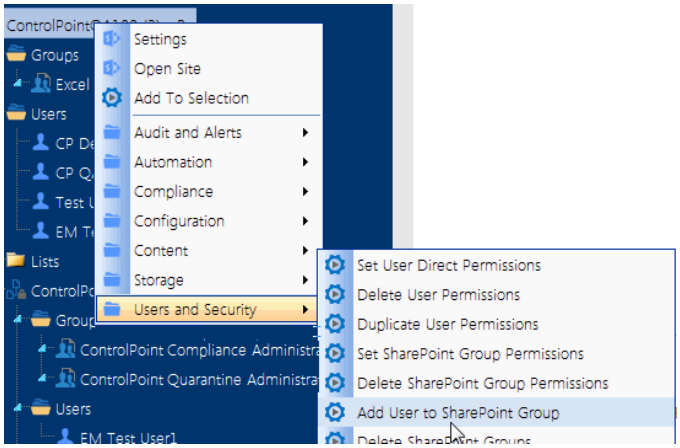
2 Enter a full or partial **Name** and/or **URL**.



3 Click the magnifying glass icon ( ).

All of the sites and subsites that meet *all* of your search criteria display—along with associated lists, users and groups—within the appropriate hierarchical context,

You can navigate through search results and access SharePoint pages and ControlPoint actions and analyses via the right-click menu.



Managing SharePoint Objects

From the SharePoint Hierarchy panel, you can access a variety of SharePoint administration pages and ControlPoint value-added actions for managing SharePoint objects.

Accessing SharePoint Pages

From the SharePoint Hierarchy panel, you can

- access the relevant SharePoint administration page for managing a SharePoint object, and
- open a SharePoint site or list.

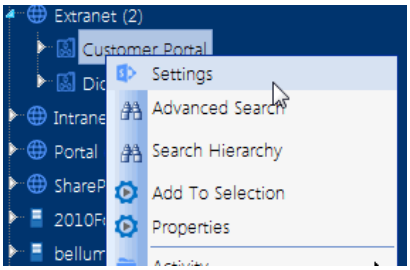
One of the advantages of using ControlPoint over native SharePoint to access these pages is that you can link *directly* to the appropriate page, within the relevant context, and without having to enter a url. In a multi-farm environment, you can access SharePoint pages for either the home farm or a remote farm.

Consult your SharePoint documentation for information on using SharePoint administration features to manage SharePoint objects.

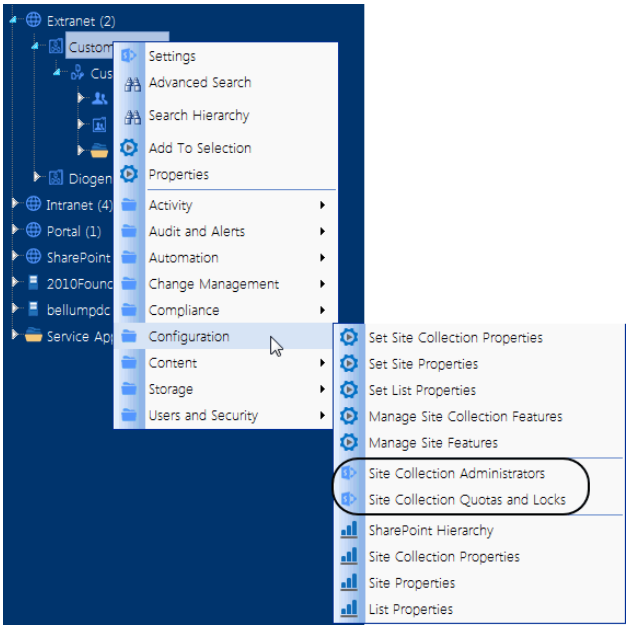
Accessing SharePoint Site Collection Administration Pages

From a site collection's right click menu, you can access a variety of SharePoint pages for managing the site collection, including

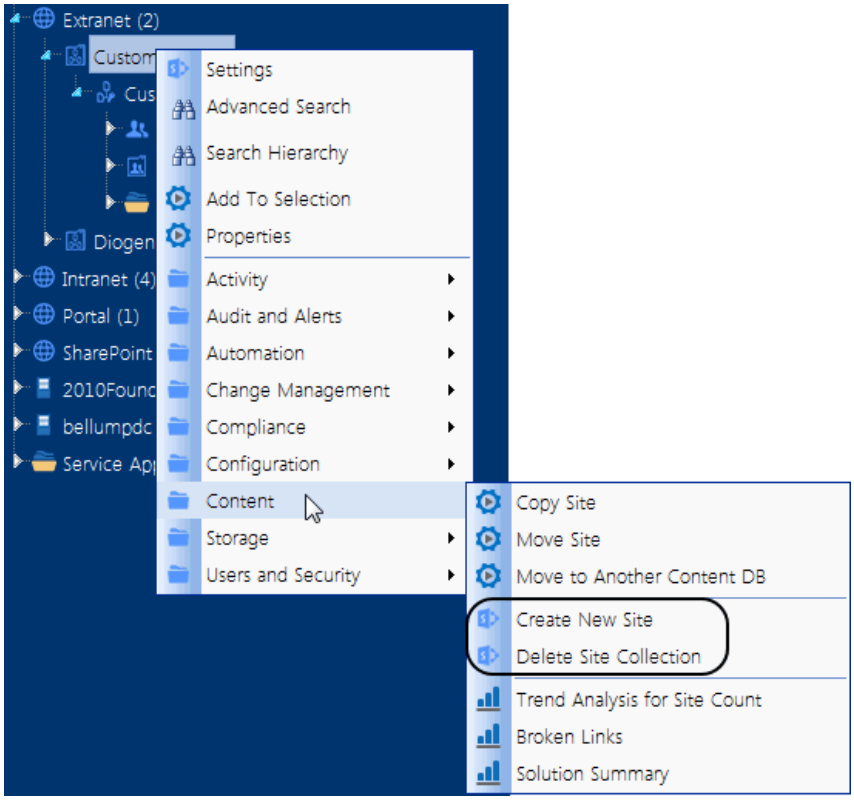
- Site Settings (for the root site)



- Configuration pages for operations that include setting site properties such as quotas and administrators



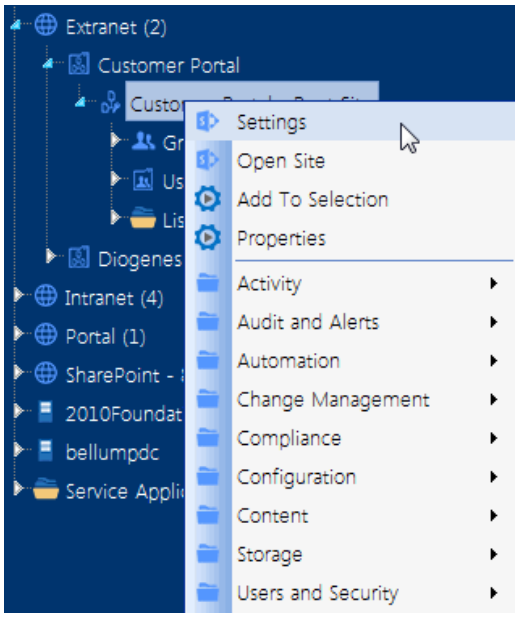
- Pages for managing a site collection's Content, including Content and Structure and site creation and site collection deletion.



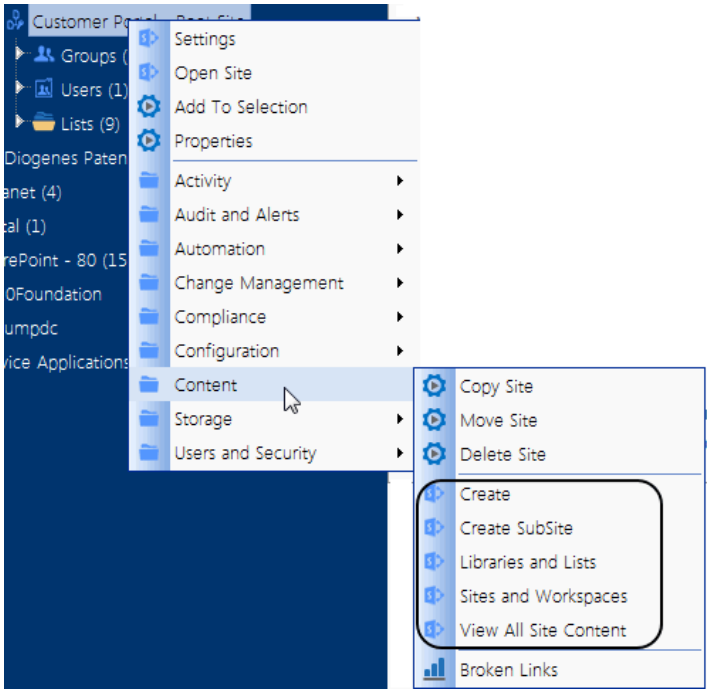
Accessing SharePoint Site Administration Pages

From a site's right click menu, you can access a variety of SharePoint pages for managing the site, including:

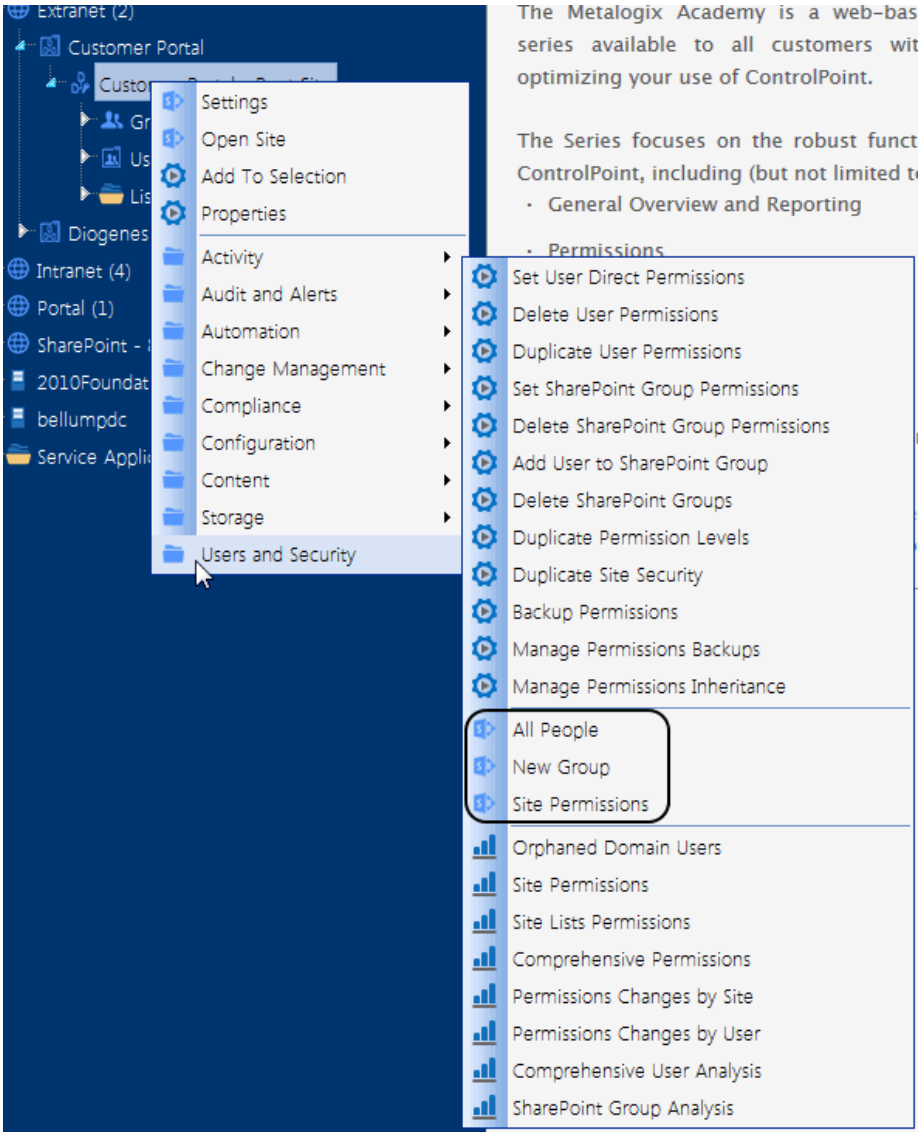
- Site Settings



- options for managing site Content, including creating and deleting subsites



- options for managing Users and Security, including users, groups, and permissions for the site.

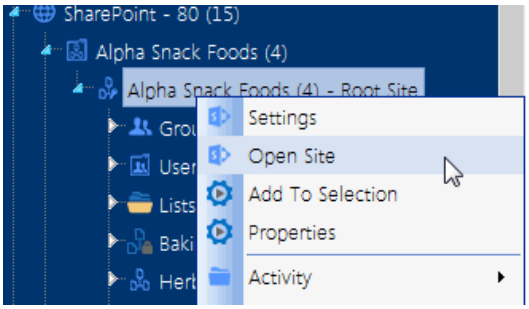


Opening a SharePoint Site in ControlPoint

From the SharePoint Hierarchy panel, you can open a SharePoint site or list in the ControlPoint workspace pane.

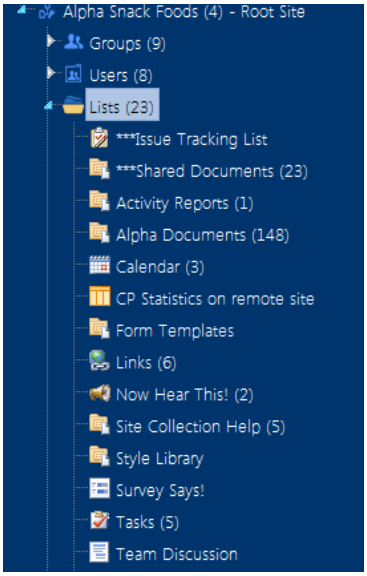
To open a SharePoint site in ControlPoint:

From the site's right-click menu, choose Open Site.



Accessing SharePoint Pages for Managing Libraries and Lists

The Lists folder contains all of the libraries and lists currently used in a site.



NOTE: Three asterisks (***) to the left of a list name indicates that the list has unique (non-inherited) permissions.

You can link directly to the SharePoint pages for managing the settings of an existing list or open a list.

NOTE: If the Lists folder does not display for a selected site, libraries or lists have not yet been created.

Deleting Sites

The ControlPoint Delete Sites action lets you delete one or more sites from your SharePoint farm.

If you delete an entire site collection (by deleting its root site) from the source content database, any activity associated with it remains but becomes "orphaned." The site collection in the source content database will display as a deleted site collection in Site Collection Activity results only if it was active during the period covered by the analysis. A deleted site will continue to be included in activity and storage analysis results if it was active during the period covered by the analysis.

To delete one or more sites from your SharePoint farm:

1 Select the site(s) that you want to delete.

NOTE: If you want to delete a an entire site collection—and have permissions to do so— select the root site (which, by extension, includes all of its subsites).

2 Choose Content > Delete Site.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

If you chose the Run Now, option, after the action has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the action and displays in the Results section.

If you schedule the action, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

Deleting Lists

The ControlPoint Delete Lists action lets you delete one or more sites from your SharePoint farm *in real time*.

To delete one or more lists from your SharePoint farm:

1 Select the list(s) that you want to delete.

2 Choose Content > Delete List.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

If you chose the Run Now, option, after the action has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the action and displays in the Results section.

If you schedule the action, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

Managing Metadata

ControlPoint offers two actions for managing metadata created via the SharePoint Online Term Store Management Tool:

- **Set Metadata Value** lets you change Managed Metadata, text, or numeric value values for one or more lists or libraries.
- **Create Managed Metadata** lets you create or update a Managed Metadata column on a list or library from an existing text column.

You can also analyze Managed Metadata usage within your SharePoint Server environment.

It is assumed that, when using these features, you are familiar with the use and behavior of SharePoint Content Types and Managed Metadata.

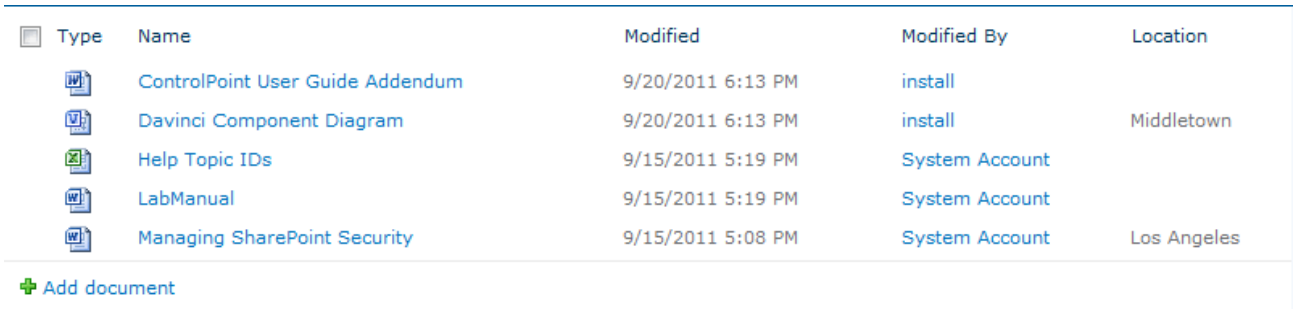
Setting Metadata Values

ContolPoint lets you populate or change Managed Metadata, a single line of text, or numeric values within a list column for a selected Content Type.

You can also run a simulation of how the operation will be carried out before committing to the action. This can be valuable, for example, to identify exactly which items would be changed.

EXAMPLE:

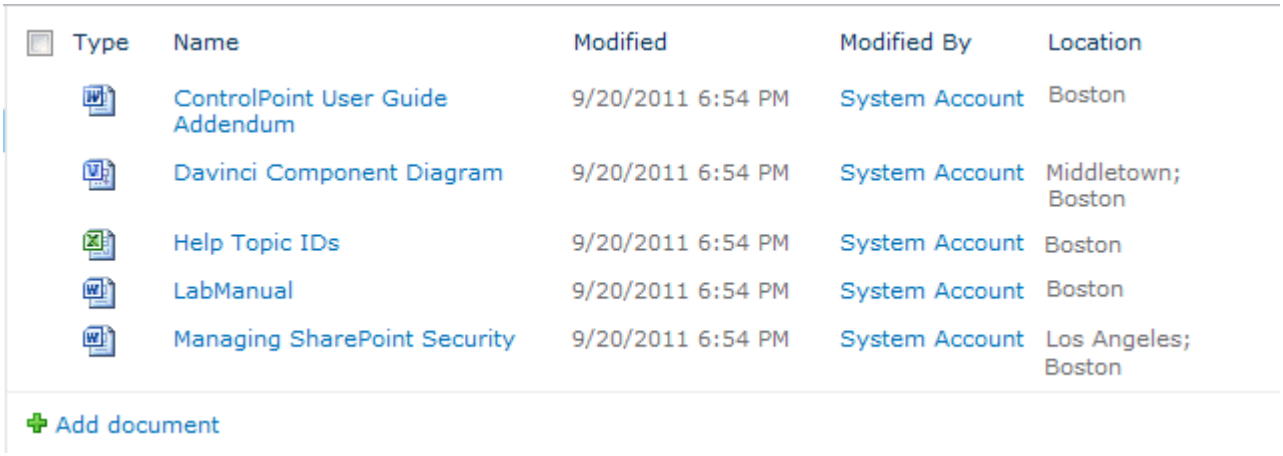
The Shared Documents library on the company website has a Managed Metadata column called **Location**.



Type	Name	Modified	Modified By	Location
	ControlPoint User Guide Addendum	9/20/2011 6:13 PM	install	
	Davinci Component Diagram	9/20/2011 6:13 PM	install	Middletown
	Help Topic IDs	9/15/2011 5:19 PM	System Account	
	LabManual	9/15/2011 5:19 PM	System Account	
	Managing SharePoint Security	9/15/2011 5:08 PM	System Account	Los Angeles

Add document

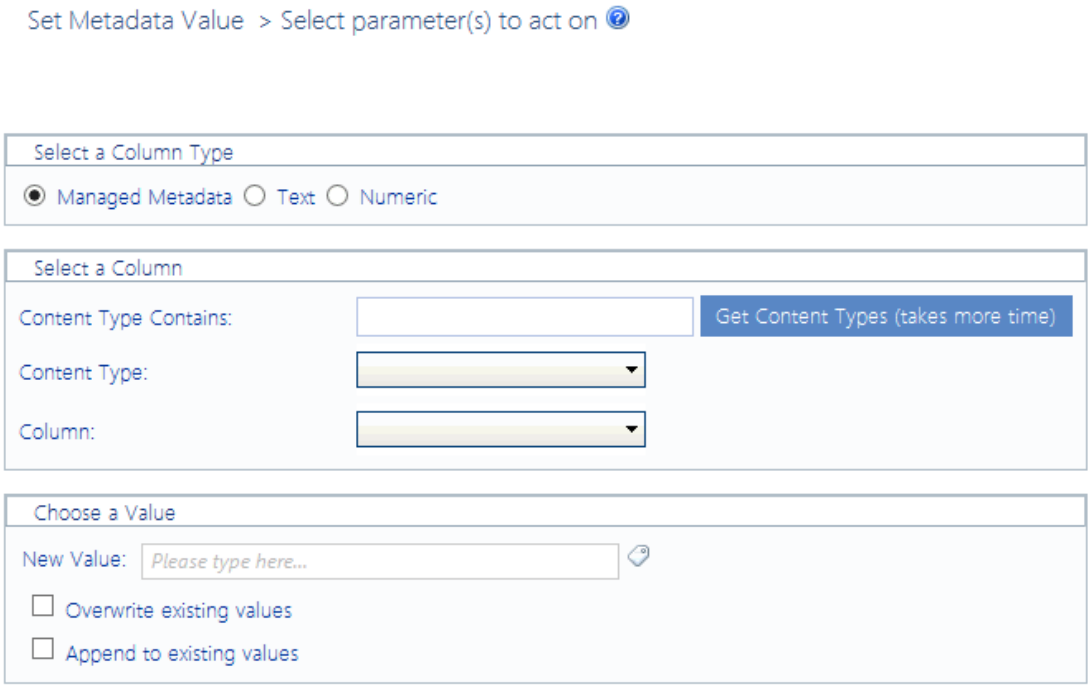
I want to make sure that the value Woburn is added to the Location column for all documents in that library.



To set a metatdata value:

1 Select the object(s) whose column data you want to set.

2 Choose Automation > Set Metadata Value.



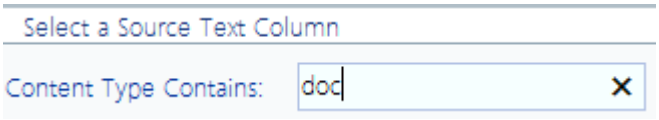
3 Select the type of metadata you want to set:

- **Managed Metadata**
- **Single Line Text**, or
- **Numeric**

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

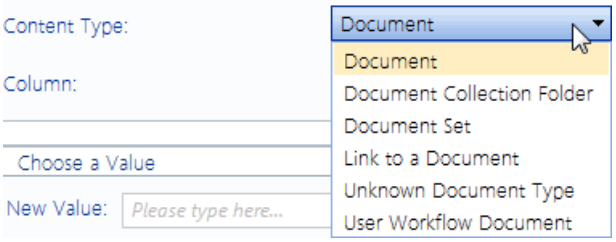
If the scope of your selection ...	Then ...
• is at the site level or above and/or • includes more than one list	go to the next step. NOTE: Before you can select a list column, you must first choose from available Content Types.
consists of only one list	you may want to go to Step 8. NOTE: It is not necessary to choose a Content Type for a single list. The **Column** drop-down will automatically populate with all of the columns used by that list.

5 If you want to filter content types by a specific text string, complete the **Content Type Contains** field.



6 To populate the **Content Type** drop-down with relevant Content Types, click **[Get Content Types]**.

7 Select a **Content Type** from the drop-down.



NOTE: If you have selected objects above the list level (for example, Web applications, site collections, and/or sites), the drop-down will be populated with all Content Types that are available for use by lists and libraries within the scope of your selection. If you have selected multiple lists, only Content Types that are currently *in use* by those lists will be available for selection.

8 Select the **Column** whose value you want to set. (This drop-down is populated with all of the columns used by lists within the scope of your selection that match the selected data type and content type.)

NOTE: If your selection includes more than one list, custom columns will only appear in the drop-down if they have been added to the Content Type at the site level. If a column was added directly to a particular list (or to a Content Type on the list), it will appear in the drop-down if your selection consists of *only* that list.

9 For **Choose a Value**:

a) Enter the new value for the column (For Managed Metadata, you can also click the icon and select from available values.)

b) If you want to **Overwrite existing values**, check this box.

NOTE: If you leave this box unchecked and a value already exists in that column for an item, it will be skipped. If you selected a Managed Metadata column that allows multiple values, you also have the option to **Append to existing values**.

Now you can either:

- run a simulation of the action (by clicking [**Run Simulation**])
- run the action immediately (by clicking [**Run Now**]),

OR

- schedule the action to run at a later time .

OR

- create an xml file with instructions for the analysis that can be executed at a later time (by clicking [**Save Instructions**]).

If you click [**Run Simulation**], ControlPoint runs through the process without actually making changes. A Task Audit will be generated with a description of what ControlPoint *would have done* if the action had been carried out. Text in the task description identifies it as a simulation.

If you chose the Run Now, option, after the action has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the action and displays in the Results section.

If you schedule the action, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

Creating a Managed Metadata Column from a Text Column (SharePoint Server)

The Create Managed Metadata action lets you map an existing text column in a SharePoint list or library to a Managed Metadata term. You can:

- map the text column to a Managed Metadata column that is already used by the list/library

OR

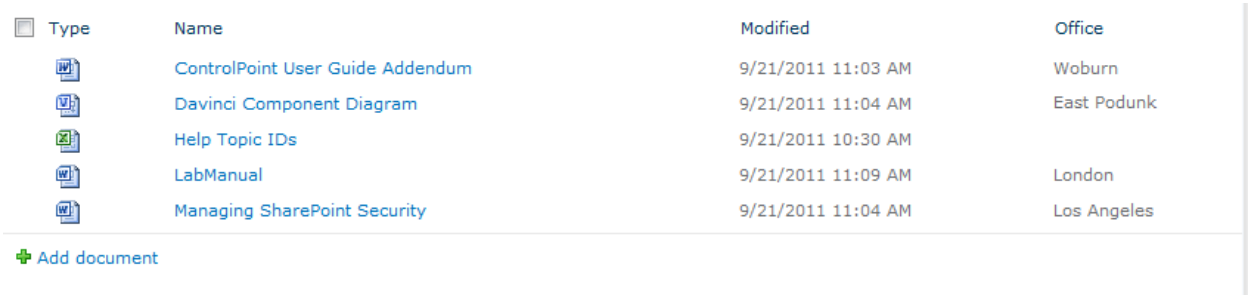
- create a new Managed Metadata column using a term set that has been defined either within the current site collection or in the Managed Metadata Service Application.

NOTE: If ControlPoint *creates* the Managed Metadata column, it will do so on the list-level Content Type. If you have defined a Content type at a higher level (such as the site collection or site) you may want to manually update the shared definition, and then use this action to populated the *values* of that column.

You can also run a simulation of how the operation will be carried out before committing to the action. This can be valuable, for example, to identify exactly which items would be changed.

EXAMPLE:

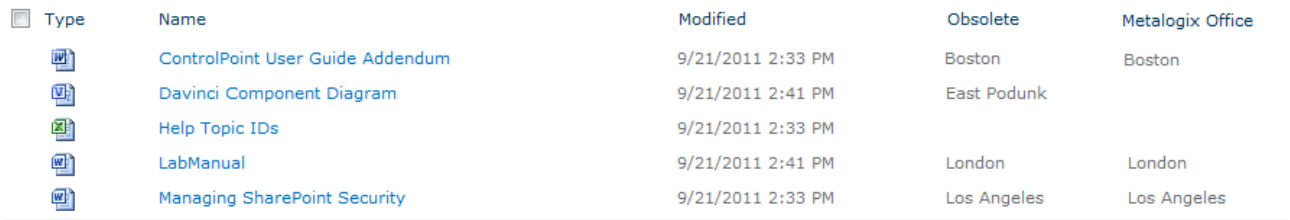
A SharePoint document library has a text field called Office, which identifies the Metalogix regional office that has ownership of a document.



Type	Name	Modified	Office
	ControlPoint User Guide Addendum	9/21/2011 11:03 AM	Woburn
	Davinci Component Diagram	9/21/2011 11:04 AM	East Podunk
	Help Topic IDs	9/21/2011 10:30 AM	
	LabManual	9/21/2011 11:09 AM	London
	Managing SharePoint Security	9/21/2011 11:04 AM	Los Angeles

Add document

The SharePoint administrator wants to map that column to a new Managed Metadata column entitled Metalogix Office, populate the new column with only *valid* Managed Metadata, and rename the original column, which is retained for reference or cleanup.

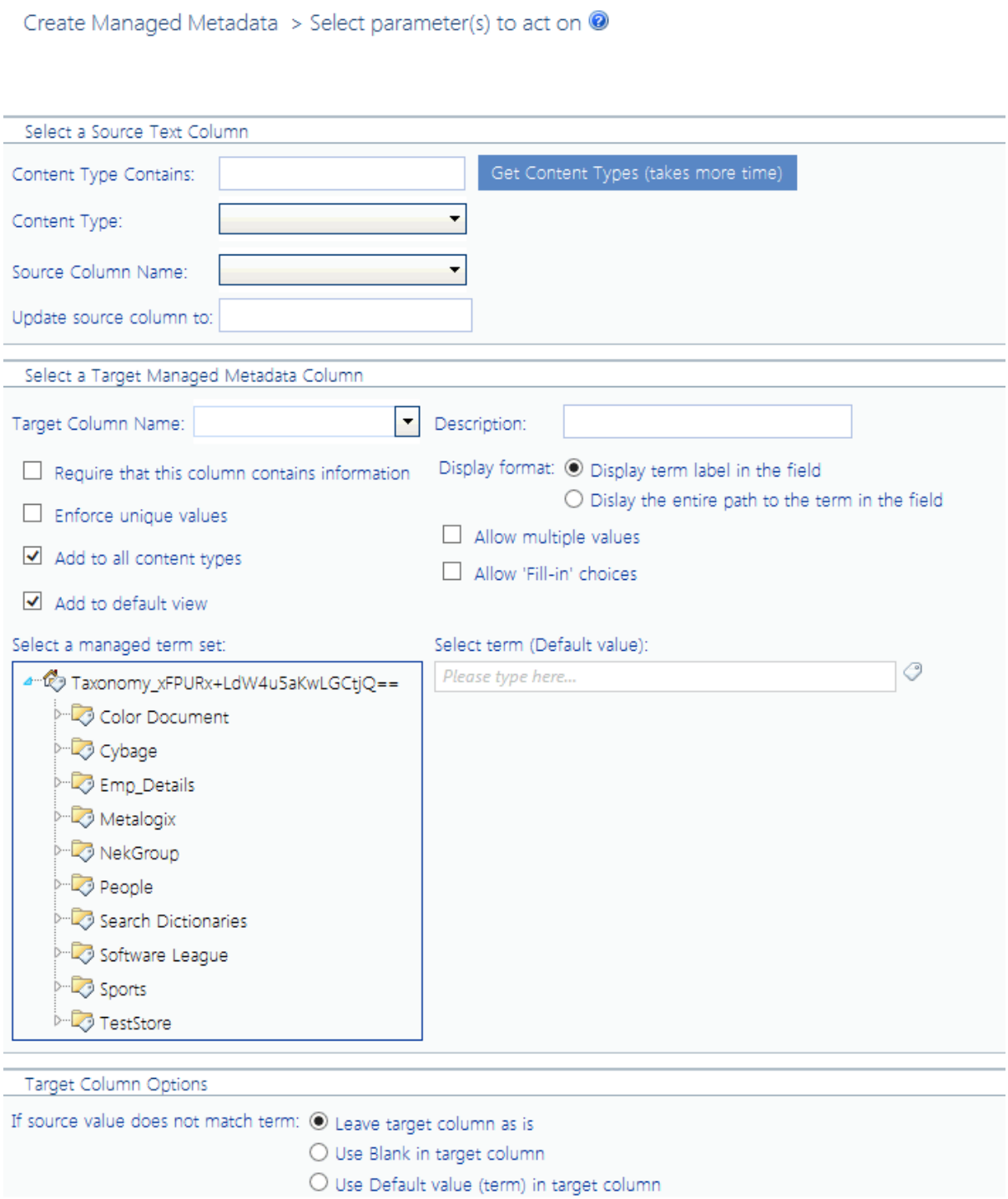


Type	Name	Modified	Obsolete	Metalogix Office
	ControlPoint User Guide Addendum	9/21/2011 2:33 PM	Boston	Boston
	Davinci Component Diagram	9/21/2011 2:41 PM	East Podunk	
	Help Topic IDs	9/21/2011 2:33 PM		
	LabManual	9/21/2011 2:41 PM	London	London
	Managing SharePoint Security	9/21/2011 2:33 PM	Los Angeles	Los Angeles

To create Managed Metadata from a text column:

1 Select the object(s) for which you want to create Managed Metadata.

2 Choose Automation > Create Managed Metadata.

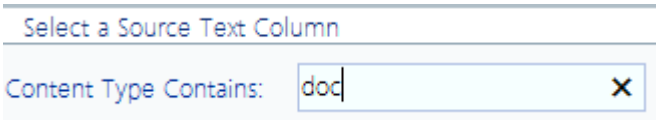


3 Use the information in the following table to determine the appropriate action to take.

If the scope of your selection ...	Then ...
• is at the site level or above and/or	go to the next step.

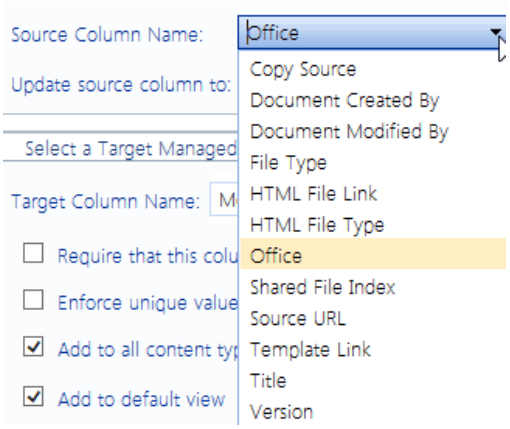
• includes more than one list	NOTE: Before you can select a list column, you must first choose from available Content Types.
consists of only one list	you may go to Step 7. NOTE: It is not necessary to choose a Content Type for a single list. The **Column** drop-down will automatically populate with all of the columns used by that list.

4 If you want to filter source column content types by a specific text string, complete the **Content Type Contains** field.



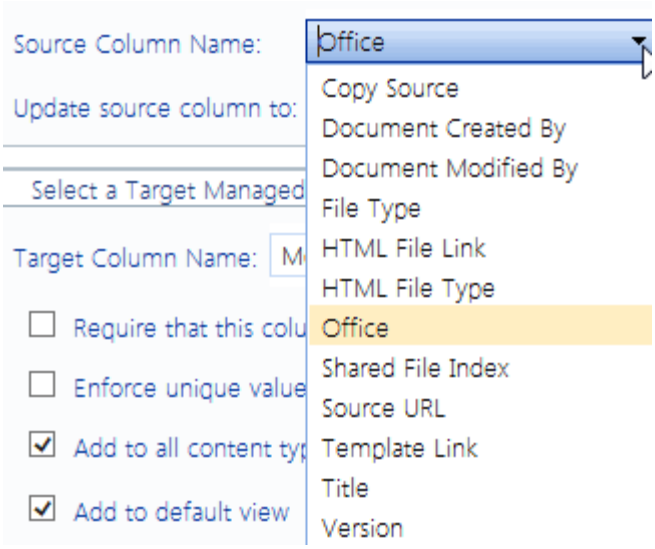
5 To populate the Content Type drop-down with relevant content types, click **[Get Content Types]**.

6 Select a source column **Content Type** from the drop-down.



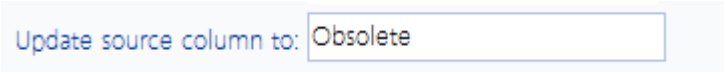
NOTE: If you have selected objects above the list level (for example, Web applications, site collections, and/or sites), the drop-down will be populated with all Content Types that are available for use by lists and libraries within the scope of your selection. If you have selected multiple lists, only Content Types that are currently *in use* by those lists will be available for selection.

7 Select the **Source Column Name** of the column whose value you want to use in setting the Managed Metadata field. (This drop-down is populated with all of the *text* columns within the scope of your selection that match the selected Content Type.)



NOTE: If your selection includes more than one list, custom columns will only appear in the drop-down if they have been added to the Content Type at the site level. If a column was added directly to a particular list (or to a Content Type on the list), it will appear in the drop-down if your selection consists of *only* that list.

8 If you want to give the source column a new name, complete the **Rename source column to** field. (If you want to use the same name for the target column, then you must rename the source column.)



9 Complete the **Select a Target Managed Metadata section** as follows:

a) For **Target Column Name** and **Description**:

- If the Managed Metadata column already exists for the Content Type, select it from the drop-down.

NOTE: When you select an existing Managed Metadata column, the remaining fields will be grayed-out, and the existing column definition will be used.

OR

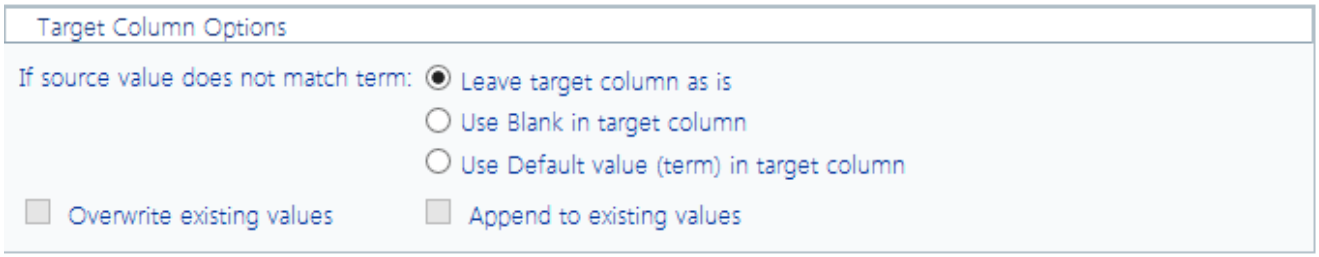
- If you want to create a Managed Metadata column for the Content Type, enter a name for the new column in the drop-down then enter a **Description**.

NOTE: If you are creating a new Managed Metadata column, complete the remaining fields as you would if you were creating it in SharePoint.

10 Check the options that you want to apply to the target column.

11 Complete the **Target Column Options** section as follows:

a) For **If source value does not match term**, specify how to proceed if a source value does not match a valid term within the selected term set. Use the information in the following table for guidance.



If the source value does not match a valid term within the selected term set and ...	**Then ...**
you want to retain the existing value in the target Managed Metadata column	select **Leave target column as is**. NOTE: If you are creating a new target Managed Metadata column and select this option, when a non-matching value is encountered the target column value will be left blank.
you want the value in the target column to be blank (and blank is a valid value per the column definition)	select **Use Blank in target column**.
you want the default value that has been specified for the target Managed Metadata column to be used	select **Use Default value (term) in target column**.

b) If the target Managed Metadata column already exists and you want to **Overwrite existing values**, check this box.

NOTE: If you leave this box unchecked and a value already exists in that column for an item, the existing value will be retained. If you selected a Managed Metadata column that allows multiple values, you also have the option to **Append to existing values**.

Now you can either:

- run a simulation of the action (by clicking [**Run Simulation**])
- run the action immediately (by clicking [**Run Now**]),

OR

- schedule the action to run at a later time

OR

- create an xml file with instructions for the analysis that can be executed at a later time (by clicking [**Save Instructions**]).

If you click [**Run Simulation**], ControlPoint runs through the process without actually making changes. A Task Audit will be generated with a description of what ControlPoint *would have done* if the action had been carried out. Text in the task description identifies it as a simulation.

If you chose the Run Now, option, after the action has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the action and displays in the Results section.

If you schedule the action, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

Managing SharePoint User Permissions

ControlPoint includes a variety of value-added actions that facilitate the management of SharePoint users, groups, and permissions:

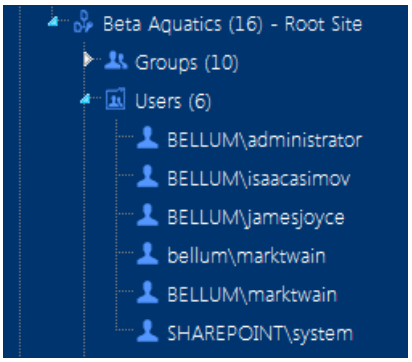
These actions are accessible from various levels of the hierarchy, enabling you to act on a single site collection or site, multiple site collections, sites, and/or lists within a Web application, or across the entire farm.

EXCEPTION: You cannot use these actions to manage user permissions for the SharePoint Central Administration site.

From the ControlPoint left navigation pane, you can also link directly to SharePoint pages for managing users and permissions.

Accessing SharePoint Pages for Managing User Permissions

The Users folder displays all of the users with direct or explicit permissions for a selected site collection or site. You can link directly to the SharePoint pages for managing direct permissions of an existing user or create a new user.

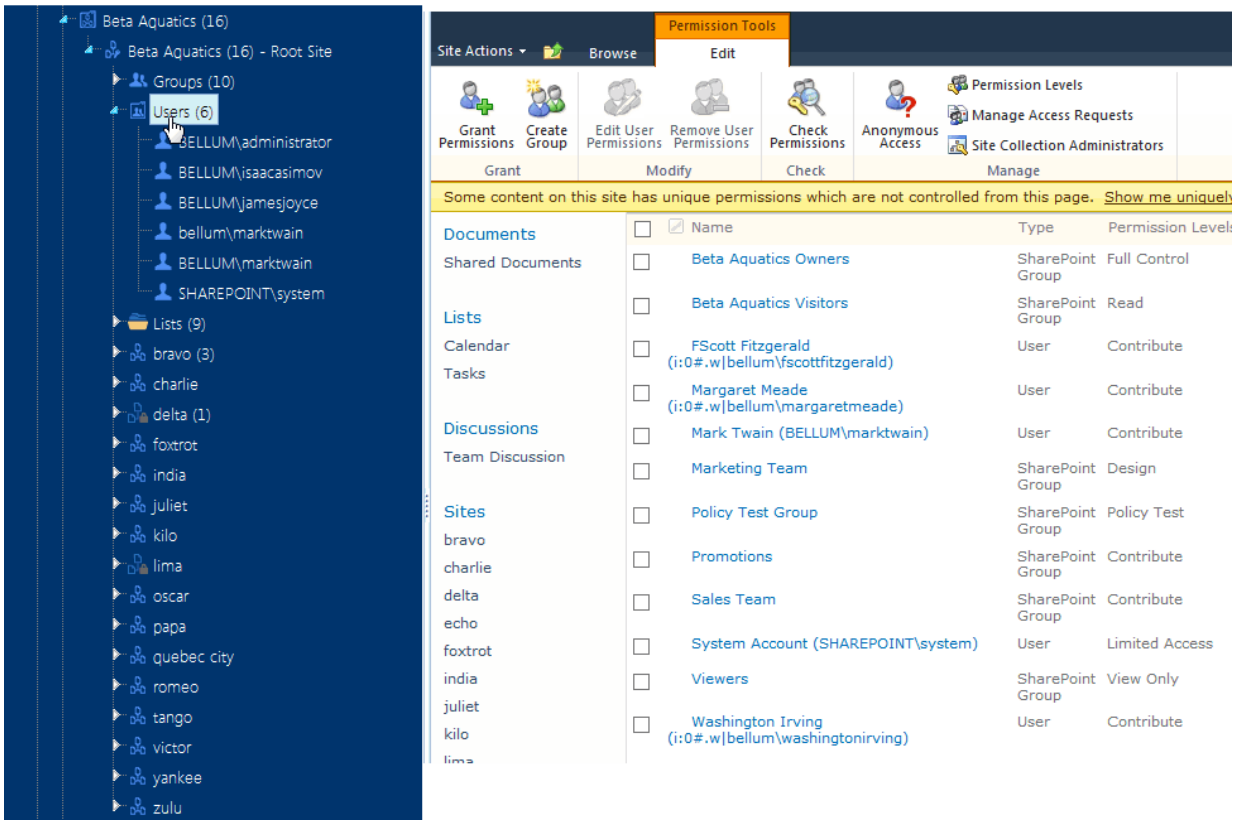


NOTE: Users do not display for sites whose permissions are *inherited* (as indicated by a site icon).

If a user has permissions to the site collection/site via a group, permissions are managed at the group level. See Accessing SharePoint Pages for Managing Groups.

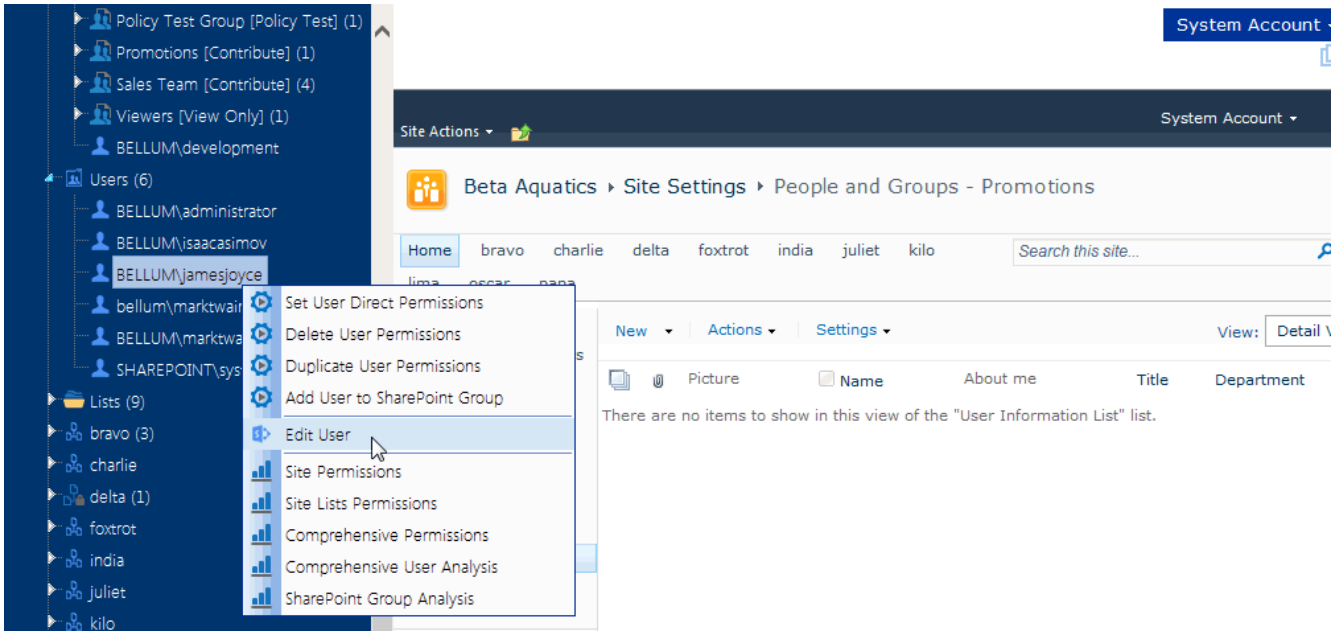
To view user permissions for the site collection/site in SharePoint

Click on the Users folder to access the SharePoint Permissions page for the site collection/site



To view/edit information about a user in SharePoint:

Select a user name and choose Edit to access the SharePoint Edit Personal Settings page for that user.

