

ControlPoint

Administration Guide

VERSION 7.6

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Preface

This guide contains detailed information about configuring and managing the ControlPoint application.

Audience

The *Metalogix ControlPoint Administration Guide* is intended for **ControlPoint Application Administrators** (that is, SharePoint administrators who also have responsibilities for managing ControlPoint configuration and permissions).

Configuring the Environment in Which ControlPoint Will Run

Once the ControlPoint application has been installed and configured on the first Web front-end server in your SharePoint farm, you can perform the following tasks as needed:

- Configure ControlPoint for each additional Web front-end server in your farm (both when installing ControlPoint for the first time and whenever a new Web front-end server has been *added* to your farm).
- Set up host headers and/or alternate access mappings (for load balancing).
- If you use alternate authentication providers in your farm, configure ControlPoint to recognize them.

REMINDER: Each farm in a multi-farm installation has its own copy of the ControlPoint application. Therefore, if you have installed ControlPoint on multiple farms, you must perform the entire configuration and setup process for each farm.

Configuring ControlPoint for Additional Web Front-End Servers

If you have more than one Web front-end server in your farm, SharePoint automatically propagates the ControlPoint application to all of them. However, you must perform the following tasks manually on each additional Web front-end server:

- Install the appropriate version of the NET Framework. From the installation folder, run **prerequisites.exe.**

  NOTE: It is important that additional Web front-end servers run with the version of prerequisites provided by Metalogix. Refer to the topic Installing and Deploying ControlPoint *in the ControlPoint Installation and Upgrade Guide* for more information on prerequisites.

- Create an IIS Virtual Directory, as described below.

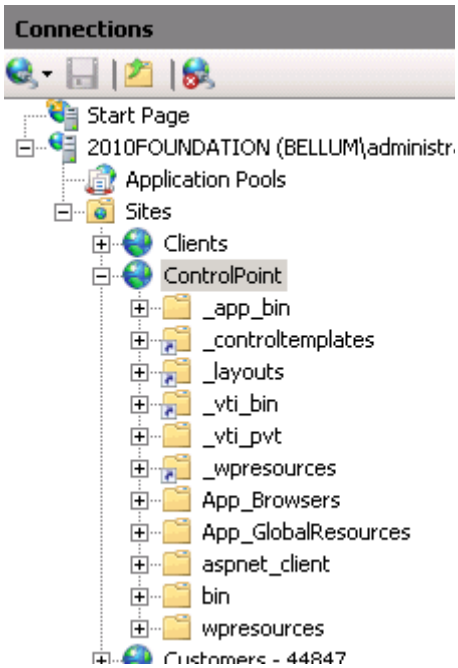
  NOTE: SharePoint automatically propagates the ControlPoint application to all Web front end servers; however, it only creates the IIS Virtual Directory on the machine on which ControlPoint was installed. Included with ControlPoint is a utility called **CreateVirtDirectory.exe** to help automate this process. Alternatively, you can create the IIS Virtual Directory manually. Consult your Microsoft Server documentation for details, as the procedure varies based on the version of IIS Manager you are running.

To create an IIS Virtual Directory on an additional front-end server using the Create Virtual Directory utility:

1 Open the IIS Manager on the additional Web front-end server.

2 Verify that SharePoint has propagated the ControlPoint website, as indicated by its presence in the IIS of the server).

NOTE: The amount of time it takes for SharePoint to propagate the ControlPoint website to additional Web front-end servers depends on a number of factors, including the size of your farm.



3 On the front end server where the ControlPoint application was initially installed, go to the following directory: **C:\Program Files\Metalogix\ControlPoint\ControlPointFeature**

4 Copy the file **CreateVirtDirectory.exe** to any location on the additional front-end server, then double-click to run it.

NOTE: If you are running Windows Server 2008, it may be necessary to "Run as Administrator."

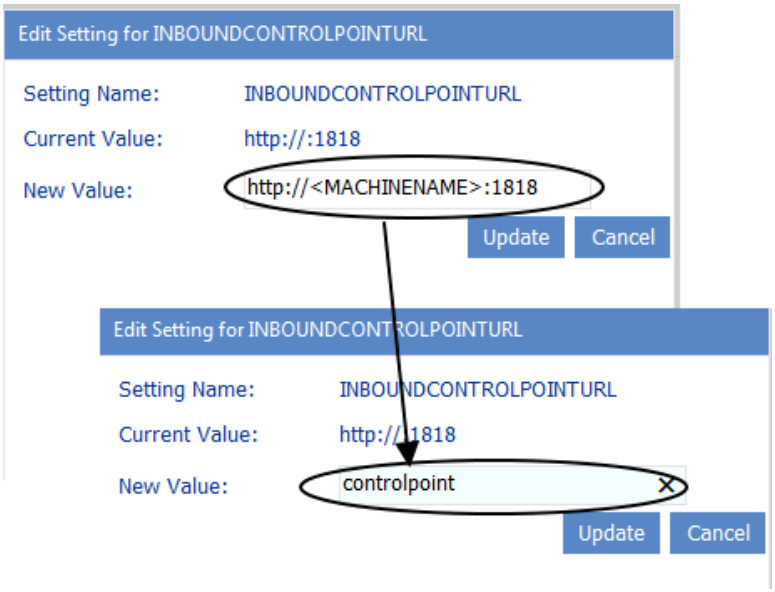
5 Repeat Steps 1-4 for each additional front-end server in your farm.

Enabling Session Affinity for Load Balancing

If the ControlPoint application is to be accessed behind a load balancer, Session Affinity (“Sticky Sessions”) should be enabled for the ControlPoint Web Application. Otherwise, ControlPoint analyses may fail to complete. (Note that the method for enabling Site Affinity will vary, depending on your load balancer).

Setting Up Host Headers

If you set up a host header for the Web application that hosts the ControlPoint Configuration Site collection, use the same procedure as you would any other SharePoint Web application. After setting up the host header, it is recommended that you change the Value of the ControlPoint Configuration Setting INBOUNDCONTROLURL from the default value to the host header name.



See also Modifying ControlPoint Configuration Settings.

Additional Configuring Considerations for Multi-Farm Installations

If you want to run ControlPoint in a multi-farm environment:

- At a minimum, all farm in the installation must be in domains that share a two-way trust.
- If different ControlPoint Service Accounts are used for different farms, each of these accounts must be a member the ControlPoint Configuration site Remote Service Account Administrators group on all other farms in the installation.
- ControlPoint users must have the appropriate permissions for the ControlPoint Configuration site on each farm that they will be managing.

Managing Your ControlPoint Installation

Managing Your ControlPoint License

ControlPoint is licensed according to the number of SharePoint users in your farm and the number of farms tenancies being managed with ControlPoint.

When your licensed user count exceeds 10%, the following message displays in the ControlPoint application interface:

Your licensed limit of {x} users has been exceeded by 10%. Please contact Metalogix to update your license.

If your license is not updated, a similar message will display when the licensed user count exceeds 15%.

When the licensed user count exceeds 20%, ControlPoint will become disabled, and a ControlPoint Application Administrator must follow the procedure for Renewing or Changing the Terms of Your ControlPoint License.

Calculating Farm User Count

By default, ControlPoint automatically counts the number of users with permissions in SharePoint, and this information is sent to the Metalogix License Server daily (that is, when an internet connection is available).

How ControlPoint Counts Users

ControlPoint counts all individual users who currently have permissions in SharePoint, either directly, through an Active Directory group, and/or through a SharePoint group.

Excluded from this user count are:

- external or anonymous users
- sharepoint\system
- most built-in Active Directory accounts

NOTE: ControlPoint will consider the account **NT Authority\authenticated users** and the Active Directory group **Everyone** to encompass all *active* Active Directory users (that is, for these groups, Disabled users will not be counted). If either of these accounts has permissions within the SharePoint farm, it will be reflected in the user count.

TIP: If you suspect that there are disabled or deleted Active Directory user accounts that still have permissions in SharePoint, either explicitly or through a group *other than* NT Authority/authenticated users or Everyone, generate an Orphaned Domain Users report and delete them from SharePoint so they will not be included in the user count.

Overriding the Frequency of the User Count

ControlPoint Application Administrators can override the frequency of the user count by scheduling the **Calculate Farm User Count** action to run on a recurring basis, up to every seven (7) days. (If more than seven days has passed since the action has run, a reminder displays in the ControlPoint application interface.)

Therefore, if you want to override the default (daily) user count, schedule the job to run at intervals of seven (7) days or less.

If the Metalogix License Server does not receive a user count users at minimum required intervals, a warning message will display in the License dialog, and your license may eventually require re-activation.

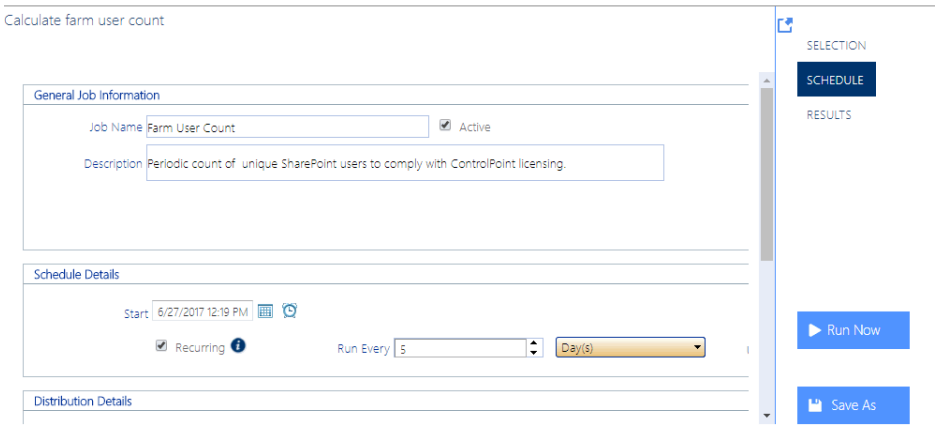
Note that the user count calculation is farm-specific. Therefore, in a multi-farm enviornment, the user count is calculated separately for each farm and the licensed user count cannot be exceeded on any one of those farms.