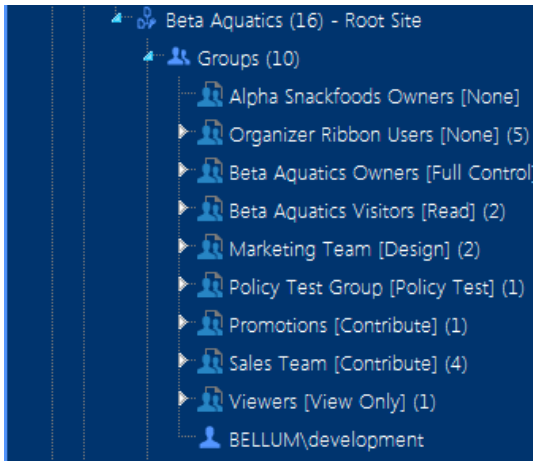


As an alternative to managing permissions through SharePoint, you can use ControlPoint value-added features for managing user permissions. These features are especially useful if you want act on multiple users and/or across multiple sites in a single operation.

Accessing SharePoint Pages for Managing Groups

The Groups folder displays all of the SharePoint and Active Directory groups with permissions for a site. You can link directly to the SharePoint pages for managing an existing group or create a new group.

All groups with permissions for each site within a site collection display beneath the site. In the case of SharePoint groups, the number of users within a group, as well as the group's permission level, displays to the right of each group name.

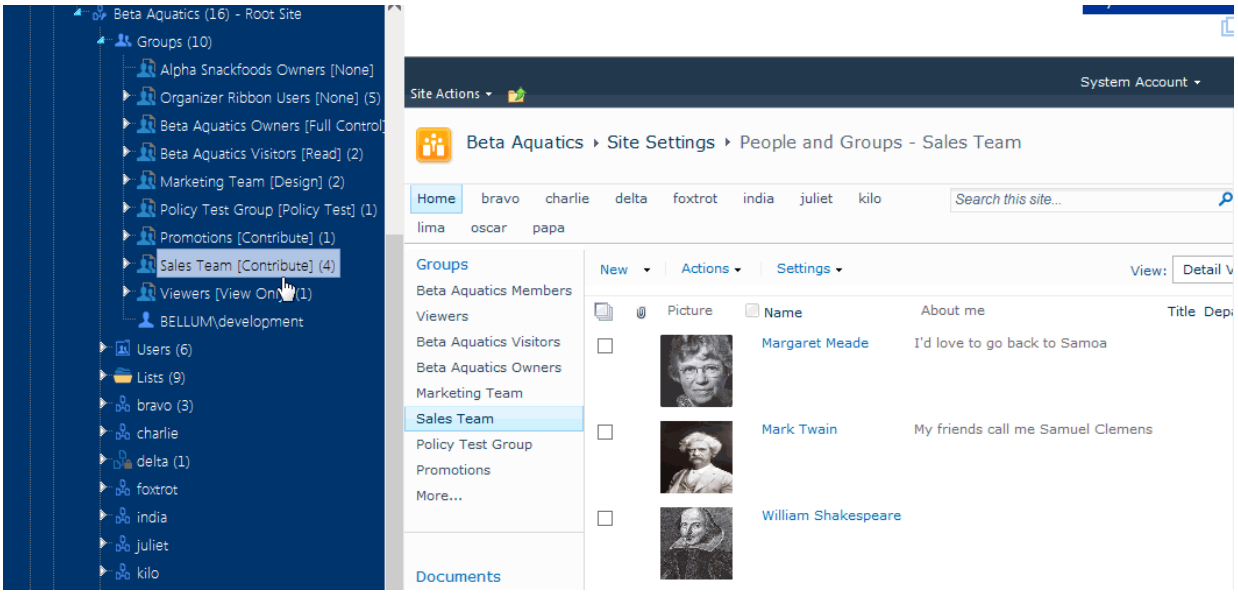


NOTE: Groups do not display for sites whose permissions are *inherited* (as indicated by the icon).

You can view group membership by clicking on the plus sign (+) to the left of the group name.

To view/edit an existing group in SharePoint:

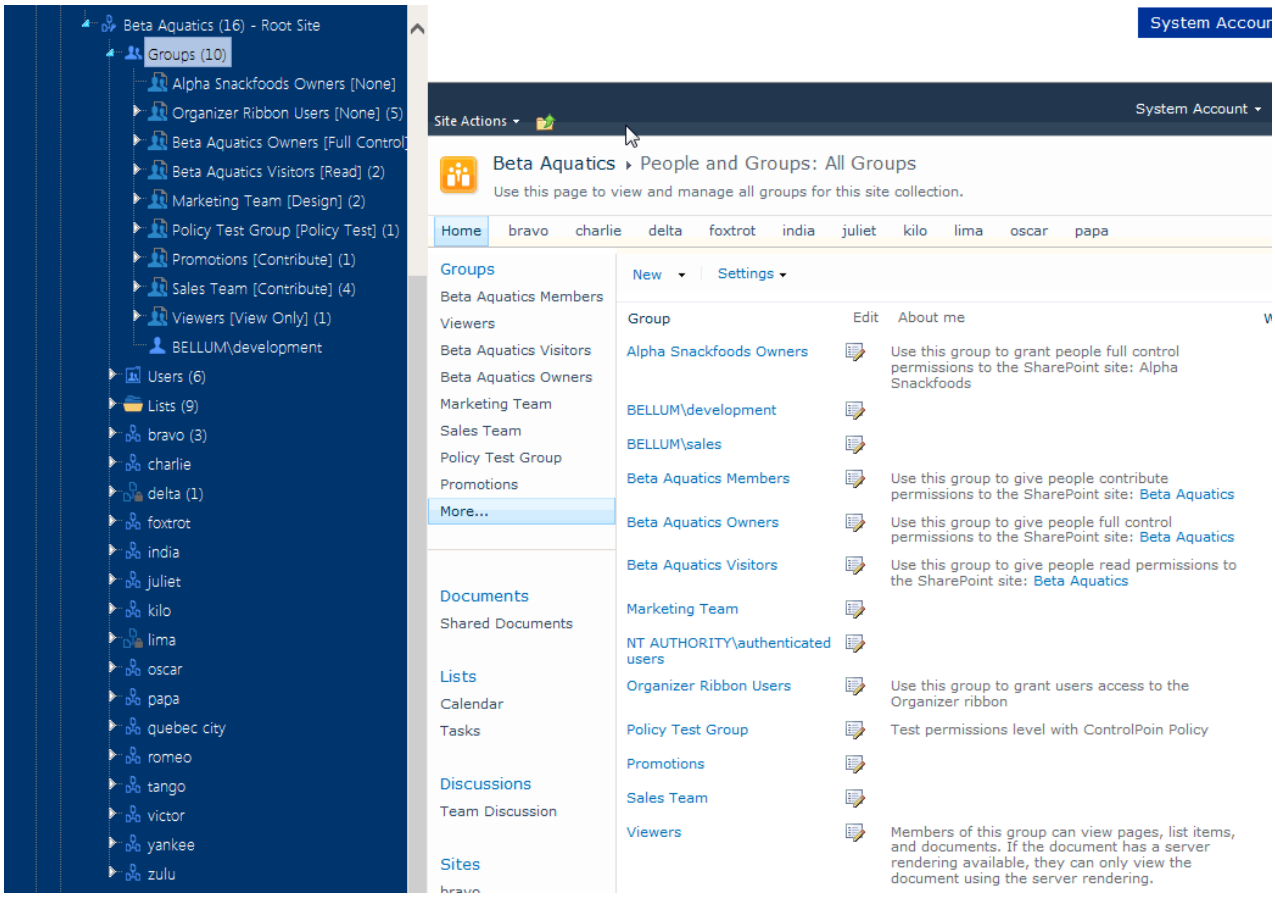
Click on a SharePoint group name to access the SharePoint People and Groups page for that group.



To view/edit groups in SharePoint:

Click the Groups folder to access the SharePoint All Groups page, from which you can create a new group for the site.

Consult your SharePoint documentation for instructions on creating a group.



NOTE: If the Groups folder does not display for a root site or a site with unique permissions, no groups have been granted permissions for it. To set up permissions for the first Group, navigate to the People and Groups page through the SharePoint site. Once a group has been granted permissions, the Groups folder will display in the ControlPoint left navigation pane as soon as you refresh the SharePoint Hierarchy.

Setting User Direct Permissions

Set User Direct Permissions is a ControlPoint action that lets you grant users direct permissions to one or more SharePoint sites, lists/libraries, and/or items. (The action will not, however, overwrite or replace any direct permissions a user may already have.)

NOTE: If you want to add users to an existing SharePoint group, use the procedure for Adding Users to SharePoint Groups.

To set user direct permissions:

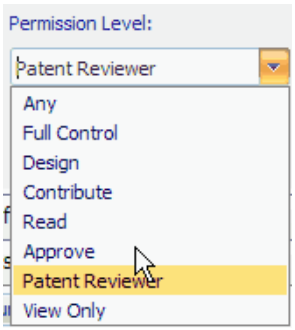
1 Select the object(s) to which you want to grant user permissions.

2 Choose Users and Security > Set User Direct Permissions.

3 Complete the Parameters section as follows:

a) For **Set Permissions for User(s)**, select the user(s) for whom you want to set direct permissions.

b) In the **Permission Level (Direct)** drop-down, select a level from the list.



NOTE: All custom permissions levels that are currently assigned to at least one user within the scope of your selection display in the drop-down. (In a multi-farm environment, this list is populated from the permissions of the home farm.) If you want to assign a custom permissions level that has been defined for a site collection but either is not currently in use or exists only on a remote farm, you can type it into the drop-down.

c) If your selection includes one or more sites and you want the permissions to be applied to all lists within the site(s) that have unique permissions, check the **Propagate to All Lists with Unique Permissions** box.

d) If you have checked the **Propagate to All Lists with Unique Permissions** box and want the permissions to be applied to all *items* within the list(s) that have unique permissions, check the **Propagate to List Items** box.

NOTE: The "Propagate" options do not apply to lists that you selected explicitly. If you want to include items within explicitly-selected lists, use the **Include Children** or **Choose** option in the Selection panel. See also Selecting List Items on Which to Perform a ControlPoint Operation.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

If you chose the Run Now, option, after the operation has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the operation and displays in the Results section.

If you schedule the operation, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

Deleting User Permissions

Delete User Permissions is a ControlPoint action that lets you delete SharePoint user permissions from one or more site collections/sites. You can also choose whether to:

- delete the user's entry from the selected site(s) (so that they no longer appear in the site's All People list)
- delete alerts associated with the user
- delete the user's My Site site collection, and/or
- reassign a user's permissions to one or more target users before performing the deletion

EXCEPTION: You cannot reassign Site Collection Administrator privileges using this action.

CAUTION: Deleting Users from SharePoint Groups

The Delete User Permissions action will remove the selected user(s) from SharePoint groups in which they are listed as a member. Because groups are defined at the site collection level and may be used anywhere in the site collection, if you are performing the action on one or more individual sites that includes groups that are used elsewhere in the site collection, the user(s) will lose permissions on unselected sites within the collection as well.

NOTE: This action does not remove users from *Active Directory* groups. Therefore, if a user is granted permissions via an Active Directory group, those permissions will not be impacted.

Deleting Permissions from Lists, Folders, or Items with Unique Permissions

When user permissions are added to a list, folder, or item that has unique permissions, SharePoint automatically creates an entry for the user on its first non-inherited parent object and assigns a permissions level of "Limited." This entry will be deleted only if that parent object is included in the scope of the action. If the parent object is not included in the scope, the following message will display in the Task Audit:

User [user_name] permissions cannot be removed from [object_type] [object_name]. Go to the first non-inheriting parent [object_type] to remove this permission.

To delete the permissions of one or more users:

1 Select the object(s) from which you want to delete permissions.

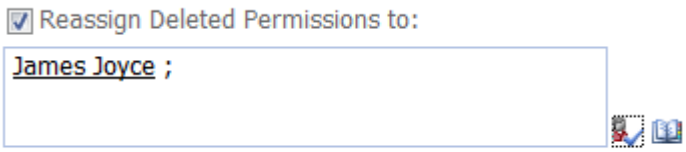
2 Choose Users and Security > Delete User Permissions.

3 For **Delete All Permissions for User(s)**, select the user whose permissions you want to delete.

NOTE: Delete User Permissions is one of the ControlPoint actions that can be performed on unvalidated users. (For example, you can delete the SharePoint permissions of a user that you know has been removed from Active Directory or alternate authentication provider database.) However, any individual user(s) entered into the Reassign Deleted Permissions to People Picker must be validated.

4 Specify the remaining parameters as appropriate. Use the information in the table below for guidance.

If you want to ...	Then ...

remove the user(s) from the site collection's People and Group list	check the **Delete User Entries from the Site Collection** box .(If you leave this box unchecked, permissions will be deleted but user entries will remain in the People and Groups list). NOTES: • If a user was granted permissions *only* through an Active Directory group, that user may have an "invisible entry" in the site collection's People and Group list. This action will remove that entry. • If the **Delete direct permissions only** is selected, this option becomes disabled. The removal of a user from the site collection would remove *all* of that user's permissions, including those granted through membership in SharePoint groups.
remove *only* direct permissions and retain permissions granted through SharePoint group membership	check the **Delete direct permissions only (Leave group permissions intact)** box. NOTE: If **Delete User Entries from the Site Collection is selected**, this option becomes disabled. Removal of a user from the site collection would remove *all* of that user's permissions, including those granted through membership in SharePoint groups.
reassign the permissions of the user(s) to be deleted to one or more other users	a. Check the **Reassign Deleted Permissions to** box. b. Select the user(s) to whom you want to copy the permissions.  NOTE: If you entered the name of more than one user in the Delete Users field, the permissions of every one of those users (if different) will be reassigned to the target user.
delete the user My Site site collection(s)	check the **Delete My Sites** box.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

If you chose the Run Now, option, after the operation has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the operation and displays in the Results section.

If you schedule the operation, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

NOTE: If you chose to reassign permissions, the delete action will not be carried out unless the permissions are successfully reassigned.

Duplicating a User's Permissions

Duplicate User Permissions is a ControlPoint action that lets you copy the permissions of one SharePoint user to one or more others. Permissions can be copied for multiple site collections in a farm or Web application, or for individual site collections and sites.

EXCEPTIONS: You cannot duplicate *Site Collection Administrator* privileges using this action. You also cannot duplicate permissions that were granted via an Active Directory group (as an alternative, you can simply add the new user(s) to the Active Directory group).

All of a user's permissions for a site collection, including any unique permissions for sites, lists, and libraries, and items are copied. .

NOTE: If your ultimate goal is to delete a user after copying his or her permissions to another user (for example, if the user is leaving the department or company and is being replaced by someone else), you can do so as part of the procedure for Deleting User Permissions.

To duplicate a user's permissions:

1 Select the site(s) for which you want to duplicate permissions.

2 Choose Users and Security > Duplicate User Permissions.

3 Complete the Parameters section as follows:

a) For **Model User Name**, select the user(s) whose permissions you want to duplicate.

NOTE: Make sure that the permissions of the user you want to use as the model are appropriate for the target user(s). Remember that you can review the permissions of the model before continuing. If you entered the name of more than model user, the permissions of every one of those users (if different) will be assigned to the target user(s).

b) For **Duplicate Permissions To**, select the target user(s).

c) If you want permissions of the model user(s) to *replace* those of the target user(s), check the **Delete existing permissions from target** box.

NOTE: If you leave this box unchecked, model user permissions will be *added* to any existing permissions.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

If you chose the Run Now, option, after the operation has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the operation and displays in the Results section.

If you schedule the operation, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

Adding Users to SharePoint Groups

Add Users to SharePoint Groups is a ControlPoint action that enables you to add one or more users to existing SharePoint groups.

To add users to SharePoint groups:

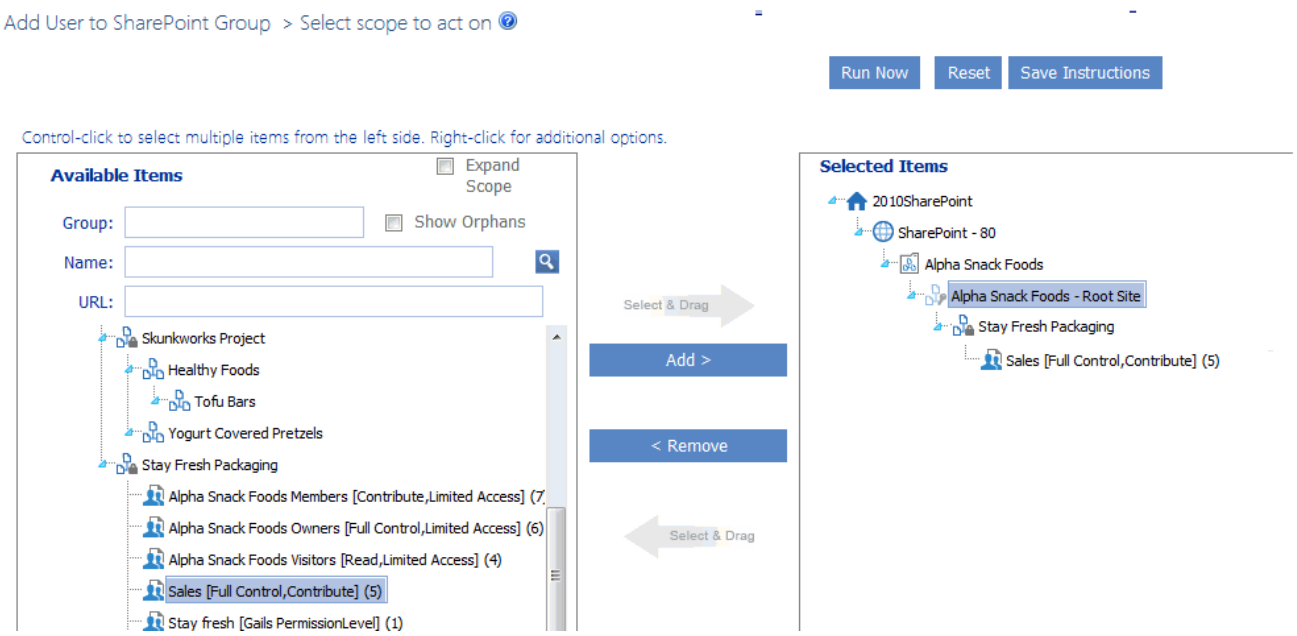
1 Select the object(s) for which you want to add users to groups.

2 Choose Users and Security > Add User to SharePoint Group.

3 Select the SharePoint group(s) to which you want to add users as follows:

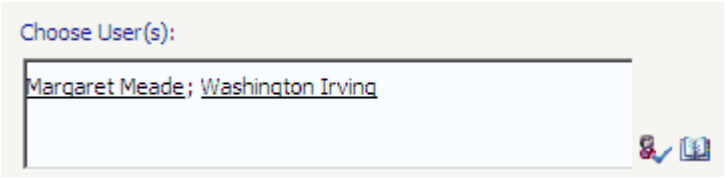
a) From the **Available Items** list, select the group(s) to which you want users and move them to the **Selected Items** list.

Note that all groups defined for the entire site collection display beneath the root site. Groups with unique permissions also display beneath the site granting those permissions. By default, groups will display in this list if they have been assigned at least one permissions level. ControlPoint Application Administrators can, however, configure ControlPoint to display groups that do not have an associated permissions level. Details can be found in the *ControlPoint Administration Guide*.



b) When you have finished adding groups to the Selected Items list, click [**Apply**].

4 In the Parameters section **Choose User(s)** field, select the user(s) that you want to add to the group(s).



5 If you want to remove any user direct permissions from objects for which the selected *group* has permissions, check the **Remove matching direct permissions** box.

NOTE: Direct permissions for any objects within the scope of the action for which the selected SharePoint group does *not* have permissions will be retained.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

If you chose the Run Now, option, after the operation has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the operation and displays in the Results section.

If you schedule the operation, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

Setting SharePoint Group Permissions

The Set SharePoint Group Permissions action lets you assign a permissions level to one or more SharePoint groups within a single site collection or site.

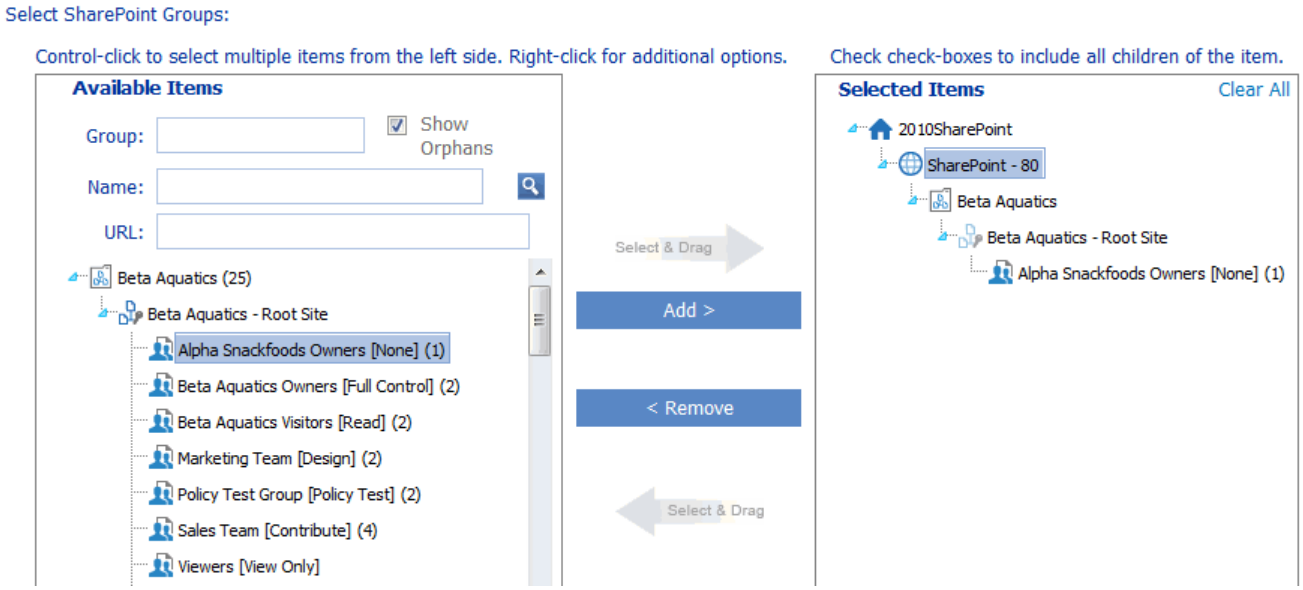
By default, only groups that have existing permissions within the site collection can be selected. In that case, the action *adds* to the existing permissions (it does not replace them). ControlPoint Application Administrators can, however, choose to display? and allow the selection of? groups that exist in the site collection but do not have permissions to the object. See the *ControlPoint Administration Guide* for details on changing the ControlPoint Setting "Show SharePoint Groups with No Permissions in Hierarchy."

In a multi-farm environment, SharePoint group permissions can be set on a single farm; either the home farm or a remote farm.

To set SharePoint Group Permissions

1 Select the site collection or site whose SharePoint group permissions you want to set.

2 Choose Users and Security > Set SharePoint Group Permissions.



3 Select the group(s) to which you want to add permissions as follows:

a) From the **Available Items** list, select the group(s) to which you want to set permissions and move them to the **Selected Items** list.

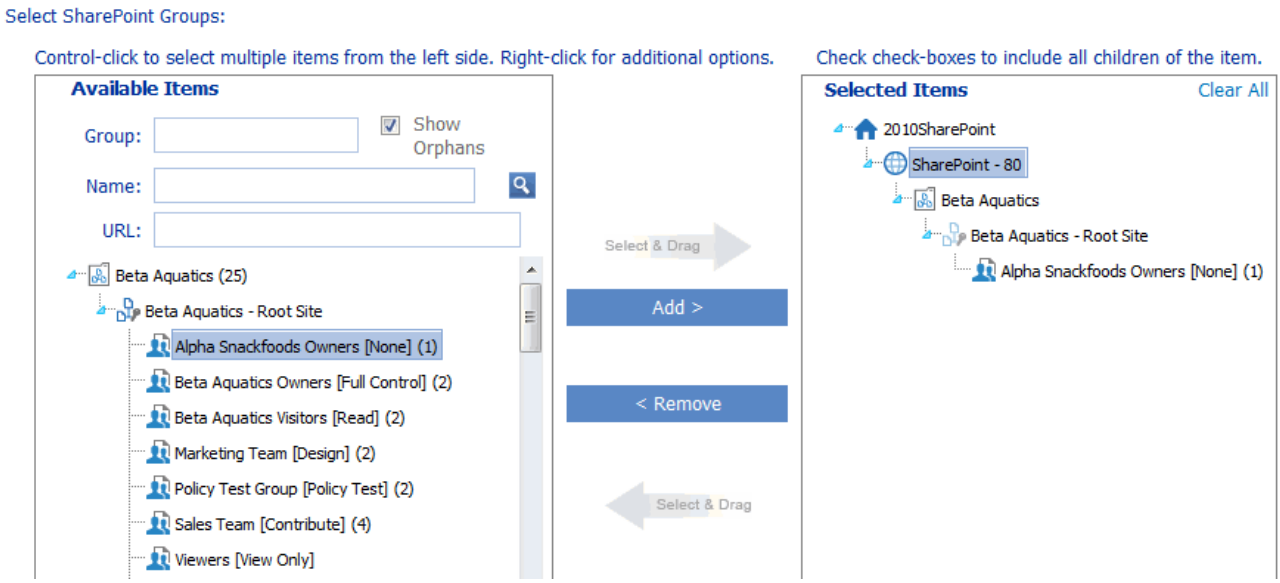
Note that all groups defined for the entire site collection that have at least one associated permissions level display beneath the root site. Groups with unique permissions also display beneath the site granting those permissions. Any group that does not have at least one associated permissions level for the site collection or site will not display in the list.

TIP: If your Available Items list is particularly long, you may find it useful to narrow the scope by searching based on **Group** name, site **Name**, and/or site **URL**) and searching for the group. For example, if you want to narrow your scope to all group owners, enter "owner" in the Group field.

b) Click [**Apply**].

4 From the **Permission Level** drop-down, select the permissions level you want to add to the group.

REMINDER: This action will add to, but will not replace, an existing permissions level.



NOTE: All custom permissions levels that are currently assigned to at least one user within the scope of your selection display in the drop-down. (In a multi-farm environment, this list is populated from the permissions of the home farm.) If you want to assign a custom permissions level that has been defined for a site collection but either is not currently in use or exists only on a remote farm, you can type it into the drop-down.

5 If your selection includes one or more sites and you want the permissions to be applied to all lists within the site(s) that have unique permissions, check the **Propagate to All Lists with Unique Permissions** box.

6 If you have checked the **Propagate to All Lists with Unique Permissions** box and want the permissions to be applied to all *items* within the list(s) that have unique permissions, check the **Propagate to List Items** box.

NOTE: The "Propagate" options do not apply to lists that you selected explicitly. If you want to include items within explicitly-selected lists, use the **Include Children** or **Choose** option in the Selection panel. See also Selecting List Items on Which to Perform a ControlPoint Operation.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- complete the Enforce Policy section and schedule the operation to run at a later time.

OR

- save the operation as XML Instructions that can be executed at a later time.

Deleting SharePoint Group Permissions

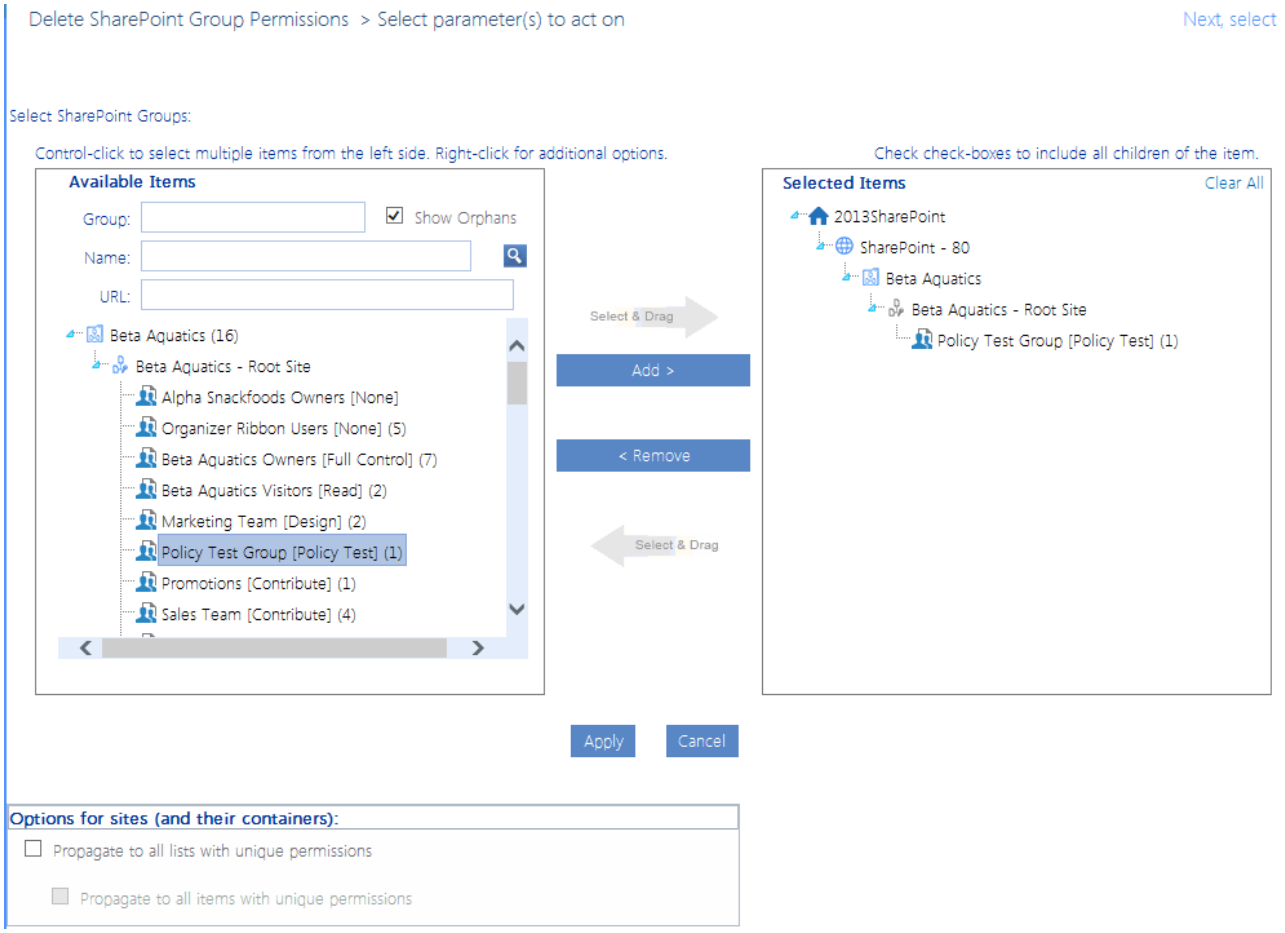
The Delete SharePoint Group Permissions lets you delete the permissions of one or more SharePoint groups from a single site collection or site without removing its members or deleting the group itself.

NOTE: This action deletes *all* permissions currently assigned to a group. Once permissions have been removed from a SharePoint group, the group will display in the SharePoint Group Analysis. Whether or not the group continues to display in the SharePoint Hierarchy or any ControlPoint group pickers depends on the Value of the ControlPoint Configuration Setting ShowNoPermSPGroup.

To delete SharePoint Group Permissions:

1 Select the site collection or site whose group permissions you want to delete.

2 Choose Users and Security > Delete SharePoint Group Permissions.



3 Select the group(s) whose permissions you want to delete as follows:

a) From the **Available Items** list, select the group(s) to which you want to add users and move them to the **Selected Items** list.

Note that all groups defined for the entire site collection that have at least one associated permissions level display beneath the root site. Groups with unique permissions also display beneath the site granting those permissions. Any group that does not have at least one associated permissions level for the site collection or site will not display in the list.

TIP: If your Available Items list is particularly long, you may find it useful to narrow the scope by searching based on **Group** name, site **Name**, and/or site **URL**) and searching for the group. For example, if you want to narrow your scope to all group owners, enter "owner" in the Group field.

b) Click [**Apply**].

4 If your selection includes one or more sites and you want the permissions to be deleted from all lists within the site(s) that have unique permissions, check the **Propagate to All Lists with Unique Permissions** box.

5 If you have checked the **Propagate to All Lists with Unique Permissions** box and want the permissions to be deleted from all *items* within the list(s) that have unique permissions, check the **Propagate to List Items** box.

NOTE: The "Propagate" options do not apply to lists that you selected explicitly. If you want to include items within explicitly-selected lists, use the **Include Children** or **Choose** option in the Selection panel. See also Selecting List Items on Which to Perform a ControlPoint Operation.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- complete the Enforce Policy section and schedule the operation to run at a later time.

OR

- save the operation as XML Instructions that can be executed at a later time.

If you chose the Run Now, option, after the operation has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the operation and displays in the Results section.

If you schedule the operation, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

Deleting SharePoint Groups

Use the Delete SharePoint Groups action to delete SharePoint groups from one or more site collections/sites in the farm.

To delete one or more SharePoint groups:

1 Select the object(s) from which you want to delete SharePoint groups.

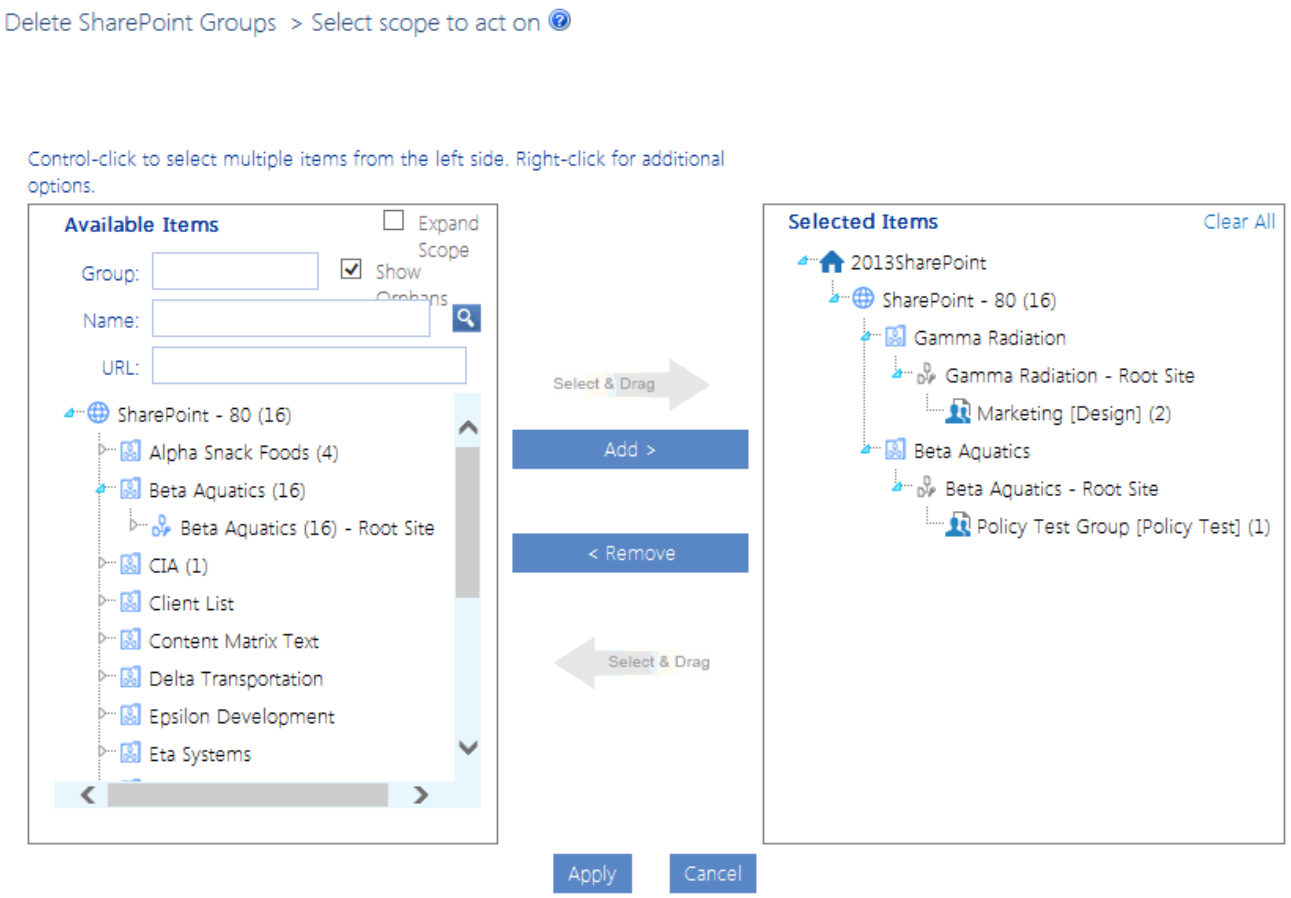
2 Choose Users and Security > Delete SharePoint Groups.

3 Select the SharePoint group(s) you want to delete as follows:

a) Select the group(s) from the **Available Items** list and move them to the **Selected Items** list.

Note that all groups defined for the entire site collection display beneath the root site. Groups with unique permissions also display beneath the site granting those permissions.

TIP: If your Available Items list is particularly long, you may find it useful to narrow the scope by searching based on **Group** name, site **Name**, and/or site **URL**) and searching for the group.



CAUTION: Because SharePoint groups are defined at the site collection level and may be used anywhere in the site collection, if you are performing the action on one or more individual sites that includes groups that are used elsewhere in the site collection, the groups will be deleted from unselected sites within the collection as well.

b) When you have finished adding groups to the Selected Items list, click [**Apply**].

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- complete the Enforce Policy section and schedule the operation to run at a later time.

OR

- save the operation as XML Instructions that can be executed at a later time.

If you chose the Run Now, option, after the operation has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the operation and displays in the Results section.

If you schedule the operation, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

Backing Up and Restoring Site Permissions

The ControlPoint Backup Permissions action lets you back up the permissions of one or more SharePoint sites, which includes:

- permissions granted to users or groups specified in Active Directory or other authentication providers
- permissions granted to SharePoint groups
- membership in SharePoint groups.

The following are *not* backed up:

- Permission level definitions
- SharePoint group definitions
- Active Directory group membership

A separate backup is created for each site within a site collection. For example, if you choose to back up a site collection that contains multiple subsites, a separate backup will be made of the root site and each subsite.

In a multi-farm environment, permissions backups can be created and managed for the home farm only.

Restoring Permissions from a Backup

You can restore permissions from a backup using the ControlPoint Manage Permissions Backups feature. You can choose whether or not to restore SharePoint groups that have been deleted, membership in SharePoint groups, and/or Site Collection Administrators.

Changes that are made between the time when permissions are backed up and restored are handled as follows:

- If an object had unique permissions at the time of the backup has since been made inherited, the unique permissions will be restored.
- If a site has been deleted since the backup was made, it will be skipped.
- If it can be determined that a user no longer exists (on the site, Active Directory group, server etc.), permissions for that user will not be restored.
- Any new list or list item has been added since the backup was created will remain intact.
- The permissions of any user who was given *direct* permissions since the backup was created will be deleted (the user(s) will remain in the SharePoint All People list, however). If you choose to restore group membership, any users added to a SharePoint group since the backup was created will *not* be deleted. Because SharePoint groups are defined at the site collection level, deleting a user would remove the user's permissions to all sites within the collection that use that group.

Backing Up Site Permissions

Use the ControlPoint **Backup Permissions** action to back up permissions on one or more SharePoint sites, to maintain the integrity of site security throughout your farm.

For example, you may want to back up permissions:

- for the entire farm on a regular basis (such as weekly)
- to have a "snapshot" of the original permissions set up for a newly created site
- before performing an administrative action that may compromise site security settings.

Permissions are backed up site by site, with permissions for each individual site saved as a separate line item in the data table xcPermissionsbackup—in the ControlPoint Administration database (xcadmin)—along with the date and time of the operation. Definitions of permissions levels are not backed up..

NOTE: Depending on the scope of the operation and the number of objects (sites, lists, and/or list items) with unique permissions, the permissions backup process can be time-consuming and resource-intensive. Therefore, it is recommended that you perform the operation—or schedule the operation to run—when system usage is low.

To back up site permissions:

1 Select the object(s) containing the sites whose permissions you want to back up.

2 Choose Users and Security > Backup Permissions.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- complete the Enforce Policy section and schedule the operation to run at a later time.

OR

- save the operation as XML Instructions that can be executed at a later time.

If you chose the Run Now, option, after the operation has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the operation and displays in the Results section.

If you schedule the operation, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

Restoring Site Permissions from a Backup

Use the **Manage Permissions Backups** action to restore user permissions for one or more sites whose permissions have been backed up. You can choose whether or not to restore from the backup:

- SharePoint groups that may have been deleted
- the membership of SharePoint groups, and/or
- the Site Collection Administrator.

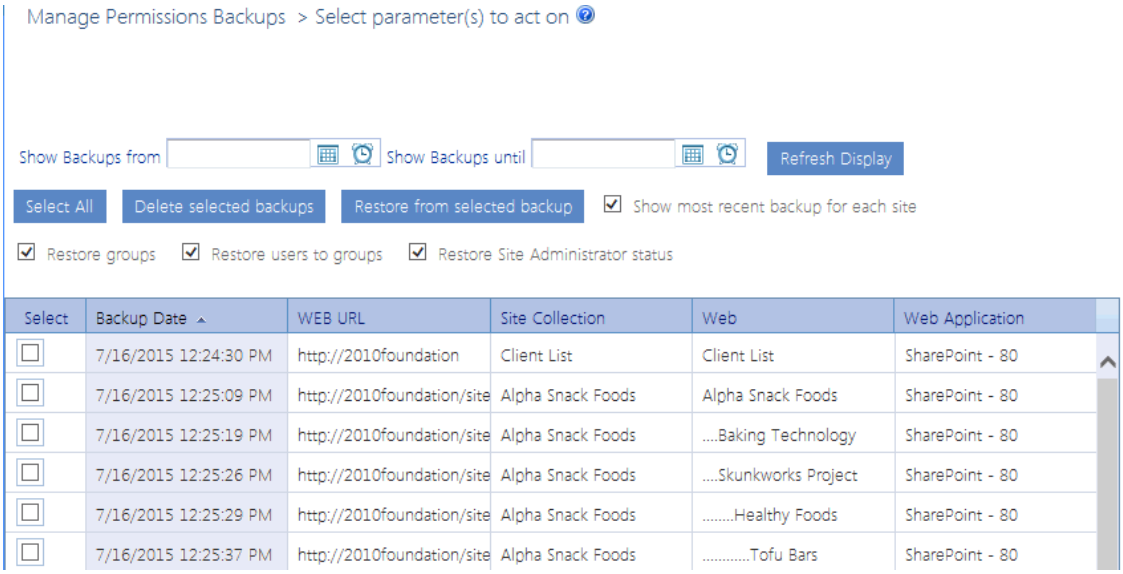
REMINDER: Permissions That are Restored/Not Restored

- Definitions of permissions levels cannot be backed up, and therefore cannot be restored. If a permissions level was deleted from a site since the Backup Date, an error will be reported.
- Any sites that have been deleted since the Backup Date will not be restored, nor will permissions for users who are no longer valid on the server or in Active Directory (that is, deleted or disabled users).
- For any object that currently that has unique permissions but had inherited permissions as of the Backup Date, inheritance will be restored. Conversely, for any object with unique permissions that had inherited permissions as of the Backup date, the unique permissions will be restored.
- The permissions of any user who was given *direct* permissions since the Backup Date will be deleted. If you choose to restore group membership, however, any user added to a SharePoint group since the Backup Date will *not* be deleted, as that user may have permissions to other sites in the collection via membership in the group.
- Any lists and list items created after the Backup Date will remain intact.

To restore permissions backups:

1 Select the object(s) whose permissions you want to restore.

2 Choose Users and Security > Manage Permissions Backups.



The **Show most recent backups for each site** box is checked by default and only the most recent backup for each site within the scope of your selection will display. You can, however, check or uncheck this box as needed.

3 If you want to narrow the list to backups to a specific date range:

a) Select a **Show Backups from** and **Show Backups until** date ( ) and time ( ).

b) Click [**Refresh Display**].

4 Check the appropriate restore option(s):

- **Restore groups** - Check this box if you want any SharePoint groups (and group membership) that have been deleted since the Backup Date to be restored. If you leave this box unchecked, groups will not be restored.
- **Restore users to groups** - Check this box if you want to restore membership in SharePoint groups that may have changed since the Backup Date. (That is, any deleted users will be restored. Users that have been added to group since the Backup Date will not be deleted, however.) If you leave this box unchecked, only members that have been added to the group since the backup date (if any) will be retained.

  REMINDER: Users who are no longer valid on the server or in Active Directory will not be restored.

- **Restore Site Administrator** - Check this box if you want to restore the Site Administrator(s) that existed as of the backup date. If you leave this box unchecked, the current Site Administrator(s) will be retained.

5 Highlight the row(s) containing the backups from which you want to restore permissions. To select multiple backups, use the [**Shift**] and [**Ctrl**] keys in the conventional manner.

Now you can either:

- run the action immediately, (by clicking the [**Restore from selected backup**] button)

OR

- schedule the restore to run at a later time

OR

- generate an xml file with instructions that can be executed at a later time (by clicking [**Save Instructions for Restore**]).

If you chose the Run Now, option, after the operation has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the operation and displays in the Results section.

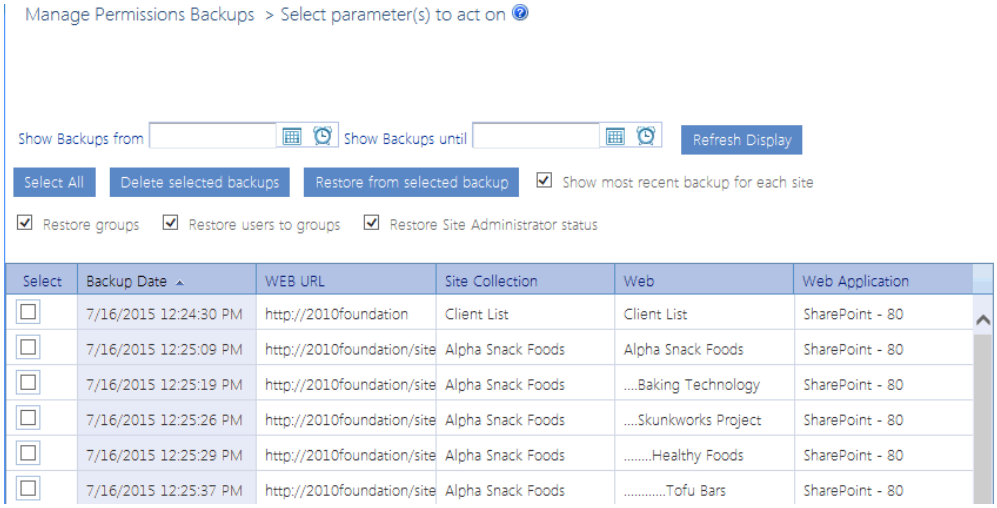
If you schedule the operation, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

Deleting Permissions Backups

From the Manage Permissions Backups interface you can delete one or more permissions backups.

NOTE: If you want to narrow the list to backups to a specific date range, select a **Show Backups from** and **Show Backups until** date ( ) and time ( ), then click [**Refresh Display**].



To delete selected backup(s):

1 In the **Select** column, check the box beside each backup you want to delete.*

2 Click [**Delete selected backups**].

You will be prompted to confirm the deletion before the operation is carried out.

To delete all backups:

1 Click [**Select All**].*

2 Click [**Delete selected backups**].

You will be prompted to confirm the deletion before the operation is carried out.

*NOTE: If you want to de-select currently selected backups, click [**Reset**].

Managing Permissions Inheritance

The ControlPoint Manage Permissions Inheritance action lets you break or restore permissions inheritance of sites, subsites, lists, folders, and items across your SharePoint farm.

SharePoint Objects Included in the Operation by Default

The following table identifies the SharePoint objects that are included in the Break/Restore Inheritance operation by default.

Operation	Scope	Objects Included by Default
Restore Inheritance	Site Collection	All sites, subsites, lists, folders and items within the selected scope. NOTE: You can use the Change Selection option if you want to exclude individual sites, lists, folders, and items.
	Site	The site itself and all lists, folders and items within the site. NOTE: If you have checked the **Include Children** box in the Selection pane (that is, you want to include child sites of the selected site), you can also choose to *exclude* the selected site itself (so that child sites will inherit from it).
	List	The list itself. NOTE: By default folders and items are not acted upon. You can, however, use the Change Selection option to explicitly select any folders, and items you want to include.
Break Inheritance	Site Collection	All sites and subsites within the selected scope. NOTE: By default, lists, folders, and items are not acted upon. You can, however, use the Change Selection option to explicitly select any lists, folders, and items you want to include.
	Site	The site itself and all subsites. NOTES: • By default, lists, folders, and items are not acted upon. You can, however, use the Change Selection option to explicitly select any lists, folders, and items you want to include. • If you have checked the **Include Children** box in the Selection pane (that is, you want to include child sites of the selected site), you can also choose to *exclude* the selected site itself (so that child sites will no longer inherit from it).
	List	The list itself.

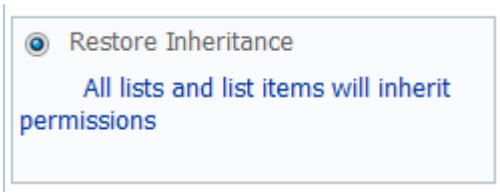
Operation	Scope	Objects Included by Default
		NOTE: By default, folders and items are not acted upon. You can, however, use the Change Selection option to explicitly select any folders, and items you want to include.

To manage permissions inheritance:

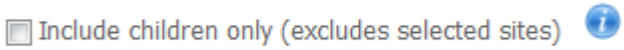
1 Select the object(s) for which you want to break or restore inheritance.

2 Choose Users and Security > Manage Permissions Inheritance.

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

If you want to ...	Then ...
restore permissions inheritance	select the **Restore Inheritance** radio button. 
break permissions inheritance	a. Select the **Break Inheritance** radio button. b. Select whether you want to: • **Copy Permissions from Parent** OR • **Leave Permissions Empty**. 

4 If you initiated the action at the site level and want to act *only* on child site(s), check the **Include Children only (exclude selected sites)** box.



NOTE: This option is valid only if one or more *sites* (other than root sites) were explicitly selected.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- complete the Enforce Policy section and schedule the operation to run at a later time.

OR

- save the operation as XML Instructions that can be executed at a later time.

If you chose the Run Now, option, after the operation has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the operation and displays in the Results section.

If you schedule the operation, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

Data Analysis and Reporting

ControlPoint offers several advanced tools for analyzing data in the SharePoint environment, including:

- storage used by various SharePoint objects
- site content
- information about users
- trends over a specified time period
- the contents of SharePoint audit and change logs.

An additional tool, the ControlPoint Task Audit, enable you to review ControlPoint actions taken by administrators.

Analysis tools are accessible for various levels of the hierarchy. As with other ControlPoint features, the scope of the analysis is determined by the hierarchical context.

Most analyses can also be configured so that they can be invoked directly from a url, which can be bookmarked, emailed, or placed on a SharePoint site.

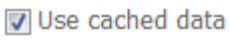
NOTE: This chapter describes all of the ControlPoint analysis tools provided by Metalogix. Depending on the configuration of your ControlPoint menus, however, the analysis tools to which you have access, and their location in the menus invoked from the left navigation pane, may vary.

Specifying Parameters for Your Analysis

When you select a ControlPoint analysis tool from the left navigation pane, you are prompted to specify the parameters you want to use. The most common parameters used in various ControlPoint analysis tools are described below.

Cached vs. Real-time Data

Some ControlPoint analyses give you the option of using either cached or real-time data for analyses performed on the farm, one or more Web applications, or site collections.



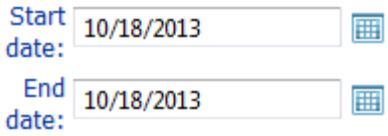
If the **Use cached data** box is checked, your analysis will include data that has been collected by ControlPoint during the last run of Discovery. The advantage of using cached data is that the analysis will be processed more quickly and will not compete for system resources. Because Full Discovery is run on a nightly basis, the use of cached data is often sufficient, especially when the analysis contains data that is not likely to change significantly over the course of a day.

The advantage of using **real-time data** (when the **Use cached data** box is unchecked) is that your analysis will contain the most current information. However, because the data is being captured in real time, the analysis will take longer to process and may tie up system resources.

IMPORTANT: For analyses performed on a single site collection or site, real-time data is *always* used and the **Use cached data** option is disabled. Because data collection within a single site collection or site is less time-consuming, the impact on system resources is minimal.

Specific Date or Time Period

For analyses that cover a specific time period, you select the time period by specifying a **Start Date** and **End Date**.



For analyses that involve *activity*, only cached data is used, since these analyses are based on accumulated summary data collected nightly by SharePoint usage analysis jobs.

For analyses involving other types of data (such as site collection storage) you are given the option of using real-time data.

IMPORTANT: Historical data that predates the ControlPoint cache will not be reflected in analysis results. For example, if the ControlPoint cache was created two weeks ago, a maximum of two weeks-worth of data is available for analysis, regardless of the date range you specify. Similarly, any historical data that postdates the last run of Discovery will not be reflected in results. For example, if you request data for a time period that covers the last 30 days and the last time Discovery ran was 10 days ago, analysis results will reflect the time period *up to* the last Discovery run date.

The format that ControlPoint uses to display dates is based on browser settings (rather than server settings). If you want to change the format (from mm/dd/yy to dd/mm/yy for example), go to Internet Options and change the Language Preference.

It is worth noting that deleted sites will display in activity and storage analysis results if they were active during the specified time period.

Open drill-down Options

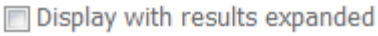
For analyses that allow you to drill down to a more detailed ControlPoint analysis, you can choose to display it in a separate window by checking the **Open drill-downs in new window** box.

If you leave this box unchecked, the analysis to which you are drilling down will display in the current workspace, and parameters from the original analysis will be carried over. You can return to the original analysis by clicking the Back arrow in the report header.

Note that, when you link to a *SharePoint page* from analysis results, it always displays in a separate window.

Expanded Results Option

For most analyses that contain nested data, you have the option of choosing whether or not you want to display results expanded.



If you want to display results at the highest level of detail, leave the **Display with results expanded** box unchecked (the default option). You can then expand items individually, and view, print, or export additional detail for selected items only.

If your analysis contains a lot of nested data and you want to view, search, print, or export all of the analysis detail without drilling down, you may choose to have results display fully expanded by checking the **Display with results expanded** box .

TIP: If you choose to display expanded results and your analysis contains a large amount of data, you can use the Document Map to more easily navigate through results. See Analysis Results Display.

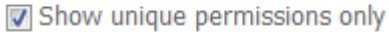
Additional Parameters for Permissions Analyses

The following parameters are specific to SharePoint user permissions analyses:

- If you want to limit results to one or more specific users, the **Select users** field allows you to select the users you want to include in your analysis. If you leave this field blank, all users will be included.

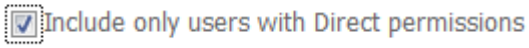
NOTE: You must use real-time (not cached) data if you are selecting users based on a SharePoint User Profile Property.

- If the scope of your analysis includes sites with multiple child objects, you can choose to display all objects (including those whose permissions are inherited) by unchecking the **Show Unique Permissions Only** box.



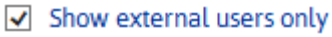
NOTE: If this option is checked, only sites with unique (non-inherited) permissions will be included in the results.

- If you want results to include only users who have direct permissions (that is, do not have permissions via a SharePoint group), check the **Include only users with Direct permissions** box.

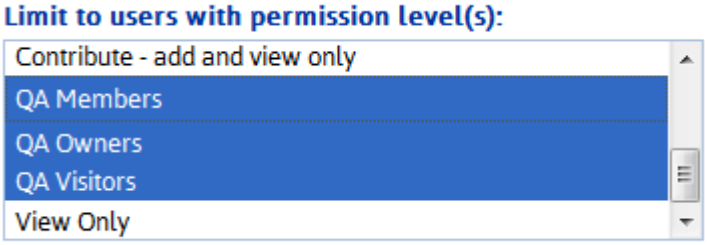


TIP: You can use this option to identify "rogue users" who *should* have permissions through membership in a SharePoint group, then initiate an Add User to Groups action directly from analysis results. See Acting on Search or Data Analysis Results.

- If you want results to **Show External Users only**, check this box.

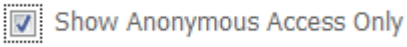


- If you want to limit results to one or more specific permissions levels, select them from the **Limit to Users with permissions level(s)** list box. (All built-in and custom permissions levels that are currently assigned to at least one user on at least one site within the scope of your analysis display in the this box.)



If the analyses includes lists and/or items, permissions levels that are assigned to a list/item that are *not* assigned at the site level will not display in the list box. (The list box is populated by data collected by the ControlPoint Discovery process, which does not go below the site level.) A list- or item-level permissions level can, however, be entered in the **Limit by Other Levels** field.

- If you want results to include *only* sites for which anonymous access is allowed, check the **Show Anonymous Access Only** box.



- If you want a cumulative total of unique users who have permissions for objects within the selected scope, check the **Calculate Total Users with Permissions** box.

NOTE: Total Users with Permissions uses data recorded in the ControlPoint Service (xcadmin) database, and is current as of the last Discovery run. If you run the analysis using real-time data, all users are counted in real time, which may significantly increase the amount of time it takes to run the analysis.

Analysis Results Display

All ControlPoint analysis results displays include a standard header and footer, in addition to analysis-specific detail.

Analysis Results Toolbar

ControlPoint analysis results pages include a toolbar which contains page navigation, export, and print capabilities.

Above the toolbar are links that enable you to:

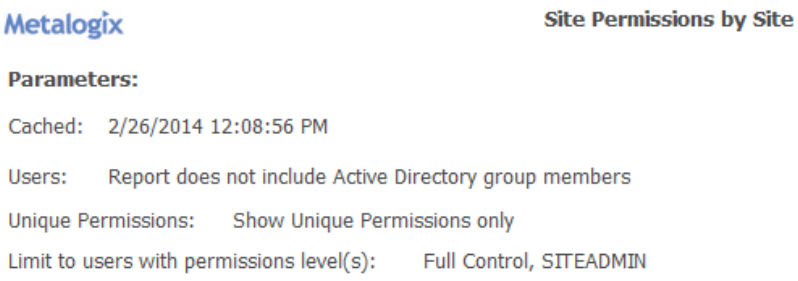
- select all objects in analysis results to include in a ControlPoint operation
- download results as a CSV file

Analysis Results Detail

The analysis results detail sections contains summary information, followed by the analysis-specific content.

The summary section includes the parameters used, as well as the name of the user who ran the analysis and the run date and time.

Note that, if the analysis was run using cached data, the date and time that the cache was last refreshed via the Discovery task displays. The information in the analysis is current as of that date and time. If the analysis was run on real-time data, the Cached field will be populated by the value "False."



You can sort line items in analysis detail for any column that includes an up/down arrow.

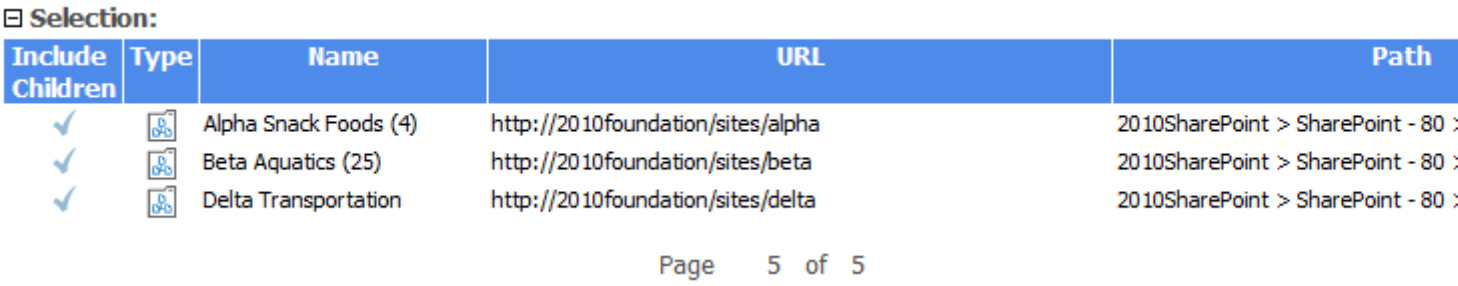
Analysis Results Footer Information

The analysis footer, which appears on every page of the results, contains the following information:

- the name of the administrator who generated the analysis (which can be useful if results are exported or printed and distributed, since the content of the analysis reflects that administrator's permissions)
- the number of pages in the analysis (you can scroll through multi-page results from the navigation toolbar in the search results header), and
- the date and time when the results were generated.

Selection Summary

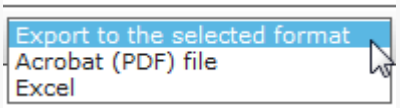
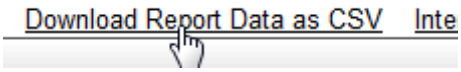
The Selection table is repeated at the end of the Results section. This information is included in printed or exported results, as a helpful reminder of the item(s) included in your analysis.



Working with Data Analysis Results

From data analysis results you can perform any of the operations described in the following table.

If you want to ...	Then ...
print analysis results	from the results toolbar: a) Click the print preview icon ( ) b) Click the print icon ( ). (Printed results will contain only the data that is currently expanded.)

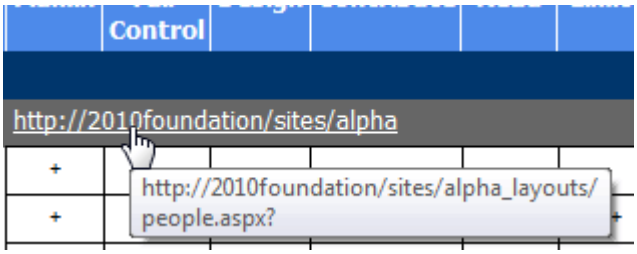
If you want to ...	Then ...
export analysis results	choose an **Export to the selected format** option from the drop-down, then click the **Export** link.  NOTE: If you export to Excel, all data will be exported, regardless of whether it is expanded. If you export to an Acrobat (PDF) file, only data that is currently expanded will be exported.
download raw analysis result data to a CSV file that can be imported into another program for further examination	click the **Download as CSV** hyperlink in the results toolbar.  This option differs from the csv option in the Export... drop-down in that it provides all of the raw data (including object GUIDs and internal field names, for example) used to create the report. This may be useful for troubleshooting or for more in-depth analysis.
perform a ControlPoint action or analysis within the current workspace	use the procedure for Acting on Search or Data Analysis Results.
return to the results of an analysis from which you drilled-down	click the Back button in the results toolbar. 

Linking to SharePoint Pages and Other ControlPoint Analyses from Analysis Results

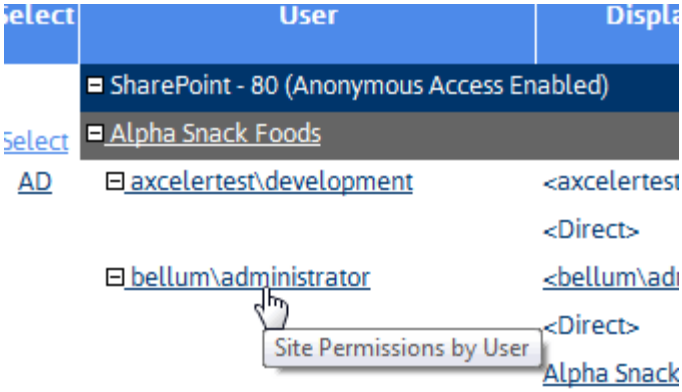
When run interactively*, from the results of most ControlPoint analyses, you can:

- open relevant SharePoint pages
- generate applicable ControlPoint analyses for the same scope and parameters.

Links to SharePoint pages always open in a separate browser window or tab.



Links to ControlPoint analyses may either open in a separate browser window/tab or in the current workspace, depending on the value of the **Open drill-downs in new window** .



* Generally, these links are not functional in analysis results that have been exported, although in some cases they may be.

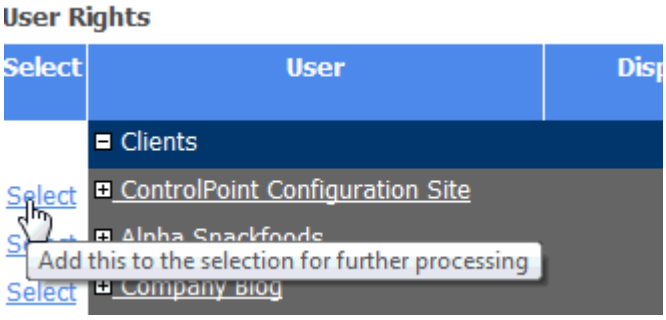
Acting on Search or Data Analysis Results

From ControlPoint search or data analysis results, you can open a SharePoint page or initiate a ControlPoint action or another analysis for selected objects.

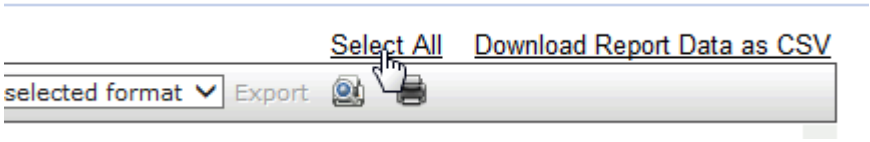
This feature can facilitate the performance of a variety of administrative tasks. For example, you can generate a Site Permissions analysis to identify the users who have been granted permissions directly, then initiate the appropriate action (such as Add User to SharePoint Group).

To select objects on which to perform a ControlPoint action or analysis:

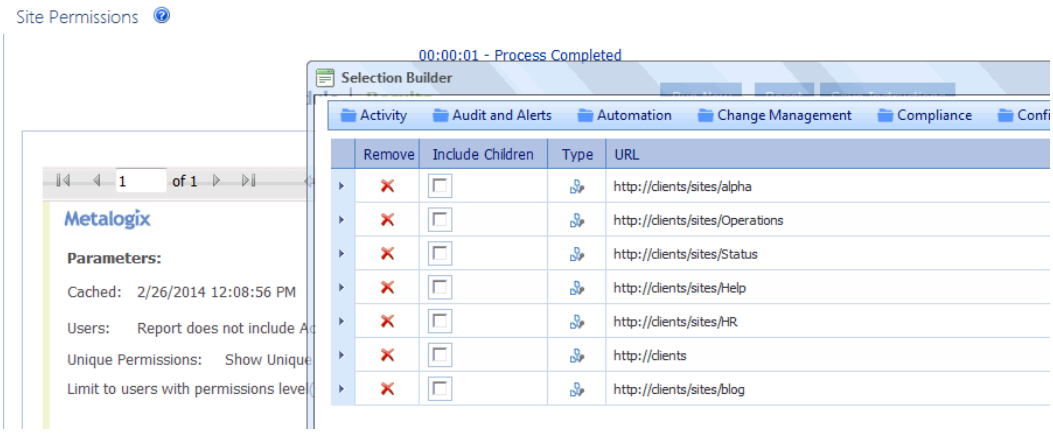
1 Click the **Select** link for the object on which you want to act.



NOTE: To select all objects in the results list, click the **Select All** link in the Results header.



The Selection Builder opens in a separate window.



NOTE: If you want the Selection Builder to remain open in a static location in the browser window, click the Pin On icon ( ) in the upper left corner of the Selection Builder window. To disable this feature, click Pin Off ( ).

2 If you want to select additional objects, either:

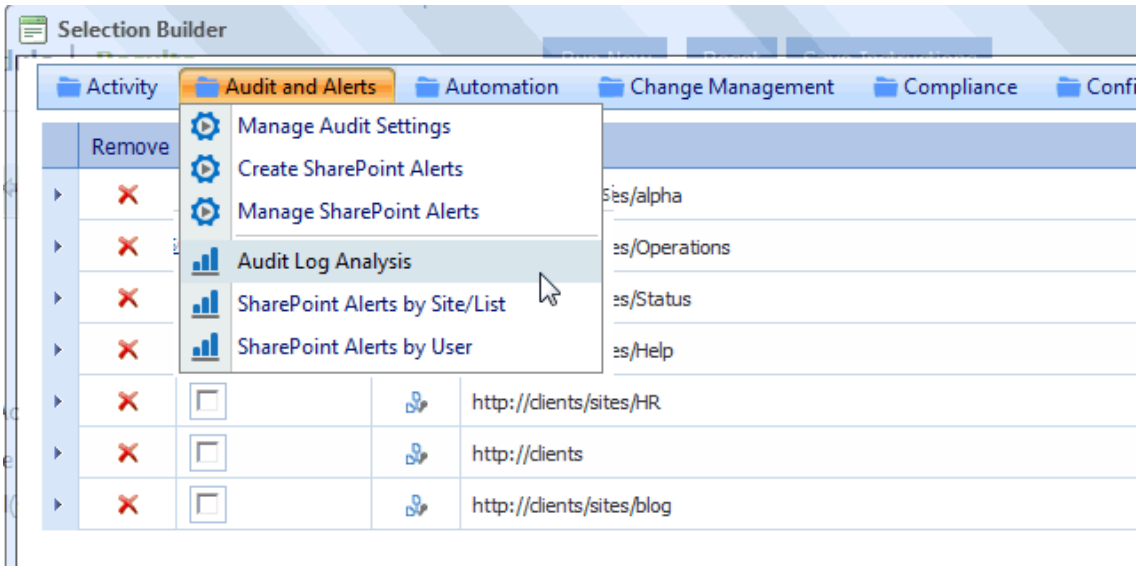
- click the **Select All** link in the analysis results Select column for each additional item you want to add to the Selection Builder.

OR

- from within the Selection Builder, use the procedure for Changing Your Selection.

3 Choose the applicable SharePoint page or ControlPoint operation from the Selection Builder menu.

- Note that the rules for selecting objects from the left navigation pane apply here as well. For example, only options that are appropriate for the selected object(s) are available.



NOTE: The Selection Builder will appear minimized until you click Restore ( ). If you close the Selection Builder, your current selection(s) will be cleared.

Generating a SharePoint Summary Report

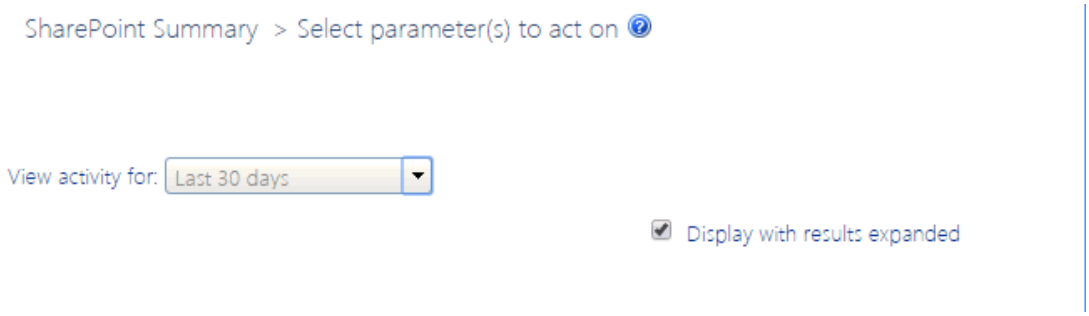
The SharePoint Summary report provides a comprehensive summary of the components (servers, services, Web applications, site collections, and sites) in the SharePoint Online environment currently being managed in ControlPoint, along with various size statistics.

You also have the option of including details about servers in your SharePoint farm—such as storage, performance, and usage statistics—which is collected from Windows Performance Monitor. This option can, however, significantly increase the time it takes to generate the report.

NOTE: For a server's details be included in report results, the ControlPoint Service account must have permissions to request status information from the server. Details can be found in the *ControlPoint Administration Guide*.

To generate a SharePoint Summary report:

From the SharePoint Hierarchy panel select the top node, then from the context menu or ribbon Home tab choose SharePoint Summary.:



Note that the **View activity for:** dropdown is disabled as it does not apply for this report.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

The SharePoint Summary consists of the following sections:

- a summary of farm components
- Servers and Services
- Web Applications
- Service Application Association (SharePoint 2010 farms only)

Farm Components Summary

The top of the report displays the total number of servers, Web applications, site collections, and sites in the farm.

Note that the Total # of Sites includes root sites (whereas in the SharePoint Hierarchy, the number that displays in parentheses beside a site collection *excludes* the root site).

Servers and Services

If you chose to Show Servers Details, the Servers and Services section lists all of the servers in the farm, as well as all of the services currently installed on each server. Storage, performance, and usage details also display.

NOTE: Information reported varies, depending on the nature of the server. For example, Web Requests are not relevant for a SQL server. Depending on how WMI captures the information, if a statistic is irrelevant for the server, the value will display as either N/A or 0.

Web Applications

In addition to the Web application name and url, the Web Applications section displays the following statistics for each individual Web application, as well as aggregated totals for the entire farm:

- the number of:
  - Site **Collections**
  - **Sites -** which includes root sites and any subsites that have been created
  - **Lists -** which includes both user-created (visible) lists and internal (hidden) lists, such as galleries, that are necessary for the functioning of the site, and
  - **Files** - which includes web pages as well as documents
- **Size**, (in **MB**) - the total size of the Web application's *content*, which:
  - does not include elements such as metadata, logs, free space, and other overhead
  - is not the disk size of the content database
- If *all* site collections within a Web application have quotas:
  - **Free Space**
  - **% Usage**

  NOTE: If there are site collections within a Web application that do *not* have quotas set, "N/A" will display in the Free Space and % Usage columns.
- Number of **Requests** for the specified date or date range.

EXCEPTION: If you have WSS only installed, only cumulative data is available. For more detail, see Variations in Activity Data.

When expanded, the following information about each Web application's content database(s) displays:

- the corresponding IIS application pool and the source account that runs the application pool
- the name of both the content database and the server on which it resides
- the current number of site collections in the database, and
- the maximum number of site collections allowed in the database.

Service Application Associations (SharePoint 2010)

If you are running SharePoint 2010, two additional sections are included in report results:

The Service Application Associations per Web Application section lists each Web application, along with the application **Proxy Group** to which it is mapped. When expanded, each Service Application associated with the Web application is listed along with its **Status**.

The Web Applications Associated With Service Applications section lists each of the Service Applications that have been associated with one or more Web applications. When expanded, all of the Web applications with which the Service Application is associated are listed.

Object Summary

The top of the report displays the total number of site collections and sites in the environment.

Total # of Site Collections:	51
Total # of Sites:	245

Site Collection Detail

The Site Collection Details section displays the following statistics for each individual site collection, as well as aggregated totals for the entire environment:

- the number of **Sites**, **Lists**, and **Files** in the collection
- the **Size** of the collection as well as **Free Space** and **% Usage** of allocated storage space.

Analyzing Site Collection Storage

The Site Collection Storage Analysis provides storage statistics for selected site collections, including:

- the distribution of storage among Web applications selected for analysis, and
- the number of top site collections (that is, site collections with the scope of your analysis using the most storage).

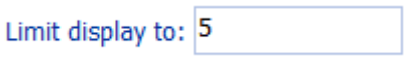
To generate a Site Collection Storage Analysis:

1 Select the object(s) on which you want to perform the analysis.

2 Choose Storage > Site Collection Storage Analysis.

3 Specify the parameters for your analysis.

Note that, in addition to the "standard" parameters, a **Limit display to** must be specified. The value in this field (which is 10 by default, but may be changed), represents the number of sites using the most storage space that you want to examine more closely. These sites are listed in a separate section at the bottom of the analysis results.



Now you can either:

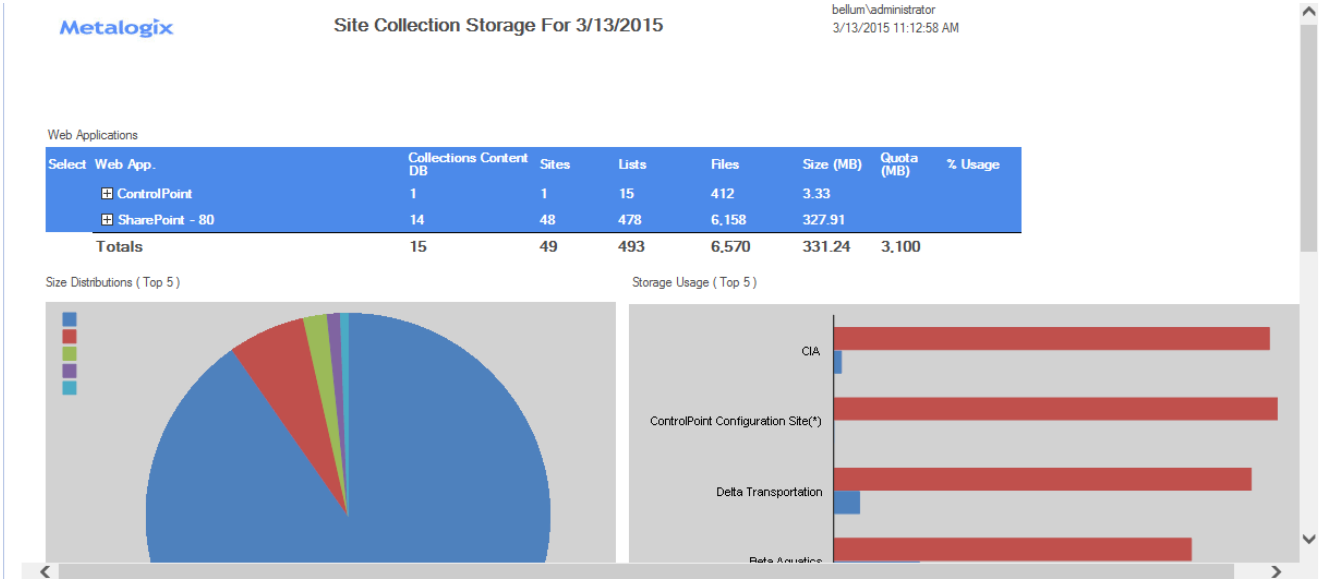
- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.



The Site Collection Storage analysis consists of the following sections:

- Web Applications
- Size Distributions
- Storage Usage
- Top Site Collections

Web Applications Section

The Web Applications section lists the Web application(s) within the scope of your analysis, along with the following statistics for individual Web applications and cumulative totals:

- the number of site **Collections**, **Sites**, **Lists**, and **Files**.
- the **Size**, in megabytes (**MB**) of storage used.

NOTE: Size includes content but excludes logs, metadata and other storage overhead. It is not meant to reflect the size of the content database.

When expanded, these statistics display for individual site collections, along with:

- the **Content DB** used by the site collection
- **Quota** in megabytes **(MB)**

- **%Usage** relative to the quota..

Web Applications

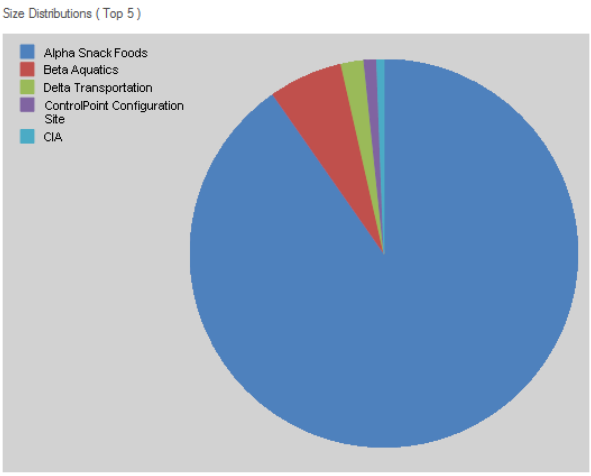
Select	Web App.	Collections Content DB	Sites	Lists	Files	Size (MB)	Quota (MB)	% Usage
	ControlPoint	1	1	15	400	4.53		
Select	ControlPoint Configuration Site (http://2010foundation:1818)	WSS_CONTENT_AXCELER	1	15	400	4.53	0	N/A
	SharePoint - 80	14	48	478	6,158	327.91		
Select	Alpha Snack Foods (http://2010foundation/sites/alpha)	wss_content_clients	8	89	1,529	284.23	0	N/A
Select	Beta Aquatics (http://2010foundation/sites/beta)	wss_content_clients	27	157	1,623	19.42	100	19.42
Select	Delta Transportation (http://2010foundation/sites/delta)	wss_content_clients	1	19	260	5.95	100	5.95
Select	CIA (http://2010foundation/sites/CIA)	wss_content_clients	2	25	310	1.87	100	1.87
Select	Client List (http://2010foundation)	wss_content_clients	1	21	348	1.81	100	1.81
Select	Model Site Collection (http://2010foundation/sites/model)	WSS_Content	1	15	134	1.71	1,000	0.17
Select	Gamma Radiation (http://2010foundation/sites/gamma)	wss_content_clients	1	19	291	1.7	100	1.7
Select	Iota Nanotechnology (http://2010foundation/sites/iota)	wss_content_clients	1	19	238	1.61	100	1.61
Select	Eta Systems (http://2010foundation/sites/Eta)	wss_content_clients	1	19	237	1.61	100	1.61

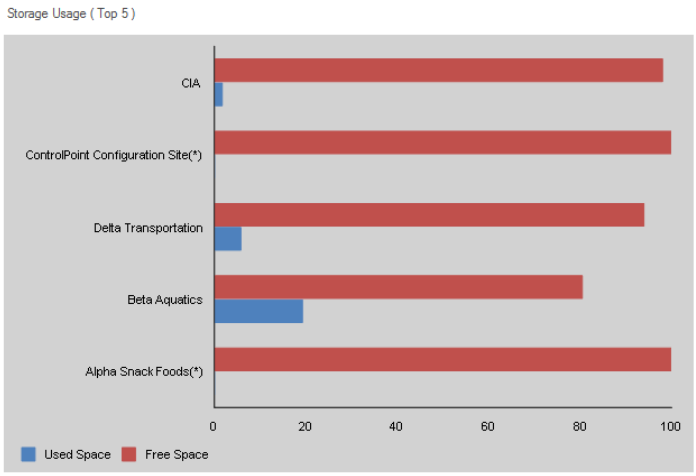
Size Distributions and Storage Usage Sections

The Size Distributions section consists of a pie chart that depicts the size distribution among the Web applications within the scope of your analysis. (If you generated the report for a single Web application, the chart will appear solid.)

The Storage Usage section consists of a bar chart that shows the amount of storage space used by each Web application relative to the Web application's quota.

NOTE: If a quota has not been set for the Web application, Used Space will not be captured.





Top Site Collections by Size

This section shows statistics for the site collections using the most storage space. The number of site collections that display in this section is determined by the value you specified for **Limit display to**.

Top 5 Site Collections By Size (*) Web Application has no Quota

Select	Site Collection	Web Application / Content DB	Owner	Files	Size (MB)	Quota (MB)	% Usage
Select	Alpha Snack Foods (http://2010foundation/sites/alpha)	SharePoint - 80 wss_content_clients	AXCELERTEST\development	1,529	284.23	0	N/A
Select	Beta Aquatics (http://2010foundation/sites/beta)	SharePoint - 80 wss_content_clients	BELLUM\Administrator	1,623	19.42	100	19.42
Select	Delta Transportation (http://2010foundation/sites/delta)	SharePoint - 80 wss_content_clients	BELLUM\Administrator	260	5.95	100	5.95
Select	ControlPoint Configuration Site (http://2010foundation:1818)	ControlPoint WSS_CONTENT_AXCELER	administrator	382	3.33	0	N/A
Select	CIA (http://2010foundation/sites/CIA)	SharePoint - 80 wss_content_clients	BELLUM\Administrator	310	1.87	100	1.87
	Totals			**4,104**	**314.8**	**300**	

Analyzing Storage by File Type

The Storage by File Type analysis provides both a graphical and tabular representation of the amount of storage used by various file types in the content database(s), both by file size and count. You have the option of including all file types, or including/excluding those with specified file extensions.

You can also drill down to a Most/Least Storage Analysis for a selected file type, to view files using the largest amount of storage.

NOTE: This analysis encompasses files within SharePoint content databases. Files stored within the file system, such as SharePoint Features, are not included.

To generate a Storage by File Type analysis:

1 Select the object(s) you want to include in your analysis.

2 Choose Storage > Storage by File Type.

3 Specify the following parameters for your analysis:

If you want include or exclude specific file types:

- Specify whether you want to **Include Extensions** or **Exclude Extensions**.
- Enter the file extension(s) you want to include or exclude in the **File Extensions** field. Enter multiple extensions as a comma-separated list.

NOTE: If you want include *all* file types, leave the File Extensions field blank. If you chose Exclude Extensions, you must enter at least one file extension.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

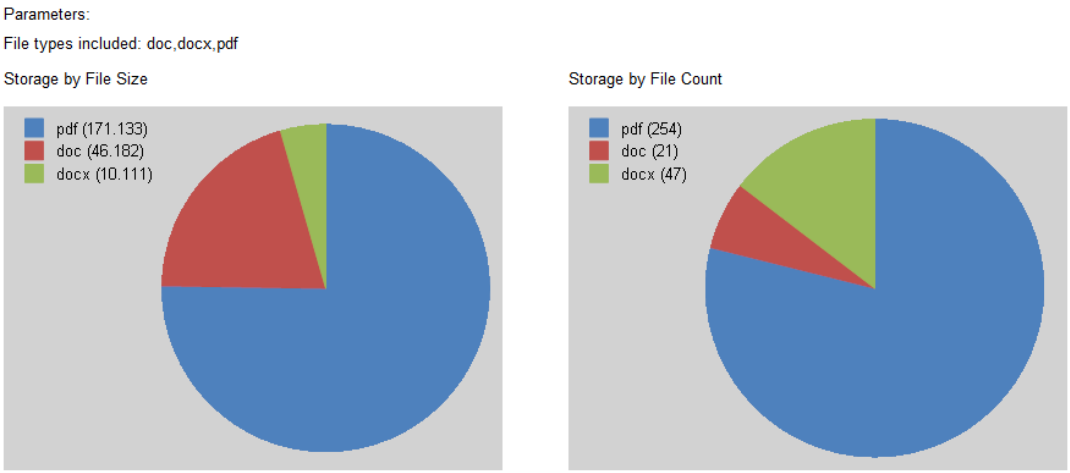
- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

Analysis results include:

- two pie charts that depict the **Storage by File Size** and **Storage by Type** for the selected scope and file types.



- a listing that includes the **Extension(s)**, **Total Files** and **Total Size (MB)** for each file type.

  Click an Extension(s) hyperlink to generate a Most/Least Storage analysis that shows the files with that extension that use the most storage (the number of which was specified in the **Number of Files to Show in Drill-down**).

Extension(s)	Total Files	Total Size (Mb)
pdf	254	171.133
doc	21	46.182
docx	47	10.111

Analyzing Trends

For a single farm, Web application, or site collection, you can analyze trends over a specified time period in:

- site count, and/or
- storage.

To generate a Trends analysis:

1 Select the object for which you want to analyze trends.

NOTE: You can only analyze trends for one object (farm, Web application, or site collection) at a time. If you multi-select, only the object on which you right-clicked will apply.

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

If you want to analyze trends in ...	Choose ...
site count	Content > Trend Analysis for Site Count.
storage	Storage > Trend Analysis for Storage.

3 Specify the following parameters for your analysis:

a) Enter or select a **Start Date** and **End Date** for your analysis.

The date range you select determines the time intervals captured in the analysis, as described in the following table.

If the time period you specified is ...	Then the Trend Analysis will be reported ...
up to 60 days	by Day
between 61 and 364 days	by Week
365 days or greater	by Month.

b) If you want to change the **Statistics to Graph**, select a different value from the drop-down.

c) If you want your graph to include a line that smooths out short-term fluctuations, check the **Include moving Average** box.

The default value for **Moving average period** (days) is 7, which represents the number of days within a given week. This value is useful for many business users who can expect less activity, for example, on the weekend. You can, however, change this value to measure moving average for a different time period. For example, if you generally experience week-to-week fluctuations over the course of a month, you may choose to set the Moving average period to 31.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

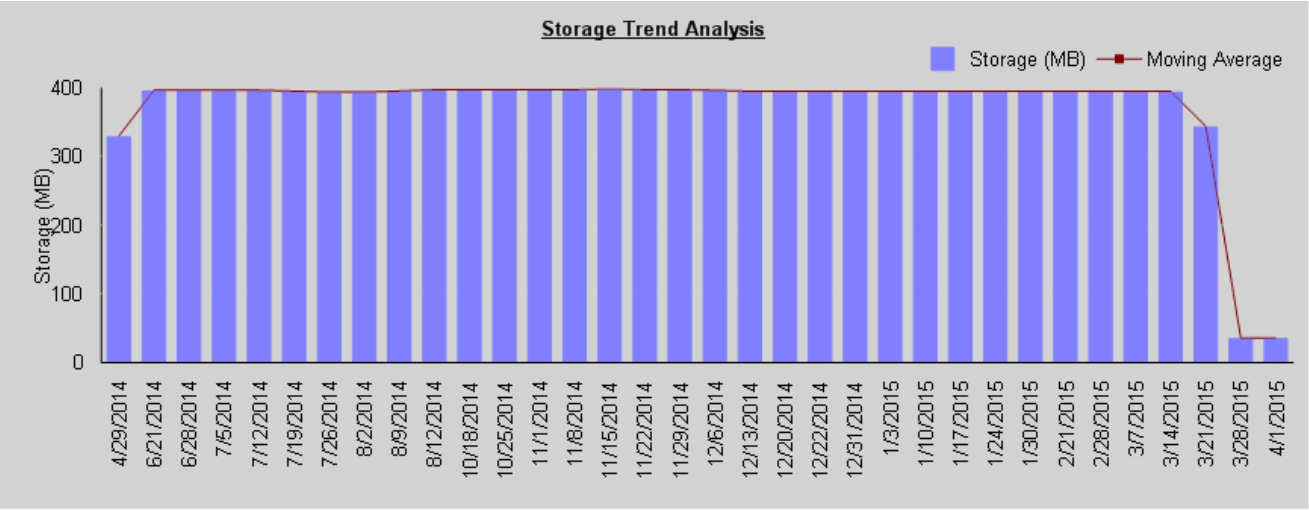
OR

- save the operation as XML Instructions that can be executed at a later time.

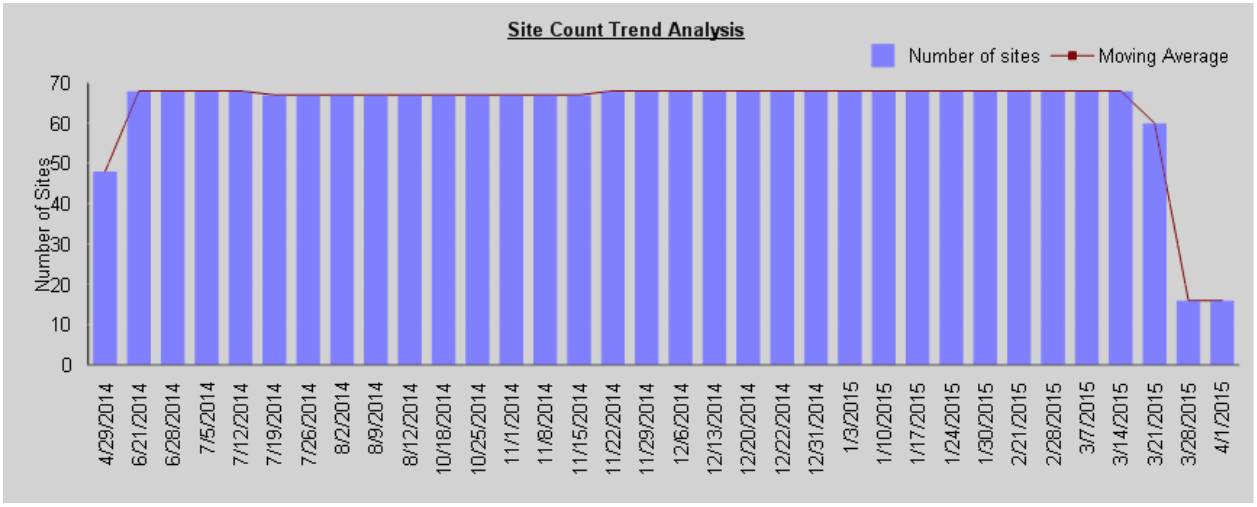
Trend Analysis results consist of two graphs:

- The Trend Analysis bar graph includes the statistics for the selected criterion. (Note that if you selected ALL from the **Statistics to graph** drop-down, a separate graph will be included for each). Below are examples of Trend Analyses by Day reports (including a 7-day moving average) for Storage, and Site Count over the same 28-day time period.

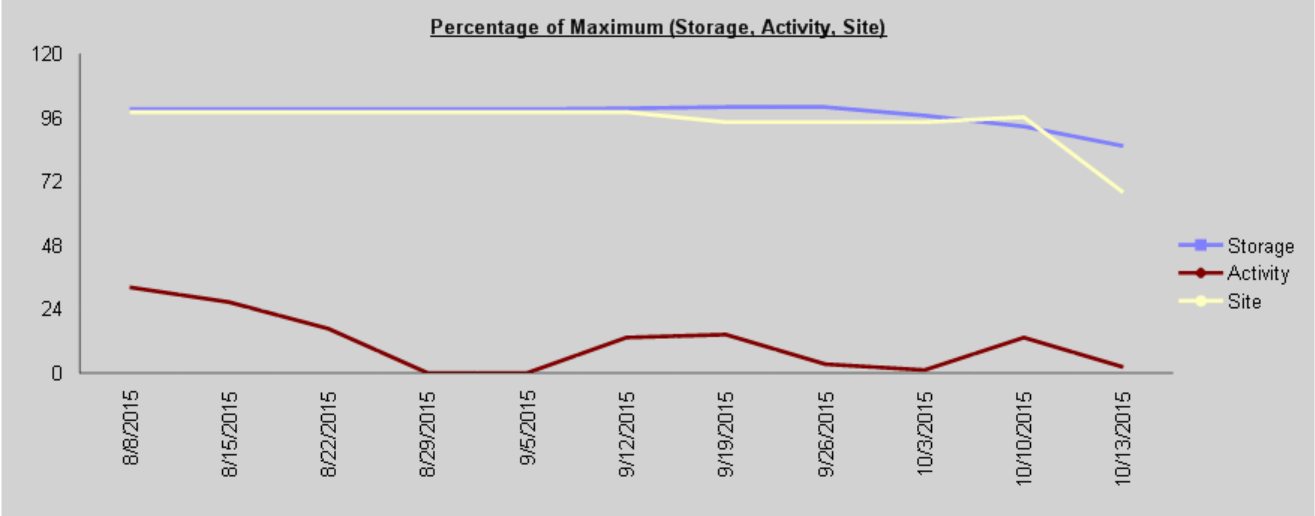
Storage Trend Analysis



Site Count Trend Analysis



- The second graph is a line graph that shows statistics for both options (storage and site count) in terms of a percentage over the course of the selected time period. Note that the maximum value (100%) represents the most storage used and largest site count over the selected time period.