To schedule the Calculate Farm User Count action:

NOTE: This action is only available to ControlPoint Application Administrators.

1. From the Manage panel, choose Calculate User Farm Count.
2. Click the **Schedule** tab and schedule the operation to run on a recurring basis.

REMINDER: Make sure to schedule the action to run at intervals of seven (7) days or less.



Note that you can also calculate user count in real time (by clicking **[Run Now]**).

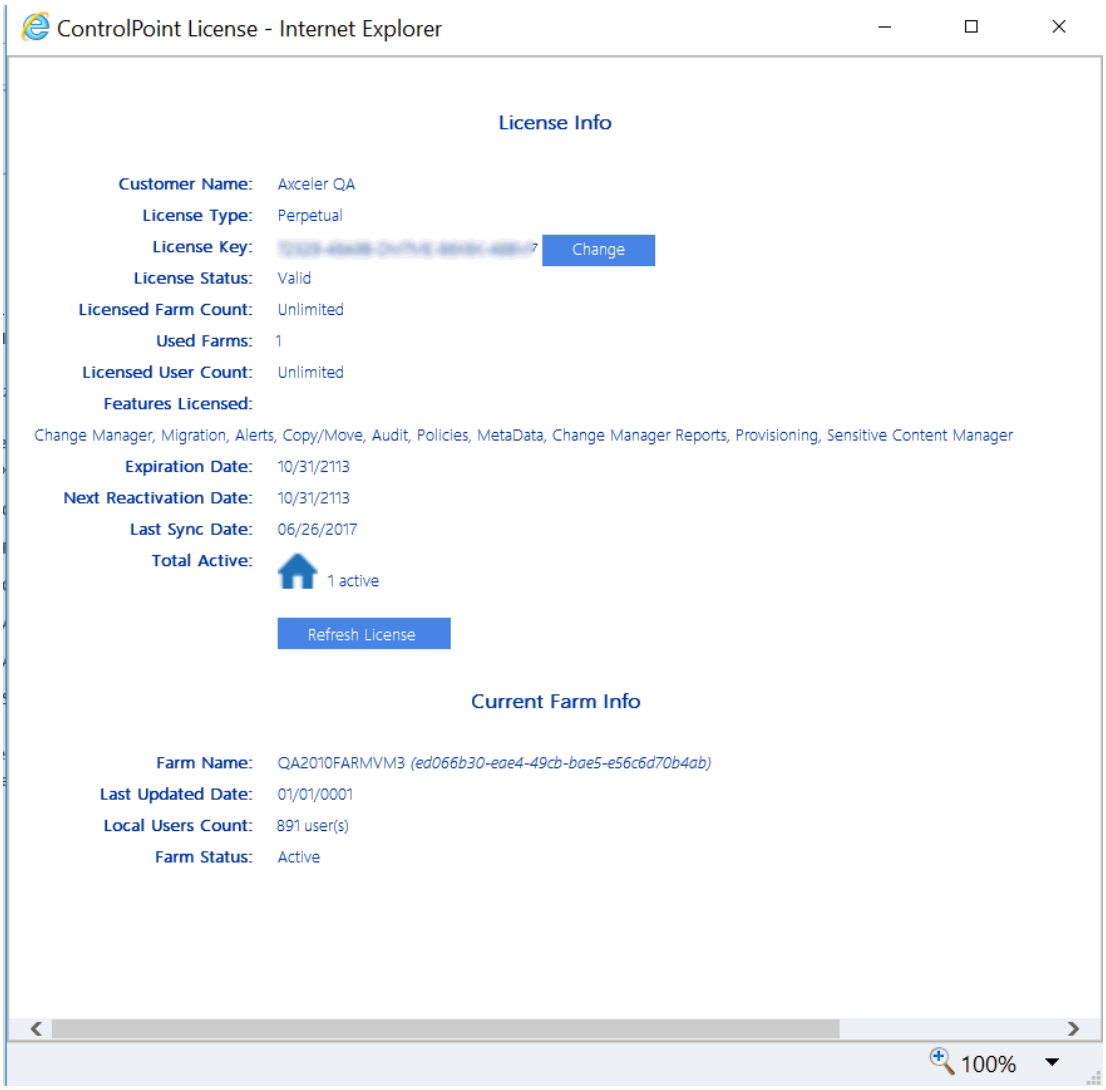
Reviewing, Changing, and Refreshing License Information

You can review the terms of your ControlPoint license, refresh license information, and change your license code via the License Info dialog.

NOTE: Currently, in a multi-farm environment, the information is displayed for the current farm only.

To access ControlPoint license information:

From the bottom of the left pane, choose **LICENSE**.



To refresh license information:

Click **[Refresh License]**.

The License dialog is updated with the latest **License Info** (from the Metalogix Licensing server) and the **Current Farm Info** from the ControlPoint Service (exAdmin) database.

Renewing or Changing the Terms of Your ControlPoint License

Use the following procedure if you need to:

- extend the period of an evaluation license
- update your ControlPoint license to include additional farms or SharePoint users, or
- upgrade from an evaluation version to a full version of ControlPoint

- reactivate a license that has expired or is about to expire.

If your evaluation period has expired, or if the number of SharePoint users or managed farms exceeds the number covered by your license, the appropriate message displays in the ControlPoint application header.

For example:

You have {x} days to reactivate the license. Please contact Metalogix to update your license

Your license has expired

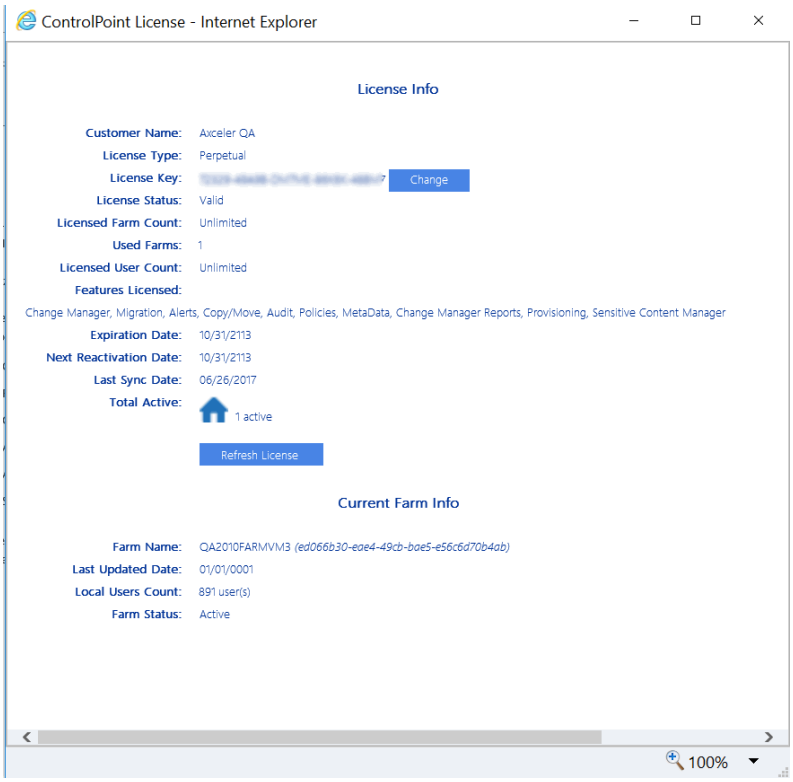
Your licensed limit of {x} users has been exceeded by x%.

You will be unable to continue using the ControlPoint application until you activate a license update.

To change the terms of a ControlPoint license:

1 Contact Metalogix and request a license update.

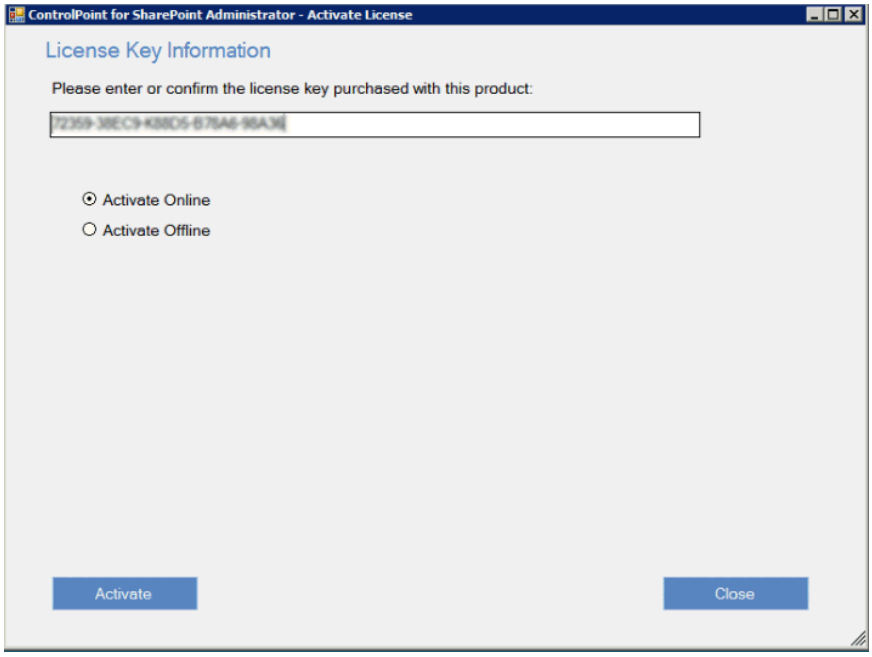
2 From the left navigation pane, choose **LICENSE**.