Analyzing Managed Metadata Usage

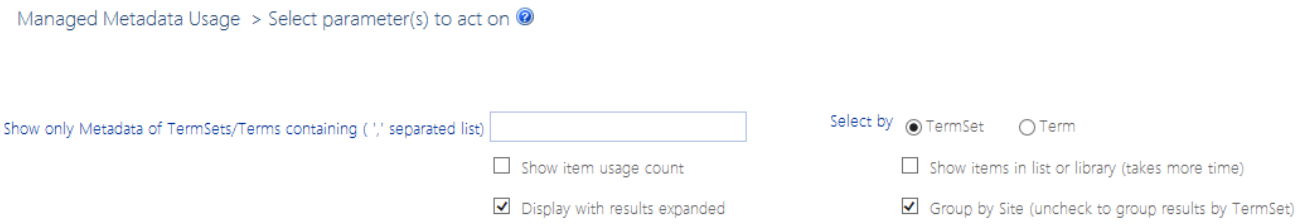
The Metadata Usage analysis lets you analyze the use of managed metadata as list/library columns in your SharePoint environment. You can group results by site or by term set and you have the option to Include usage count and the individual items in lists or libraries that use the metadata.

To generate a Managed Metadata Usage analysis:

1 Select the object(s) whose managed metadata usage you want to analyze.

2 Choose Content > Managed Metadata Usage.

3 Specify the parameters for your analysis. Use the information in the following table for guidance.



If you ...	Then ...
want results to include only metadata with term sets OR terms that contain a specific text string	• enter the string in **Show only Metadata of TermSets/Terms containing** field. NOTE: You can enter multiple text strings as a comma-separated list.

If you ...	Then ...
	• choose the applicable **Select by** option (to indicate whether you want ControlPoint to search for **TermSet** or **Term**)
want results to include the *number of* list items that have a value in the column that uses the metadata	check the **Show item usage count** box.
want results to include the actual list items that have a value in the column that uses the metadata	check the **Show items in list or library** box. NOTE: If you check this box, ControlPoint must iterate through all list items. Depending on the scope of your analysis and the number of items within that scope, processing time may increase noticeably.
want to group results by term set rather than by site	uncheck the **Group by Site** box.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

If you chose to group results **by site**:

- The top level of the analysis shows each of the Web applications and sites within the scope of your analysis that use managed metadata
- When expanded, the following information displays each list that uses managed metadata, along with the following information:
  - the name of the **Column referencing the Metadata**
  - the **Term Store**, **Term Group**, and **Term Set**
  - the **Term** specified for the list column (if applicable)

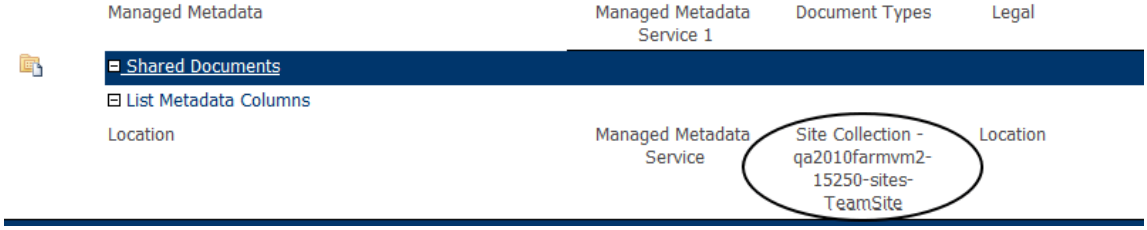
NOTE: The Term column will also show *item-level* terms only if the **Show items in list or library** box.

- if the **Item Usage count** parameter was checked, the number of items for which the column has been populated with metadata.

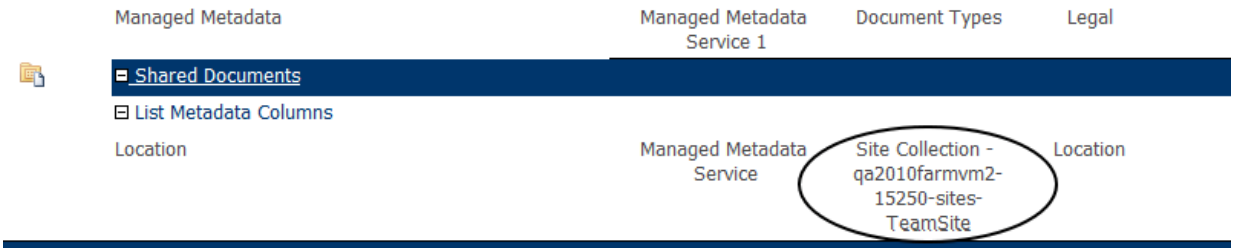
If you chose to group results **by TermSet**:

- The top level of the analysis shows each Term Store providing the metadata, followed by each **Term Group** and **Term Set**.
- When expanded, the following information displays for each term set:
  - the site that uses the metadata
  - for each list that uses the metadata:
    - the name of the **Column Referencing the Metadata**
    - if the **Item Usage count** parameter was checked, the number of items for which the column has been populated with metadata.
  - the **Term** specified for the *column* (if applicable)

NOTE: The Term column will also show *item-level* terms only if the **Show items in list or library** box.



Note that if you have customized a term set for the site collection, SharePoint assigns the name of the Term Group.



To open the SharePoint site that uses the metadata, click on the site url.

To open SharePoint list settings page for a list, click on the list name.

Analyzing Users and Permissions

ControlPoint provides the following tools that allow you to examine permissions of SharePoint users throughout your farm:

- **Site Permissions** shows the permissions of users for selected sites
- **Site List Permissions** shows user permissions for individual lists and list items within a site.

An additional analysis, **Comprehensive Permissions**, show permissions for all sites, lists, and optionally list items within a single result set.

NOTE: In addition to showing user permissions at the individual site level, all Site Permissions analyses include any Web application policy permissions users may have.

Finding Orphaned Domain Users

If you are using Active Directory as the authentication method for your SharePoint Online environment, the Orphaned Domain Users analysis lists users who currently have permissions in SharePoint but are no longer valid in the Active Directory.

Users Evaluated as Potential Orphans

ControlPoint evaluates users as potential orphans if they are disabled in and/or deleted from Active Directory but are found in:

- a SharePoint permission entry at any level (site, subsite, list, library, folder, or item)
- a site collection's All People list, and/or
- a Site Collection Administrator's list.

ControlPoint does not evaluate names in Web application policies, the Farm Administrator list, or any custom SharePoint list that may contain user names.

Users That Are Not Reported as Orphans

ControlPoint does not report a user as being orphaned if it is considered valid by SharePoint (that is, if a user who is not in the All People list can still be validated by the SharePoint People Picker). Active Directory entries that are considered valid by SharePoint (and therefore are not reported as orphaned by ControlPoint) include:

- expired accounts, and
- locked accounts (i.e., accounts for which the allowable threshold for failed login attempts has been exceeded).

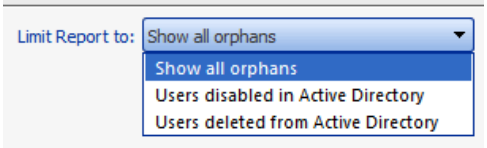
To generate an Orphaned Domain Users analysis:

1 Select the object(s) you want to include in your analysis.

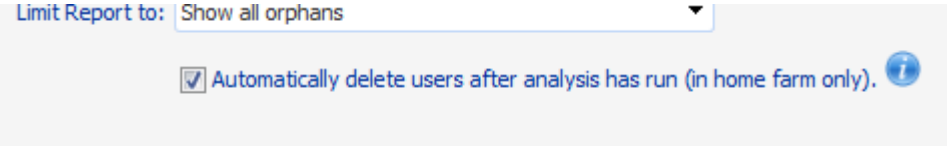
2 Choose Users and Security > Orphaned Domain Users.

3 Specify the parameters for your analysis.

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. If you accept the default option, **Show all orphans**, both types of users will be included.



4 If you want ControlPoint to automatically delete all users returned by the analysis on the home farm, check the **Automatically delete users after analysis has run** (in home farm only). Note that, in a multi-farm environment, this action cannot be carried out on a remote farm.



CAUTION: If you check this box, ControlPoint will automatically submit one or more Delete User jobs to the ControlPoint scheduler. The number of jobs submitted depends on the number of users to be deleted, and the number of users processed in a job is determined by the ControlPoint Setting OrphanDeleteBatchSize. The first job will be scheduled to run 30 minutes after the analysis has finished processing. Because this action cannot be undone, you may want to back up user permissions before executing the operation. (You also have the option of deleting jobs before they have run via the Schedule Monitor.)

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

When expanded, a list of rights for each orphaned user displays the same information as the User Rights section of the Site Permissions analysis.

Disabled Accounts as Orphans

Users whose accounts have been disabled (or disabled and renamed) in the Active Directory are normally considered orphans by both SharePoint and ControlPoint and are annotated as such in analysis results. This annotation is intended to help you in evaluating whether or not such users really should be considered orphans in accordance with you organization's policies.

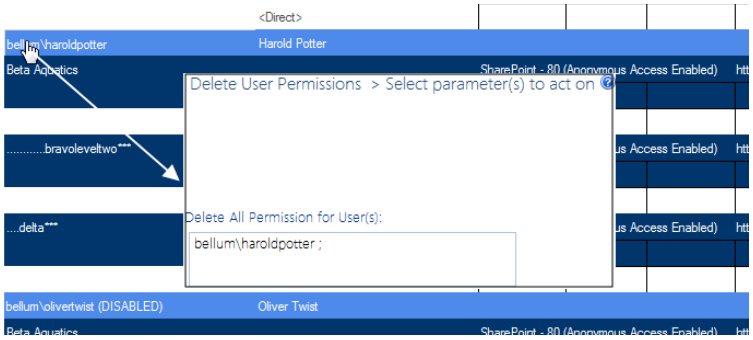
If an account has been both disabled and renamed, the annotation will include the original name, followed by the string DISABLED, RENAMED; and the new name. (ControlPoint will not consider a renamed account orphaned if it is also active, expired, or locked.)

NOTE: Although it is not a common practice, it is possible for restricted reads and other permissions to be placed on entries in the Active Directory. This can affect ControlPoint's ability to detect disabled accounts. Specifically, if an account has been disabled AND cannot be read by the ControlPoint Service Account, then both SharePoint and ControlPoint will treat that account as valid (not an orphan).

To delete orphaned user permissions from analysis results:

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

CAUTION: If you have any doubt as whether a user is truly orphaned, it is recommended that before you delete permissions, you verify his/her existence and status in the Active Directory.

If you want to delete permissions for ...	Then ...
a specific orphaned user	click a **User** hyperlink to initiate a ControlPoint Delete User Permissions action.  The Delete User Permissions page opens in a separate browser window, with the **Delete Users** field pre-filled with the selected user(s). Note that you need to run the

If you want to delete permissions for ...	Then ...
	action without validating the user, as the account now longer exists in Active Directory.
all orphaned users as an interactive tasks	click the **Delete All** hyperlink at the top of the analysis results section.

Analyzing Site Permissions

The Site Permissions analysis lets you examine the permissions that one or more users have for selected sites, including external users.

To generate a Site Permissions analysis:

1 Select the object(s) you want to include in your analysis.

2 Choose Users and Security > Site Permissions.

3 Specify the parameters for your analysis.

Note that, In addition to the "standard" parameters, you have the option to **Group by** Sites (the default) or Users.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

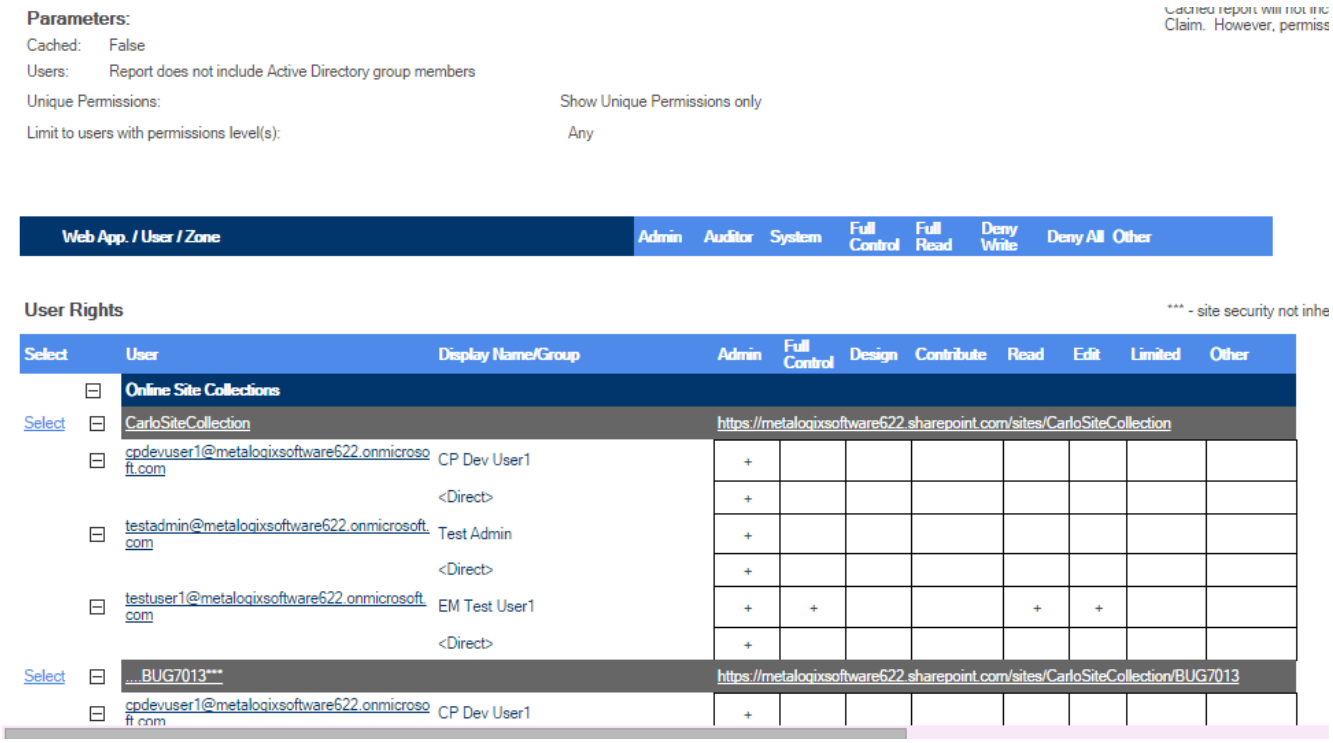
The top level of the User Rights section lists the Web application(s) within the scope of your analysis.

When expanded, a list of users with permissions for the site collection or site displays, along with the following information:

- the login name of the SharePoint **User**

- the user's permission level(s), as indicated by a plus sign (+) in the applicable column(s), which may include:
  - the site collection's **Admin** group
  - the five default SharePoint permission levels:
    - **Full Control**
    - **Design**
    - **Contribute**
    - **Read**
    - **Limited**.

NOTE: If a user has a template-specific or custom permission level, it is recorded in the **Other** column.



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

Web App. / User / Zone	Admin	Auditor	System	Full Control	Full Read	Deny Write	Deny All	Other

User Rights

*** - site security not inhe

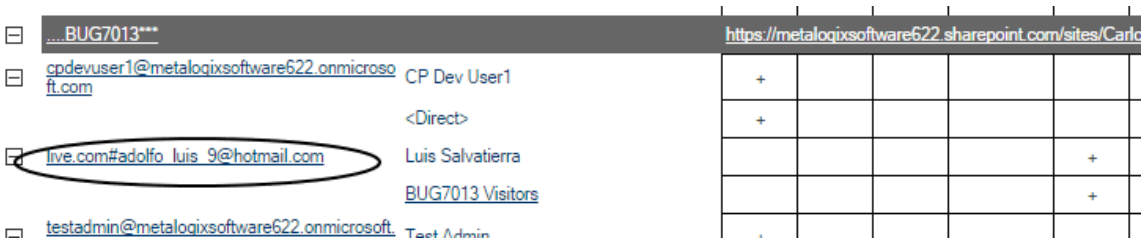
Select	User	Display Name/Group	Admin	Full Control	Design	Contribute	Read	Edit	Limited	Other
	Online Site Collections									
Select	CarloSiteCollection		https://metalogixsoftware622.sharepoint.com/sites/CarloSiteCollection							
	cpdevuser1@metalogixsoftware622.onmicrosoft.com	CP Dev User1	+							
		<Direct>	+							
	testadmin@metalogixsoftware622.onmicrosoft.com	Test Admin	+							
		<Direct>	+							
	testuser1@metalogixsoftware622.onmicrosoft.com	EM Test User1	+	+			+	+		
		<Direct>	+							
Select	....BUG7013***		https://metalogixsoftware622.sharepoint.com/sites/CarloSiteCollection/BUG7013							
	cpdevuser1@metalogixsoftware622.onmicrosoft.com	CP Dev User1	+							

By default, the report lists:

- users with direct permissions, and
- users with membership through SharePoint groups.

The **Display Name/Group** column shows the display name of each user whose permissions are direct or through membership in a SharePoint group. If a display name does not exist for the user, the user's login name will display in brackets < >.

Note that in the following example, the external user is identified by his external email address.



Analyzing Site Lists Permissions

The Site Lists Permissions analysis lets you examine the permissions of users for individual lists within a selected site, including external users.

NOTE: List permissions are also included as part of the Comprehensive Permissions analysis. You can also view permissions for items within a selected list by running a Permissions by List Item analysis.

To generate a Site Lists Permissions analysis:

1 Select the site whose list permissions you want to analyze.

NOTE: You can only analyze list permissions for one site at a time. If you multi-select, only the site on which you right-clicked will apply.

2 Choose Users and Security > Site Lists Permissions. Use the information in the following table to determine the appropriate action to take.

3 Specify the parameters for your analysis.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

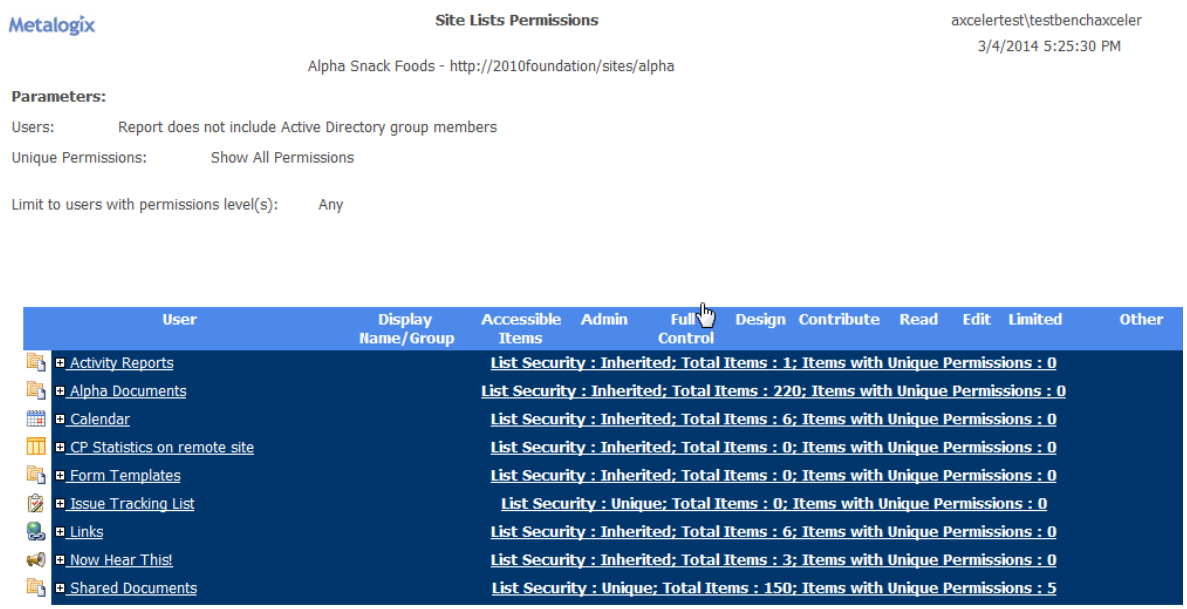
OR

- save the operation as XML Instructions that can be executed at a later time.

The top level of the Site Lists Permissions analysis shows all of the lists used on the site, along with the following information:

- the **Security** type (Inherited or Unique)
- the number of **Items** in the list
- the number of **Items with Unique Permissions**.

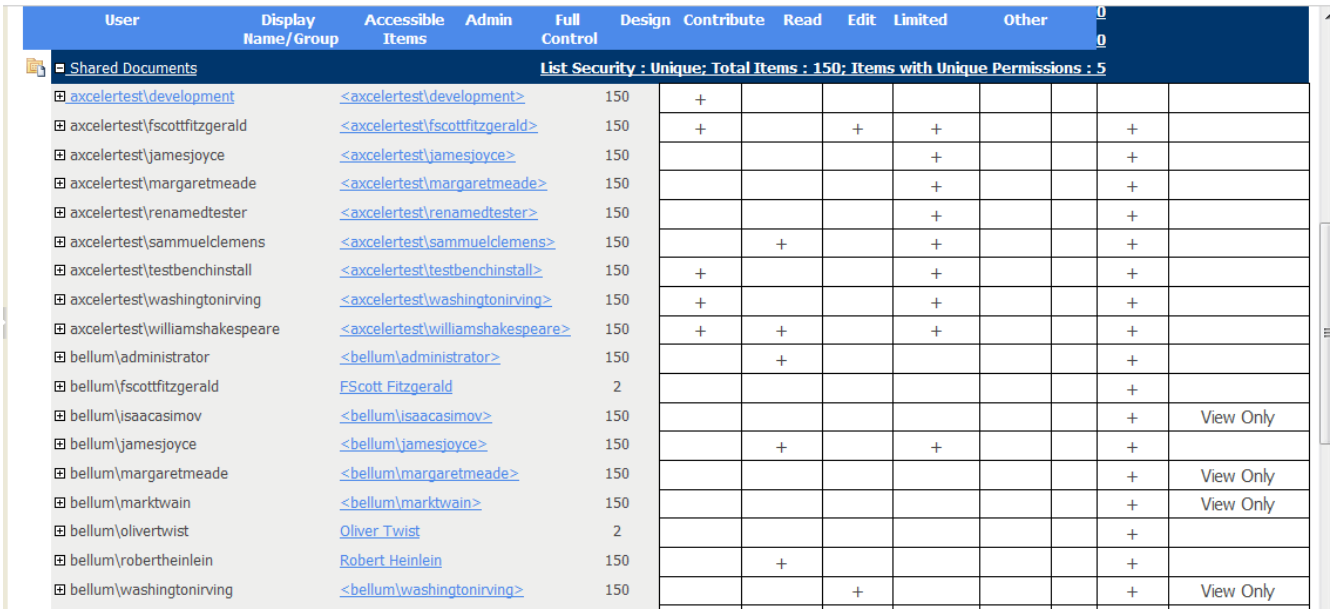
NOTE: If you chose to **Show unique permissions only**, results will include any list that contains *items* with unique permissions (even if the list itself has inherited permissions).



When expanded, the following information displays for each list:

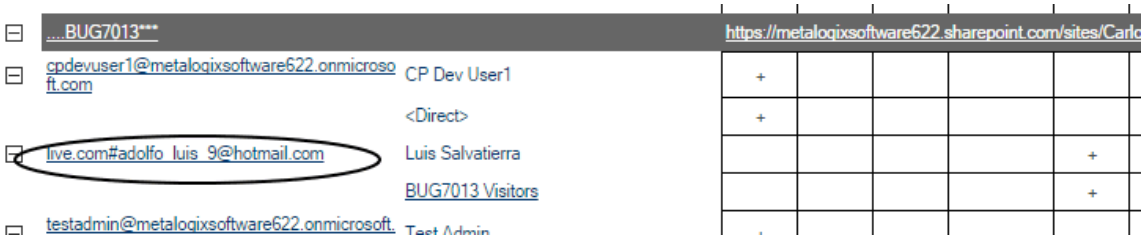
- each **User** with permissions to the List item(s)
- if applicable, the SharePoint **Group** via which the user has permissions (users who have direct access are appropriately identified)
- the number of **Accessible Items** for that user, and
- the user's permission level(s). A plus sign (+) displays in the applicable column(s), which may include any of the five default SharePoint permission levels:
  - **Full Control**
  - **Design**
  - **Contribute**
  - **Read**
  - **Limited**.

NOTE: If a user has a template-specific or custom permission level, it is recorded in the **Other** column.



User	Display Name/Group	Accessible Items	Admin	Full Control	Design	Contribute	Read	Edit	Limited	Other	0 0	
Shared Documents				List Security : Unique; Total Items : 150; Items with Unique Permissions : 5								
axcelertest\development		<axcelertest\development>			150	+						
axcelertest\fscottfitzgerald		<axcelertest\fscottfitzgerald>			150	+		+	+		+	
axcelertest\jamesjoyce		<axcelertest\jamesjoyce>			150				+		+	
axcelertest\margaretmeade		<axcelertest\margaretmeade>			150				+		+	
axcelertest\renamedtester		<axcelertest\renamedtester>			150				+		+	
axcelertest\sammuelclemens		<axcelertest\sammuelclemens>			150		+		+		+	
axcelertest\testbenchinstall		<axcelertest\testbenchinstall>			150	+			+		+	
axcelertest\washingtonirving		<axcelertest\washingtonirving>			150	+			+		+	
axcelertest\williamshakespeare		<axcelertest\williamshakespeare>			150	+	+		+		+	
bellum\administrator		<bellum\administrator>			150		+				+	
bellum\fscottfitzgerald		FScott Fitzgerald			2						+	
bellum\isaacasimov		<bellum\isaacasimov>			150						+	View Only
bellum\jamesjoyce		<bellum\jamesjoyce>			150		+		+		+	
bellum\margaretmeade		<bellum\margaretmeade>			150						+	View Only
bellum\marktwain		<bellum\marktwain>			150						+	View Only
bellum\olivertwist		Oliver Twist			2						+	
bellum\robertheinlein		Robert Heinlein			150		+				+	
bellum\washingtonirving		<bellum\washingtonirving>			150			+			+	View Only

Note that in the following example, the external user is identified by his external email address.



Analyzing Permissions by List Item

The Permissions by List Item analysis lets you examine user permissions for folders and items within selected lists.

NOTE: List item permissions are also included as part of Comprehensive Permissions analysis.

To generate a Permissions by List Item analysis:

1 Select the list(s) whose item permissions you want to analyze.

2 Choose Users and Security > Permissions by List Item.

3 If you want to analyze only specific items within the selected scope, select the items you want to analyze.

4 Specify the parameters for your analysis.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

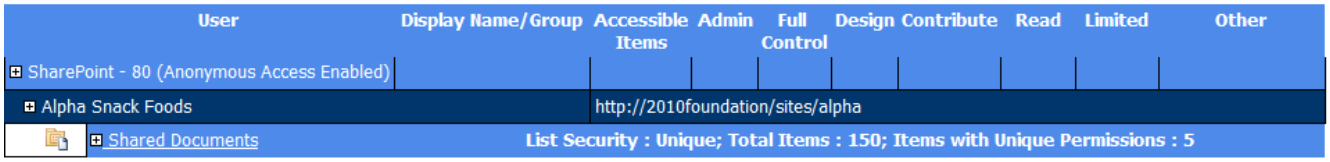
- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

The first row of the result set includes the following information about the list itself:

- an icon that identifies the list type (document library, calendar, task list, etc.).
- the name of the list
- the **List Security** type (Inherited or Unique)
- the number of **Items** in the list
- the number of **Items with Unique Permissions**.



When the first row is expanded, each user with permissions for the list is displayed, along with the following information:

- the name of the SharePoint **User**
- the number of **Accessible Items** (that is, the number of items within the list for which the user has permissions)
- the user's permission level(s) for the list itself, as indicated by a plus sign (+) in the applicable column(s), which may include:
  - the site collection's **Admin** group
  - the five default SharePoint permission levels:
    - **Full Control**
    - **Design**
    - **Contribute**
    - **Read**
    - **Limited**.

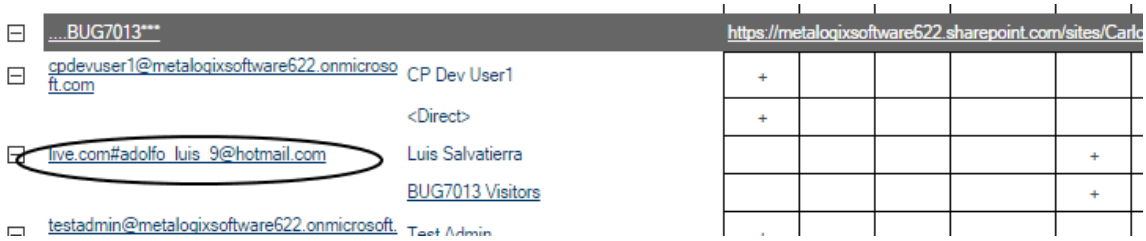
NOTE: If a user has a template-specific or custom permission level, it is recorded in the **Other** column.

User	Display Name/Group	Accessible Items	Admin	Full Control	Design	Contribute	Read	Edit	Limited	Other
SharePoint - 80 (Anonymous Acce Enabled)										
Alpha Snack Foods	http://2010foundation/sites/alpha									
Shared Documents	List Security : Unique; Total Items : 151; Items with Unique Permissions : 5									
bellum\administrator	<bellum\administrator>			+		+			+	
	<Direct>								+	
bellum\agathachristie	Agatha Christie					+			+	
	Alpha Snack Foods Members					+			+	
bellum\fscottfitzgerald	FScott Fitzgerald					+			+	
	Viewers								+	
bellum\hmiller	Henry Miller			+	+	+			+	
	Alpha Snack Foods Members					+			+	
bellum\isaacasimov	Isaac Asimov					+			+	View Only
	<Direct>								+	
bellum\jamesjoyce	James Joyce			+		+			+	
	<Direct>								+	
bellum\margaretmeade	Margaret Meade					+			+	View Only
	<Direct>								+	
bellum\marktwain	Mark Twain			+		+			+	
	<Direct>								+	

The remaining rows contain detailed permissions information for each folder and item within the list.

Click a list, folder, or item name to open the SharePoint Permissions page.

Note that in the following example, the external user is identified by his external email address.



Analyzing Comprehensive Permissions

The Comprehensive Permissions analysis shows the permissions that users (including external users) have to selected sites as well as lists (and optionally, list items) within those sites.

If you want to analyze site-level permissions only (with the option of drilling down to list permissions for each user individually), you can run a Site Permissions analysis instead.

NOTE: The Comprehensive Permissions analysis always uses real-time (not cached) data.

To generate a Comprehensive Permissions analysis:

1 Select the object(s) on which you want to perform the analysis.

2 Choose Users and Security > Comprehensive Permissions

3 Specify the parameters for your analysis.

Note that, In addition to the "standard" parameters, you have the option to **Group by** Sites (the default) or Users.

NOTE: By default, permissions for list items are excluded from the analysis. You can, however, chose to Include **List Items**. Be aware however, that processing time may increase significantly.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

Because Comprehensive Permissions analyses are always run on real-time data, if your analysis encompasses multiple users, sites, lists, and/or list items, the analysis may run very slowly and the result set may be very large. Therefore, you may want to consider running it by schedule.

In addition to the same site-level permissions (Site Security) shown in the Site Permissions by Site analysis, the User Rights section also shows the same list-level and optionally, item-level permissions (List Security) shown in the Site Lists Permissions analysis.

Analyzing SharePoint Groups

The SharePoint Groups Analysis provides details about membership and permissions of SharePoint groups within one or more site collections and/or sites.

To generate a SharePoint Groups analysis:

1 Select the object(s) for which you want to analyze SharePoint groups.

2 Choose Users and Security > SharePoint Group Analysis.

3 Specify the parameters for your analysis.

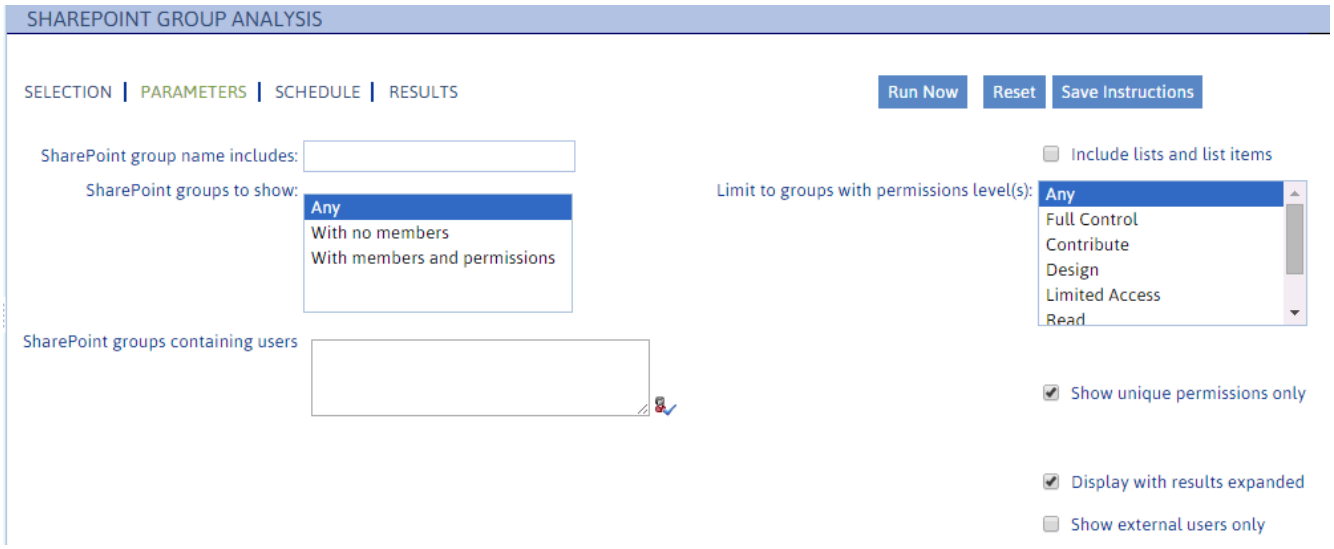
In addition to the "standard" parameters for permissions analyses, you can limit results to:

- SharePoint groups whose name include a specific text string
- groups **with no members** and/or **with no permissions** or only groups with both **members and permissions**

NOTE: Currently, you can only report on groups with no permissions if the ControlPoint Configuration Setting "Show SharePoint Groups with No Permissions in Hierarchy" is set to *true*. (See the *ControlPoint Administration Guide* for details.)

You can also choose whether to **Include lists and list items** in results.

CAUTION: If you chose to include lists and list items, the analysis may take significantly longer to run and may generate a much larger set of results.



Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

The SharePoint Group Analysis consists of the following sections:

- Membership
- Permissions

Membership Section

The Membership section lists each site collection within the scope or your analysis.

When expanded the following information displays:

- each **SharePoint Group** within the site collection
- the **No of users** in the group.

- a plus sign (+) identifying each group that **Has Permissions**.

When expanded, each **Member** login name and **Display Name** is listed.

Membership

SharePoint Group	Member	Display Name	No of Users	Has Permissions
Online Site Collections				
SkyBlue				
SkyBlue Owners			0	+
	(This group has no members)	<(This group has no members)>		
SkyBlue Visitors			0	+
	(This group has no members)	<(This group has no members)>		
Excel Services Viewers			0	+
	(This group has no members)	<(This group has no members)>		
SkyBlue Members			3	+
	live.com#adolfo_luis_9@hotmail.com	Luis Salvatierra		
	live.com#mijael.vargas@live.com	Mijael Vargas		
	testadmin@metalogixsoftware622.onmicrosoft.com	Test Admin		

Permissions Section

The Permissions section lists each site within the scope of your analysis.

When expanded, a Site Security summary row indicates whether site security is Inherited or Unique. Each SharePoint Group within the site is listed, along with a plus sign (+) identifying each of its permissions. Any custom permissions levels are recorded in the **Other** column.

Permissions

SharePoint Group	Full Control	Design	Contribute	Read	Edit	Limited	Other
Online Site Collections							
Select SkyNet	https://metalogixsoftware622.sharepoint.com/sites/skynet						
SkyNet							
Site Security	Site Security : Unique						
SkyNet Owners	+						
SkyNet Members					+		
SkyNet Visitors				+			
Excel Services Viewers							View Only

Note that in the following example, the external user is identified by his external email address.

....BUG7013***	https://metalogixsoftware622.sharepoint.com/sites/Carlo						
cpdevuser1@metalogixsoftware622.onmicrosoft.com	CP Dev User1	+					
	<Direct>	+					
live.com#adolfo_luis_9@hotmail.com	Luis Salvatierra					+	
	BUG7013 Visitors					+	
testadmin@metalogixsoftware622.onmicrosoft.	Test Admin						

Auditing Activities and Changes in Your SharePoint Environment

SharePoint captures activities and changes to the environment via the following mechanisms:

- the **Audit Log**, which focuses on *activities* performed by SharePoint users.
- the **Change Log**, which focuses on *changes* made to the SharePoint environment.

ControlPoint provides functionality that enables you to view contents of audit logs and change logs, which is not currently available in native SharePoint.

Events Captured in SharePoint Logs

The following tables identify the log(s) where different types of events are recorded and the event codes used to identify them.

NOTE: Be aware that some events may not appear immediately in analysis results, as it can take several minutes for them to be recorded in the SharePoint log.

Add/Delete Site Collections, Sites, Libraries and Lists

Event	Where Recorded (ControlPoint Event Type)
• Site collection added • Site added • Library or list added	Change Log (**Add**) NOTE: It may take several minutes for an added site to appear in the Change Log.
• Site deleted • Library or list deleted	• Audit Log (**Delete/Delete Child**) NOTE: A Delete event is reported from the perspective of the object itself. A Delete Child event is reported from the perspective of the object's parent. • Change Log (**Delete**)

Add/Delete Document and List Items

Event	Where Recorded (ControlPoint Event Type)
Document or list item added	• Audit Log (**Update**) • Change Log (**Add**)
Document or list item deleted	• Audit Log (**Delete/Delete Child**)

Event	Where Recorded (ControlPoint Event Type)
	NOTE: A Delete event is reported from the perspective of the object itself. A Delete Child event is reported within the scope of the object's parent. • Change Log (**Delete**)
Document or list item restored	• Audit Log (**Undelete**) • Change Log (**Restore**)

Other Actions on Document and List Items

Event	Where Recorded (ControlPoint Event Type)
• Document opened/downloaded • List item viewed • List item properties viewed	Audit Log (**View**)
• Document or list item edited • Document or list item properties edited	• Audit Log (**Update**) • Change Log (**Update**)
Item checked in/checked out	• Audit Log (**Check In/Check Out**) • Change Log (**Update**)
Items moved to another location in the site	Audit Log (**Move**) Change Log (**Move Away/Move Into**)
Items copied to another location in the site (using the Send To menu entry)	Audit Log (**Update**)
Item accessed as part of a workflow	Audit Log (**Workflow**)

Add/Delete/Change Users and Permissions

Event	Where Recorded (ControlPoint Event Type) (*SharePoint Event Code*)
Site security inheritance broken	• Audit Log (**Turn Off Inheritance from Parent**) (*SecRoleBindBreakInherit*) • Change Log (**Add Assignment**) (*AssignmentAdd*)

Event	Where Recorded (ControlPoint Event Type) (*SharePoint Event Code*)
Site security inheritance restored	• Audit Log (**Turn On Inheritance from Parent**) (*SecRoleBindInherit*) • Change Log (**Delete Assignment**) (*Assignment*)
Permission level inheritance restored	Change Log (**Delete Assignment**) (*Assignment*)
Site permission level created	• Audit Log (**Create Permissions**) (*SecRoleDefCreate*) • Change Log (**Add Role**)(*RoleUpdate*)
Site permission level deleted	• Audit Log (**Remove Permissions**) (*SecRoleDefDelete*) • Change Log (**Delete Role**) (*RoleUpdate*)
Site Permission level changed	• Audit Log (**Modify Permissions**) *(SecGroupCreate*) • Change Log (**Update Role**) (*RoleUpdate*)
User or SharePoint group permission changed	• Audit Log (**Change Permissions**) (*SecRoleBindUpdate*) • Change Log (**Add Assignment** and/or **Delete Assignment**) (*AssignmentAdd* and/or *Assignment*)
SharePoint group created	• Audit Log (**Create Group**) (*SecGroupCreate*) • Change Log (**Add**)
SharePoint group deleted	• Audit Log (**Delete Group**) (*SecGroupDelete*) • Change Log (**Delete**)
Member added to SharePoint group	• Audit Log (**Add Member to Group**) (*SecGroupMemberAdd*) • Change Log (**Add Member**) (*MemberAdd*)
Member deleted from SharePoint group	• Audit Log (**Delete Member from Group**) (*SecGroupemberDelete*) • Change Log (**Delete Member**) (*MemberDelete*)

Add Content Types and Columns

Action	Where Recorded (ControlPoint Event Type) (SharePoint Event Code)
Content Type added	Audit Log (**Change Profile**) (*ProfileChange*)
Column added	Audit Log (**Change Schema**) (*SchemaChange*)

SharePoint Search Activity

Event	Where Recorded (ControlPoint Event Type)
SharePoint search performed	Audit Log (**Search**)

Audit Settings

Event	Where Recorded (ControlPoint Event Type) (*SharePoint Event Code*)
Audit settings changed	Audit Log (**Change Mask**) (*AuditMaskChange*)

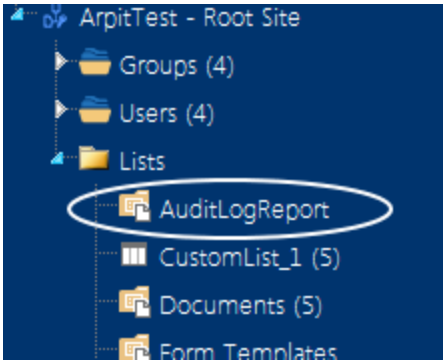
Analyzing Audit Log Contents

The ControlPoint Audit Log analysis extends SharePoint's built-in audit logging by letting you easily view entries written to the audit log. You can focus your analysis on specific event types, and even limit the scope to include only certain objects (sites, lists, documents, etc.).

Audit logging must be enabled for each site collection whose events you want to log.

How ControlPoint Online Gathers Audit Log Data

When an Audit Log analysis is run, ControlPoint Online prompts SharePoint to gather the requested data. The data collected by SharePoint is saved to a document library at the root site of each site collection within the scope of the analysis. The library to which this data is saved is defined by the ControlPoint Configuration Setting **HostedAuditLogReportList**.



To generate an Audit Log analysis:

1 Select the object(s) for which you want to view audited events.

NOTES:

- If the scope of your analysis includes site collections that have been deleted, audit events associated with that site collection will no longer exist.
- As with all ControlPoint analyses, if you initiated the analysis from the farm or site collection level, all child items will be included by default. If you initiated the analysis at the site level, only information for that site (not its subsites) will be included. You can, however, use the Change Selection option to further refine your scope.

2 Choose Audit and Alerts > Audit Log.

3 Specify one or more of the following parameters for your analysis:

- select both a **Start** and **End date** ( ) and time ( ) for which you want to report

The time period for which you can generate an audit log analysis depends on how many days audit data is retained. The ControlPoint default is 0 (meaning that audit data is never deleted), but the ControlPoint Application Administrator can specify a different value via ControlPoint Configuration Settings.

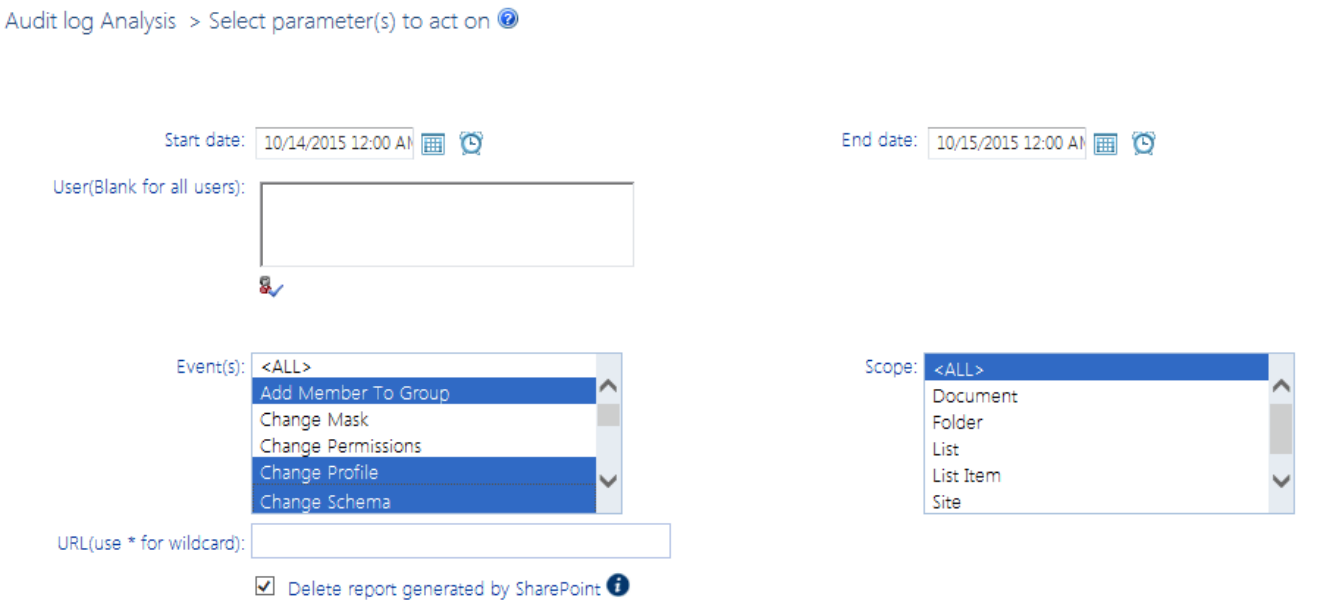
- select the **User**(s) whose actions you want to audit (or leave blank for all users)
- enter a *relative* **URL** (note that you can enter a url down to the item level; you can also use an asterisk (*) at the beginning and end of a url as wildcards)

  EXAMPLES

  - sites/al*
  - sites/alpha/shared documents/xcrSummaryReport.pdf

- select one or more **Event** types from the list box. Refer to the topic Events Captured in SharePoint Log.

CAUTION: Although you have the option of viewing ALL events, if you select this option your result set may be extremely large. One reason is that SharePoint records some events (such as a View) as a series of several events. Also, some event types (such as Update) may encompass a wide variety of events.



- If you want the report generated by SharePoint to be deleted from the SharePoint library(ies), check **Delete report generated by SharePoint.**

NOTE: ControlPoint saves the SharePoint report to a file that includes a date stamp. Therefore, if you leave this box *unchecked*, a *new* report will be saved to the library(ies) each time the analysis is run (that is, it will not *replace* a previously-saved report).

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

Information in the Audit Log analysis

The Audit Log analysis contains the following information:

- the **Date** and time that the event occurred
- the **User** responsible for the event
- the **Event** type
- the **Scope** of the event, which may be:
  - site collection (Site)
  - site (Web)
  - List
  - Folder, Document, or List Item
- the name of the **Site Collection** and **Site** on/within which the event occurred.
- the relative **URL** for the list or document/item.

NOTE: If auditing has been enabled at the site collection level, the URL for the document or item will display. If auditing has been enabled at the site level or below, the URL for the list itself (but not the document or item within the list) will display.

Depending on the event type, additional detail may display beneath each line item.

Analyzing Change Log Contents

The ControlPoint Change Log lets you view the contents of SharePoint change logs for one or more selected event types.

To generate a Change Log analysis:

1 Select the object(s) for which you want to view change log entries.

2 Choose Audit & Alerts > Change Log Analysis.

3 Specify one or more of the following parameters for your analysis:

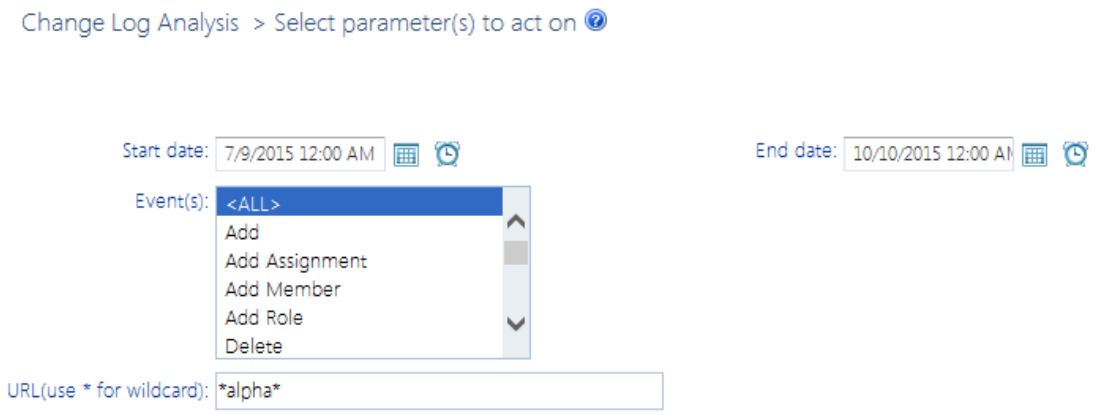
- select both a **Start** and **End date** ( ) and time ( ) for which you want to report

The time period for which you can generate a change log analysis depends on how many days change log data is retained. ControlPoint relies on the history maintained by SharePoint. SharePoint for Office 365 retains Change Log data for 60 days.

- enter a *relative* **URL** (note that you can enter a url down to the item level; you can also use an asterisk (*) at the beginning and end of a url as wildcards)

  EXAMPLES

  - sites/al*
  - sites/alpha/shared documents/SharePointPlanning.docx
- select one or more **Event** types from the list box. Refer to the topic Events Captured in SharePoint Logs for guidance in selecting the appropriate event type(s).



Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

Information in the Change Log Analysis

Metalogix

Change log (9/9/2015 12:00 AM to 10/10/2015 12:00 AM)

bellum\administrator
10/9/2015 5:20:16 PM

Parameters:

Event: <ALL>

URL: *alpha*

Total : 127

Date	Scope	Event	Performed By	Site Collection	Site	URL
9/12/2015 2:00:34 AM	Web Site	Update	None	Alpha Snack Foods	Alpha Snack Foods	http://2010foundation/sites/alph
Site: Alpha Snack Foods						WAP: SharePoint - 80
9/15/2015 2:00:44 AM	Web Site	Update	None	Alpha Snack Foods	Alpha Snack Foods	http://2010foundation/sites/alph
Site: Alpha Snack Foods						WAP: SharePoint - 80
9/17/2015 2:00:30 AM	Web Site	Update	None	Alpha Snack Foods	Alpha Snack Foods	http://2010foundation/sites/alph
Site: Alpha Snack Foods						WAP: SharePoint - 80
9/19/2015 2:00:32 AM	Web Site	Update	None	Alpha Snack Foods	Alpha Snack Foods	http://2010foundation/sites/alph
Site: Alpha Snack Foods						WAP: SharePoint - 80
9/22/2015 2:00:43 AM	Web Site	Update	None	Alpha Snack Foods	Alpha Snack Foods	http://2010foundation/sites/alph
Site: Alpha Snack Foods						WAP: SharePoint - 80
9/23/2015 2:00:47 AM	Web Site	Update	None	Alpha Snack Foods	Alpha Snack Foods	http://2010foundation/sites/alph
Site: Alpha Snack Foods						WAP: SharePoint - 80

The ControlPoint Change Log Analysis contains the following information:

- the **Date** and time that the event occurred
- the **Scope** of the event
- the **Event** type
- the individual the event was **Performed By**

  NOTE: For many event types, SharePoint change logging does not record the user who performed the event. In such cases, the value "None" will appear in the Performed By column.

- the name of the **Site Collection** and **Site** on/within which the event occurred.
- the **URL** for the item (if applicable).

Analyzing List Properties

The **List Properties** analysis provides information about one or more lists in your farm, including:

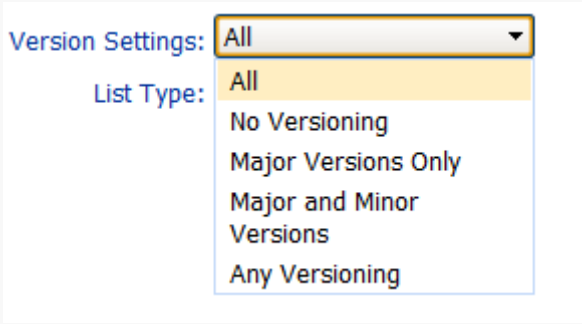
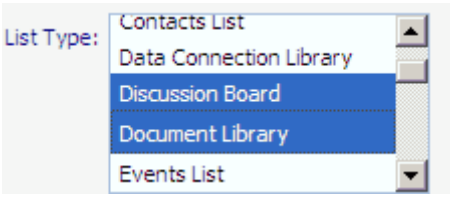
- the properties of the list, including versioning and advanced settings
- audit settings that are/are not enabled for the list.

To generate a List Properties analysis:

1 Select the object(s) you want to include in your analysis.

2 Choose Configuration > List Properties.

3 If you want results to include only lists that meet one or more specific criteria, specify one or more of the parameters described in the following table.

If you want results to include only lists...	Then ...
whose name contains a specific text string	enter the text string in the **List Name contains** field. 
that have a particular version setting	select from the **Versions Setting** drop-down. 
of one or more specific types	select from the **List Types** drop-down. 

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

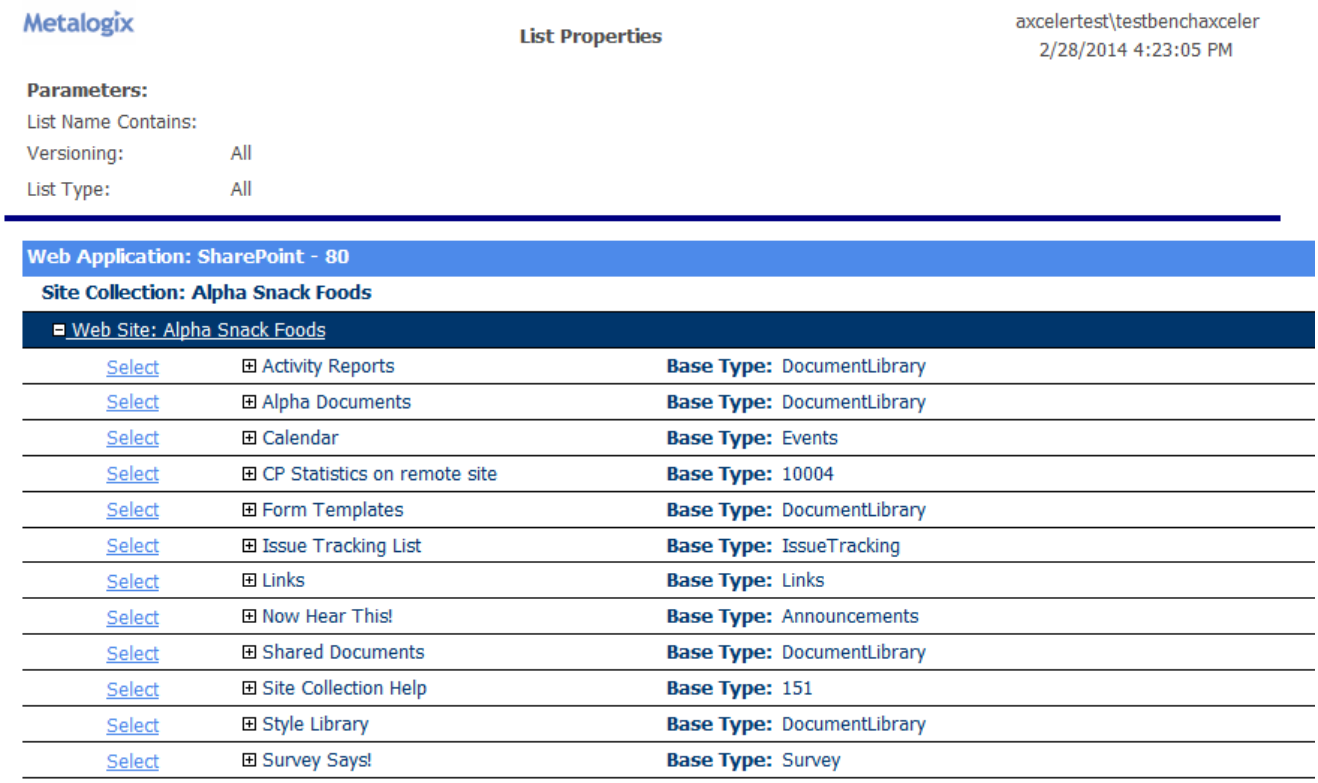
OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

The top level of the analysis lists each Web application, site collection, site, and list within the scope of your analysis, along with the list's **Base Type**.



Metalogix

List Properties

axcelertest\testbenchaxceler
2/28/2014 4:23:05 PM

Parameters:

List Name Contains:
Versioning: All
List Type: All

Web Application: SharePoint - 80

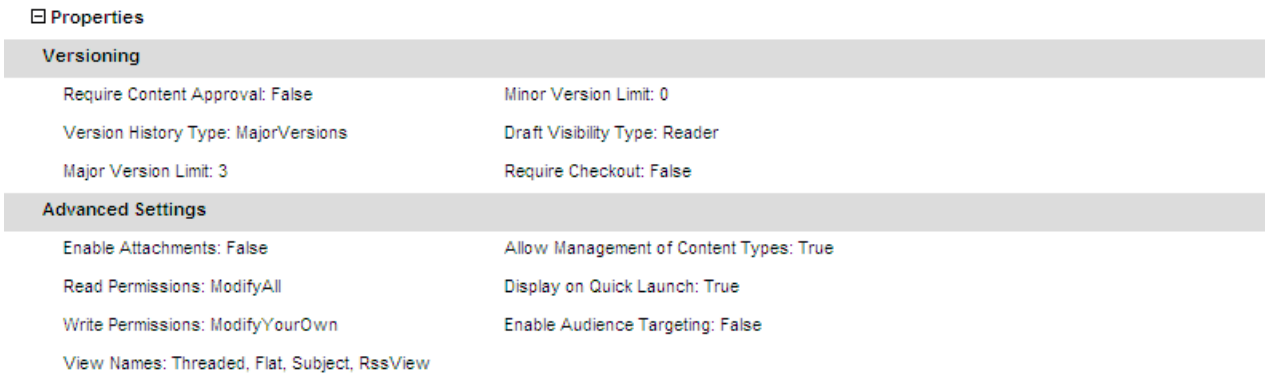
Site Collection: Alpha Snack Foods

Web Site: Alpha Snack Foods

Select	⊞ Activity Reports	**Base Type:** DocumentLibrary
Select	⊞ Alpha Documents	**Base Type:** DocumentLibrary
Select	⊞ Calendar	**Base Type:** Events
Select	⊞ CP Statistics on remote site	**Base Type:** 10004
Select	⊞ Form Templates	**Base Type:** DocumentLibrary
Select	⊞ Issue Tracking List	**Base Type:** IssueTracking
Select	⊞ Links	**Base Type:** Links
Select	⊞ Now Hear This!	**Base Type:** Announcements
Select	⊞ Shared Documents	**Base Type:** DocumentLibrary
Select	⊞ Site Collection Help	**Base Type:** 151
Select	⊞ Style Library	**Base Type:** DocumentLibrary
Select	⊞ Survey Says!	**Base Type:** Survey

When expanded, the following information is displayed for each list:

- list **Properties**, including versioning and advanced settings detail



⊟ Properties

Versioning

Require Content Approval: False	Minor Version Limit: 0
Version History Type: MajorVersions	Draft Visibility Type: Reader
Major Version Limit: 3	Require Checkout: False

Advanced Settings

Enable Attachments: False	Allow Management of Content Types: True
Read Permissions: ModifyAll	Display on Quick Launch: True
Write Permissions: ModifyYourOwn	Enable Audience Targeting: False
View Names: Threaded, Flat, Subject, RssView	

- all of the available **Audit Settings**, with settings that are currently enabled for the list identified by a plus sign (+).

NOTE: Audit settings that are inherited from the site collection are flagged with >.

⊟ **Audit Settings** (Note: ' > ' indicates that the audit item is inherited from the parent site collection.)

Enabled?	Lists, Libraries and Sites - Events to audit	Enabled?	Documents and Items - Events to audit
	Editing content types and columns	+	Opening or downloading documents, viewing items in lists, or viewing item properties
	Searching site content		Editing items
	Editing users and permissions	>	Checking out or checking in items
	Deleting child objects		Moving or copying items to another location in the site
		>	Deleting or restoring items

- list **Columns** settings

⊟ **Columns**

Name	Column Type	Column Description	Content Types
Approval Status	Moderation Status	Moderation Status	N/A
Approver Comments	Multiple lines of text	Multiple lines of text	N/A
Attachments	Attachments	Attachments	N/A
Body	Multiple lines of text	Multiple lines of text	Discussion, Message
Body Was Expanded	Computed	Computed	Discussion, Message
Content Type	Single line of text	Single line of text	Discussion, Message
Content Type ID	Content Type Id	Content Type Id	N/A
Copy Source	Single line of text	Single line of text	N/A
Correct Body To Show	Computed	Computed	Discussion, Message
Created	Date and Time	Date and Time	N/A
Created By	Person or Group	Person or Group	N/A
Discussion Subject	Computed	Computed	Discussion, Message
Discussion Title	Lookup	Lookup (information already on this site)	Discussion, Message

Generating a OneDrive Summary Report

If you The OneDrive Summary report lets you view OneDrive for Business usage information for personal sites to which you have administrator privileges, including "Share With Me" documents.

To generate this report, the ControlPoint Application Administrator must explicitly choose to include OneDrive site collections in the SharePoint Hierarchy. (However, doing so may significantly increase SharePoint Hierarchy load time, especially if there are a large number of OneDrive site collections in the environment.) Contact Metalogix Support for details.

To generate a OneDrive Summary Report:

1. Select the OneDrive site collection(s) (or the OneDrive Site Collections node if you want to include all OneDrive site collections that you administer).

2 Choose OneDrive > OneDrive Summary.

3 If you want to **Include item level permissions**, check this box.

NOTE: If you choose this option, processing time may increase, especially if the scope of your selection contains a large number of site collections and/or documents.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

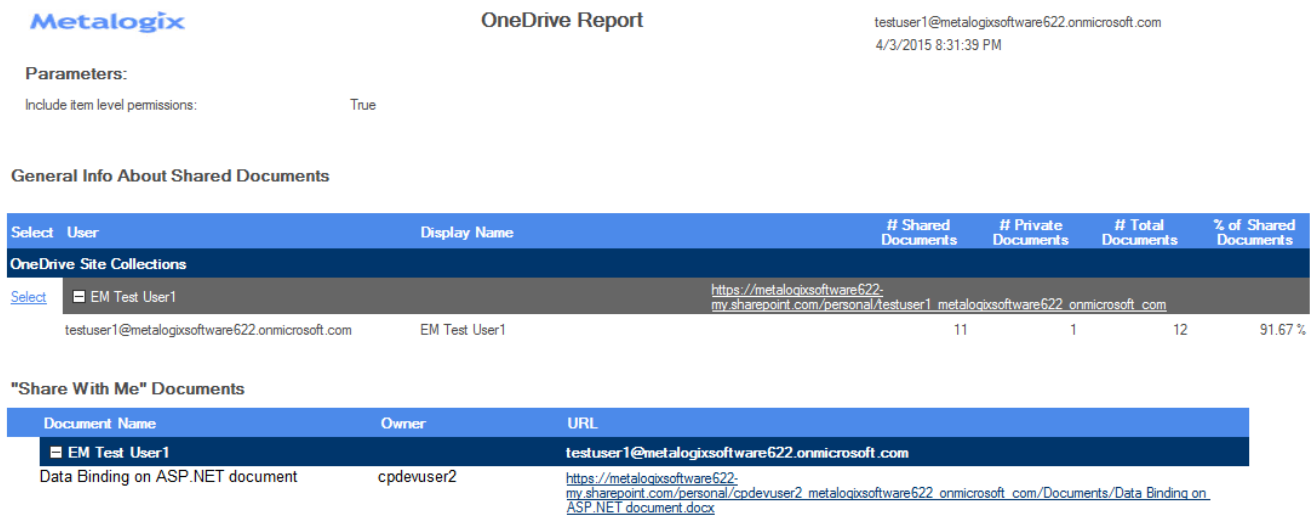
- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

Analysis results include the following information about each OneDrive site collection in the scope of your selection:

- the following **General Info About Shared Documents**:
  - the owner of the site collection
  - the document name, owner, and URL of each "Share With Me" document on the selected site(s).
  - If you chose to Include item level permissions, the following additional information displays
    - **# Shared Docments**
    - **# Private Documents**
    - **# Total Documents**
    - **% of Shared Documents**
- the name, owner, and URL for **"Share With Me" Documents.**


Metalogix

OneDrive Report

testuser1@metalogixsoftware622.onmicrosoft.com
4/3/2015 8:31:39 PM

Parameters:

Include item level permissions: True

General Info About Shared Documents

Select	User	Display Name	# Shared Documents	# Private Documents	# Total Documents	% of Shared Documents
OneDrive Site Collections						
Select	EM Test User1	https://metalogixsoftware622-my.sharepoint.com/personal/testuser1_metalogixsoftware622_onmicrosoft_com				
	testuser1@metalogixsoftware622.onmicrosoft.com	EM Test User1	11	1	12	91.67 %

"Share With Me" Documents

Document Name	Owner	URL
EM Test User1		testuser1@metalogixsoftware622.onmicrosoft.com
Data Binding on ASP.NET document	cpdevuser2	https://metalogixsoftware622-my.sharepoint.com/personal/cpdevuser2_metalogixsoftware622_onmicrosoft_com/Documents/Data Binding on ASP.NET document.docx

The ControlPoint Task Audit

The ControlPoint Task Audit is an analysis tool that summarizes one or more of the ControlPoint actions that have been performed by administrators over a specified time period.

By default, the Task Audit report is accessible from the Manage ControlPoint panel. An action-specific Task Audit Report is also displayed automatically after a ControlPoint action is carried out.

NOTE: In a multi-farm installation, the Task Audit includes actions performed on both home and remote farms.

To generate a Task Audit:

1 From the Manage ControlPoint panel, choose Schedule Management and Logging > ControlPoint Task Audit.

2 Specify the following parameters for your analysis:

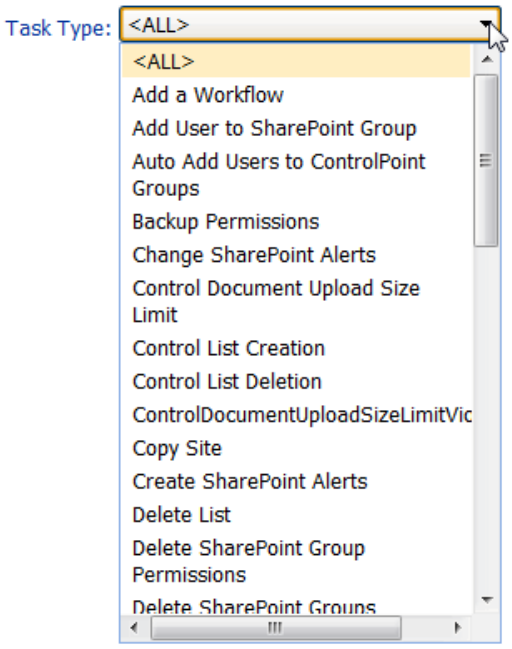
- Either
  - Enter the **StartDate** and **EndDate**, or
  - click the Calendar icon ( )and select the date(s).
- (Optional) If you want to search for a specific text string, complete the **Search for** field. You can enter a full or partial:
  - site name or url
  - action name, or
  - action description

  For example, by entering the words "Site Theme" in the **Search for** field, your results will be limited to tasks that involved modifying a site theme.

Select an **Administrator** from the drop-down. (If you want report results to include all administrators in the list, select <ALL>).

Note that the drop-down list includes only administrators who have performed a ControlPoint action within that farm.

- Select a **Task Type** from the drop-down.



NOTE: The Task Type list is populated with the types of actions that have actually been performed by administrators. For example, if a Delete User Permissions action has never been performed, it will not appear in the list. If you want to include all available options in the report results, select <ALL>.

If you chose the Run Now, option, after the operation has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the operation and displays in the Results section.

If you schedule the operation, a link to the Task Audit is included in the scheduled action notification email.

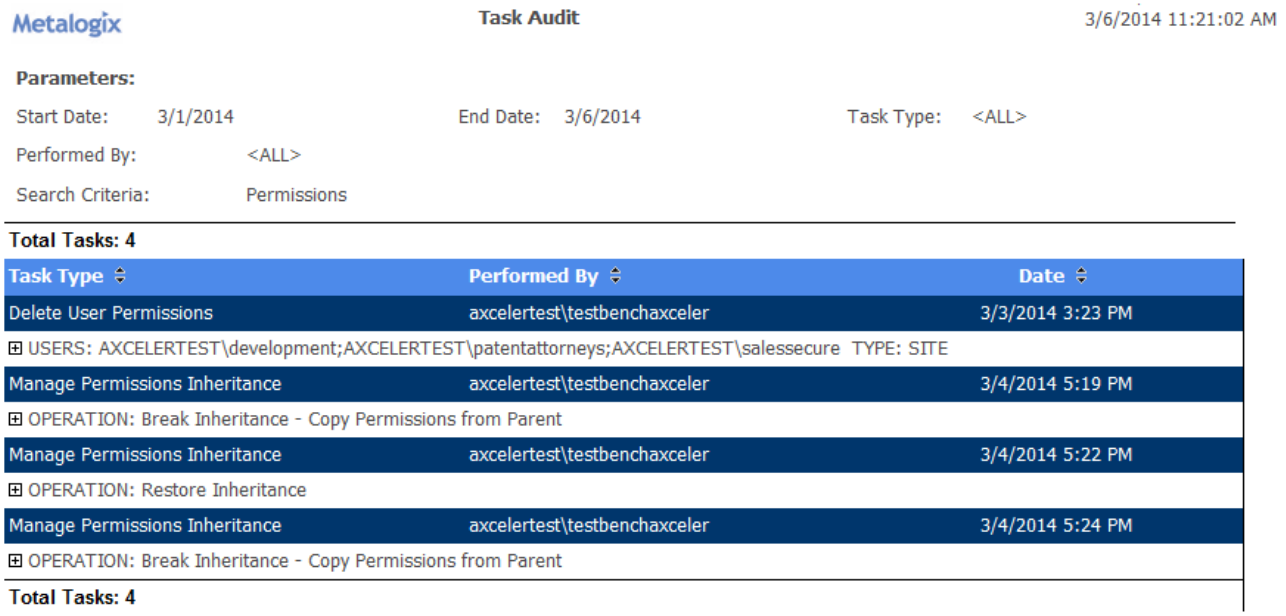
See also Auditing ControlPoint Administrator Tasks.

Information in the Task Audit Report

The Task Audit Report contains the following information for each task:

- the **Task Type**
- the username of the administrator that the task was **Performed by**
- the **Date** and time when the task was performed, and

- a summary of the parameters chosen for the action.



Metalogix

Task Audit

3/6/2014 11:21:02 AM

Parameters:

Start Date: 3/1/2014 End Date: 3/6/2014 Task Type: <ALL>

Performed By: <ALL>

Search Criteria: Permissions

Total Tasks: 4

Task Type	Performed By	Date
Delete User Permissions	axcelertest\testbenchaxceler	3/3/2014 3:23 PM
⊞ USERS: AXCELERTEST\development;AXCELERTEST\patentattorneys;AXCELERTEST\salessecure TYPE: SITE		
Manage Permissions Inheritance	axcelertest\testbenchaxceler	3/4/2014 5:19 PM
⊞ OPERATION: Break Inheritance - Copy Permissions from Parent		
Manage Permissions Inheritance	axcelertest\testbenchaxceler	3/4/2014 5:22 PM
⊞ OPERATION: Restore Inheritance		
Manage Permissions Inheritance	axcelertest\testbenchaxceler	3/4/2014 5:24 PM
⊞ OPERATION: Break Inheritance - Copy Permissions from Parent		

Total Tasks: 4

When expanded, a more detailed description of a task displays, which lists:

- site collections or sites on which the action was carried out, and

- any special notes or errors (such as "*Security is inherited - no processing is done*").

Task Type	Performed By	Date
Delete User Permissions	axcelertest\testbenchaxceler	3/3/2014 3:23 PM
⊟ USERS: AXCELERTEST\development;AXCELERTEST\patentattorneys;AXCELERTEST\salessecure TYPE: SITE		
Performed On	**URL**	**Path**
Alpha Snack Foods	http://2010foundation/sites/alpha	2010SharePoint > SharePoint - 80 > Alpha Snack Foods > ....> Alpha Snack Foods
User AXCELERTEST\Development permissions have been removed from the Root Site Alpha Snack Foods		
User AXCELERTEST\patentattorneys permissions have been removed from the Root Site Alpha Snack Foods		
User AXCELERTEST\SalesSecure permissions have been removed from the Root Site Alpha Snack Foods		
Manage Permissions Inheritance	axcelertest\testbenchaxceler	3/4/2014 5:19 PM
⊟ OPERATION: Break Inheritance - Copy Permissions from Parent		
Performed On	**URL**	**Path**
***Issue Tracking List	http://2010foundation/sites/alpha	2010SharePoint > SharePoint - 80 > Alpha Snack Foods > ....> Alpha Snack Foods
Permissions inheritance has been broken and the parent's permissions have been copied for the list		
***Shared Documents	http://2010foundation/sites/alpha	2010SharePoint > SharePoint - 80 > Alpha Snack Foods > ....> Alpha Snack Foods
Permissions inheritance has been broken and the parent's permissions have been copied for the list		
Manage Permissions Inheritance	axcelertest\testbenchaxceler	3/4/2014 5:22 PM
⊟ OPERATION: Restore Inheritance		
Performed On	**URL**	**Path**
Issue Tracking List	http://2010foundation/sites/alpha	2010SharePoint > SharePoint - 80 > Alpha Snack Foods > ....> Alpha Snack Foods
Permissions inheritance has been restored for the list		

Note that:

- As with other ControlPoint analyses, only actions taken on sites you have permissions to manage within ControlPoint display in audit report results.
- Sites for which the administrator who performed the action does not have permissions to manage are not acted upon, and therefore are not captured in the audit report.

Viewing Logged Errors

The Logged Errors Report lets you view the contents of the ControlPoint Services (xcAdmin) database error log for a specified date range. You can use this detail with guidance from Metalogix Support to diagnose potential issues in your environment.

To view logged errors:

1 From the Manage ControlPoint panel, choose Schedule Management and Logging > Logged Errors Report.

2 Select a **Start date** and **End date** representing the time period for which you want to view logged errors.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

Logged Error Report results contain a time-stamped entry for each error logged within the specified date range, followed by detailed error text.

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Logged Errors (6/8/2015 to 7/8/2015)

bellum\administrator
7/8/2015 10:45:51 AM

Date	User	Source
6/8/2015 3:54:15 AM	bellum\administrator	

ID #: 213: Connection LOGDB is not available

Stack: at Axceler.Datalayer.xcDataManager.GetSQLConnection(String name, Boolean throwException)
at Axceler.Datalayer.xcDataManager.#vcb(String #9)
at Axceler.Datalayer.xcDataManager.GetDatareaderWParms(String connName, String sSQL, Dictionary`2 hshParm, Nullable`1 type)
at Axceler.Datalayer.xcDataManager.GetDatareaderWParms(String connName, String sSQL, Dictionary`2 hshParm)
at xcCore.Reports.ReportsCommon.getPartionsList(DateTime dtstart, DateTime dtend, WebDataManager dbman, String Conname)
at xcCore.Reports.ReportsCommon.GetActivityInt(String type, String dtstart, String dtend, String sGuid, String siteGuid, WebDataManager dbman, DateTime& MinDate, DateTime& LastAccessed, Boolean isLoggingConnection)
at xcCore.Reports.ReportsCommon.GetActivity(String type, String dtstart, String dtend, String sGuid, String siteGuid, WebDataManager dbman, DateTime& MinDate, DateTime& LastAccessed, Boolean isLoggingConnection)
at Axceler.Core.Logic.Operations.DiscoveryOperation.GetActivities(String SiteId, String processDate, WebDataManager dbman, Boolean isLoggingConnection)
at Axceler.Core.Logic.Operations.DiscoveryOperation.UpdateAnalytics(String SiteId, String processDate, WebDataManager dbman, Boolean isLoggingConnection)
at xcCore.Logic.Traverse.PopulateActivityColumns(DataRow workRow, Boolean renewRow, SPSite spSiteColl, Boolean isANLAvailable, Boolean isLoggingConnection)

6/8/2015 3:54:15 AM	bellum\administrator	

ID #: 214: Connection LOGDB is not available

Stack: at Axceler.Datalayer.xcDataManager.GetSQLConnection(String name, Boolean throwException)
at Axceler.Datalayer.xcDataManager.#vcb(String #9)
at Axceler.Datalayer.xcDataManager.GetDatareaderWParms(String connName, String sSQL, Dictionary`2 hshParm, Nullable`1 type)
at Axceler.Datalayer.xcDataManager.GetDatareaderWParms(String connName, String sSQL, Dictionary`2 hshParm)
at xcCore.Reports.ReportsCommon.getPartionsList(DateTime dtstart, DateTime dtend, WebDataManager dbman, String Conname)
at xcCore.Reports.ReportsCommon.GetActivityInt(String type, String dtstart, String dtend, String sGuid, String siteGuid, WebDataManager dbman, DateTime& MinDate, DateTime& LastAccessed, Boolean isLoggingConnection)
at xcCore.Reports.ReportsCommon.GetActivity(String type, String dtstart, String dtend, String sGuid, String siteGuid, WebDataManager dbman, DateTime& MinDate, DateTime& LastAccessed, Boolean isLoggingConnection)
at Axceler.Core.Logic.Operations.DiscoveryOperation.GetActivities(String SiteId, String processDate, WebDataManager dbman, Boolean isLoggingConnection)
at Axceler.Core.Logic.Operations.DiscoveryOperation.UpdateAnalytics(String SiteId, String processDate, WebDataManager dbman, Boolean isLoggingConnection)
at xcCore.Logic.Traverse.PopulateActivityColumns(DataRow workRow, Boolean renewRow, SPSite spSiteColl, Boolean isANLAvailable, Boolean isLoggingConnection)

Scheduling a ControlPoint Operation

The ControlPoint scheduler lets you set up ControlPoint operations to run in the background at a specified date and time, such as when system resource usage is low. Depending on your ControlPoint permissions, you can schedule:

- an Advanced Search
- any ControlPoint analysis
- most ControlPoint actions
- a full or partial Discovery.

This feature is especially useful for:

- operations that might take a significant amount of time to complete (such as a an analysis run on a large farm)
- operations that you want to run during off-peak hours (such as moving an active site)
- enforcing corporate or regulatory policies (for example, by ensuring that user permissions are always set at the proper levels)
- analyses that you want to run and distribute on a regular basis (such as weekly site activity or storage usage).

Results of scheduled ControlPoint analyses can be sent to email distribution lists and/or posted to a SharePoint document library as a .pdf, an Excel formatted spreadsheet, or a csv file. Individual data sets within analyses can also be saved as SharePoint lists for use in creating dashboards.

ControlPoint uses a different (typically larger) limit on the number of line items that can be returned when an analysis is run on a scheduled basis than when run interactively. ControlPoint Application Administrators can, however, modify this limit.

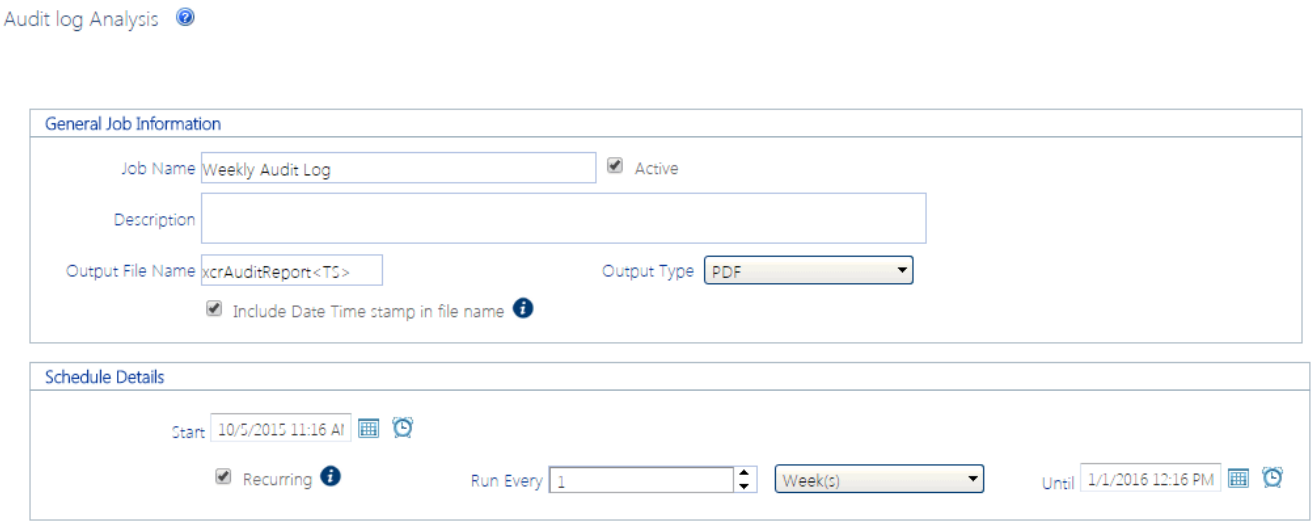
NOTE: In a multi-farm installation, operations can only be scheduled for the home farm.

Scheduling a Recurring Analysis for Which a Specific Date Range or Time Period was Selected

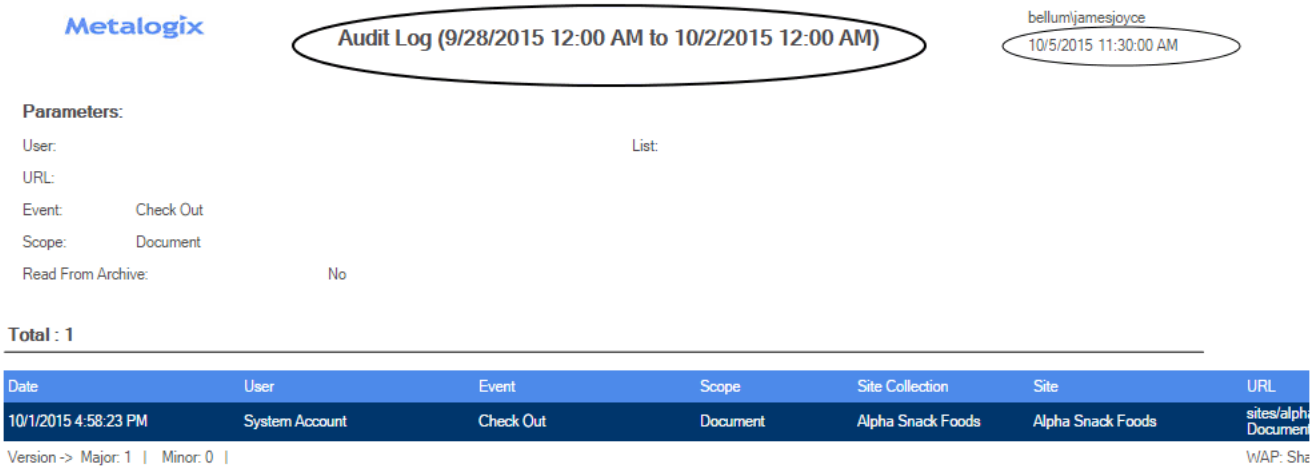
If a ControlPoint analysis is scheduled to run on a recurring basis and includes a date range or time period, the ControlPoint scheduler will interpret it as a relative date range or time period (that is, relative to the date when the scheduled job is run). The first time the scheduled job runs, the analysis will cover the date range specified in the Parameters section. For subsequent job runs, the date range will be updated accordingly.

EXAMPLES:

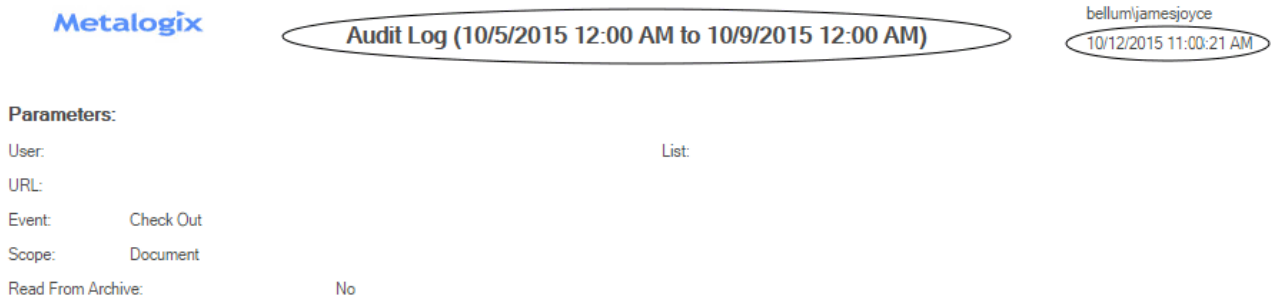
- If you initiate an Audit Log analysis on a Monday for a date range that covers the the previous week, then schedule it to run on a recurring basis:



  - the first time the scheduled job runs, the analysis will include data for the first week in January (that is, the week you specified)



  - the second time the scheduled job runs (at the end of the following week), the analysis will include data for the second week in January



  - and so on.

- If you schedule a SharePoint Summary Report to run every 30 days, the analysis will include activity that occurred 30 days ending on the date the scheduled job runs, regardless of the date on which the report was initiated.

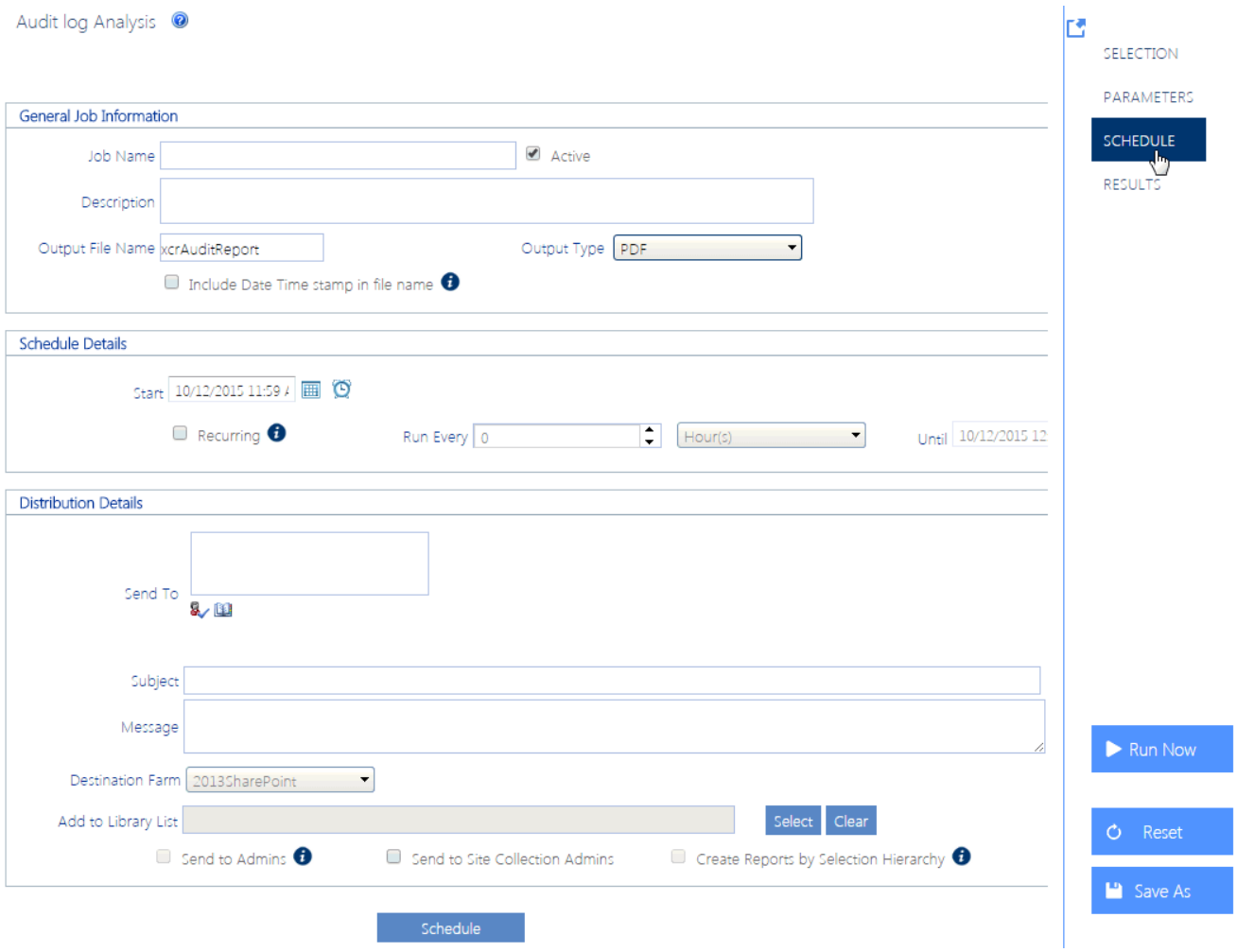
How Scheduled Jobs are Handled

The ControlPoint scheduler is driven by the Windows scheduled task that has been configured using the ControlPoint Utility (xcUtilities.exe.) This task both checks for and initiates the execution of scheduled jobs. The task performs these activities every time it runs. (For information on configuring and running the ControlPoint Scheduler, see the *ControlPoint Online Administration Guide*.)

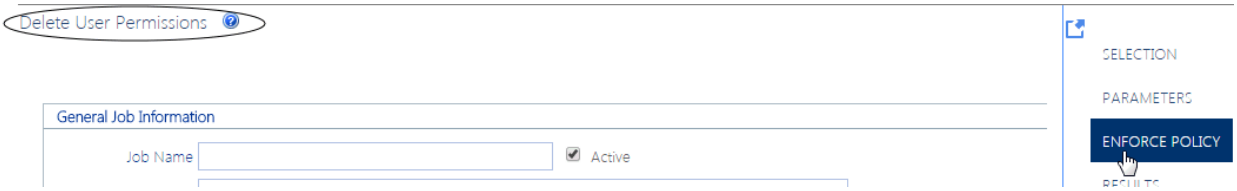
Creating a Scheduled Job

To schedule a ControlPoint operation:

1 After initiating and specifying the parameters for a ControlPoint operation, open the **Schedule** section.



Note that, for some ControlPoint operations that are likely to be scheduled for purposes of compliance with corporate or regulatory policy, this section is labeled **Enforce Policy**.



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

TIP: Choose a brief but descriptive name that uniquely identifies the job. This will make it easier for you to identify it in the Schedule Monitor and Scheduled Jobs Report. If you choose to have the output posted to a SharePoint document library, the Job Name will also be used as the document Title.

3 If you want the job to be active, make sure the **Active** box is checked.

NOTE: Once a scheduled job has been added, it can be activated or deactivated as needed.

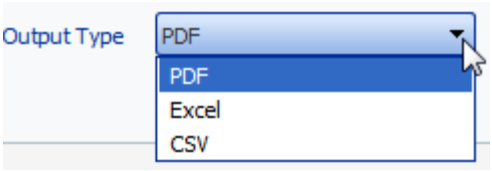
4 If you want to change the **Output File Name**, overwrite the default name.

CAUTION: The same *default* Output File Name is used for every action or analysis of a particular type. For example, whenever you schedule a Site Permissions by Site analysis, the default output file name is `xcrRightsBySite`, regardless of its scope, or who requested it. It is possible to have more than one job with the same output file name. Keep in mind, however, if more than one job with exactly the same output file name is posted to the same document library, an existing document will be overwritten with a more recent document with the same name.

5 For ControlPoint *analyses* only:

a) If you want the date and time that the job is run to be appended to the file name, click the **Include Date Time stamp in the file name** box. (This will enable you to retain a historical record of analysis results that may be used as a record of compliance with policies or regulations.)

b) If different than the default, select an **Output Type** from the drop-down.



NOTE: If you choose **CSV**, output will be in the form of raw analysis data that can be imported into another program for further examination.

6 Complete the **Schedule Details** as follows:

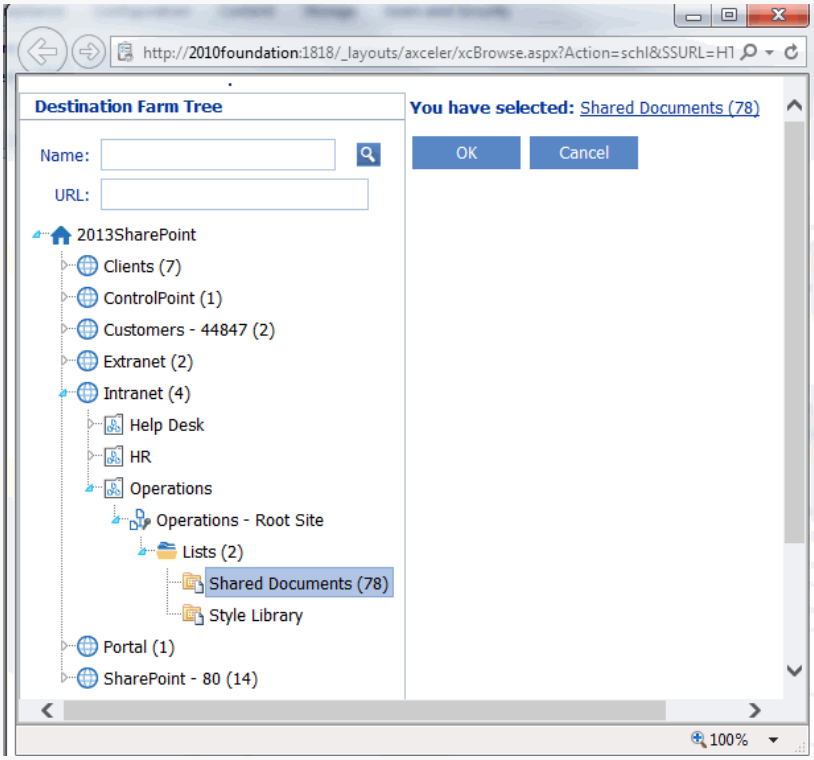
If you want to ...	Then ...
run an operation one time only	Enter or select a **Start** date ( ) and time ( ).