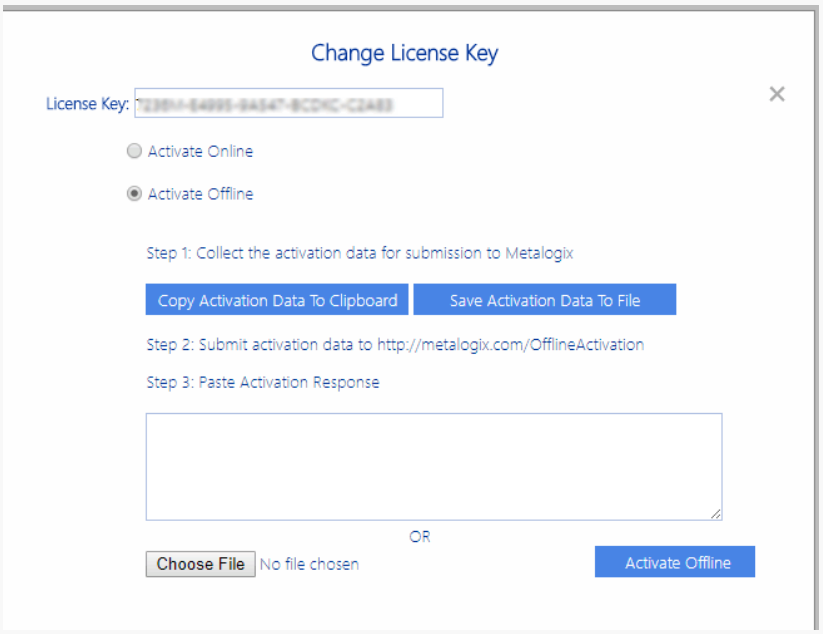
3 Click **[Change]**.

4 Highlight the line containing your license information.

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



If	Then ...
you have internet access and want to activate your license updates online.	make sure the **Activate Online** radio button is selected.
you do not have internet access and/or want to activate your license offline	select the **Activate Offline** radio button and follow the instructions that display in the dialog to complete the activation process.



NOTE: Because the request for the activation key file must be submitted via the Metalogix website, the *request* must be submitted from a machine that has internet access.

6 Click **[Activate]**.

Granting the ControlPoint Service Account Access to Additional Web Applications or Content Databases

You must ensure that the ControlPointr Service Account has Full Control access to the Web application(s) if:

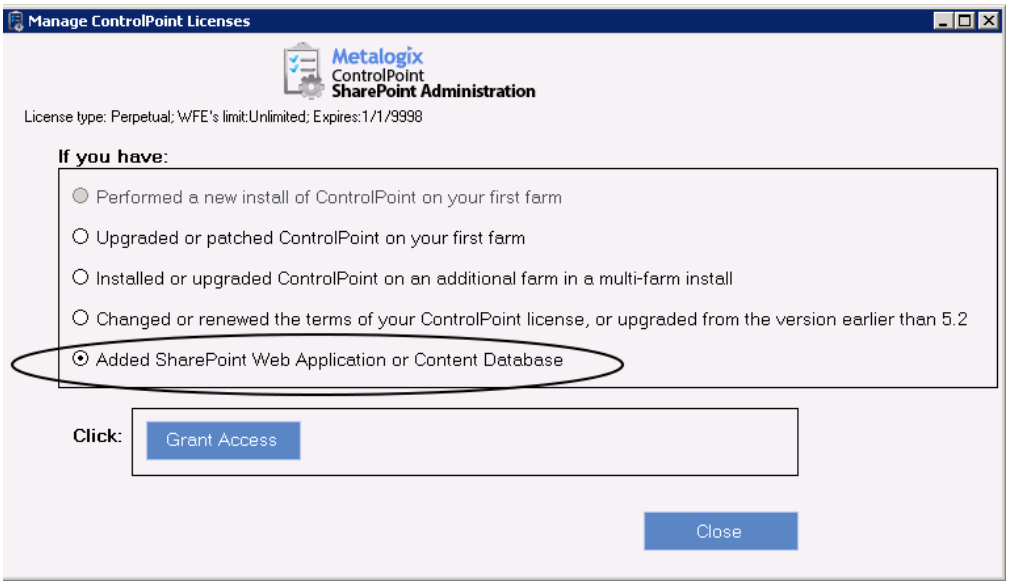
- a new Web application is added to a farm
- a new content database has been added to a Web application, or
- the permissions for the ControlPoint Service Account have been changed in or deleted from the Web application's policy.

NOTE: If the ControlPoint Service Account does *not* grant access rights for the Web application, the following text will display beside the Web application icon in the left navigation pane: (*WebApp is not configured for ControlPoint.)* If a content database has been added and access rights have not been granted, site collections beneath the text *Inaccessible* will display.

To grant access to an additional Web application or Content Database:

1. Log into the server on which the ControlPoint application was originally installed for the farm on which the Web application was created. Log in using the same account from which the installation was run.
2. Choose Start > All Programs > Metalogix > ControlPoint > Manage ControlPoint Licenses to display the Manage ControlPoint Licenses dialog.

3. Choose the **Added a SharePoint Web Application or Content Database** radio button.



4. Click **[Grant Access]**.

The ControlPoint Configuration Site

The ControlPoint Configuration site is a SharePoint site that is integral to your ControlPoint 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 Hierarchy panel. See ControlPoint Security in the *ControlPoint User's Guide* 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 tree, by right clicking the ControlPoint Configuration Site - Root Site and choosing Open Site.
- from the Manage section, by choosing ControlPoint Configuration Site.

Removing (Uninstalling) ControlPoint

After the initial installation of ControlPoint, you can use the **Remove** option if you want to completely remove ControlPoint from your farm.

The Web application that hosts the ControlPoint Configuration Site collection and all of its contents will be deleted as part of the uninstall.

When removing installed components:

Make sure that you:

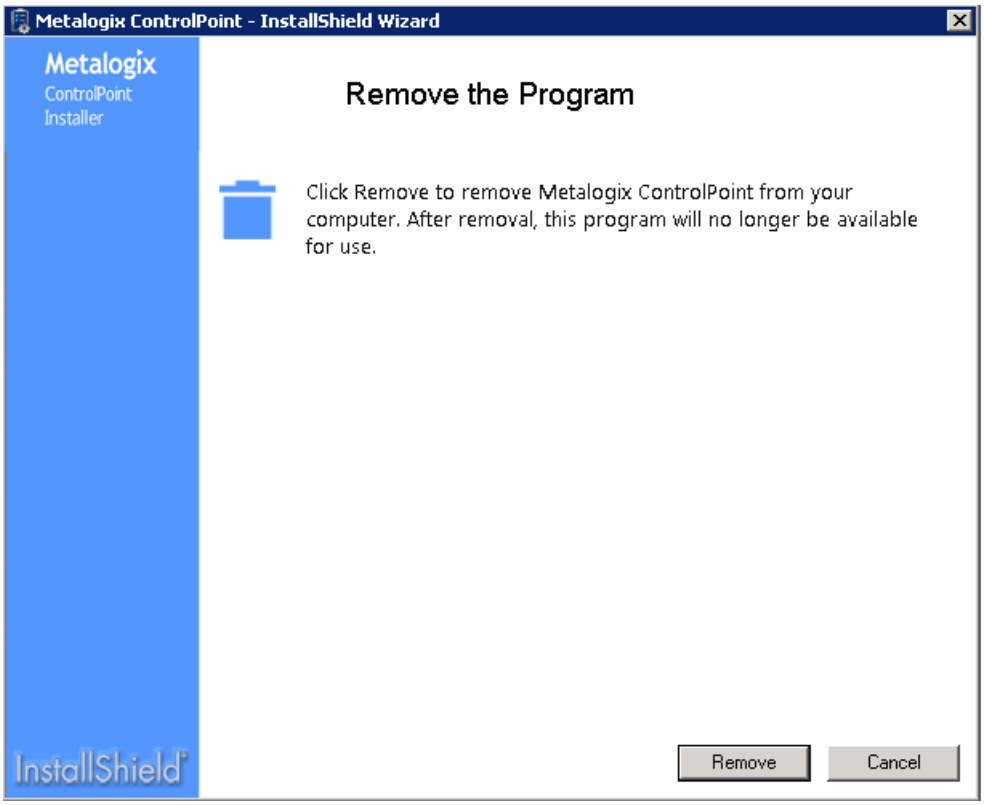
- run the installer on the Web front-end server on which the original installation was performed, and
- log in using the account from which the original installation was run.

To launch the installer:

From the Control Panel Programs and Features select **Metalogix ControlPoint** and choose Uninstall

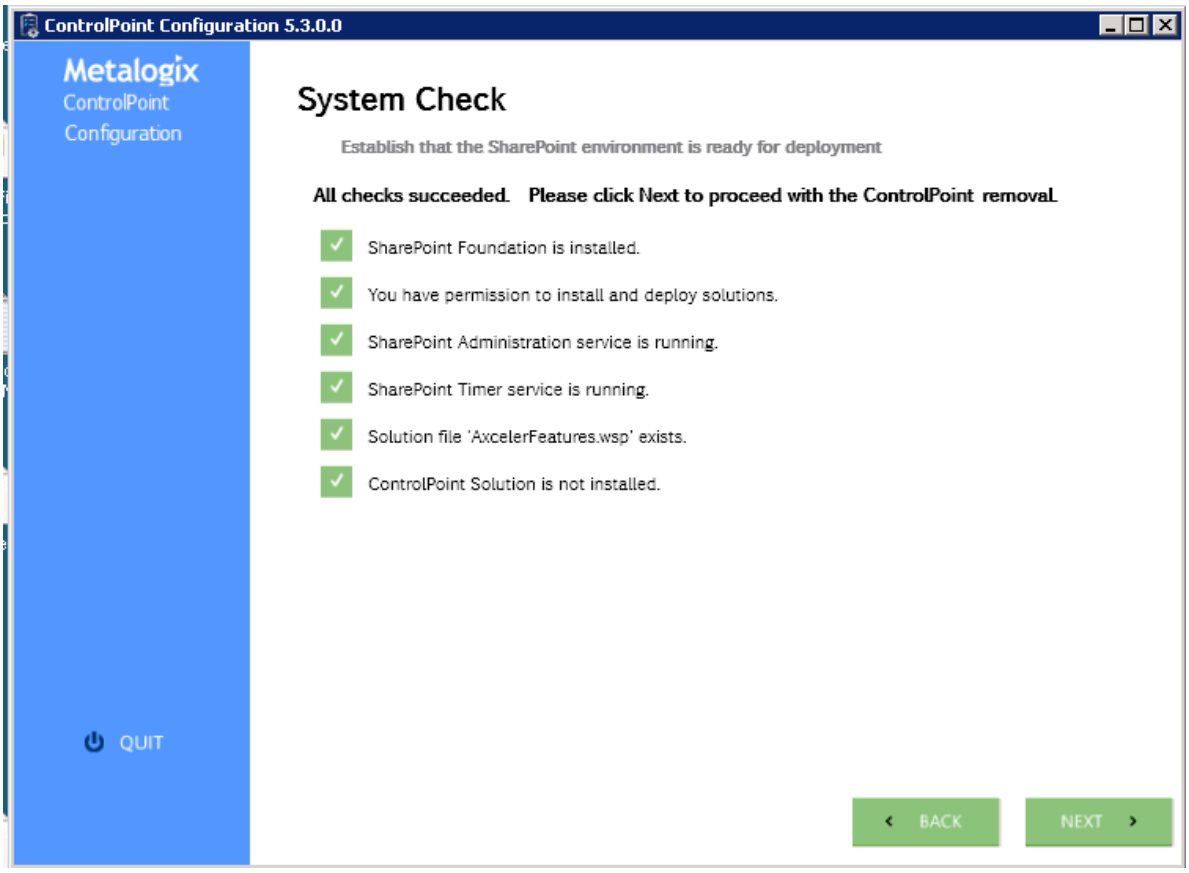
To remove (uninstall) ControlPoint:

1 From the Remove Program dialog click **[Remove]**.

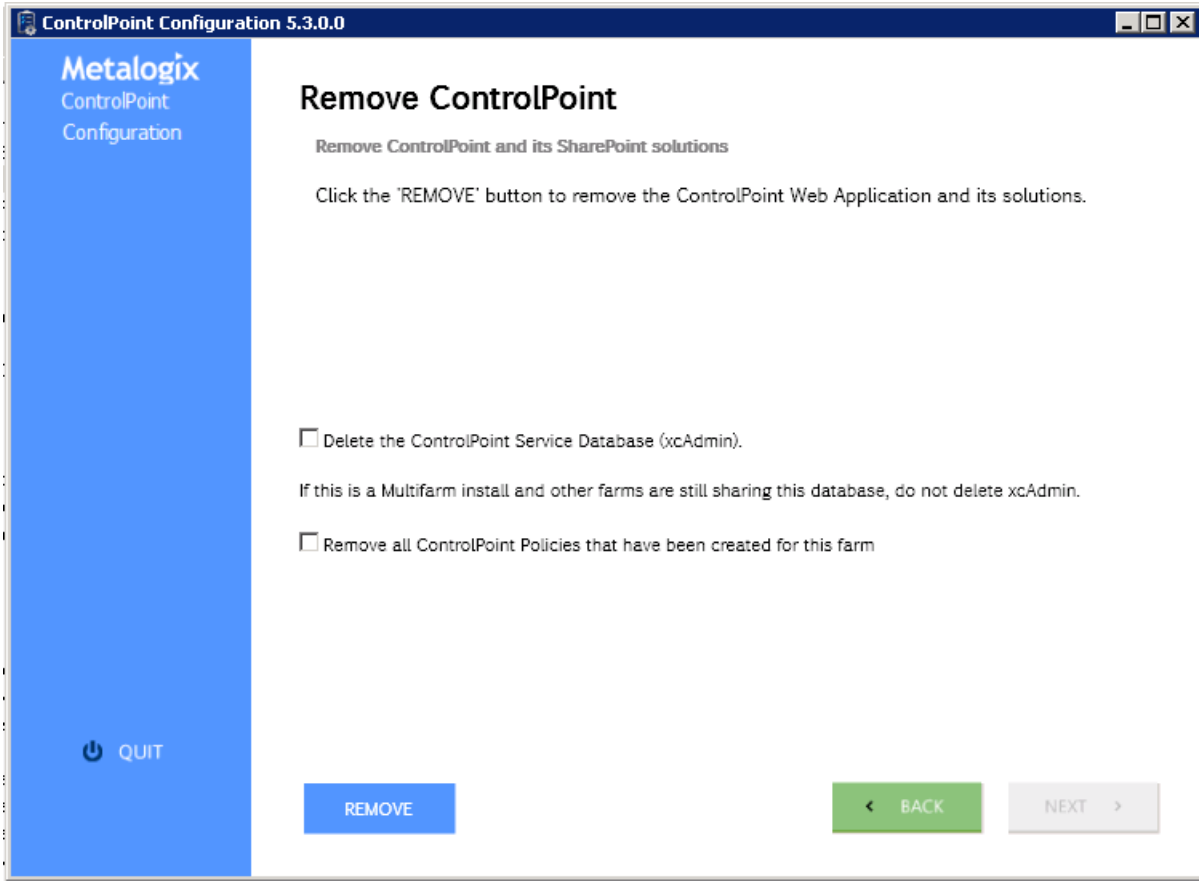


The System Check dialog displays and the Configuration Wizard verifies that the Sharepoint environment is ready for deployment.

NOTE: If your environment fails one or more of the system checks listed, you may have the opportunity to correct the issue before proceeding.



2 When the System Check has been completed successfully, click **[NEXT]** to display the Remove ControlPoint dialog.



3 Use the information in the following table to determine the appropriate option to select for **Delete the ControlPoint Service Database (xcAdmin)**.

If ...	Then ...
▪ you are using ControlPoint in a multi-farm environment and want to continue to use it to manage other farms OR ▪ you plan to reinstall ControlPoint in your environment	leave the **Delete the ControlPoint Service Database (xcAdmin)** box unchecked.
▪ you are permanently removing ControlPoint from a single-farm environment OR ▪ you have a multi-farm installation of ControlPoint and you want to permanently remove the application from all farms	check the **Delete the ControlPoint Service Database (xcAdmin)** box.

4 Use the information in the following table to determine the appropriate option to select for **Remove all ControlPoint Policies that have been created for the farm**.

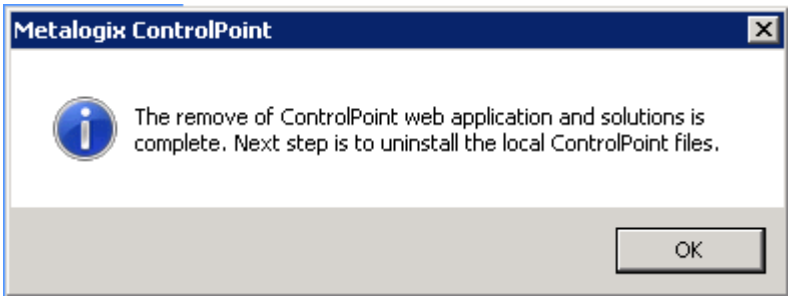
If ...	Then ...
▪ you plan to reinstall ControlPoint in your environment and you want all existing ControlPoint policies to be retained OR ▪ no ControlPoint polices have been created for your farm	leave the **Remove all ControlPoint Policies that have been created for the farm**. box unchecked
you are permanently removing ControlPoint from the farms	check the **Remove all ControlPoint Policies that have been created for the farm**. box. NOTE: The program xcUtilities will be copied to the system temp directory and will be executed from there. Normally, it will continue to perform its cleanup after other aspects of the uninstall have completed.

5 Click **[REMOVE]**.

6 The Configuration Wizard removes installed components, including the ControlPoint Web application and solution.

7 When the *ControlPoint was successfully removed* message displays, click **[NEXT]**.

A pop-up displays, informing you that the removal of the ControlPoint web application is complete and the next step is to uninstall local ControlPoint files.



8 Click **[OK]** to dismiss the pop-up and begin the uninstallation of ControlPoint files.

9 When the *Uninstallation Completed* message displays, click **[Finish]**.

Managing ControlPoint Configuration and Permissions

Administration of the ControlPoint application includes:

- managing users and permissions for the ControlPoint application.
- configuring the menus that appear in the ControlPoint left navigation pane, and
- managing the list of farms administered via ControlPoint.

Managing ControlPoint Users and Permissions

Process Overview

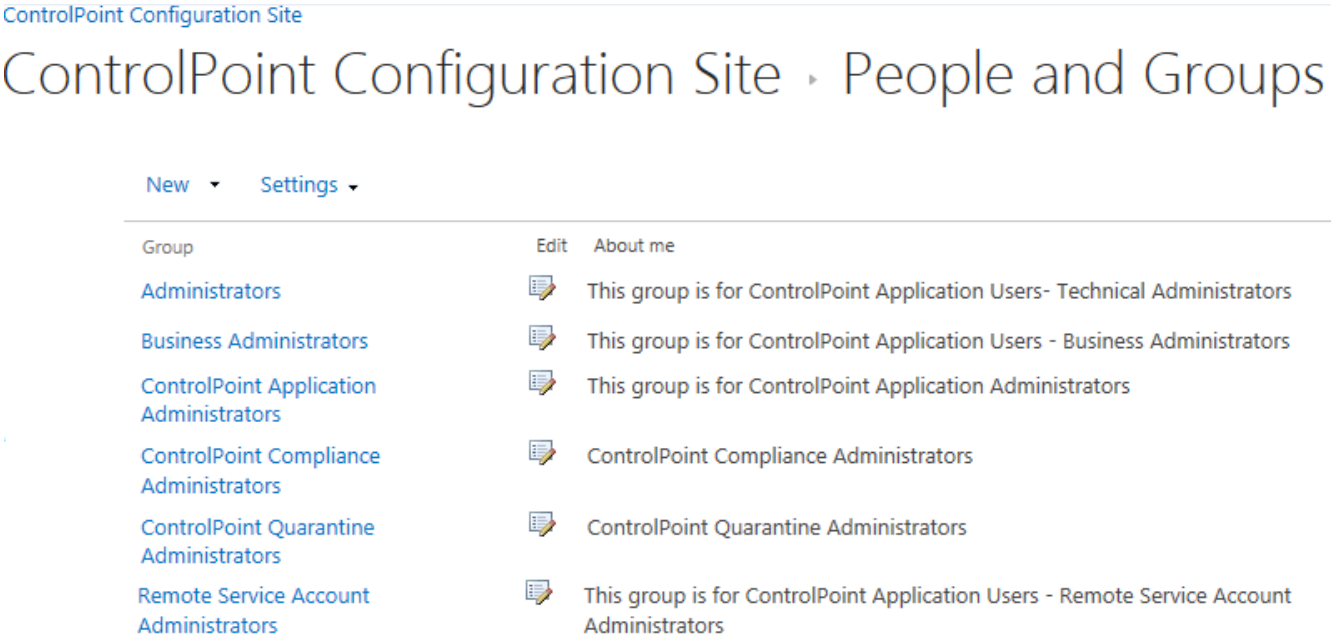
The following table describes the process ControlPoint Application Administrators use to manage users and permissions for the ControlPoint application.