If you want to ...	Then ...
run an operation at regular intervals	a. For **Start**, enter the *first* date ( ) and time ( ) that you want the job to run. b. Click the **Recurring** box. c. For **Run every:** • enter the interval (as a positive integer) at which you want the job to run • select an interval type (Hour, Day, or Month) d. For **Until**, enter or select the *last* date ( ) and time ( ) that you want the job to run.

NOTE: Dates and times correspond to those of the server on which the ControlPoint scheduler is running.

7 Complete the **Distribution Details**. Use the information in the following table for guidance.

If you want to ...	Then ...
have a notification email sent to one or more recipients when the job completes* (and, in the case of an *analysis*, have output included in the email as an attachment)	complete the **Send to**:, **Subject**, and **Message** fields. (The From field will automatically be populated with the email address specified when the ControlPoint Online application was originally installed.) NOTE: You can either use the SharePoint People Picker as you would when selecting users on which to perform a ControlPoint action or analysis, or enter one or more email addresses (separated by semicolons), in the **Send to** field.
have analysis results posted to a SharePoint document library	Complete the **Add to Library or List** field as follows: • Click [Select] to display the Destination Selection Page pop-up dialog, and select a document library from the Destination Farm Tree. (Note that only lists and libraries within the current farm for which you have Full Control access display). • Select a library from the tree (You can also enter a full or partial **Name** or **URL** to narrow your selection).

If you want to ...	Then ...
	 • Click [**OK**] to dismiss the dialog and populate the field with the full url path to the selected library. NOTE: When a document is placed into a SharePoint document library, the Output Filename becomes the document Name, and the Job Name becomes the document Title.

8 To save the job, click [**Schedule**].

Once a scheduled job has been created, it can be accessed via the Schedule Monitor.

Monitoring Scheduled Jobs

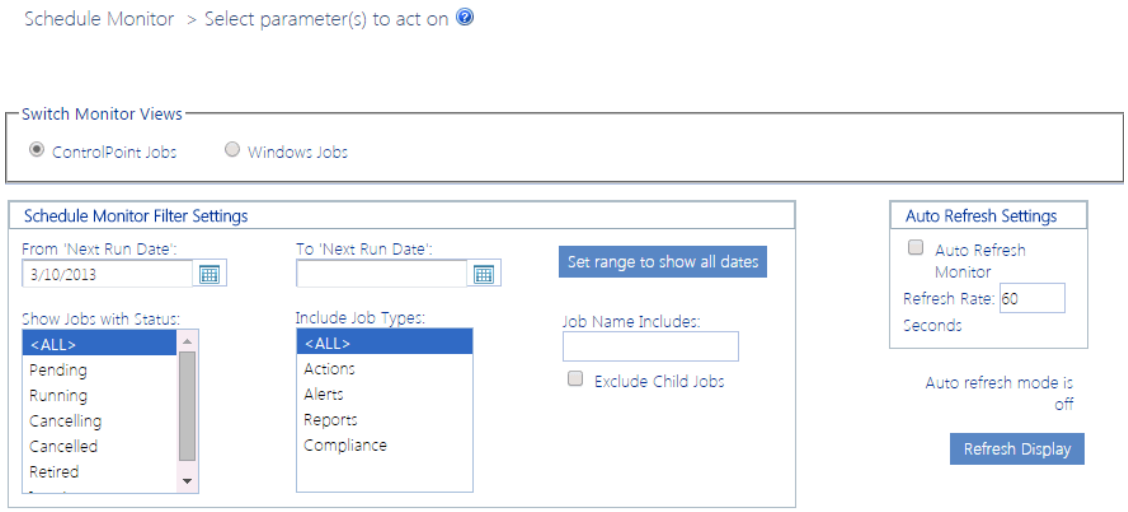
The Schedule Monitor lets you view the status of scheduled jobs over a specified date range. From the Schedule Monitor you can link to pages that let you:

- view/edit the details of a scheduled job
- delete scheduled jobs
- link to detailed run history of a job
- update Full Discovery and/or Scheduler windows jobs.

To access the Schedule Monitor:

1 From the Manage ControlPoint panel, choose Scheduled Management and Logging > Schedule Monitor.

By default, the Schedule Monitor grid displays jobs that are scheduled to run within the next seven days.



2 If you want to change the default date range, do one of the following:

- To include jobs within a specified date range:
  a) Enter or select a From "Next Run Date" and To "Next Run Date"
  b) Click [**Refresh Display**].
- To include *all* jobs regardless of the run date, click **[Set range to show all dates]**.

  NOTE: **Next Run Date** identifies:
  - the *next* date/time a Pending job is scheduled to run
  - the *last* date/time a Retired or Inactive job ran
  - the *start* date/time that an in-process job started running.

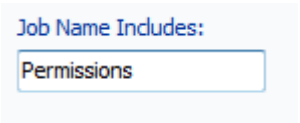
3 Select one or more **Status** values from the list box. Use the information in the table below for guidance.

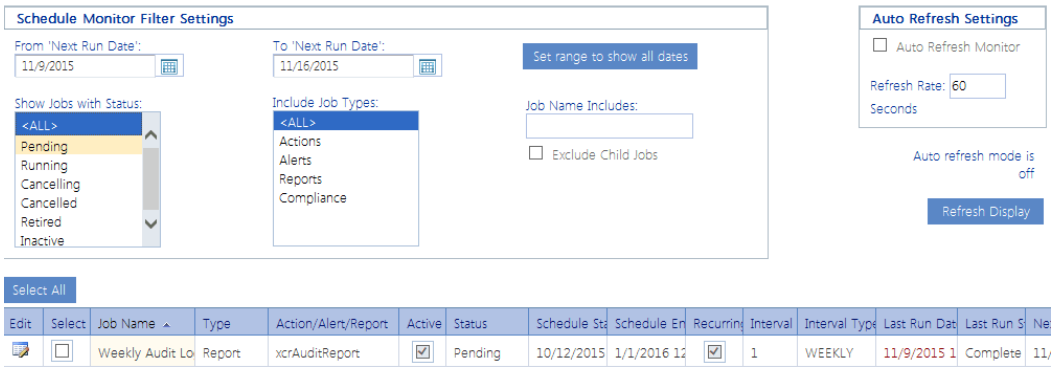
NOTE: You can select multiple status values using the [**CTRL**] or [**SHIFT**] in the conventional manner. If you want to view all scheduled jobs for the specified date range, select **All**.

Status	Description
Pending	All jobs that are scheduled to run within the specified date range. Pending jobs include: • one-time jobs that have not yet run AND • recurring jobs that have not yet reached their End Date.

Status	Description
Running	All scheduled jobs that are currently running (as long as the specified date range includes the current date).
Cancelling	All running jobs for which the current instance is in the process of being cancelled.
Cancelled	All jobs for which the last running instance was cancelled.
Inactive	Jobs that are not currently active but were created or last ran during the specified date range.
Retired	Jobs that finished running within the specified date range. Retired jobs include: • one-time jobs that have already run AND • recurring jobs that have reached their End Date.

4 If you want to further filter your results, use the information in the following below for guidance.

If you want to ...	Then ...
exclude site admin-specific "sub-jobs" that are created when a scheduled job is created with the **Create Reports by Selection Hierarchy** box checked 	check the **Exclude Child Jobs** box.
include only jobs of one or more specific types (**Actions**, **Alerts**, and/or **Reports**) (all job types are included by default)	highlight the job type(s) you want to include in the list box.
display only jobs whose name includes a specified text string	complete the **Job Name Includes:** field with a full or partial job name. 



The Schedule Monitor displays the following information:

- **Job Name**
- **Job Type**
- an indication of whether the job is **Active** (checked) or inactive (unchecked)
- **Schedule Status** (Pending, Running, Retired, or Inactive)
- **Scheduled Start** date and time
- the **Schedule End** date and time which, for recurring jobs, displays the last date and time that the job is scheduled to run.

  NOTE: For one-time jobs, the Schedule End date and time (which displays as an hour later than the Schedule Start) has no significance.
- a checkbox indicating whether the job is one-time (unchecked) or **Recurring** (checked)
- for recurring jobs, the **Interval** and **Interval Type** (Hour, Day, Week or Month)
- **Last Run Date** and time
- **Last Run Status** (Complete, Failed, Started, Cancelling, or Cancelled)
- **Next Run Date**, which identifies:
  - the *next* date/time a Pending job is scheduled to run
  - the *last* date/time a Retired or Inactive job ran
  - the *start* date/time that an in-process job started running.
- the **User** who scheduled the job.
- an indication of whether or not the scheduled job was created with the **Run by hierarchy** option
- if the job is an instance of a ControlPoint Governance Policy, the name of the Policy Instance.

You can:

- sort by clicking on a column header
- change the order of columns by dragging and dropping.

From the Schedule Monitor you can:

- set the Schedule Monitor grid to Auto Refresh

- open a job for viewing/editing
- view a job's run history
- cancel or delete one or more jobs
- update Full Discovery and/or Scheduler windows jobs.

Viewing/Editing a Scheduled Job

From the Schedule Monitor, you can access a scheduled job whose details you want to view or edit.

To access a scheduled job's details:

From the Schedule Monitor, click the job's **Edit** link.

The job opens in a separate browser window.

To edit the job:

1 Modify the appropriate fields within the Schedule or Enforce Policy section.

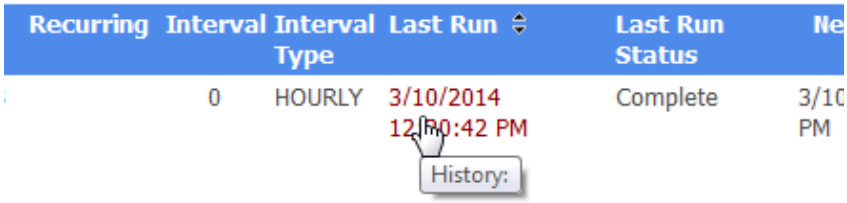
2 To save changes, click [**Update**].

Viewing a Scheduled Job's History

From the Schedule Monitor, you can view the run history of a scheduled job. In the case of scheduled actions (including alerts), you can generate a ControlPoint Task Audit to view more detail about the job.

To view the history of a scheduled job:

- From the Schedule Monitor or Scheduled Jobs Report, click the job's **Last Run** link.



- From a scheduled job's detail page, click the [**View History**] button.

The Schedule History includes the following information:

- **Run Start** date and time
- **Run End** date and time
- process **Status** (Started, Completed, or Failed)
- in the case of a Failed job, a **Message** citing the reason for the failure.

As shown in the example below, a separate entry exists for each run of a recurring job. You can sort by either Run Start or Run End date by clicking the up/down arrows in the column header.

Metalogix History: Recurring Farm Summary Report axcelertest\testbenchaxceler 3/6/2014 1:06:16 PM

Parameters:

Start Date: 2/1/2014 End Date: 2/2/2014

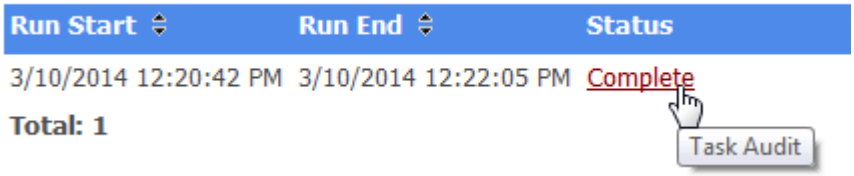
Run Start	Run End	Status	Message
2/2/2014 4:40:37 PM	2/2/2014 4:41:07 PM	Cancelling	Job Cancelled via Schedule Monitor by: axcelertest\testbenchaxceler
2/2/2014 5:40:37 PM	2/2/2014 5:41:03 PM	Complete	

Total: 2

axcelertest\testbenchaxceler Page 1 of: 1 3/6/2014 1:06:16 PM

To view a ControlPoint Task Audit for a completed action:

Click the link (Completed or Failed) in the Status column.



See also Auditing ControlPoint Administrator Tasks.

NOTE: This link is valid for actions only (not Discovery or analysis jobs)

Canceling or Deleting a Scheduled Job

From the Schedule Monitor you can:

- cancel a running instance of a scheduled job

OR

- completely delete one or more scheduled jobs.

  NOTE: If you delete a job that has already run, any history associated with the job will also be deleted.

REMINDER: Delete and Cancel options are disabled if Auto Refresh is enabled.

To stop a running instance of a scheduled job:

NOTE: You can only stop instances of jobs that are currently running, and this action does not delete either the job itself or any future instances of a recurring job.

1 In the In the **Select** column, check the box beside each running job instance you want to stop.*

2 Click **[Stop Selected]**.

To delete one or more scheduled jobs:

1 In the **Select** column, check the box beside each job you want to delete.*

2 Click [**Delete Selected**].

You will be prompted to confirm the deletion before the operation is carried out.

To delete all scheduled jobs:

1 Click [**Select All**].

2 Click [**Delete Selected**].

You will be prompted to confirm the deletion before the operation is carried out.

*NOTE: If you want to de-select currently selected jobs, click [**Reset**].

Updating Full Discovery and Scheduler Windows Jobs

As part of the initial configuration of ControlPoint Online, the following tasks are created in the Windows Task Scheduler on the server where ControlPoint Online is installed:

- the **ControlPoint FullDiscovery job**, scheduled by default to run once a day to populate the ControlPoint data cache.
- the **ControlPoint Scheduler Job**, scheduled to run by default ever 10 minutes to check for and initiate the execution of operations scheduled via the ControlPoint Scheduler.

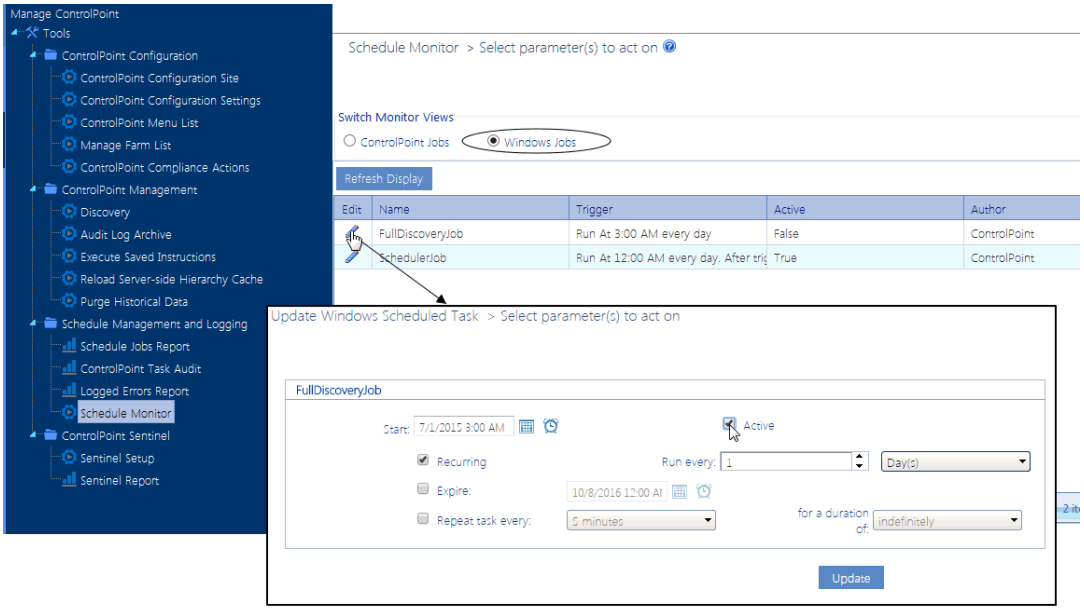
You can activate/deactivate and change the default start time and/or frequency with which these jobs run via the Schedule Monitor Windows Jobs view.

CAUTION: Full Discovery and Scheduler are application-wide jobs. Changing the start time and or/frequency will impact *all* of ControlPoint.

To update Full Discovery and/or Scheduler Windows Jobs:

1 From the Schedule Monitor, select the **Windows Jobs** radio button.

2 Click the **Edit** icon for the job whose schedule you want to update.



3 Update the Start date, time, and/or run frequency, as applicable.

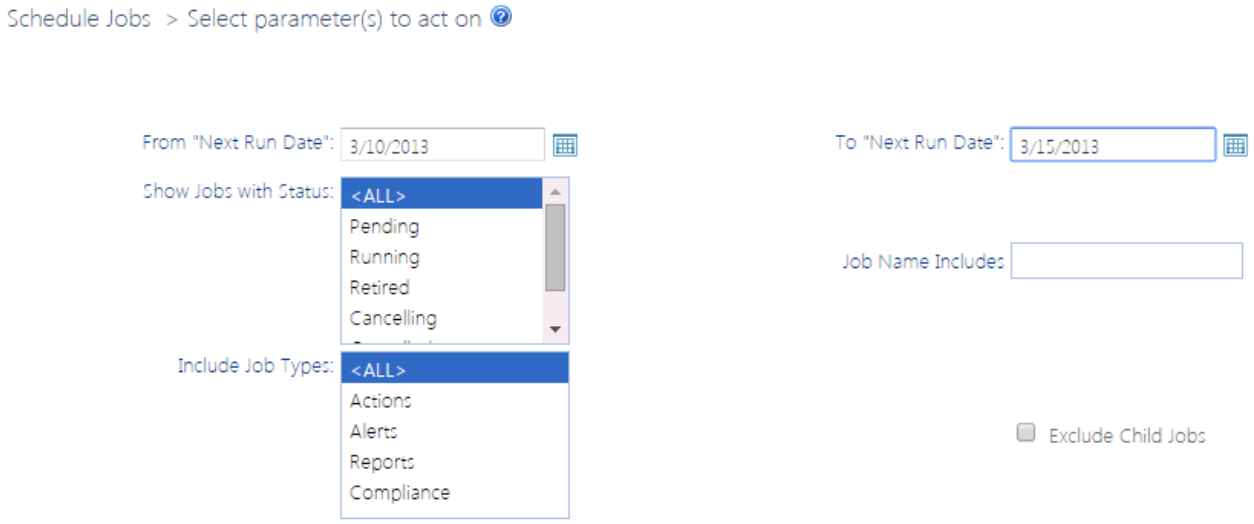
4 Click **[Update]**.

Generating a Scheduled Jobs Report

The Scheduled Jobs Report provides the same information as the Schedule Monitor.

To generate a Scheduled Jobs Report:

1 From the Manage ControlPoint panel, choose Schedule Management and Logging > Scheduled Jobs Report.



If you want to change the default date range, enter or select a **From "Next Run Date"** and **To "Next Run Date"**

NOTE: **Next Run Date** identifies:

- the next date/time a Pending job is scheduled to run
- the last date/time a Retired or Inactive job ran
- the start date/time that an in-process job started running.

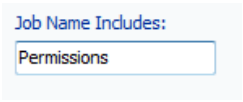
2 Select one or more **Status** values from the list box. Use the information in the table below for guidance.

NOTE: You can select multiple status values using the [**CTRL**] or [**SHIFT**] in the conventional manner. If you want to view all scheduled jobs for the specified date range, select **All**.

Status	Description
Pending	All jobs that are scheduled to run within the specified date range. Pending jobs include: • one-time jobs that have not yet run AND • recurring jobs that have not yet reached their End Date.
Running	All scheduled jobs that are currently running (as long as the specified date range includes the current date).
Cancelling	All running jobs for which the current instance is in the process of being cancelled.
Cancelled	All jobs for which the last running instance was cancelled.
Inactive	Jobs that are not currently active but were created or last ran during the specified date range.
Retired	Jobs that finished running within the specified date range. Retired jobs include: • one-time jobs that have already run AND • recurring jobs that have reached their End Date.

3 If you want to further filter your results, use the information in the table below for guidance.

If you want to ...	Then ...
exclude site admin-specific "sub-jobs" that are created when a scheduled job is created with the **Create Reports by Selection Hierarchy** box checked 	check the **Exclude Child Jobs** box..
include only jobs of one or more specific types (**Actions**, **Alerts**, and/or **Reports**) (all job types are included by default)	highlight the job type(s) you want to include in the **Include Job Type(s)** list box.

If you want to ...	Then ...
display only jobs whose name includes a specified text string	complete the **Job Name Includes:** field with a full or partial job name. 

Now you can either:

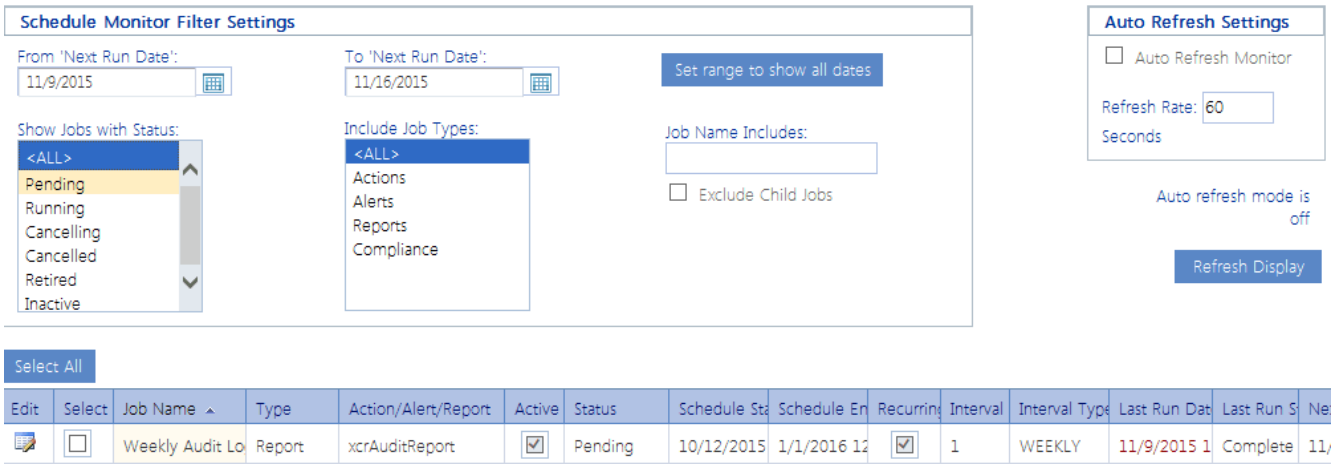
- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.



From Scheduled Jobs Report results you can view a job's run history.

Saving, Modifying and Executing Instructions for a ControlPoint Operation

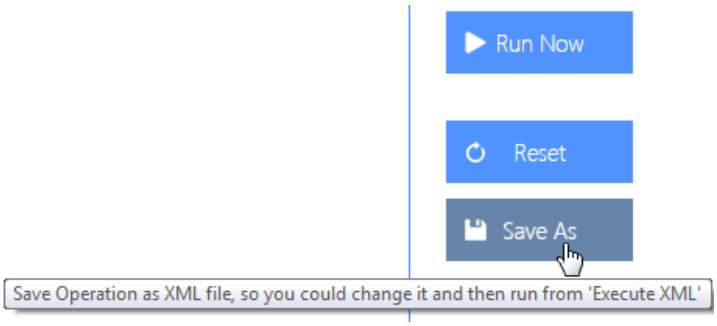
All schedulable ControlPoint operations can be saved in an XML file as "instructions" and executed at a later time. If an operation has parameters that are modifiable, you can modify them in the XML file before execution.

NOTE: Currently you cannot run instructions for multi-farm operations.

Saving Instructions

To save Instructions for a ControlPoint operation:

1 After specifying the parameters for the operation, click [**Save As**].



2 Click [**Download**] to display the File Download dialog.

3 Click [**Save**] then save the file to the local machine— that is, the machine where the browser is running— or network location of your choice.

TIP: You may want to change the default file name to one that is more unique and descriptive.

4 When the file has finished saving, click [**Close**] to dismiss the open dialogs.

Modifying Instructions

Depending on the operation, you may be able to modify some or all of the parameters of XML Instructions with valid values. For example, while the Migrate User action only permits one user to be migrated via the ControlPoint application interface, you can run the operation on multiple users by adding them to the XML instructions.

You should not attempt to change any part of the instructions apart from modifiable parameters. It is strongly recommended that you make a copy of the XML file before editing it, as it is possible that unintended changes can be made to tags or unmodifiable portions of the file.

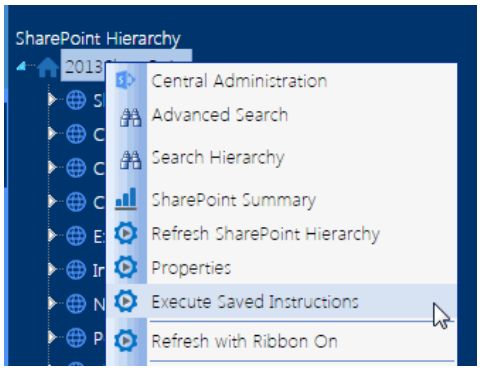
```
- <Operation Type="Action" Code="MigrateUser">
  - <selection>
      <Item name="2007SHAREPOINT (Home Farm)" type="FARM" guid="efcecfa6-42d7-4f44-b503-7e83ff6b9b29" id="0" parentid="-1" AllChildren="True"
        action="nonsense" URL="http://2008sharepoint:1919/" image="images/Farm.gif" aux="FARMGUID@efcecfa6-42d7-4f44-b503-
        7e83ff6b9b29,FARMNAME@SharePoint_Config,FARMTOOLTIP@" />
    </selection>
  - <xcMigrateUserData xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
      <sWarnings />
      <blnPropagate2Lists>false</blnPropagate2Lists>
      <blnPropagate2Items>false</blnPropagate2Items>
      <sScheduledCurrentUser />
    - <migrateUsers>
      - <item>
        - <key>
            <string>AXCELERTEST\sammuelclemens</string>
          </key>
        - <value>
            <string>AXCELERTEST\marktwain</string>
          </value>
        </item>
      - <item>
        - <key>
            <string>AXCELERTEST\stephendedalus</string>
          </key>
        - <value>
            <string>AXCELERTEST\jamesjoyce</string>
          </value>
        </item>
      - <item>
        - <key>
            <string>AXCELERTEST\marysmith</string>
          </key>
        - <value>
            <string>AXCELERTEST\maryjones</string>
          </value>
        </item>
      </migrateUsers>
      <blnVerifySid>false</blnVerifySid>
      <blnProcessADGrps>false</blnProcessADGrps>
```

Executing Instructions

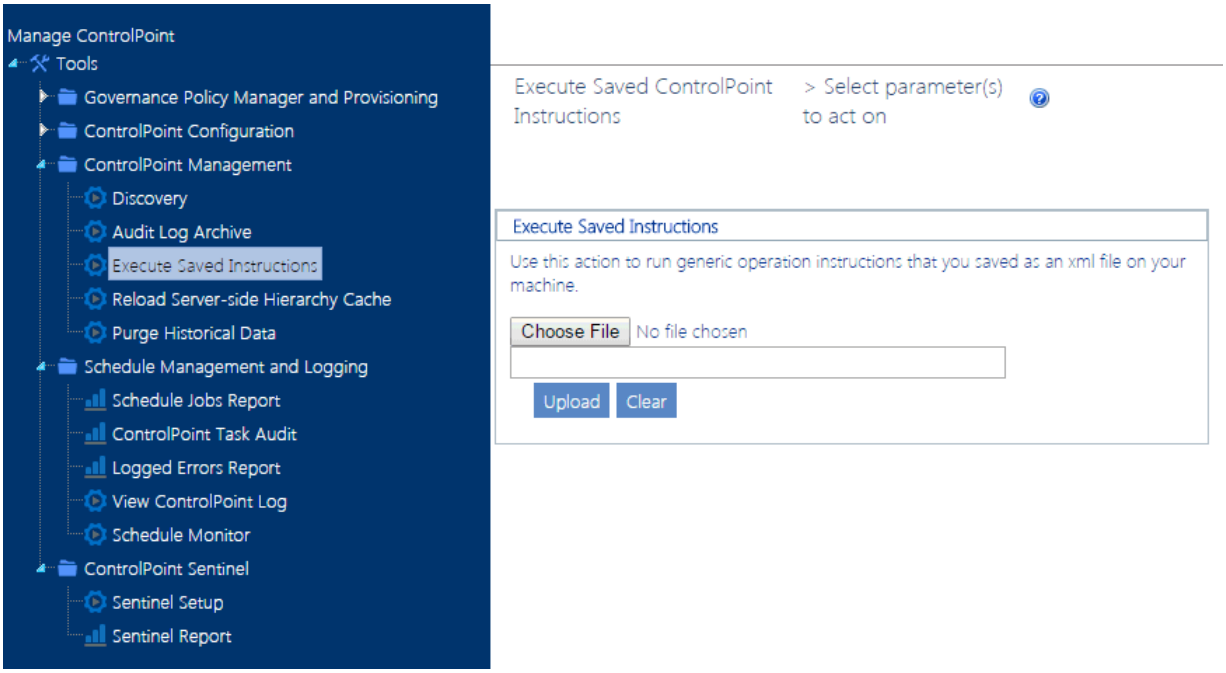
To execute Instructions for a ControlPoint operation:

1 Use one of the following options:

- From the SharePoint Hierarchy select the farm node, then from the context menu or ribbon Home tab choose Execute Saved Instructions.



- From the Manage ControlPoint panel, choose Execute Saved Instructions.



2 Click [**Browse...**] and locate the **XML File** with the instructions you want to execute.

3 Click [**Upload**].

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time.

Provisioning SharePoint Site Collections and Sites O365

ControlPoint Site Provisioning functionality automates the management of end user requests for new site collections and sites, which are based on "Provisioning Profiles" that you define.

Managing Site Provisioning Profiles

Before an end user can request a new site collection or site, at least one Provisioning Profile must have been created. Once created, the Provisioning Profile becomes available to end users when a request for a new site collection or site is initiated.

To launch the ControlPoint Provisioning Profile Manager:

From the Manager ControlPoint panel, choose Governance Policy Manager and Provisioning > Provisioning Profile Manager.

To create a Provisioning Profile:

1 From the Provisioning Profile Manager main page, choose **[Create]**.

2 Complete the fields on the Build New Provision Profile page as follows:

- Enter the **Profile Name** as you want it to display in the Provisioning Profile Manager list.
- Enter the **End User Description** as you want it to display in the Request a Site or Site Collection page.
- Enter the **Profile Description** as you want it to display in the Provisioning Profile Manager list.

- Select a **Profile Type** (Site Collection or Sub Site)
- Select a **Base SharePoint Template**.

NOTE: The Custom template tab is intended for a future release.

3 If you want to **Attach Additional Profile Settings**:, you can

- Click the appropriate link—**Set Site Collection Properties** (if available), Set Site Properties, or Set List Properties—and complete the applicable window.

  NOTE: If you select **Enforce Policy** and schedule the operation to run on a recurring basis, it will be enforced for any site collection or site created using that Profile.

4 Click **[Create]**.

To edit a Provisioning Profile:

1 From the Provisioning Profile Manager main page, check the box to the left of the Profile that you want to edit.

2 Click **[Edit]**.

3 Edit the fields on the Edit Provision Profile page as appropriate.

4 Click **[Update]**.

To delete one or more Provisioning Profiles:

1 From the Provisioning Profile Manager main page, check the box to the left of the Profile(s) that you want to delete.

2 Click **[Delete]**

You will be prompted to confirm your action before continuing.

How New Sites and Site Collections Are Requested O365

An end user can request a new site or site collection as long as:

- the url for the Request Site or Site Collection page has been made available

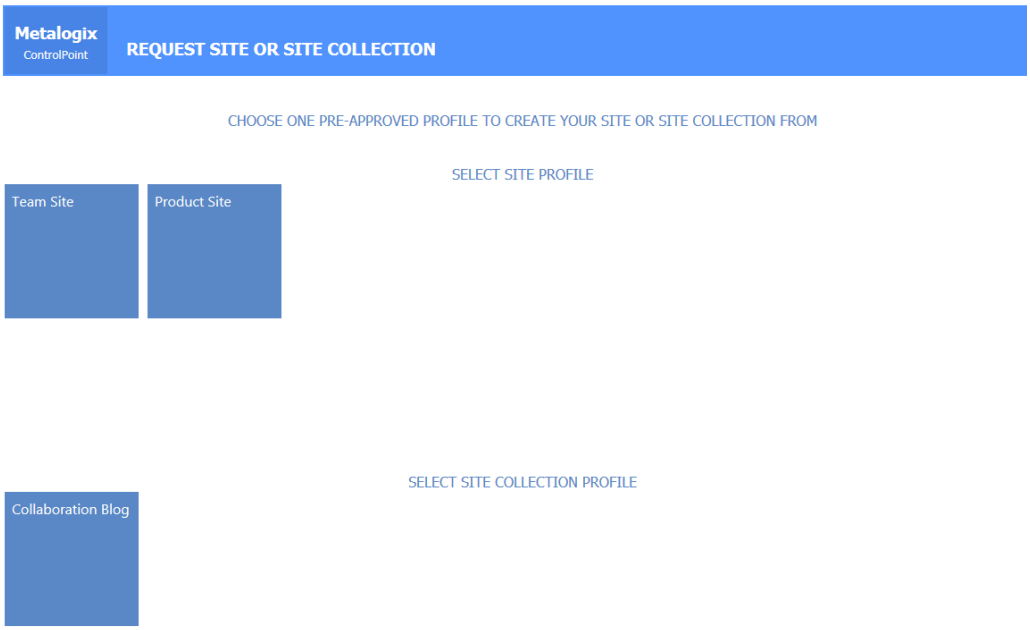
AND

- the requester can be authenticated in Active Directory as a valid Office 365 user

AND

- the ControlPoint Application Administrator has specified the credentials to use for provisioning request submission.

When the Request Site or Site Collection page is launched, the user will be prompted for login credentials. Once logged in, the user can select from the available Profiles that were created via the ControlPoint Provisioning Profile Manager.



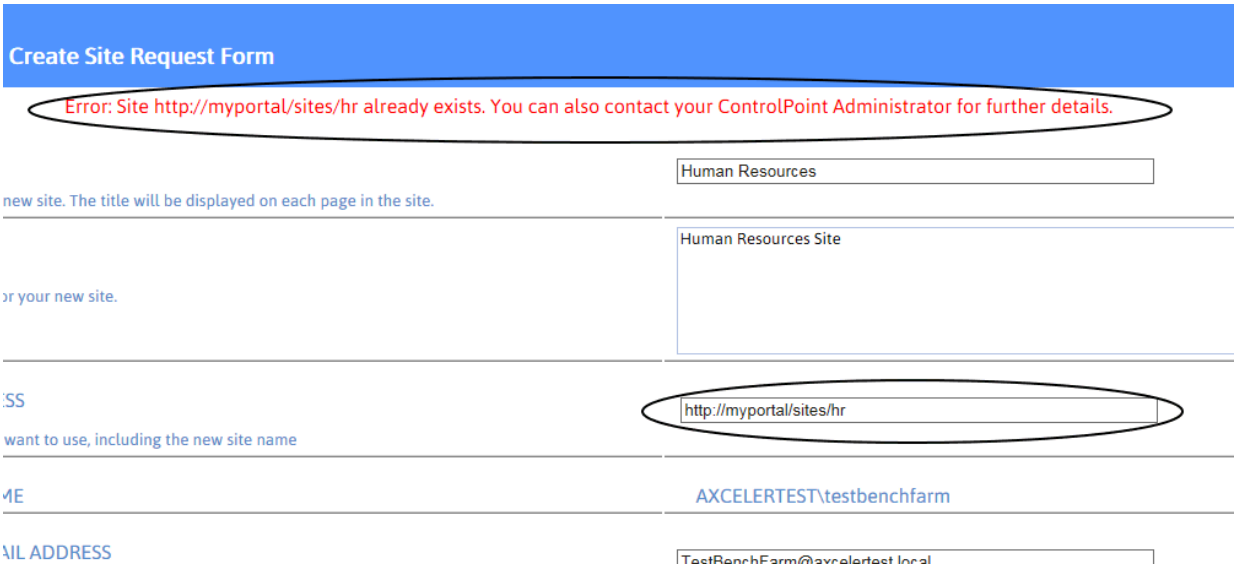
Upon selecting a Profile, the Create Site (or Site Collection) page displays, prompting the requester for the following information:

- a **Title** and **Description** for the new site
- the **Web Site Address** that the requester wants to use for the new site

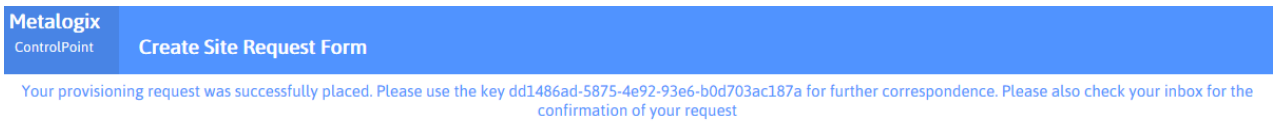
NOTE: The requester must enter a *full* URL, including the name of the new site. For example, if the requester wants to create a subsite called Blog under mycompany.sharepoint.com/sites/sales, a valid URL might be **https://mycompany.sharepoint.com/sites/sales/blog.**

The **Requester Name** and **Requester Email address** pre-populate with the login name and email address of the current user. The Requester Email Address can, however be changed. If the request is for a Site *Collection*, **Primary Site Collection Administrator** and **Primary Site Collection Email Address** fields are pre-populated with the current user's information, but they can also be changed.

- When the requester places the request, ControlPoint validates the information provided by the requester, including that the URL is valid and available. If the validation fails, any error messages display at the top of the form.



If the validation is successful, a confirmation number is generated and displays at the top of the form, and a confirmation email is automatically sent to the requester.

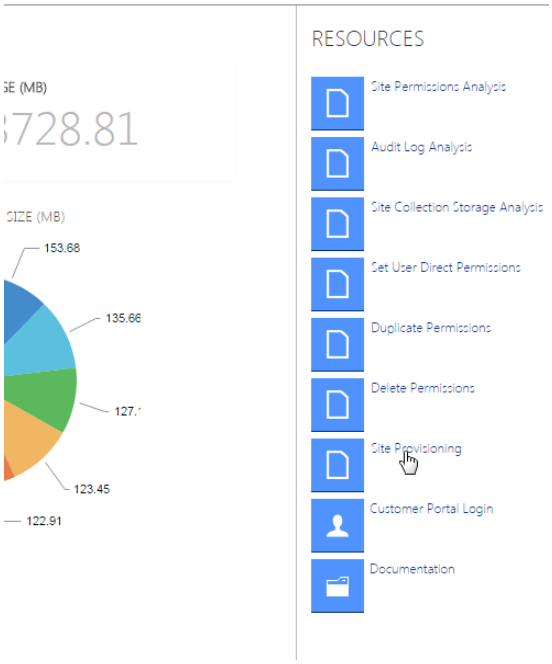


NOTE: Once a request is submitted, it is registered in the Site Creation Requests list on the ControlPoint Configuration Site.

Making Provisioning Profiles Available to End Users O365

After at least one Provisioning Profile has been created, the next step is to make the Request Site or Site Collection page available to end users so they can submit requests for new site collections and sites.

The Request Site or Site Collection Request page is initially accessible via the ControlPoint home page dashboard, in the Resources section.



For non-ControlPoint users, the Request Site or Site Collection page can be accessed via the following url:

http://*<server_name>*:*<port_number>*/_layouts/axceler/CPSiteProvisioning.aspx

(The server machine name is the name of the machine on which the ControlPoint Online application is installed. 2828 is the default port number for ControlPoint Online.)

Before a non-ControlPoint user can submit a site provisioning request, the ControlPoint Application Administrator must specify credentials that have the authority to access ControlPoint and to create site collections and sites in your SharePoint Online environment. See Specifying Credentials to Use for Site Provisioning Requests.

Specifying Credentials to Use for Site Provisioning Requests

Before a non-ControlPoint user can submit a site provisioning request, the ControlPoint Application Administrator must specify credentials that will be used to create site collections and subites in your SharePoint Online environment.

NOTE: To create subsites, the account must be a Site Collection Administrator for every site collection in the tenancy where a site may be provisioned. To create site collections, the account must be an Office 365 Global Administrator.

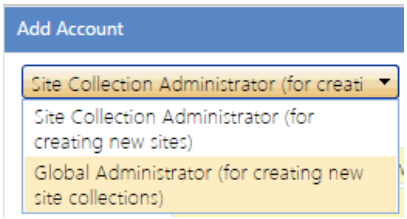
To specify credentials for Site Provisioning Request submission:

NOTE: Only one one set of credentials can be saved per account type.

1 From the Manage ControlPoint tree, choose Governance Policy Manager and Provisioning > Online Credentials Manager.

2 Click **[Create]**.

From the Add Account drop-down, select the appropriate **Account Type**:



- Site Collection Administrator (for creating new sites)

OR

- Global Administrator (for creating new site collections)

Enter the Account Name and Password, then click **[Insert]**.

ControlPoint validates the credentials to ensure that the account name and password are correct and that the account has the appropriate permissions.

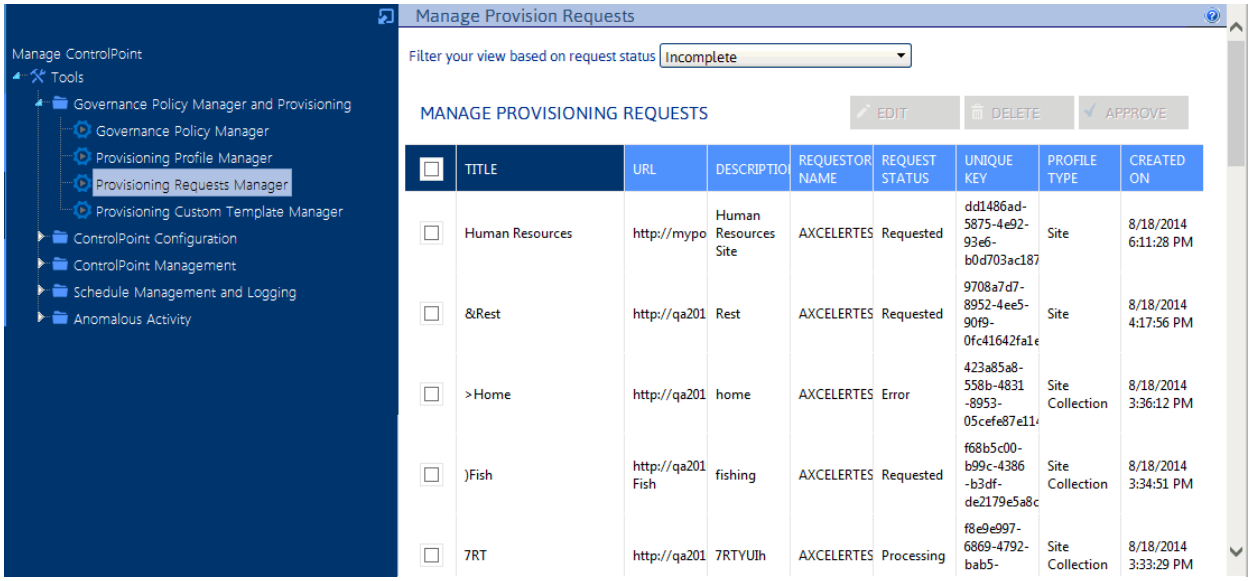
Managing Site Provisioning Requests

From the Manage Site Provisioning Requests page, you can:

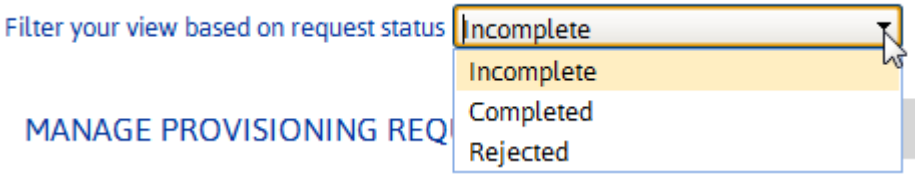
- monitor incoming requests for site collections and sites
- approve or reject the requests, and
- edit request details, such as title, description or url.

To launch the Provisioning Requests Manager:

From the Manage ControlPoint tree, choose Governance Policy Manager and Provisioning > Provisioning Requests Manager.



Note that you can filter your view based on the state of the request:



- The **Incomplete** view, includes requests with a status of:
  - Requested
  - Approved
  - In Process
  - Error
- The **Completed** view shows all requests which have been processed and for which site collections/sites have been created and all of the Additional Profile Settings (properties and Governance Policies) been applied.
- The **Rejected** view shows all Rejected requests.

To edit/view details of a Provisioning Profile:

1 In the Manage Provision Requests grid, check the box to the left of the request that you want to view/edit.

2 Click **[Edit]**.

Note that you can edit the **Title**, **Description**, and **URL** of the request. You can also approve or reject the request by changing the **Request Status**.

If a request is **Rejected**, an email is automatically sent to the requester. If a request is **Approved**, it automatically starts Processing and is **Completed** when the site collection or site is created. Once the site or site collection is created, an email is automatically sent to the requester.

Note that you can edit the **Title**, **Description**, and **URL** of the request. You can also approve or reject the request by changing the **Request Status**.

If a request is **Rejected**, an email is automatically sent to the requester. If a request is **Approved**, it automatically starts Processing and is Completed when the site collection or site is created and all of the Additional Profile Settings (properties and Governance Policies) been applied per the new site collection or site. Once the site or site collection is created, an email is automatically sent to the requester.

NOTE: Additional Profile Settings are applied the next time the scheduled job that has been defined for the operation has run.

1 Click **[Update]**.

To approve one or more requests without viewing or editing details:

1 From the Provisioning Request Manager main page, check the box to the left of each request you want to approve.

2 Click **[Approve]**.

To delete one or more requests:

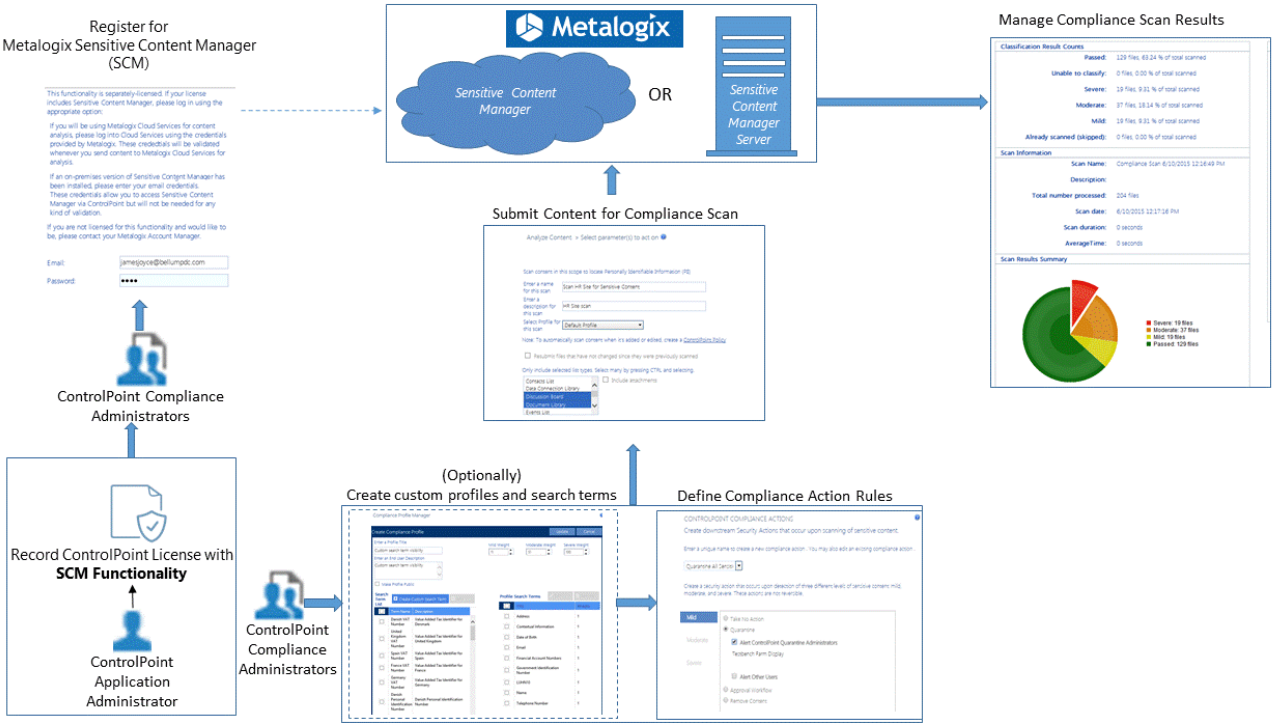
1 From the Provisioning Requests Manager main page, check the box to the left of the request(s) that you want to delete.