Stage	Description
1	**Set up ControlPoint users and groups.** See Setting Up ControlPoint Users and Groups.
2	**Configure ControlPoint menus** for different users and groups. See Configuring ControlPoint Menus.
3	**Manage access** to ControlPoint menus. See Managing Access to ControlPoint Menus.

Setting Up ControlPoint Users and Groups

As part of the initial ControlPoint installation, four default user groups are created.

After the initial configuration, the site collection administrator—or any user who has been given direct rights to manage groups—can manage ControlPoint users and groups via the ControlPoint Configuration site. You can, for example, create additional groups with different sets of permissions, including access to different sets of ControlPoint menu items.



In addition to managing permissions to the ControlPoint application itself, this site is also used to manage access to individual ControlPoint menus.

Auto-Adding Users to ControlPoint Groups

The **Auto Add Users to ControlPoint Groups** action allows ControlPoint Application Administrators to configure ControlPoint to automatically add SharePoint users to a group within the ControlPoint Configuration site if the users:

- are Site Collection Administrators, and/or
- are members of a site's Owners group, and/or
- have a specified permissions level.

When a ControlPoint group reaches its maximum number of users (which is 1000 by default, although ControlPoint Application Administrators can change this limit), ControlPoint automatically creates a new group with the same permissions as the "base" group.

EXAMPLE:

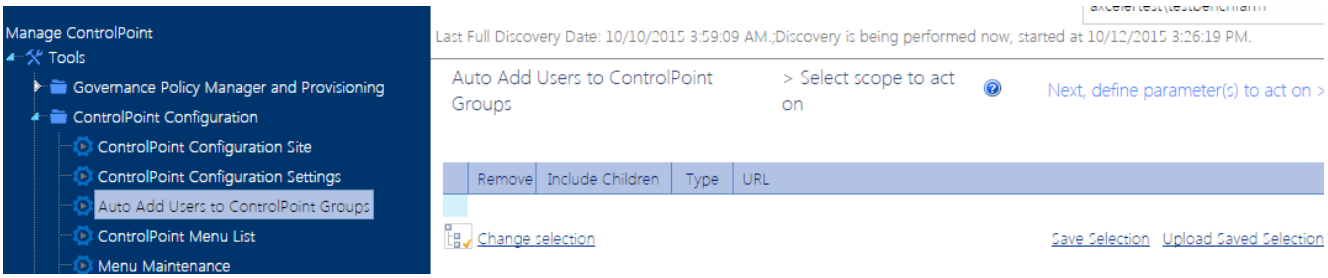
If you want all users who are members of site Owners groups to be added to the ControlPoint Business Administrators group, and more than 1000 users meet that criterion:

- when Business Administrators group membership reaches 1000, a new group named Business Administrators_1 will be created and the next 1000 users will be added to that group.
- when Business Administrators_1 group membership reaches 1000, a group named Business Administrators_2 will be created, and so on.

NOTE: Within a SharePoint 2010 or 2013 farm you can add a *Claims-authenticated user* to a ControlPoint group; however, you cannot add an actual C*laim*.

To configure ControlPoint to automatically add SharePoint users to ControlPoint groups:

1 From the Manage panel, choose ControlPoint Configuration > Auto Add Users to ControlPoint Groups.



2 In the Selection panel, click Change Selection and select the objects you want to include in the scope of the action.

NOTE: The initial default scope is always blank.

3 For **Add users to the chosen group based on:**, select the criteria that you want membership in the ControlPoint group to be based on. Use the information in the following table for guidance.

If you want membership in a ControlPoint group to be based on ...	Then ...
membership in a Site Collection Administrator's group	check **Members of Site Collection Administrators**.
membership in a site's owner's group	check **Members of Owners Group**. NOTE ControlPoint considers owners groups to be those that have been designated "Owners of this Site" in SharePoint; not necessarily only those that have "Owners" in the group name.

If you want membership in a ControlPoint group to be based on ...	Then ...
a user's permission level (both direct and via SharePoint groups)	▪ check **Members with the following permission level**, and ▪ select a permission level from the drop-down. Note that the drop-down lists all permissions levels that are valid for the selected scope.

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.

Making ControlPoint Accessible from within SharePoint

ControlPoint installs three site-level features that enable ControlPoint users to access the ControlPoint application from within a SharePoint site:

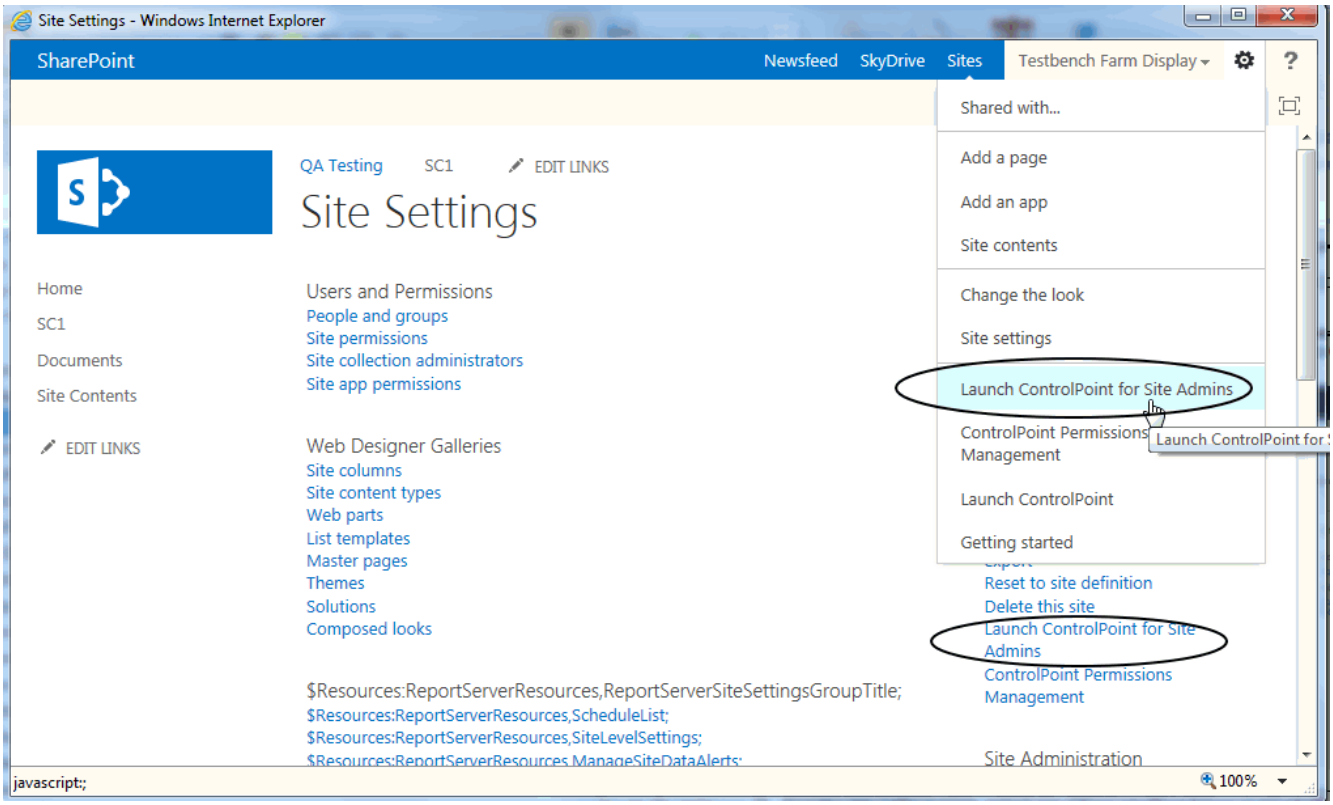
- ControlPoint for Site Admins
- ControlPoint Menus for Site Settings, and
- ControlPoint Permissions Management for Site Admins.

NOTE: Normally, these ControlPoint features will only be visible to users who have Full Control permissions (or any permission level that includes the fine-grained permission ManageWeb) for the site on which they have been activated.