2 Click **[Delete]**

You will be prompted to confirm your action before continuing.

Using Sensitive Content Manager to Analyze SharePoint Content for Compliance

If your ControlPoint license includes Compliance functionality, you can use the Metalogix Sensitive Content Manager (SCM) to scan content for sensitive content, then specify an action to take based on the type/severity of the information found.



NOTE: If your ControlPoint license does *not* include Sensitive Content Manager, this funcitonality will be hidden.

Compliance Functionality Process Overview

The process for using Metalogix Sensitive Content Manager to implement ControlPoint Compliance functionality is described below.

A. ControlPoint Compliance Administrators register for Sensitive Content Manager.

B. ControlPoint Compliance Administrators define Compliance Action Rules.

C. ControlPoint Compliance Administrators submit content to Metalogix Sensitive Content Manager for analysis.

D. ControlPoint Compliance Administrators manage Compliance Actions.

Installing and Configuring Sensitive Content Manager Server

If you are using Sensitive Content Manager Server (the on-premises edition of Sensitive Content Manager) as an alternative to Sensitive Content Manager (Cloud edition), refer to the Sensitive Content Manager Server Installation Guide, which is also provided with your Sensitive Content Manager installation kit, for complete instructions.

Before using Sensitive Content Manager Server via ControlPoint, the ControlPoint Application Administrator must change the Compliance Endpoints, which by default are configured for Metalogix Cloud Services. Details can be found in the *ControlPoint Administration Guide*.

Compliance Administrators and Quarantine Administrators Groups

If your organization is licensed for Metalogix Sensitive Content Manager, only individuals who have been added to the following group(s) in the ControlPoint Configuration Site will be permitted to perform Compliance actions:

- **ControlPoint Compliance Administrators** - Individuals permitted to access ControlPoint Compliance functionality.
- **ControlPoint Quarantine Administrators** - Individuals permitted to manage quarantined content.

  Currently, members of the Quarantine Administators group must

  - be a Site Collection Administrator for each site collection containing quarantined content (in order to invoke the Manage Quarantine Documents page from the SharePoint Hierarchy)

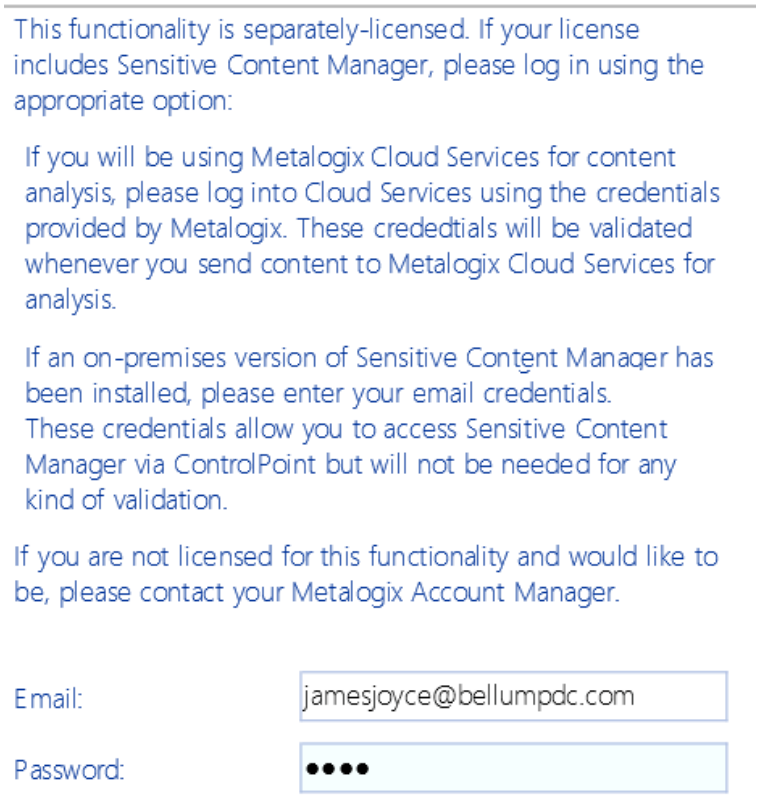
  OR

  - also be a member of the Compliance Administrators Group.

Registering with Metalogix Sensitive Content Manager

The first time a member of the ControlPoint Compliance Administrators group invokes ControlPoint Compliance functionality, that user will be prompted to register with Sensitive Content Manager. The credentials you use depend on the installation:

- If you will be using Sensitive Content Manager (Cloud edition) to analyze content, Metalogix will provide this information.
- If you will be using Sensitive Content Manager Server edition to analyze content, enter your email address and a password of your choice.



Once registration has been completed, members of the ControlPoint Compliance Administrators group can begin to use ControlPoint with Sensitive Content Manager.

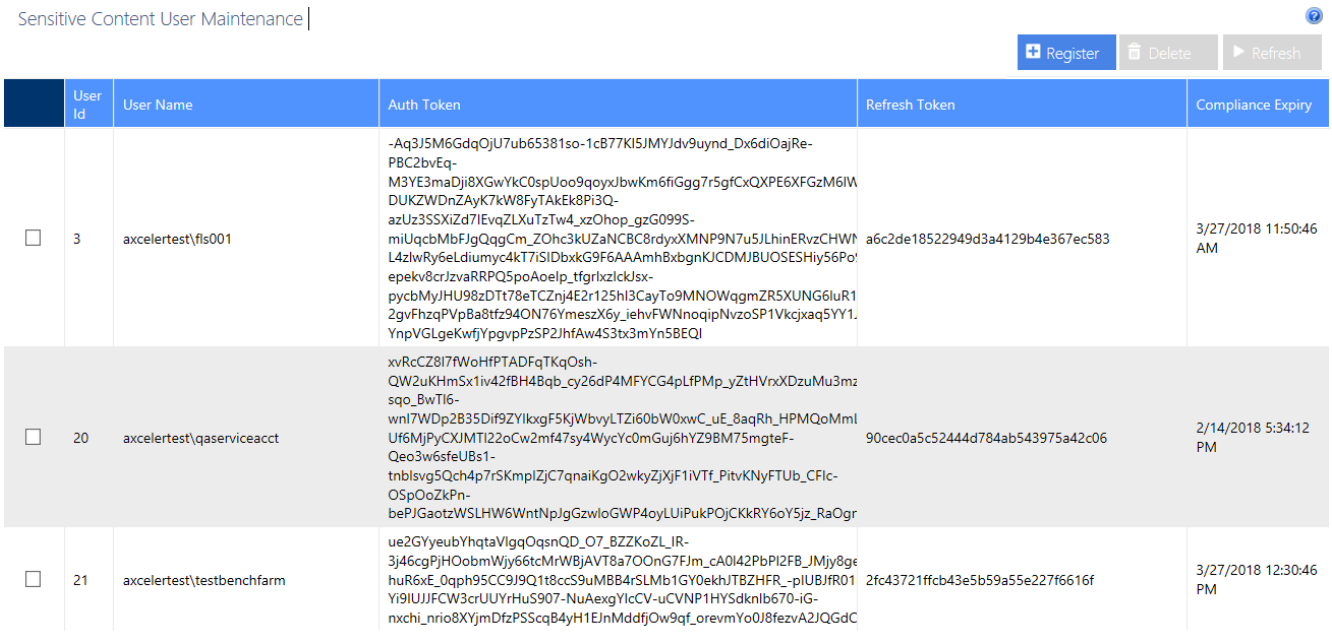
Managing Sensitive Content Manager Users

Sensitive Content User Maintenance functionality can be used by members of the ControlPoint Compliance Administrators group to register or delete other Sensitive Content Manager users, as an alternative to having users self-register.

To launch the Sensitive Content Manager User Maintenance page:

From the Manage panel, choose Compliance > User Maintenance.

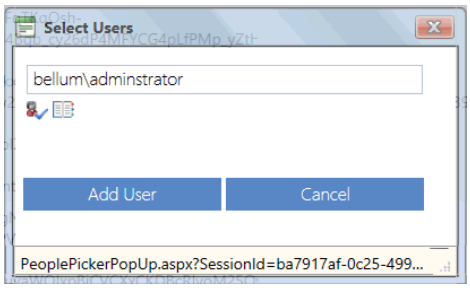
The Sensitive Content User Maintenance page uses Auth Tokens to connect to the Sensitive Content Manager service, as well as Refresh tokens to prevent Auth tokens from expiring. Under normal circumstances, Auth tokens are auto-refreshed hourly and should never expire. Therefore, the **[Refresh]** option should only be only with guidance from Metalogix Support.



To register Sensitive Content Manger users:

1 Click **[Register]** to display the **Select Users** dialog.

2 Enter the the user account that you want to register.



NOTE: You can only register one user at a time, and the user you want to register must have a valid email address.

3 Click **[Add]** to add the user and display the **Metalogix Sensitive Content Manager Registration** dialog.

4 Register the user for Sensitive Content Manager.

5 Complete Steps 1-4 for each user you want to register.

NOTE: Make sure that all registered users are also members of the ControlPoint Compliance Administrators group.

To "unregister" Sensitive Content Manager users:

1 Use the check box(es) to select the user(s) you want to unregister.

2 Click **[Delete]**.

NOTE: Unless you remove the unregistered users from the ControlPoint Compliance Administrators group, they will continue to be prompted to register whenever Sensitive Content Manager functionality is invoked

Managing Sensitive Content Manager Profiles

A Sensitive Content Manager Profile is a named collection of content search and analysis guidelines. SCM includes a number of "Standard" Profiles for detecting Sensitive Content, which include:

- Personally Identifiable Information (PII)
- Protected Health Information (PHI)
- Payment Card Industry (PCI)
- General Data Protection Regulation (GDPR) compliance.

NOTE: Metalogix continually adds new Standard Profiles, which cannot be modified or deleted.

Members of the ControlPoint Compliance Administrators group can also create and manage custom Profiles by defining content search and analysis guidelines to use, as an organization's file analysis criteria may differ from those used in Standard Profiles. For example, you may want to create a custom Profile to group and weight a different subset of the predefined Search Terms, add custom Search Terms for sensitive data types, or analyze data that falls outside "standard" Profile definitions.

Sensitive Content Manager Profile Components

Sensitive Content Manager Profiles consist of the components described in the following table.

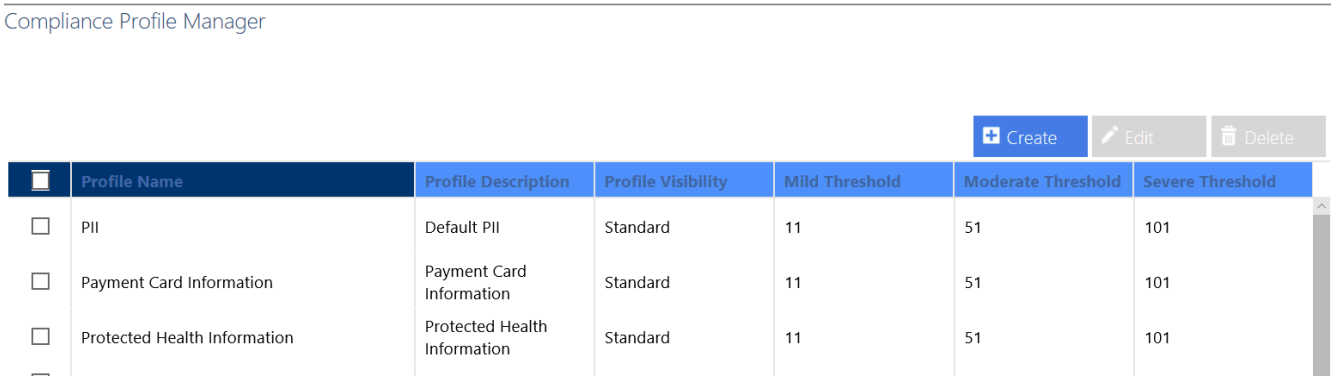
Profile Component	Description
Search Term	A word or any simple or complex alphanumeric pattern that represents sensitive information in a document. For example, in the PII Profile, these Search Terms are the personal identifiable information like a person's name, date of birth, financial account numbers, address, email address, etc. Each content search uses a set of Search Terms in a Profile.
Regular Expression (Regex)	The search syntax for a Search Term. The analysis engine matches the file contents with a Search Term based on the regex syntax specified in the Profile. You can define new Profiles that use the Standard Search Terms, or create Search Terms based on custom expressions. NOTE: Regular expressions for the predefined search terms are internally defined in the Search Term, and cannot be modified because they are not standalone regular expressions.

Profile Component	Description
Weight	The degree of severity of a possible content match for a specific Profile.
File Score	That weight factor combined with the number of content matches encountered during an analysis job. File scores are calculated during a file analysis to determine the overall severity level of a document

Creating Sensitive Content Manager Profiles

To create a Sensitive Content Manager Profile:

1. From the Manage panel, choose Compliance > Profile Maintenance.

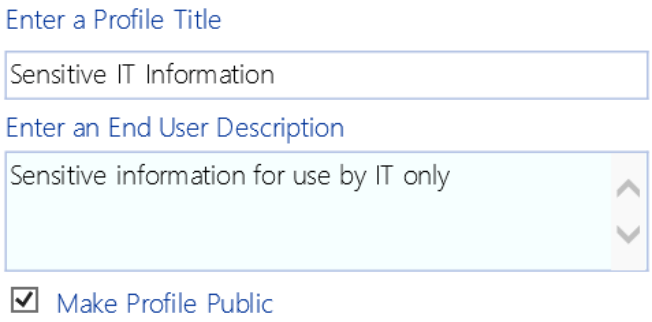


2 Click **[Create]**.

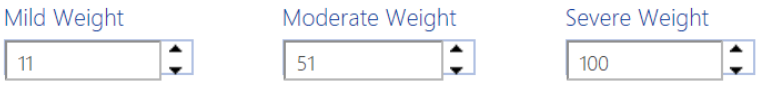
3 Enter a unique title for the Profile, as well as a description that will be visible to end users.

4 If you want to make the Profile private, uncheck the **Make Profile Public** box.

IMPORTANT NOTE: A Private profile is available to the person who created the profile, as well as all users in the Operators role in Sensitive Content Manager. For Sensitive Content Manager Server, communication with ControlPoint is performed in the context of the Service Account, and all Profiles belong to that account. Therefore, Private Profiles are available to all members of the ControlPoint Compliance Administrators group. For Sensitive Content Manager (Cloud edition), Private Profiles are available for use by the person who created them, as well as users in the Operators role in Sensitive Content Manager (Cloud edition).

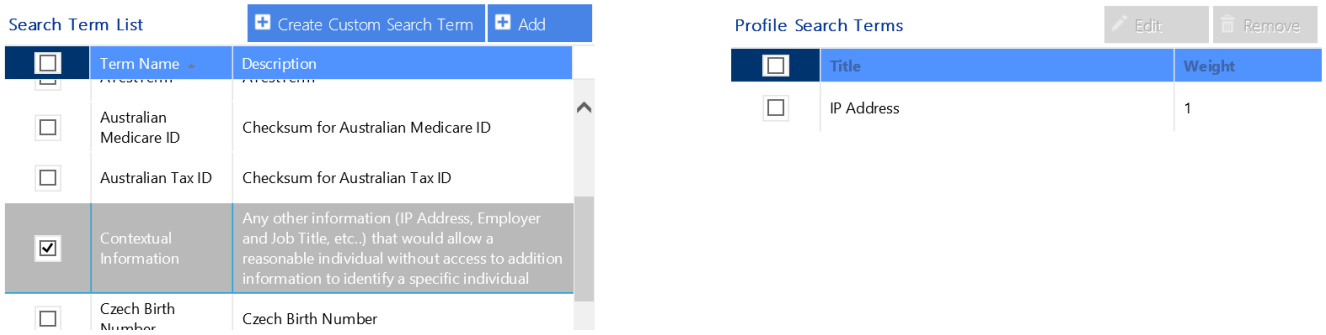


5. If different than the defaults, adjust the relative weights (that is, the degree of severity of a possible content match) for each threat level (Mild, Moderate, and Severe).



NOTE: While default weight values are recommended guidelines, you can increase or decrease the relative weights between severity levels, and there is no upper limit to the range that can be entered.

6. From the **Search Term List**, select the Search Term(s) that you want to add to the Profile, then click **[Add]** to move the term(s) to the **Profile Search Terms** list.



NOTE: If you want to include a Search Term that does not display in the list, you can create a custom Search Term.

7 Click **[Create]**.

8 **To edit a custom Profle:**

1 In the Compliance Search Terms Manager page, select the Public or Private Profile you want to edit, then click **[Edit]**.

2 Update fields as needed, then click **[Update]**.

Note that Standard Profile is provided by Metalogix acannot be edited or deleted.

Managing Compliance Search Terms

Sensitive Content Manager includes a number of out-of-the-box "standard" Search Terms for use in creating Profiles. These include terms related to:

- Personal Identification Information (PII)
- Payment Card Information (PCI)
- Protected Health Information (PHI)
- General Data Protection Regulation (GDPR) compliance.

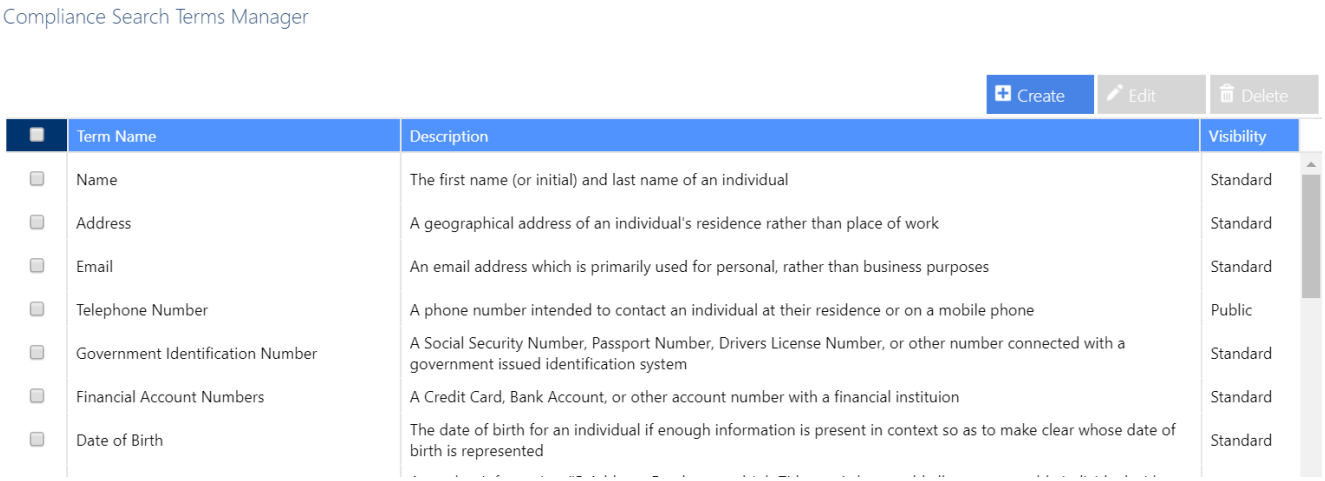
NOTE: Note that Metalogix continually adds Standard Search Terms, which cannot be edited or deleted.

Members of the Compliance Administrators can also create and maintain custom Search Terms to meet the organization's unique compliance needs.

To access the Compliance Search Terms Manager page:

From the Manage panel, choose Compliance > Search Terms Maintenance.

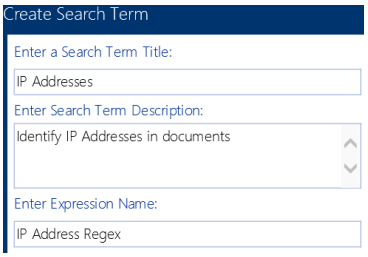
NOTE: You can also access this page from the Compliance Profile Manager page by clicking **[Create Custom Search Term]**.



To create custom Search Terms:

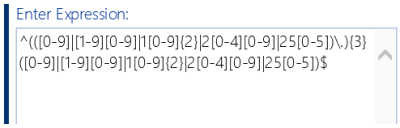
1 Click **[Create]**.

3 Enter a **Search Term Title** and **Search Term Description** as well as an **Expression Name** for the regex.



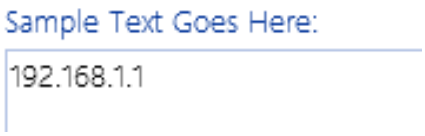
4. Enter a valid regex expression.

NOTE: Do not enter any leading or ending slashes (/)



5. To test the validity of the expression:

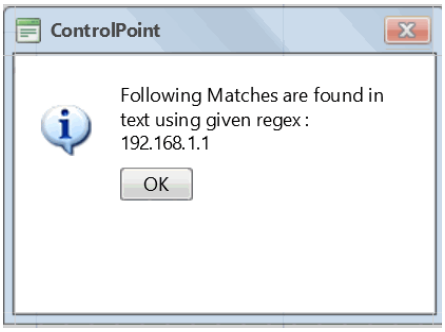
   a) enter representative text in the **Sample Text Goes Here:** field.



   b) Click the **[Test Expression]** at the bottom of the dialog.

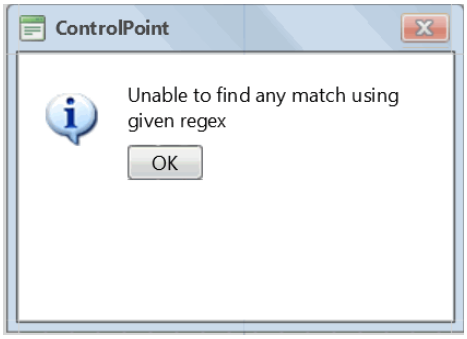
   A pop-up will display informing you that either:

   - a match can be found for the text using the given regex



   OR

   - a match cannot be found for the text using the give regex.



2 If you want to make the Search Term Private, uncheck the **Make Search Term Public** box.

IMPORTANT NOTES:

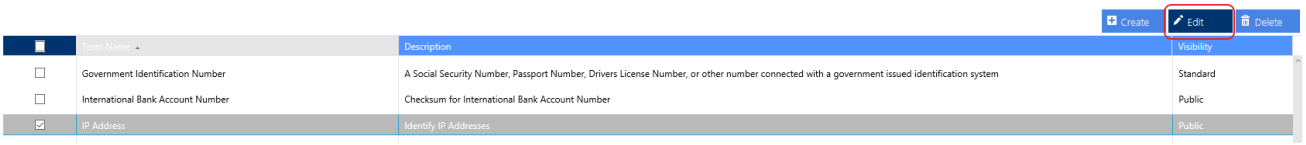
- A Private Search Term is available to the person who created it, as well as all users in the Operators role in Sensitive Content Manager. For Sensitive Content Manager Server, communication with ControlPoint is performed in the context of the Service Account, and all Search Terms belong to that account. Therefore, Private Search Terms are available to all members of the ControlPoint Compliance Administrators group. For Sensitive Content Manager (Cloud edition), Private Search

Terms are available for use by the person who created them, as well as users in the Operators role in Sensitive Content (Cloud edition).

- If a Private search Term is added to a public Profile, that search term will be visible publicly.

To edit a custom Search Term:

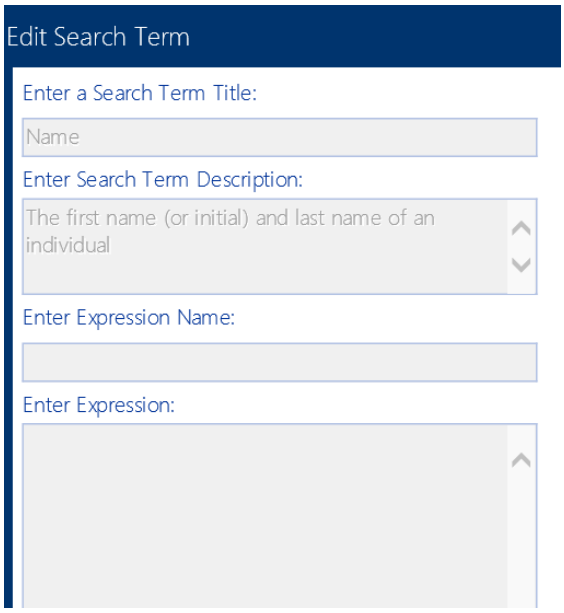
1 In the Compliance Search Terms Manager page, select the term that you want to edit, then click **[Edit]**.



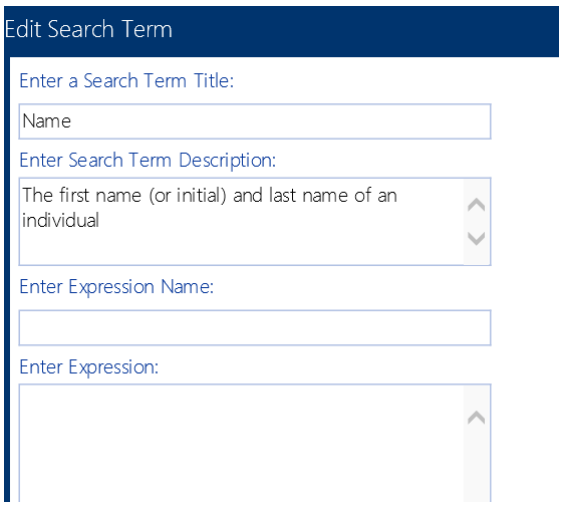
2 Update fields as needed, then click **[Update]**.

Note that any Search Term for which the regex is not visible is a Standard Search Term provided by Metalogix that cannot be edited.

- For Sensitive Content Manager (Cloud edition), all fields on the dialog of an uneditable search term will be disabled.



- For Sensitive Content Manager Server, some fields on the dialog may appear enabled, but any changes you attempt to make will not be saved.



Defining Compliance Action Rules

Members of the ControlPoint Compliance Administrators group can define Compliance Action rules to determine how non-compliant content should be handled, based on the severity level detected. You can also specify that one or more users be alerted via email when a Compliance Action is taken.

REMINDER: You must be registered for Sensitive Content Manager and a member of the ControlPoint Compliance Administrators group to use this functionality.

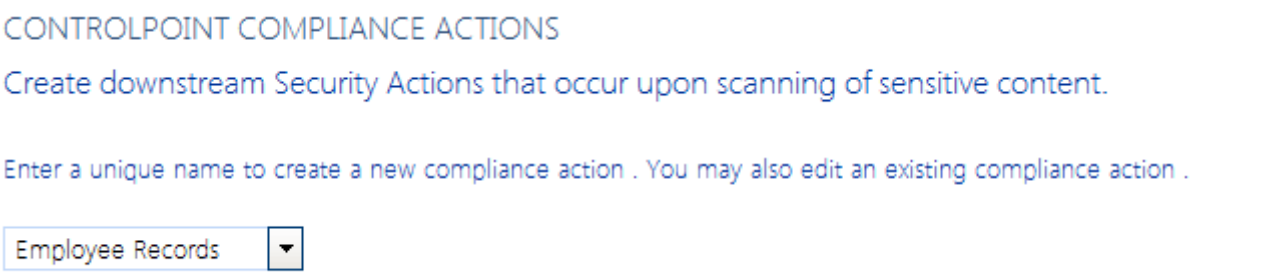
To access the Compliance Actions page:

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

If you are creating ...	Then ...
a global set of rules independent of a particular scan job	from the Manage panel, choose Compliance > ControlPoint Compliance Actions.
a set of rules for a specific scan job that has been returned from Metalogix Sensitive Content Manager	• From the Compliance Summary page, select the scan job to which you want to apply the rule. • Click **[Apply Compliance Actions].**

To define Compliance Action rules:

1 Enter a unique name to create a new Compliance Action, or choose an existing action from the drop-down.

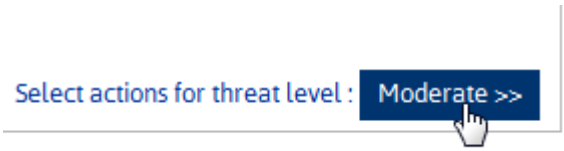


WARNING: If you choose to **Update Existing Compliance Actions**, the changes will be applied to all scan jobs that use it going forward.

2 For each of the Severity levels (**Mild**, **Moderate**, and **Severe**), specify the action that should be applied when a threat is detected. You can choose to have ControlPoint:

- **Take No Action** on non-compliant content
- **Quarantine** non-compliant content
- Use an **Approval Workflow** to address non-compliant content
- **Remove** non-compliant content

Note that an action must be defined for all three severity levels. You can navigate from one rule to the next via the **Select actions for threat level:** button.



3 If you want ControlPoint to send an email alert when a specified action is taken:

a) Check the **Alert Users** box.

b) Click **[Create New User].**

c) Complete the **Select Users** for the user to which you want to send the alert.

NOTE: Currently, you can only select one user at a time. Repeat substeps b) and c) for each user you want to alert.

If you have chosen to have ControlPoint Quarantine an item with non-compliant content, you can also choose to have an alert sent to all members of the ControlPoint Quarantine Administrators group.

If you have chosen to use an **Approval Workflow**, follow the instructions for "Using an Approval Workflow," following.

4 When you have finished defining Compliance Rules for each Severity Level, click **[Save]**.

Using An Approval Workflow

If you have chosen to use an **Approval Workflow** to address non-compliant content, after clicking the **[Create New User]** button:

1 First, select the user who will be notified by ControlPoint to start the workflow when non-compliant content is found

2 Select additional users who will be designated as *approvers*.

NOTE: The user you select to start the workflow must have permissions to Edit Items and approvers must have permissions to Approve Items for lists within the scope of the Compliance Action.

You can also choose to have SharePoint notify approvers

- **One at a Time (Serial)**

OR

- **All At Once (Parallel)**

3 Click **[Add User]**.

4 If you want SharePoint to notify additional users when an approval workflow starts and ends:

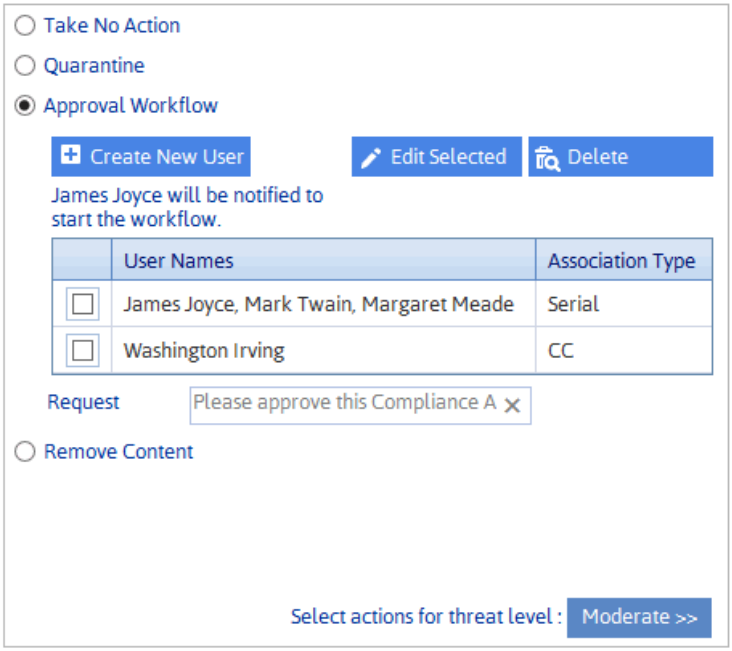
a) Click **[Create New User]**.

b) Select the users you want to notify.

c) Choose **Notify these people when the workflow starts and ends without assigning tasks to them.**

d) Click **[Add User]**.

5 For **Request**, enter the message that you want to be sent to users with assigned tasks.



Compliance Action Alert Email

When a Compliance Action rule includes an alert, an email, which identifies the Severity Level and action taken, is automatically sent to selected recipients.

ControlPoint Application Administrators can change the default text for the email by updating the applicable ControlPoint Configuration Setting:

- **ComplianceMildLevelThreatsEmailBody**
- **ComplianceModerateLevelThreatsEmailBody**
- **ComplianceSeverLevelThreatsEmailBody**

Refer to the *ControlPoint Administrators Guide* for details.

Submitting Content to Metalogix Sensitive Content Manager

Members of the ControlPoint Compliance Administrators group can use the ControlPoint Analyze Content action to submit content to the Metalogix Sensitive Content Manager where it will be scanned for potentially sensitive content. ControlPoint submits the following types of content for scanning:

- files within Document Libraries with the following extensions:
  - .doc
  - .docx
  - .eml
  - .msg

  - .pdf
  - .pps
  - .ppt
  - .pptx
  - .xls
  - .xlsx
  - .txt
- items within most types of lists (with or without attachments that have any of the file extensions listed above).

To submit content to Metalogix Cloud Services for analysis:

1 Select the object(s) containing the items that you want to submit for analysis.

2 Choose Compliance > Analyze Content.

REMINDER: You must be registered for Sensitive Content Manager and a member of the ControlPoint Compliance Administrators group to use this functionality.

3 Enter a name and description for the scan.

4 If different from the default (PII - Personal Identification Information), select a **Profile for this scan** from the drop-down.

See also Managing SCM Profiles.

5 If you want to **Resubmit files that have not changed since they were previously scanned**, check this box.

NOTE: If you leave this box unchecked, previously-scanned files that have not changed will be excluded.

6 Include one or more list types from the list box. (If you also want to **Include attachments**, check this box.)

7 Now you can:

  - run the operation immediately (by clicking **[Analyze]**)

OR

  - schedule the operation to run at a later time or on a recurring schedule

OR

  - save the operation as XML Instructions that can be executed at a later time.

A ControlPoint Task Audit is generated for the submission. You can monitor the progress of the submission via the Sensitive Content Manager Submission Maintenance page.

Compliance Action Severity Levels

When content is analyzed by the Metalogix Sensitive Content Manager, it is evaluated against the following three severity levels, as defined in the Sensitive Content Manager Profile used for the content analysis.

- Severe
- Moderate
- Mild

Compliance Administrators specify the appropriate action to take for each severity level via the ControlPoint Compliance Actions page.

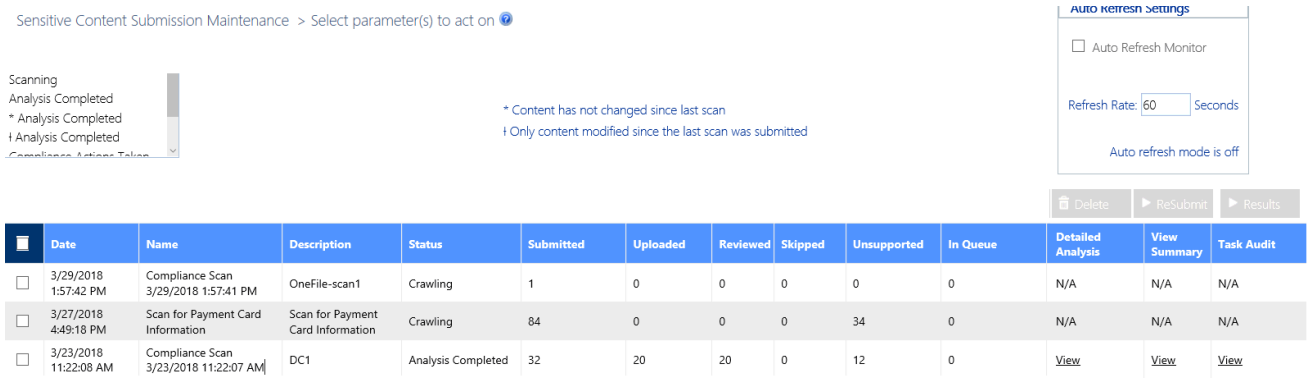
Managing Sensitive Content Manager Jobs

From the Sensitive Content Submission Maintenance page, ControlPoint Compliance Administrators can:

- monitor the progress of jobs that have been submitted to Metalogix Sensitive Content Manager for compliance scanning
- delete one or more Sensitive Content Manager jobs
- re-submit previously scanned jobs
- view a detailed analysis of compliance scan results
- manage compliance actions

To launch the Sensitive Content Submission Maintenance page:

From the Manage pane, choose Compliance > Sensitive Content Submission Maintenance.



In addition the current **Status** of each job (e.g., Crawling, Submitted, Analysis Completed), ControlPoint displays the number of items within each job that have been:

- **Submitted** by ControlPoint to the Sensitive Content Manger service for scanning
- **Uploaded** to the Sensitive Content Manager service
- **Reviewed** (scanned)
- **Skipped** (omitted from the scan; for example, if Sensitive Content Manager was unable to read an item's contents)
- are **Unsupported** by the Sensitive Content Manager service

NOTE: For a list of supported file types, see Submitting Content to Sensitive Content Manager.

- are **In Queue** (waiting to be scanned).

Now you can:

- **Delete** selected jobs (as long as they are not currently being crawled or scanned)
- **Resubmit** selected jobs

  NOTE: When you resubmit a job from this page, it will be submitted exactly as originally defined. (For example, it will not include any files that have been added to a SharePoint list since the last scan.) However, any items that have been quarantined since the last scan will not be included in the submission.

- link to:
  - a Detailed Analysis of compliance scan results
  - the Compliance Summary page, where you can manage compliance scan results
  - the ControlPoint Task Audit for the job.

Managing Compliance Action Scan Results

Members of the ControlPoint Compliance Administrators group can view and take action on Content Analysis scan job results returned by the Metalogix Sensitive Content Manager via the Compliance Summary page. You can:

- view the details of a Compliance Action job
- apply Compliance Actions
- view detailed information about scan results for individual items (and reclassify items that returned from Metalogix Sensitive Content Manager with a status of "Unable to Classify")
- if you are also a member of the ControlPoint Quarantine Administrators group, manage quarantined items
- save items of a particular severity level as a selection that can be used to perform ControlPoint operations.

To manage Compliance Action scan results:

1 Select the object(s) containing the scan jobs you want to view/edit.

2 Choose Compliance > Compliance Summary.

  NOTE: You can also access this page for a specific job from the Analyze Content page, via the **Page View** link

3 If you want to view jobs for a different date range, change the **Start** and/or **End** dates and click **[Find Scan Jobs]**.

4 Select the type of scan jobs you want to view/edit. Use the information in the following table for guidance.

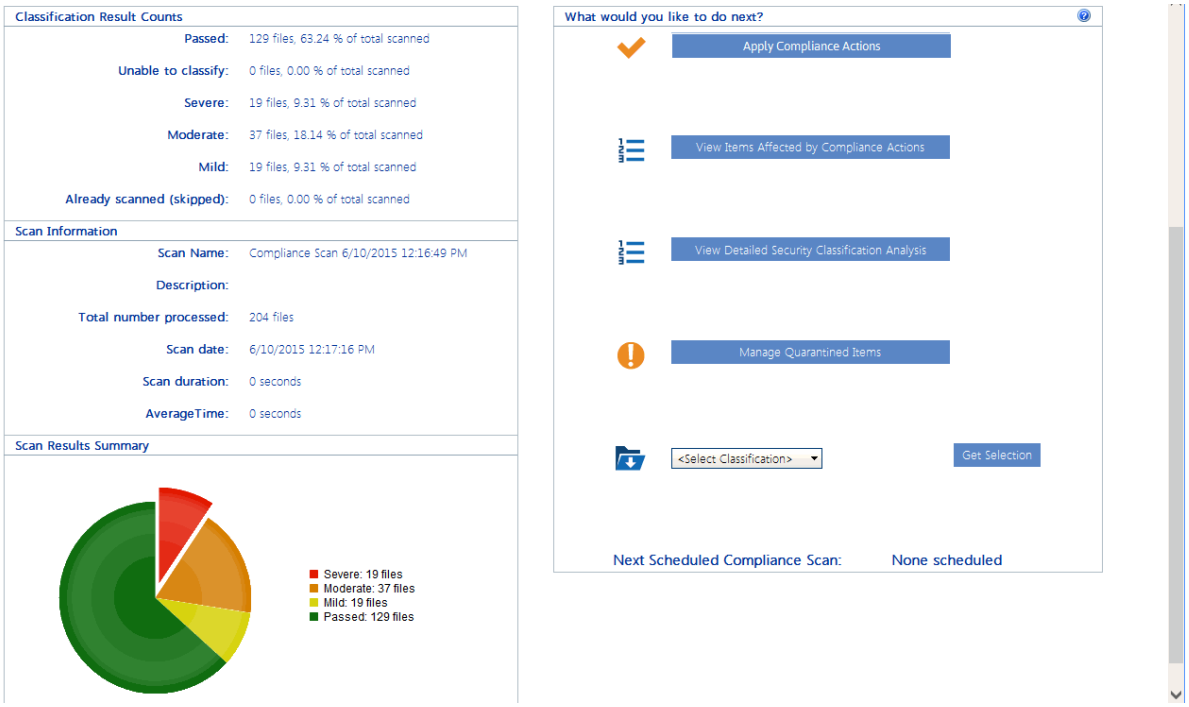
If you want to view ...	Select ...
all jobs submitted to Metalogix Sensitive Content Manager via the ControlPoint Analyze Content action, regardless of whether Compliance Actions were applied	**Real time scans**.
all jobs for which Compliance Actions have been applied.	**Compliance Action jobs.**

5 Click **[Find scan jobs]**.

6 Select the job whose details you want to view.

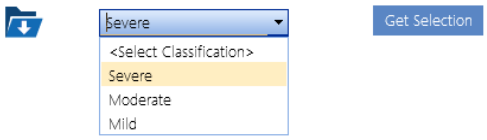
The following details about the selected job display beneath the grid:

- **Classification Result Counts** - The number of items that fall into each classification
- **Scan information** - Description of and metrics associated with the job itself
- **Scan Results Summary** - A pie chart that shows the distribution of items among classifications.



To save items of a selected severity as a ControlPoint selection:

1. Select a classification from the drop-down then click **[Get Selection]**.

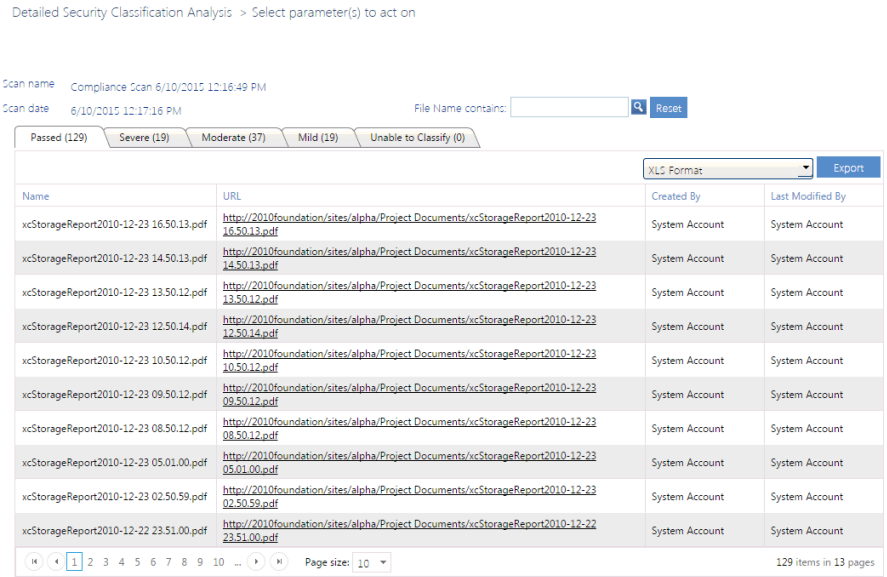


2 Follow the procedure for Saving and Re-Using a SharePoint Object Selection.

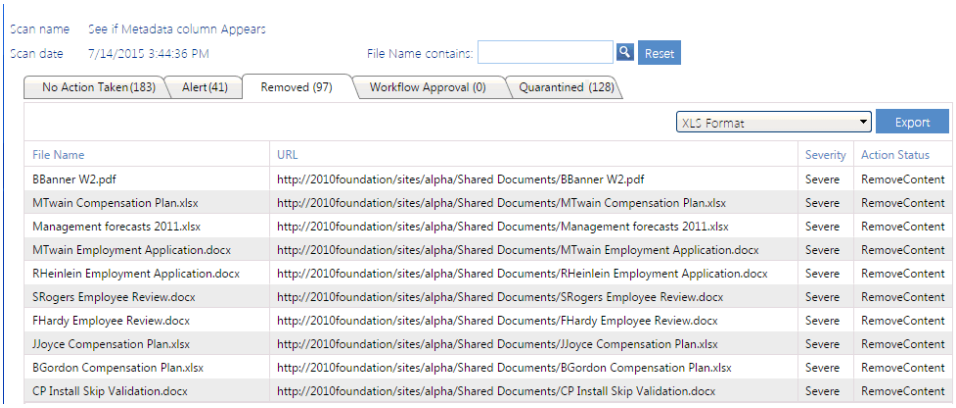
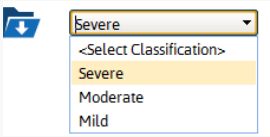
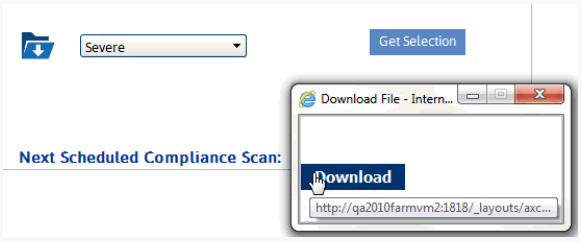
Acting on Compliance Analysis Results

From the Compliance Summary page, you can take a number of compliance actions on returned SCM scans. Use the information in the following table to determine the appropriate action to take.

NOTE: Any option that is not valid for the result set is not available for selection. For example, if you are viewing Compliance Action jobs, the option to Apply Compliance Actions will be disabled.

If you want to ...	Then ...
view more detailed information about scan results for individual items (and, optionally, export results for closer analysis)	• from the Sensitive Content Submission Maintenance page,select the applicable **Detailed Analysis** View link. OR • from the Compliance Summary page, click **[View Detailed Classification Analysis]**.  Note that there is a separate tab for each classification, with detail about each item for which scan results were returned. If you want to download a tabs-worth of results: a) Choose one of the following export formats: ▪ XLS format (for opening in a pre-2007 version of Excel) ▪ Excel XML format (for opening in Excel 2007 or later)

If you want to ...	Then ...
	▪ PDF formal b) Click **[Export]**.
re-classify an item that returned "Unable to Classify"	see Reclassifying Items Returned as Unable to Classify. If you want an action to be taken on any items that were returned by Metalogix Sensitive Content Manager as 'Unable to Classify,' you must reclassify them *before* applying Compliance Actions to the scan job.
manage quarantined items (and you are a member of the ControlPoint Quarantine Administrators group)	see Managing Quarantined Items.
apply Compliance Actions to the selected job	a) From the Compliance Summary page, click **[Apply Compliance Actions]**. NOTE: This option is not available if you filtered results by **Compliance Action Jobs**. b) Either: ▪ select a previously-defined Compliance Action from the drop-down OR ▪ define a new Compliance Action. WARNING: If you choose to **Update Existing Compliance Actions**, the changes will be applied to all scan jobs that use it going forward. This is especially noteworthy in the case of ControlPoint Policies, because once the policy is created the most current definition of the Compliance Actions is applied automatically based on scan results. 

If you want to ...	Then ...
	c) When finished, click **[Apply actions to current scan]**.
view items for which Compliance Actions have been taken	from the Compliance Summary page,, click **[View Items Affected by Compliance Actions]**.  Scan name See if Metadata column Appears Scan date 7/14/2015 3:44:36 PM File Name contains: Reset No Action Taken (183) Alert (41) Removed (97) Workflow Approval (0) Quarantined (128) XLS Format Export File Name | URL | Severity | Action Status BBanner W2.pdf | http://2010foundation/sites/alpha/Shared Documents/BBanner W2.pdf | Severe | RemoveContent MTwain Compensation Plan.xlsx | http://2010foundation/sites/alpha/Shared Documents/MTwain Compensation Plan.xlsx | Severe | RemoveContent Management forecasts 2011.xlsx | http://2010foundation/sites/alpha/Shared Documents/Management forecasts 2011.xlsx | Severe | RemoveContent MTwain Employment Application.docx | http://2010foundation/sites/alpha/Shared Documents/MTwain Employment Application.docx | Severe | RemoveContent RHeinlein Employment Application.docx | http://2010foundation/sites/alpha/Shared Documents/RHeinlein Employment Application.docx | Severe | RemoveContent SRogers Employee Review.docx | http://2010foundation/sites/alpha/Shared Documents/SRogers Employee Review.docx | Severe | RemoveContent FHardy Employee Review.docx | http://2010foundation/sites/alpha/Shared Documents/FHardy Employee Review.docx | Severe | RemoveContent JJoyce Compensation Plan.xlsx | http://2010foundation/sites/alpha/Shared Documents/JJoyce Compensation Plan.xlsx | Severe | RemoveContent BGordon Compensation Plan.xlsx | http://2010foundation/sites/alpha/Shared Documents/BGordon Compensation Plan.xlsx | Severe | RemoveContent CP Install Skip Validation.docx | http://2010foundation/sites/alpha/Shared Documents/CP Install Skip Validation.docx | Severe | RemoveContent Note that there is a separate tab for each action taken, with a list of items and the associated classifications returned by Metalogix Sensitive Content Manager. If you want to download a tabs-worth of results: a) Choose one of the following export formats: ▪ XLS format (for opening in a pre-2007 version of Excel) ▪ Excel XML format (for opening in Excel 2007 or later) ▪ PDF formal b) Click **[Export]**.
download items of a particular severity level (Mild, Moderate. or Severe) as a reusable selection on which you can perform ControlPoint operations	a) from the Compliance Summary page drop-down to the right of the icon, select a Classification (Severity Level).  Severe <Select Classification> Severe Moderate Mild b) Click **[Get Selection]**.  Severe Get Selection Download File - Intern... Next Scheduled Compliance Scan: Download http://qa2010farmvm2:1818/_layouts/axc...

If you want to ...	Then ...
	You can now download and save the file, then upload it as a selection when performing a ControlPoint operation that involves list items. See Saving and Re-Using a SharePoint Object Selection.

Reclassifying Items Returned as Unable to Classify

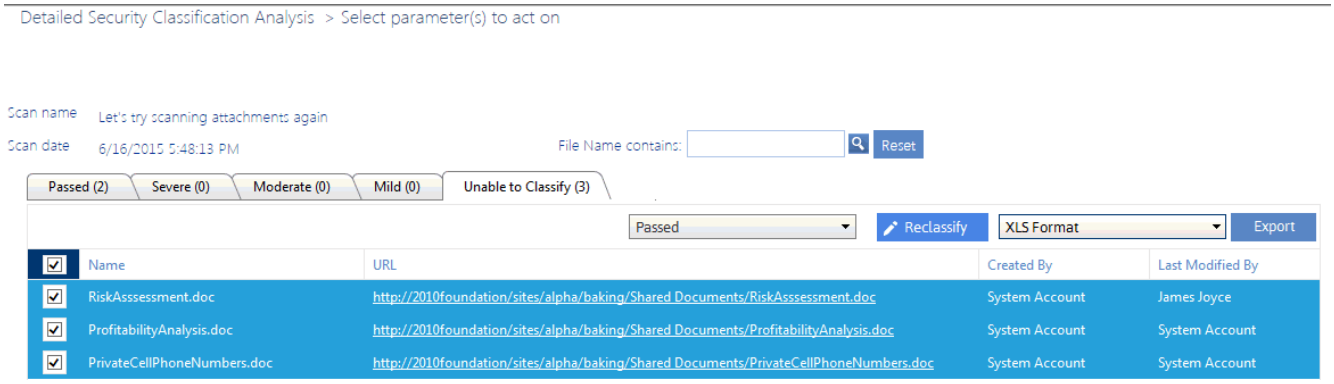
If an item is returned from Metalogix Sensitive Content Manager with a Classification of 'Unable to Classify,' it means that the service detected "probable" sensitive content but was unable to classify it *definitively* as sensitive content. You can, however, review the file and apply a classification manually before applying a Compliance Action to the scan job.

If you want an action to be taken on any items that were returned by Metalogix Sensitive Content Manager as 'Unable to Classify,' you must reclassify them *before* applying Compliance Actions to the scan job.

To reclassify items returned as 'Unable to Classify':

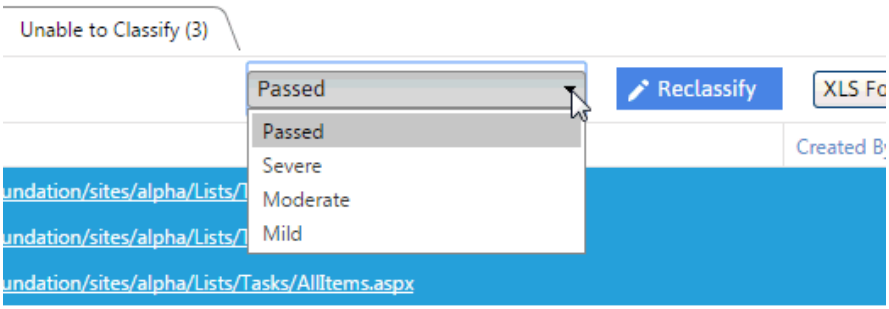
1 From the Detailed Security Classification Analysis page, select the **Unable to Classify** tab.

2 Select the item(s) to which you want to apply a a particular classification.



NOTE: If you want to review the contents of an item before assigning a classification, click the URL link to open the item.

3 Select a classification from the drop-down, then click **[Reclassify]**.



You will be prompted to confirm the action before continuing.

CAUTION: Once you reclassify an item, the drop-down becomes disabled and the item cannot be reclassified again. If Compliance Actions have already been applied to the scan job containing the item(s), the Reclassify option will no longer appear on the page.

Once an item has been reclassified:

- it will be moved to the appropriate tab for the classification

AND

- the classification change(s) will be reflected on the Compliance Summary page.

Managing Quarantined Items

If you are a member of the ControlPoint Quarantine Administrators group, you can manage items that have been quarantined as a result of a Compliance Action. When an item is quarantined, it remains in the same location in the SharePoint list, but all permissions—except those of ControlPoint Quarantine Administrators—are removed.

Currently, members of the Quarantine Administators group must

- be a Site Collection Administrator for each site collection containing quarantined content (in order to invoke the Manage Quarantine Documents page from the SharePoint Hierarchy)

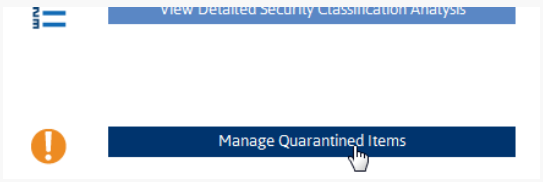
OR

- also be a member of the Compliance Administrators Group.

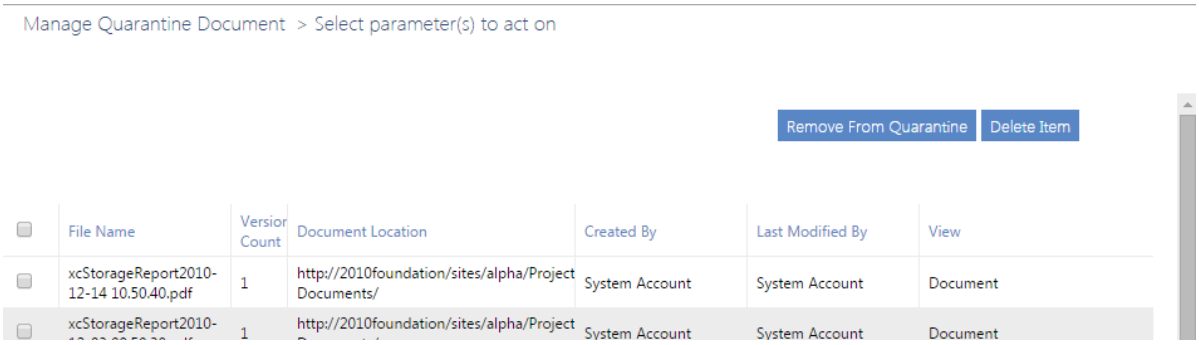
To manage quarantined items:

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

If you are starting from ...	Then ...
the SharePoint Hierarchy	a) Select the object(s) containing the quarantined items you want to manage. b) Choose Compliance > Manage Quarantined Items.
the Compliance Summary page	a) Make sure the Compliance Action jobs radio button is selected. b) Select the Scan job containing the quarantined items you want to manage. c) Click **[Manage Quarantined Items]**.

If you are starting from ...	Then ...
	

2 Select the quarantined item(s) you want to act on.



3 If you want to review the content of a quarantined item before taking an action, click the **Document** link in the **View** column.

Now you can either:

- remove the item from quarantine

NOTE: When you remove an item from quarantine, it is restored in its original location with the same permissions it had before it was quarantined.

OR

- permanently delete the file(s).

Analyzing Scanned Files

The **Scanned Files by Search Term** and **Scanned Files by Scope** analyses let you view all of the files that have been analyzed by SCM for sensitive content over a specified date range.

To generate a Scanned Files analysis:

1 Select the object(s) you want to include in your analysis.

2 Select the appropriate option, based on how you would like to have results grouped:

- Compliance > Scanned files by Scope

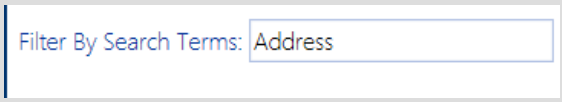
OR

- Compliance >Scanned files by Search terms.

3 Specif the parameters for your analysis.

IMPORTANT:

- Currently, you can only **Filter by Search Terms** if you enter enter one complete search term (that is, you cannot filter by multiple or partial search terms).



If you leave the **Filter by Search Terms** field blank, all search terms within the scope of your analysis will be included.

- If the **Use cached data** box is checked, results will include only files within the scope of your analysis that have been scanned. If this box is *not* checked (that is, the analysis is run on real-time data), results will also include items within the scope of your analysis that have *not* been scanned.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

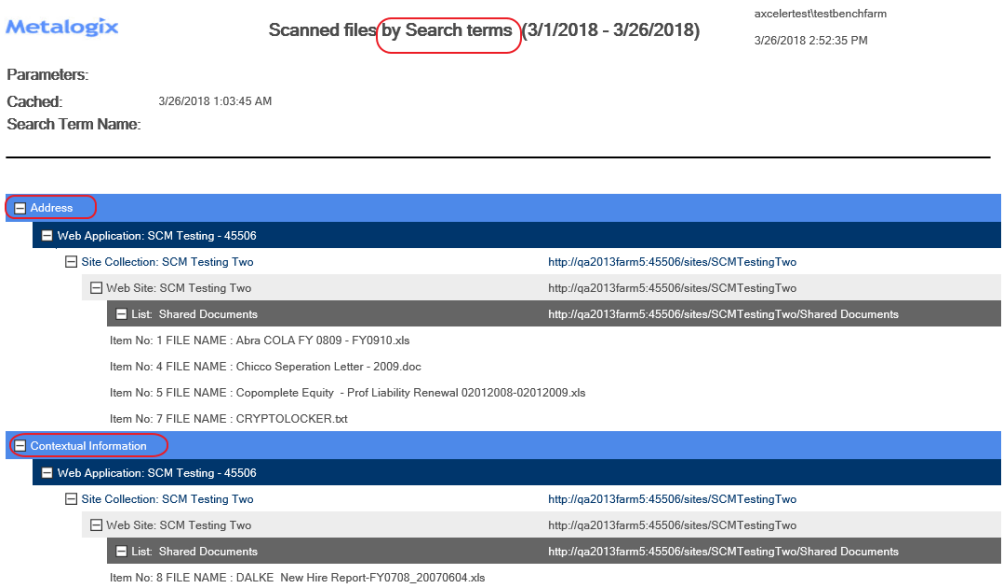
OR

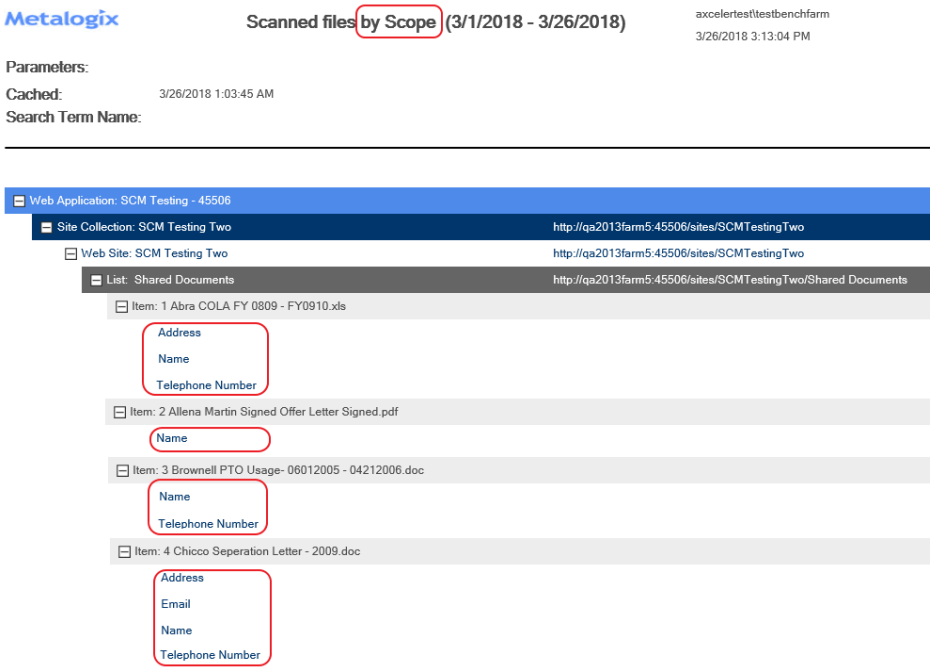
- schedule the operation to run at a later time or on a recurring basis.

OR

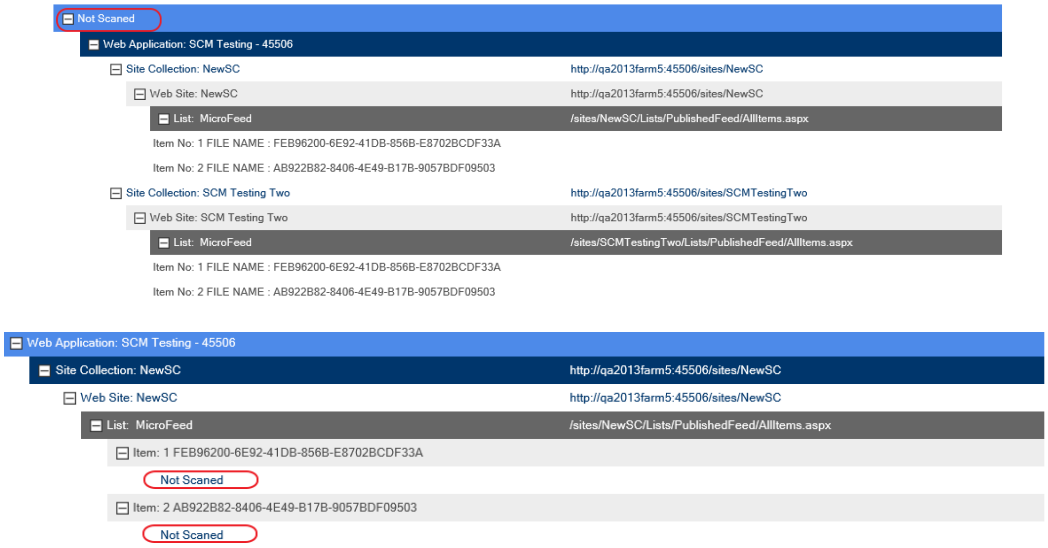
- save the operation as XML Instructions that can be executed at a later time.

If you chose to run the analysis on cached data, all of the files that have been scanned by the SCM service within the specified date range are listed, grouped either by scope or search term (depending on the analysis selected).





If you ran the analysis on real-time data, results will also include items within the scope of your analysis that were **Not Scanned**.



Using ControlPoint Sentinel to Detect Anomalous Activity

ControlPoint Sentinel functionality enables you to detect deviations in document views and downloads from individual users' "typical" daily usage patterns. ControlPoint Sentinel uses the following components in its anomalous activity determinations:

- Business Hours: Daily start and end time for each day of the work week.
- The following Anomalous Activity Limits:
  - **Default daily activity limits**: The limits for each (measured in terms of document views and downloads) to apply to any user whose personal activity limits have not yet been characterized.
  - **Personal daily activity limits**: The deviation from "typical" daily usage patterns characterized for each individual user on a given day of the week.

ControlPoint Sentinel relies on SharePoint Audit Log events. Therefore, for this functionality to be effective, the auditing of Delete, Edit, and View/Download must be enabled for every site collection for which you want to collect activity data.

How Personal Daily Activity is Determined

Anomalous activity limits are set based on the statistical analysis of how often each user views and downloads documents. The personal daily activity limits used by ControlPoint Sentinel are defined in terms of standard deviations above the mean or average observed over a period of time (currently, 12 days worth of observations for each day of the week).

Standard deviation is a statistical measure of the variation within a set of data values. Two users may have the same average of document views and downloads per day, but their standard deviation or the variation in the number of documents they view and download in any given day can be very different. If a user consistently views and downloads roughly the same number of documents every day, then their standard deviation will be low. If a user is more erratic in the number of documents they view or download in a day (for example, sometimes viewing or downloading no documents, sometimes one or two, sometimes 30 or 40) then their standard deviation will be high. By using an individual user's standard deviation to define the limits for anomalous activity the limits are tailored to each user's usage pattern.

Using the user's standard deviation we can determine how likely it is that a user would view or download a particular number of documents in a day. When looking for anomalous activity we are looking at activity that is not very likely, that should happen much less than 1% of the time. For highly anomalous activity we are looking for activity that should happen a very small fraction of a percentage of the time.

Defining Business Hours for Anomalous Activity Detection

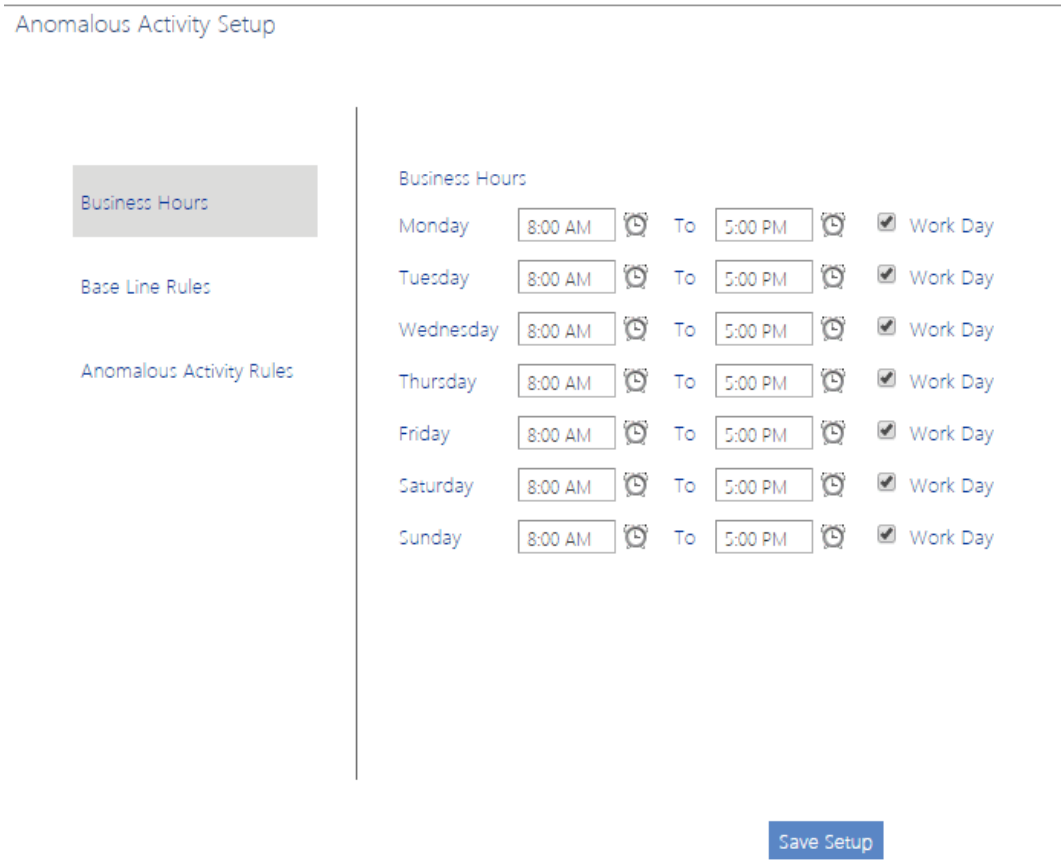
The first step in Sentinel Setup is to define Business Hours, so that Anomalous Activity Limits can be defined differently for both business and non-business hours. For example, you may want to specify a lower limit for non-business hours, when typical activity is *expected* to be lower.

Note that Business Hours reflect the local time of the server on which SharePoint is installed.

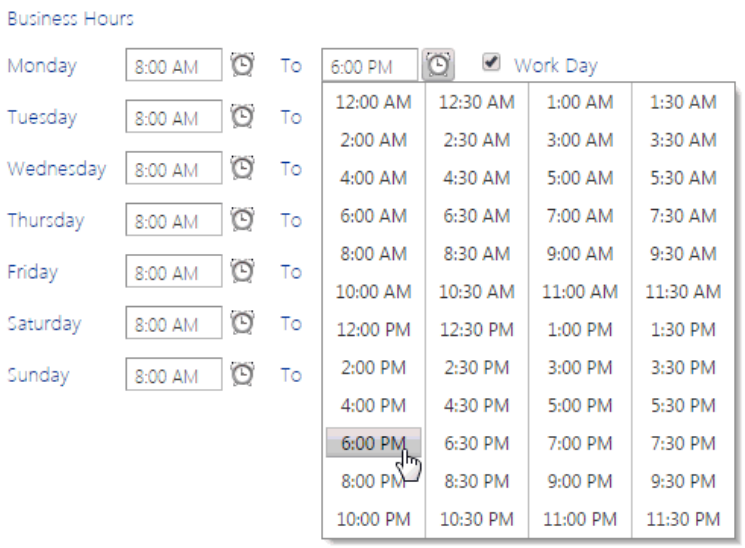
To define business and non-business hours for anomalous activity detection:

1 From the Manage ControlPoint tree choose ControlPoint Sentinel > Sentinel Setup.

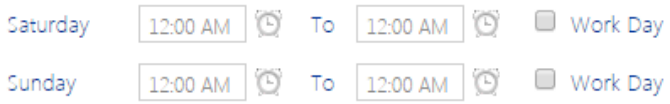
2 On the Sentinel Setup page, make sure the Business Hours tab is selected.



3 For each day that you want activity data to be collected, select the start and end time that represent the standard work hours for that particular day, and make sure the **Work Day** box is checked.



4 For each non-work day, uncheck the **Work Day** box.



NOTE: When the **Work Day** box is unchecked, activity data will not be collected for that day. Start and end times are irrelevant and will be cleared when you save the setup.

5 When you have finished defining business and non-business hours, click **[Save Setup]**.

Defining Base Line Rules for Anomalous Activity Detection

You can define two types of anomalous activity limits:

- Default daily activities, which are used for all users until personal user limits have been characterized.
- Personal daily activities, which are used as soon as a user's personal activity limits have been characterized.

NOTE: For each day of the week, personal user limits replace default daily limits after 12 days worth of observations by the Anomalous Activity Detection Job.

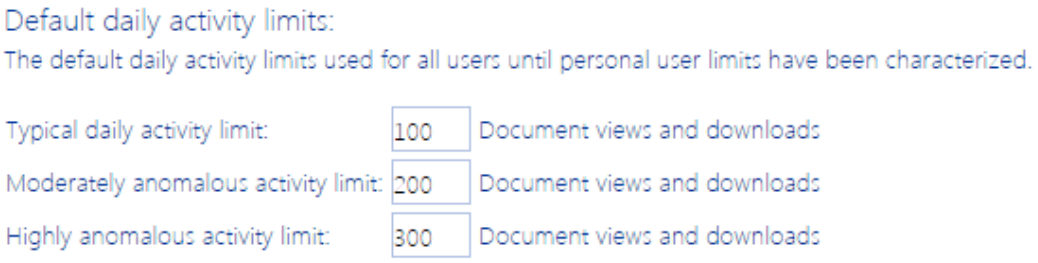
To access the Anomalous Activity Limits page:

From the Sentinel Setup page, select the **Anomalous Activity Limits** tab.

Defining Default Daily Activity Limits

Default Daily Activity Limits are expressed in terms of the number of "typical" views and downloads. Because they apply to *all* users until personal user limits have been characterized, it is recommended that you enter limits that would be considered typical and anomalous for *any* SharePoint user in your organization. For example, 100 document views and downloads per day may take into account "typical" daily activity for your

most active users without being an alarmingly high number for less active users. Double that number may be considered moderately anomalous, while triple that number may be considered highly anomalous.



NOTE: If you do not want ControlPoint Sentinel to track Default Daily Activity Limits, leave the limit fields set to 0.

Defining Personal Daily Activity Limits

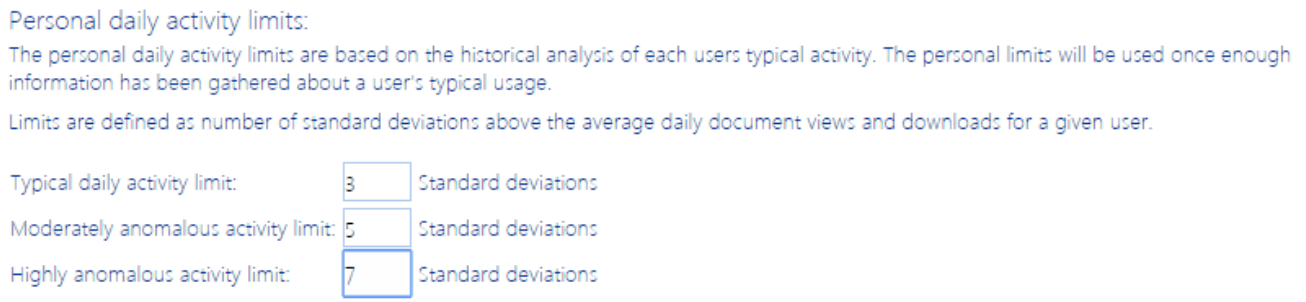
The following table shows the percentage of values that fall around or above the mean in terms of the standard deviation.

Standard Deviations (σ) Above the Mean	Percentage (%) of Values Above the Standard Deviations from the Mean
1σ	15.86553%
2σ	2.275013%
3σ	0.13499%
4σ	0.003167%
5σ	0.000028665%
6σ	0.00000009865%
7σ	0.000000000128%

It is recommended that you:

- Set the **Typical daily activity limit** to **3** standard deviations above the mean.
  A user could exceed this limit once every two years. This is not cause for concern but if it happens more frequently than that it may warrant investigation.
- Set the **Moderately anomalous activity limit** to **5** standard deviations above the mean.
  A user could exceed this limit once in about 10,000 years. This is an indication of anomalous activity that should be investigated immediately.
- Set the **Highly anomalous activity limit** to **7** standard deviations above the mean.

This level of activity is very very unlikely and should be acted upon immediately.



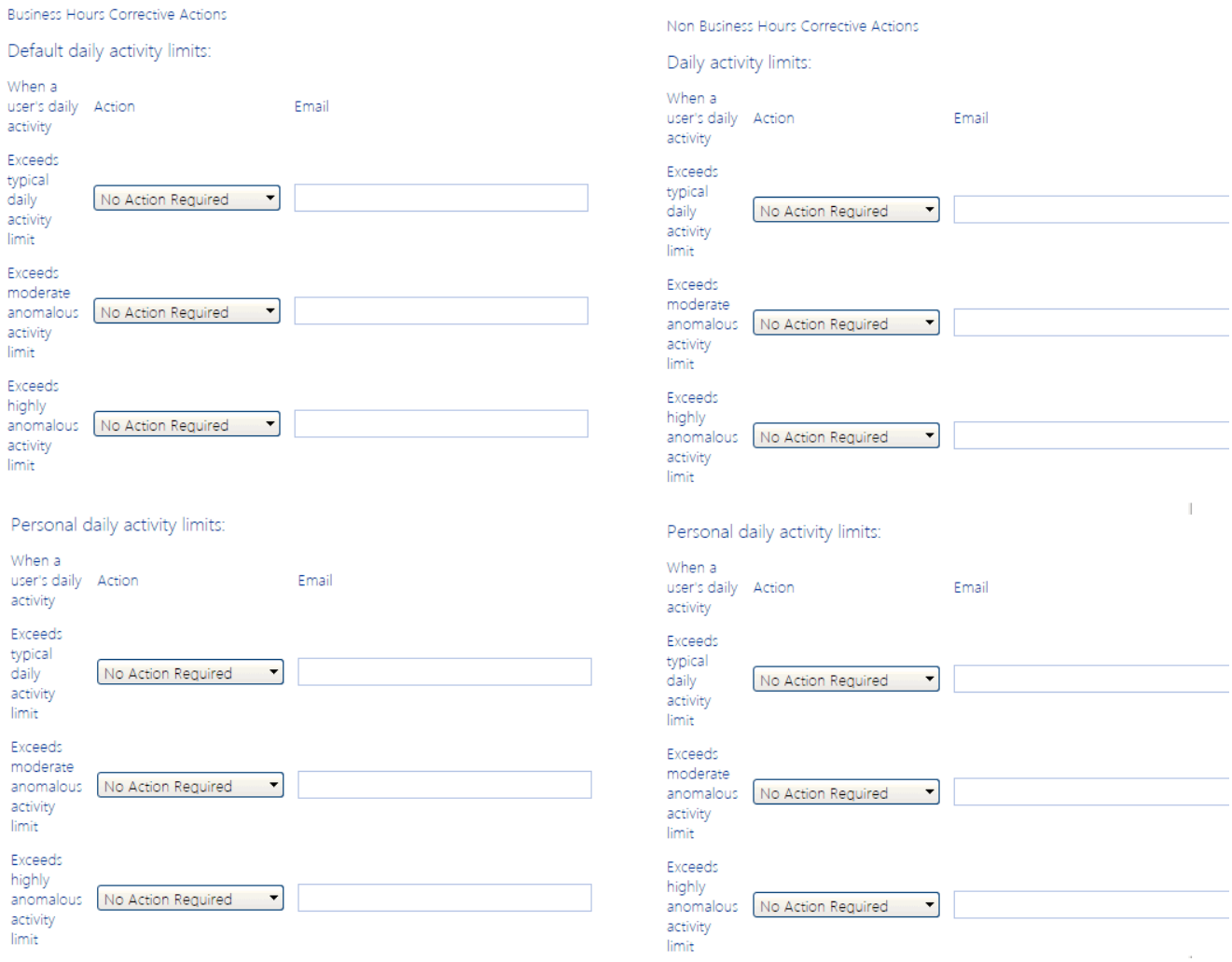
See also How Personal Daily Activity is Determined.

Defining Anomalous Activity Rules

After you have defined Business Hours and Activity Limits, the next step is to define Anomalous Activity Rules, or the action (if any) to take when a defined activity limit is exceeded, during both business hours and non-business hours.

To define Anomalous Activity Rules:

1. From the Sentinel Setup page, select the **Anomalous Activity Rules** tab.



2 If you want to have an alert generated whenever a limit is exceeded for a particular combination of criteria (Business Hours/Non-Business Hours; Default Daily Activity/Personal Activity; Activity Limit):

- Select **Alert** from the Action drop-down.
- If you want to have an email generated when the limit is exceeded, enter an **Email address**. (You can enter multiple email addresses, separated by commas (,).

NOTE: Only limits to which an Alert is applied will be subject to Sentinel reporting. Limits with No Action Required will not be reported.

Preparing Your Environment for Using ControlPoint Sentinel

Before ControlPoint Sentinel can begin collecting data for Anomalous Activity Detection:

A. SharePoint auditing must be enabled on all site collections for which Anomalous Activity detection will be performed.

B. Anomalous Activity Detection must be enabled to run:

- via the ControlPoint Anomalous Activity Detection job

OR

- as part of the ControlPoint Scheduler Job..

Enabling SharePoint Auditing

ControlPoint Sentinel analyzes the following SharePoint audit log events for Anomalous Activity Detection:

- Editing items
- Deleting items
- Opening or downloading documents, viewing items in lists, or viewing item properties.

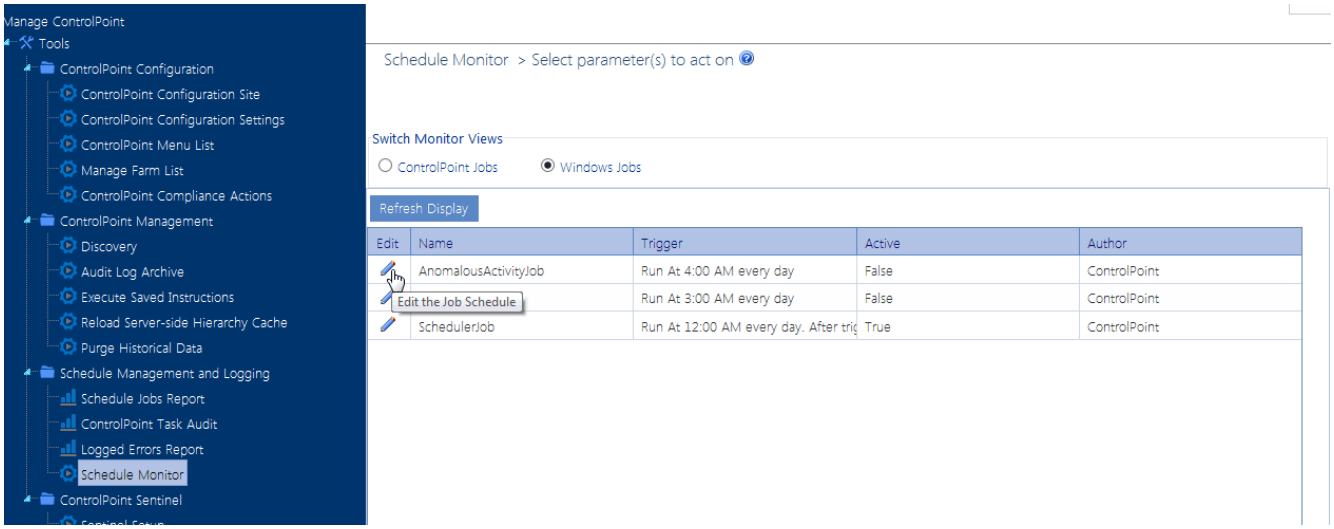
You can enable these settings for individual site collections from within SharePoint.

Enabling the Anomalous Activity Detection Job

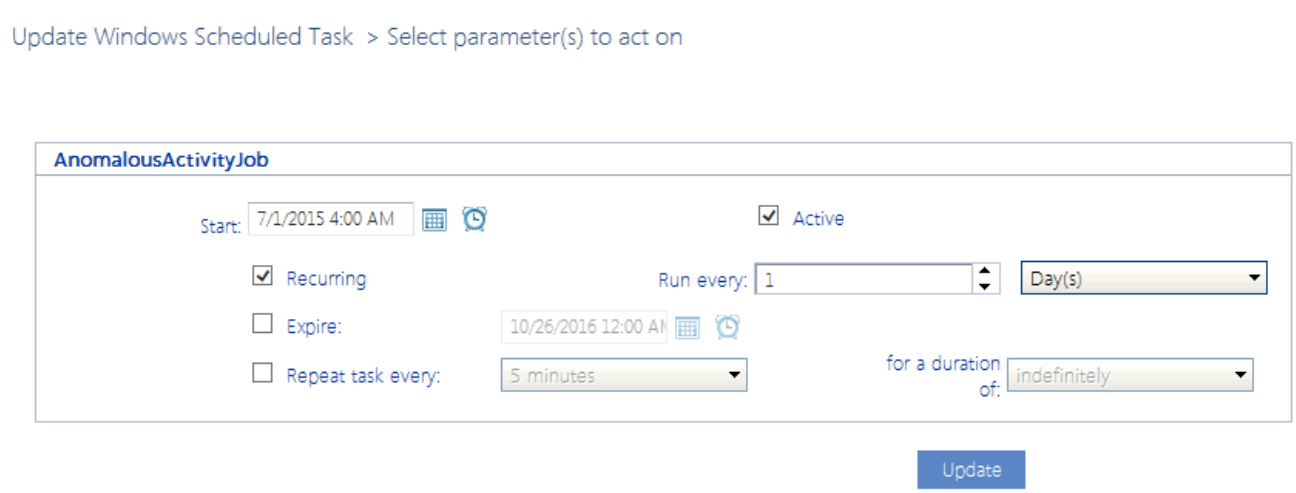
1 From the Manage ControlPoint tree choose Schedule Management and Logging > Schedule Monitor.

2 Choose Switch Monitor Views > Windows Jobs.

3 Click the Edit icon ( ) to the left of the AnomalousActivityDetectionJob.



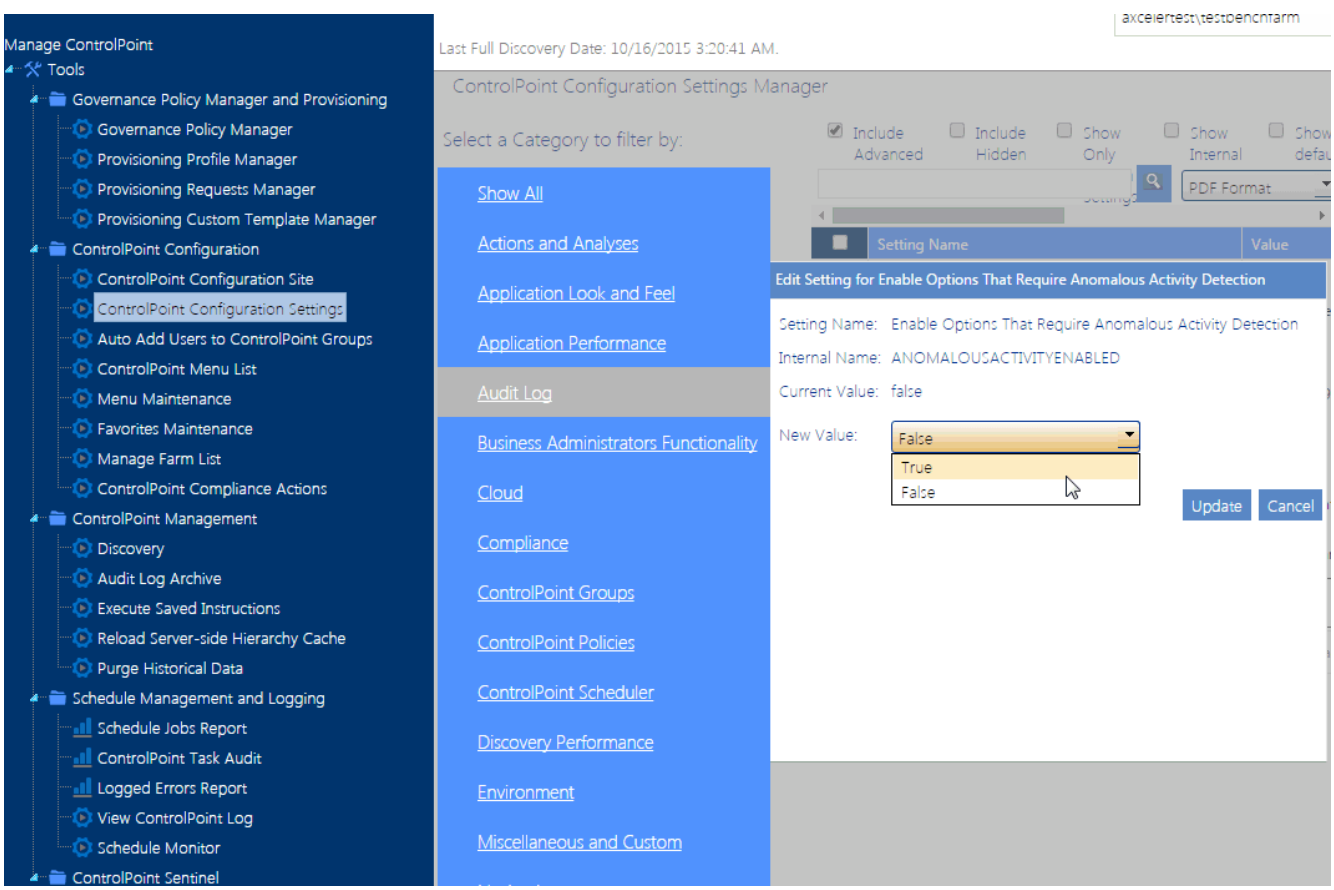
4 Check the **Active** box.



By default, the job is scheduled to run daily, at 4:00 am (local server time). You may however, change the schedule to run more frequently. Note that, the more frequently the job is run, the sooner an alert may be generated when an Anomalous Activity Limit is reached.

Enabling Anomalous Activity Detection via the ControlPoint Scheduled Job Review

As an alternative to using the Anomalous Activity Detection Job, you can choose to have anomalous activity detection performed as part of the ControlPoint Scheduler Job. (which, by default, runs every 10 minutes). ControlPoint Application Administrators can enable this option by changing the ControlPoint Configuration Setting **Enable Options That Require Anomalous Activity Detection** from *False* to *True*.



Refer to the *ControlPoint Administration Guide* for more detail on modifying ControlPoint Configuration Settings.

Reporting Anomalous Activity

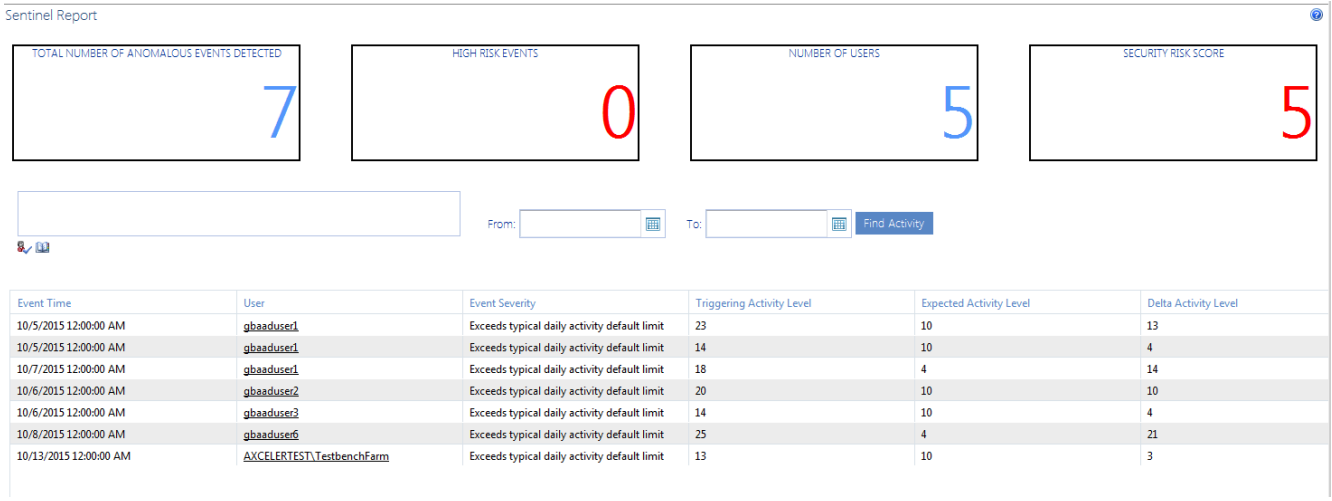
The ControlPoint Sentinel Report lets you view anomalous activity events for which an Alert has been specified on the Sentinel Setup - Anomalous Activity Rules page. You can also filter results by user and/or date range.

To report anomalous activity:

1 From the Manage ControlPoint tree choose ControlPoint Sentinel > Sentinel Report.

2 If you want to narrow your results, enter one or more user(s) in the People Picker and/or enter a date range.

NOTE: If you leave the **From** and **To** Dates blank, all available results will be returned.



Event Time	User	Event Severity	Triggering Activity Level	Expected Activity Level	Delta Activity Level
10/5/2015 12:00:00 AM	gbaaduser1	Exceeds typical daily activity default limit	23	10	13
10/5/2015 12:00:00 AM	gbaaduser1	Exceeds typical daily activity default limit	14	10	4
10/7/2015 12:00:00 AM	gbaaduser1	Exceeds typical daily activity default limit	18	4	14
10/6/2015 12:00:00 AM	gbaaduser2	Exceeds typical daily activity default limit	20	10	10
10/6/2015 12:00:00 AM	gbaaduser3	Exceeds typical daily activity default limit	14	10	4
10/8/2015 12:00:00 AM	gbaaduser6	Exceeds typical daily activity default limit	25	4	21
10/13/2015 12:00:00 AM	AXCELERTEST\TestbenchFarm	Exceeds typical daily activity default limit	13	10	3

The tiles at the top of the report highlight the following statistics:

- The **Total Number of Anomalous Activities Detected**
- The number of **High Risk Events** as characterized by ControlPoint Sentinel
- The **Number of Users** with anomalous activity
- The **Security Risk Score** (which is derived by the Severity of each activity within the date range covered by the report)

For each anomalous event detected, report detail displays:

- the **Event Time** (that is, the date and the time when the ControlPoint Anomalous Activity Detection Job captured the event)
- the **User** whose activity triggered the anomalous activity detection alert
- the **Event Severity** (as defined on the Sentinel Setup - Anomalous Activity Limits page)
- the **Triggering Activity Level** that resulted in the anomalous activity detection alert:
  - for **Default** daily activity, activity above the specified limit for the Event Severity
  - for **Personal** daily activity, the amount of activity for the Event Severity to which the specified deviations above from the user's "typical" usage pattern have been applied.
- the **Expected Activity Level**:
  - for **Default** daily activity, the specified limit for the Event Severity
  - for **Personal** daily activity, "typical" usage pattern as calculated by ControlPoint Sentinel
- the **Delta Activity Level** (that is, the difference between Triggering Activity Level and the Expected Activity Level).

To view detailed audit log data for a user:

Click the User link to generate a ControlPoint Audit Log analysis.