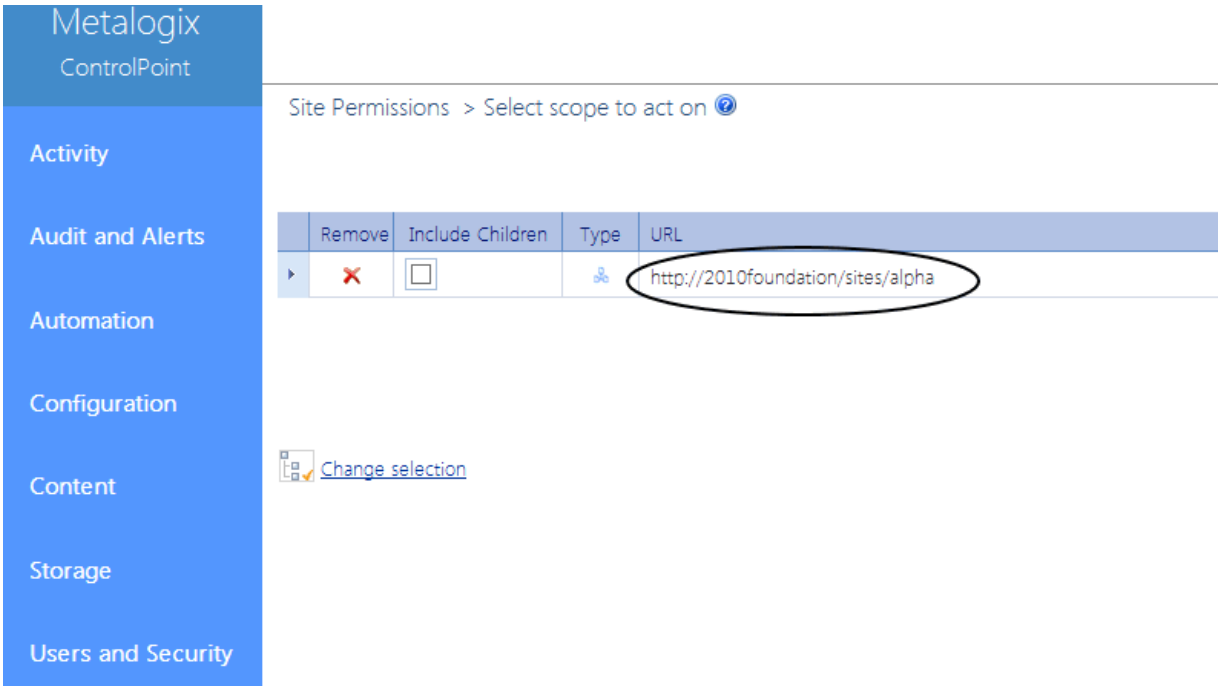
These are *hidden* features which can be activated using the ControlPoint Manage Site Features action.

ControlPoint for Site Admins

When the **ControlPoint for Site Admins** feature is activated, SharePoint users who are also ControlPoint users can choose Launch ControlPoint for Site Admins from the SharePoint Site Actions menu or Site Settings Page.



ControlPoint is launched in a separate browser window, with a simplified left navigation pane and the site from which ControlPoint was launched used as the default scope. (Users can, however, modify the scope to include other sites for which they have management privileges using the procedure for Changing Your Selection.)



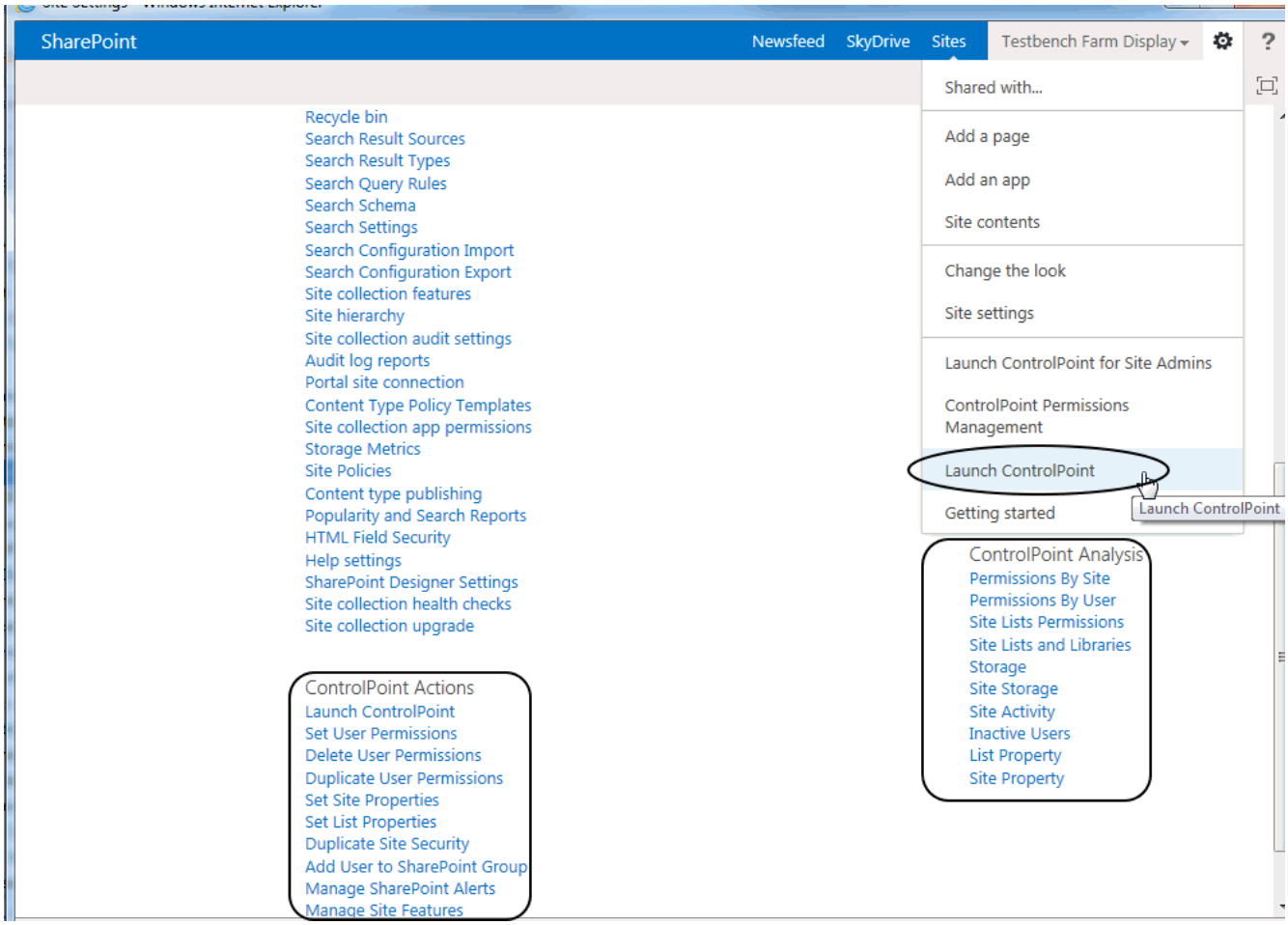
ControlPoint Application Administrators can customize the menu options that display in the left navigation pane using the procedure for Customizing ControlPoint Menus.

ControlPoint Menus for Site Settings

When the **ControlPoint Menus for Site Settings** feature is activated, the SharePoint Site Settings page includes links to individual ControlPoint actions and analyses. Users can:

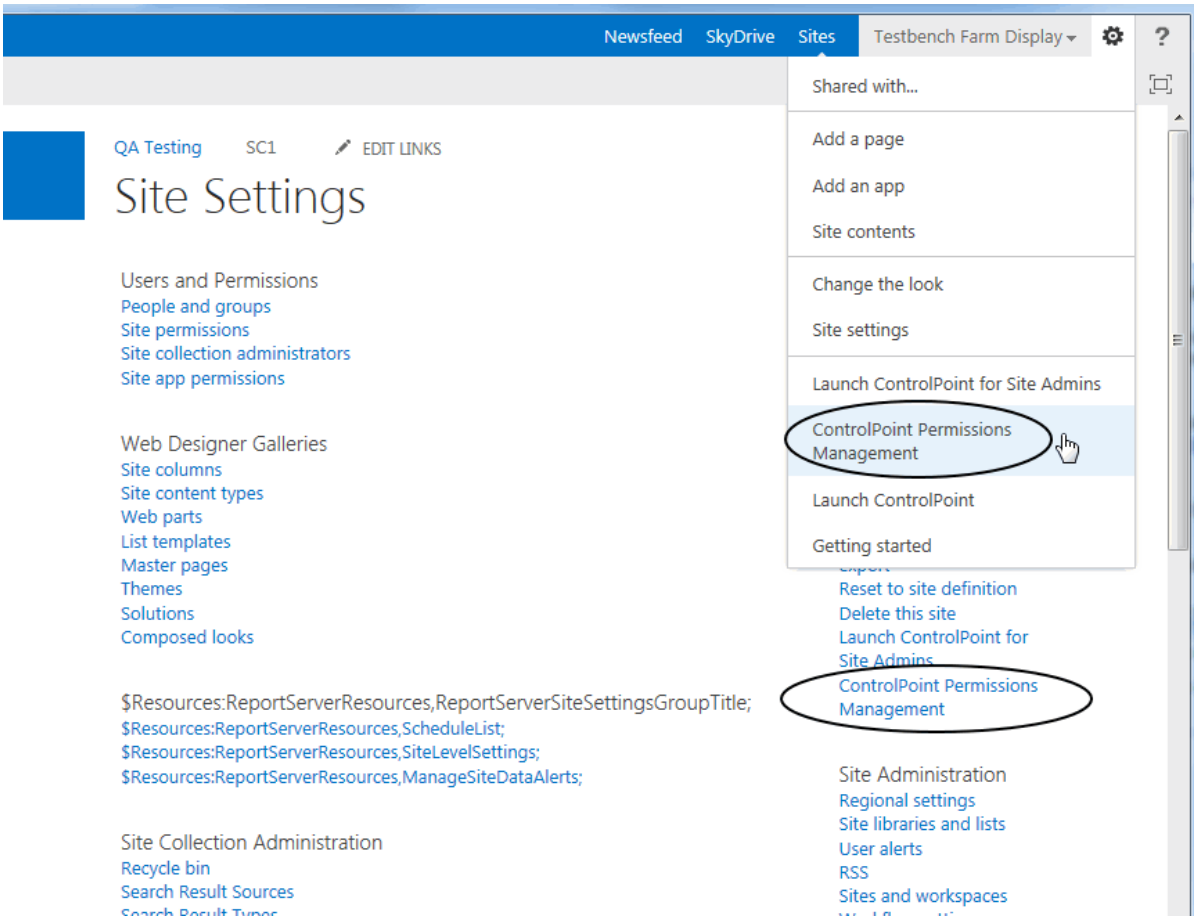
- select one of the **ControlPoint Actions** or a **ControlPoint Analysis** to open ControlPoint in a separate browser window with the same simplified user interface employed by the ControlPoint for Site Admins feature.

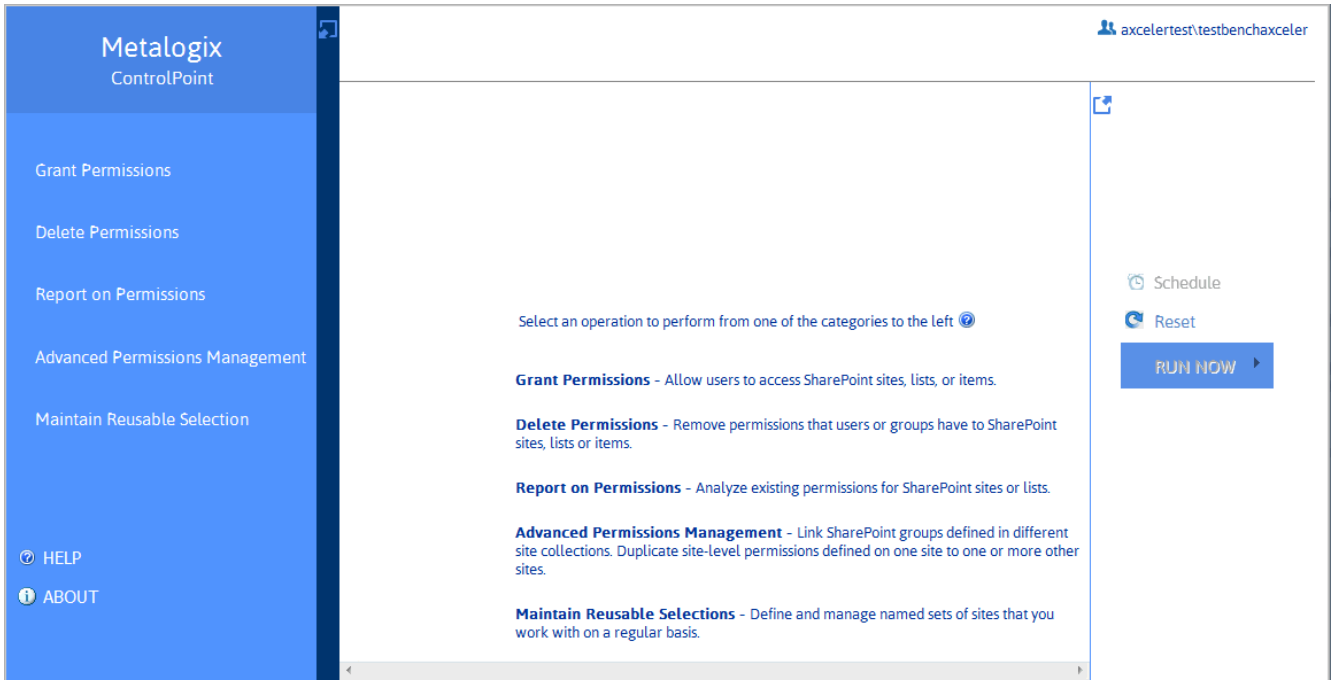
- access the standard ControlPoint interface by choosing Launch ControlPoint from the SharePoint Site Actions menu or Site Settings page.



ControlPoint Permissions Management for Site Admins

When **ControlPoint Permissions Management for Site Admins** is activated, the SharePoint Site Settings page includes links to the a stand-alone, tabbed interface that enables users to perform a variety of ControlPoint permissions actions and analyses outside of the traditional ControlPoint application interface.





Refer to the *ControlPoint Permissions Management for Site Admins User's Guide* for complete details about this feature.

Activating ControlPoint Site Administration Features

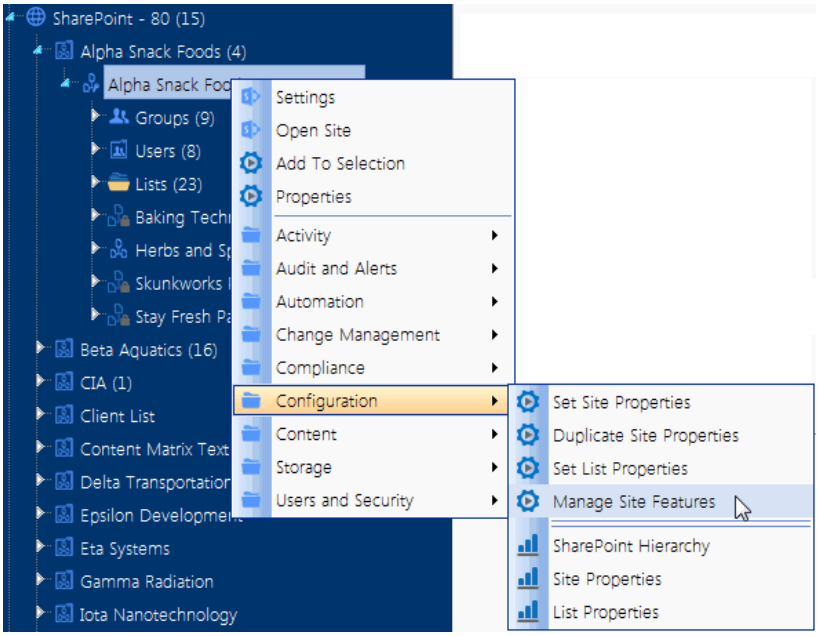
ControlPoint Menus for Site Settings, ControlPoint for Site Admins, and/or Permissions Management for Site Admins features can be activated for some or all sites in the farm via the ControlPoint Manage Site Features action.

NOTE: Because both are hidden features, they cannot be activated via the SharePoint user interface.

To activate Site Administration Features:

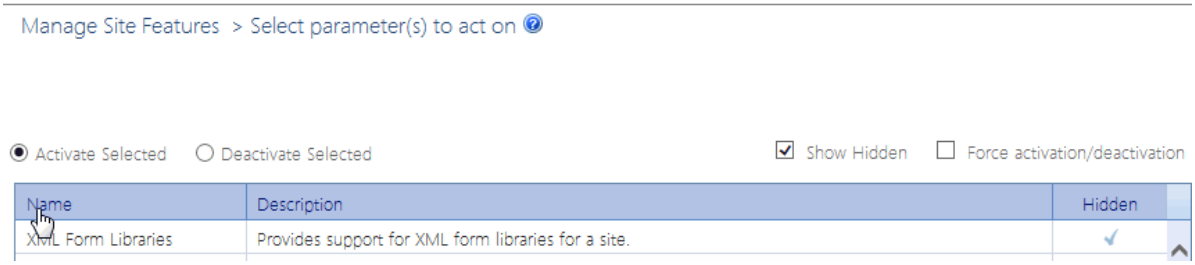
1 From the SharePoint Hierarchy, select the objects(s) for which you want to activate site administration features.

2 Choose Configuration > Manage Site Features.



3 Select **Activate Selected** and click the **Show Hidden** box.

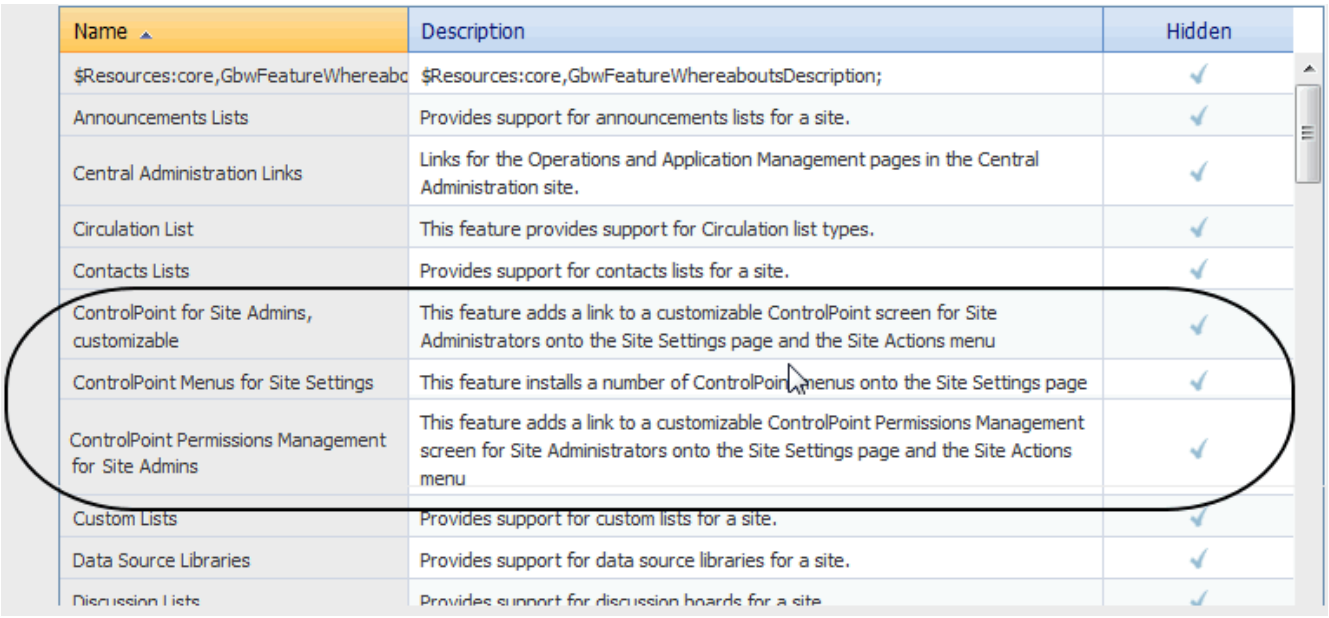
4 Click the **Name** header to sort the list of features alphabetically.



5 Select the feature(s) you want to activate:

- ControlPoint for Site Admins, customizable, and/or
- ControlPoint Menus for Site Settings, and/or

- ControlPoint Permissions Management for Site Admins



Name	Description	Hidden
$Resources:core,GbwFeatureWhereabc	$Resources:core,GbwFeatureWhereaboutsDescription;	✓
Announcements Lists	Provides support for announcements lists for a site.	✓
Central Administration Links	Links for the Operations and Application Management pages in the Central Administration site.	✓
Circulation List	This feature provides support for Circulation list types.	✓
Contacts Lists	Provides support for contacts lists for a site.	✓
ControlPoint for Site Admins, customizable	This feature adds a link to a customizable ControlPoint screen for Site Administrators onto the Site Settings page and the Site Actions menu	✓
ControlPoint Menus for Site Settings	This feature installs a number of ControlPoint menus onto the Site Settings page	✓
ControlPoint Permissions Management for Site Admins	This feature adds a link to a customizable ControlPoint Permissions Management screen for Site Administrators onto the Site Settings page and the Site Actions menu	✓
Custom Lists	Provides support for custom lists for a site.	✓
Data Source Libraries	Provides support for data source libraries for a site.	✓
Discussion Lists	Provides support for discussion boards for a site	✓

6 Click **[Run Now]**.

Configuring ControlPoint Menus

ControlPoint menus are stored as xml documents in the ControlPoint Menus document library. Included with each ControlPoint installation is a set of "original" menus provided by Metalogix. By default, the original menus are accessible by anyone with at least read access to the site (by default, all members of the ControlPoint Application Administrators and Administrators groups).

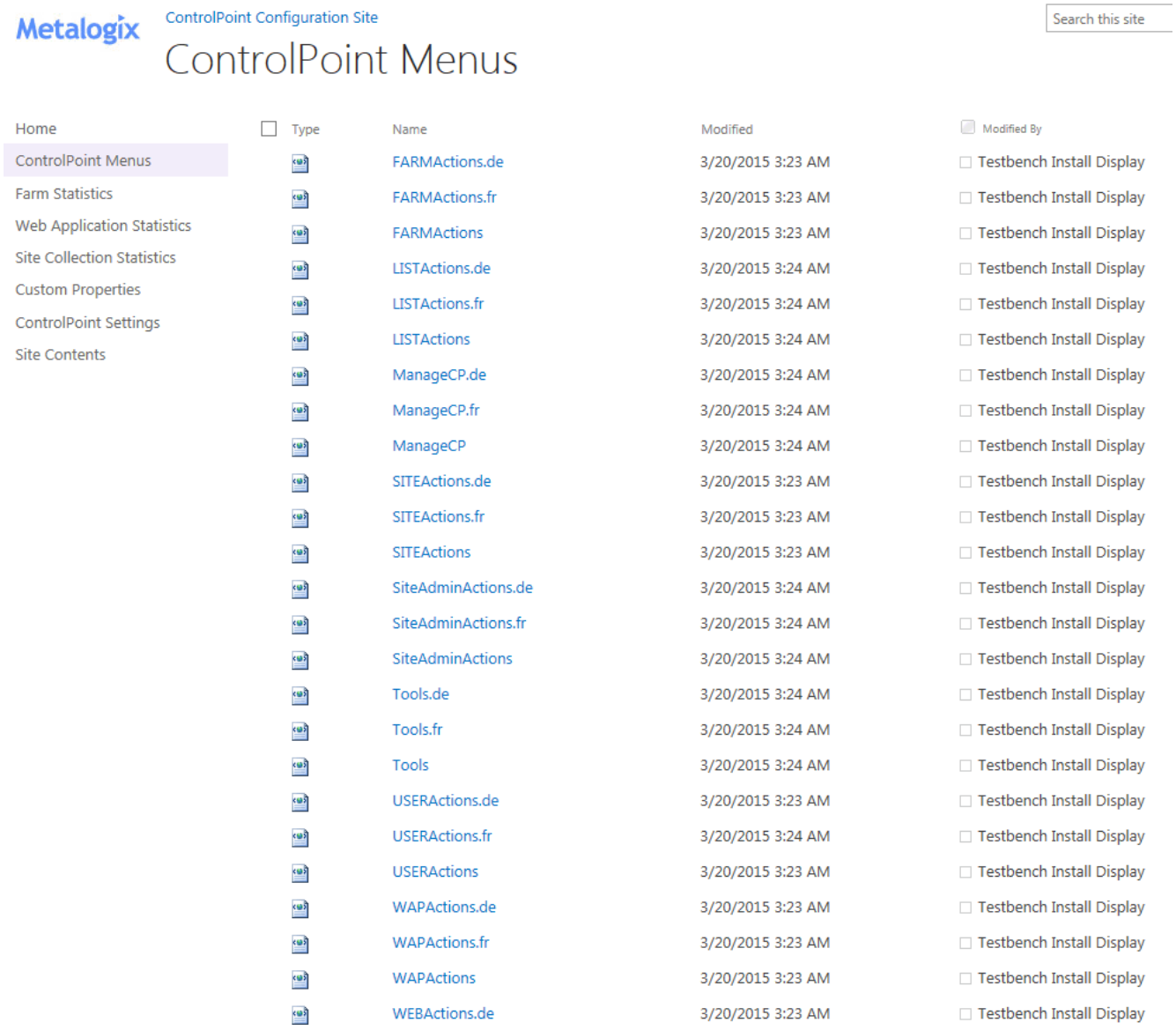
Because ControlPoint Menus is a SharePoint document library, permissions are inherited from the ControlPoint Configuration site collection, but you can break inheritance and edit the permissions for each menu file individually. You can also create customized menus for different users and groups.

To display the ControlPoint menu list:

1 Navigate to the ControlPoint Menus document library using one of the following options:

- From the ControlPoint Configuration Site home page, choose Documents, then ControlPoint Menus.
- From the Manage ControlPoint panel, choose ControlPoint Configuration > ControlPoint Menu List.
- From the ControlPoint Menu Maintenance page, click the **Go to ControlPoint Menu List** link.

Note that there are three versions of each menu, localized for English, French (.fr) and German (.de).

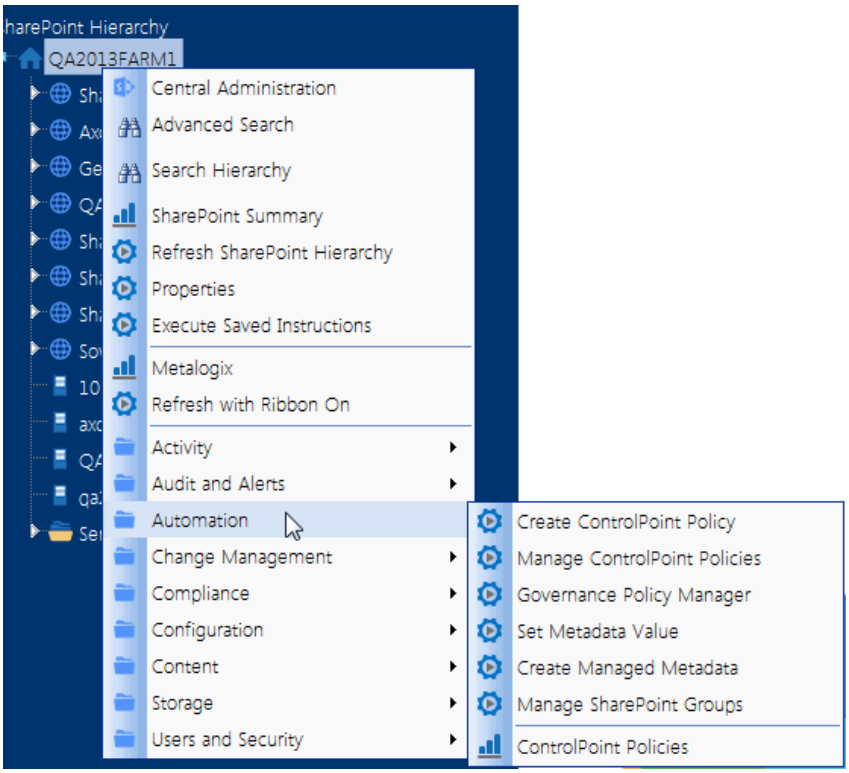


NOTE: Original menus are *not* designed to be modified and any changes to original menus will be overwritten whenever a ControlPoint repair or update installation is performed. If you want to add items to a menu, you can do so by first creating a custom version of the menu. If you want to remove items, it is best to selectively restrict permissions to the original menu files and create custom menu files that include the appropriate items. See Guidelines for Creating Customized Menus for Different Groups of Users.

Original menus contain all of the available items at various levels of the left navigation pane, as illustrated below.

FARMActions

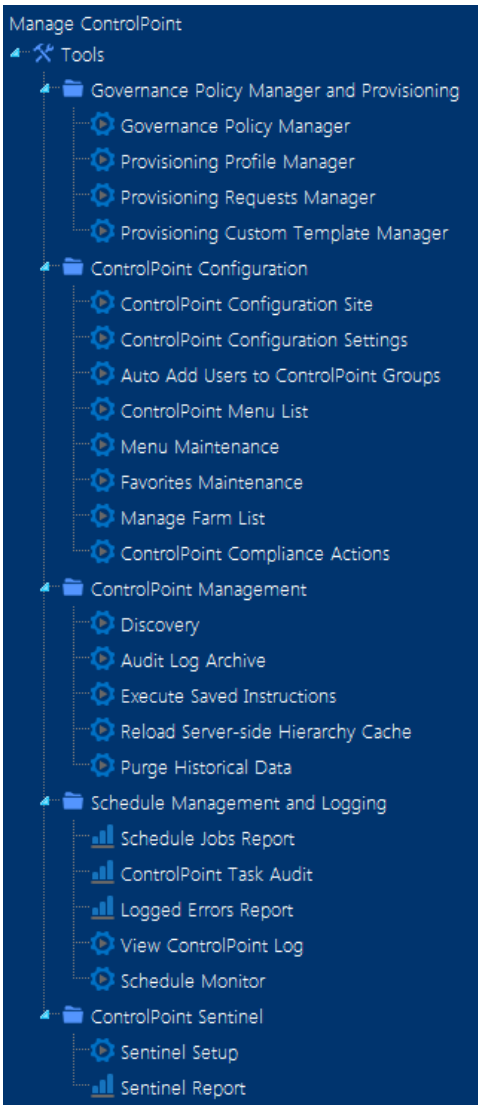
This menu contains all of the available items at the farm level



See also Farm-Level Default Menu Items in the *ControlPoint User's Guide*.

LISTActions

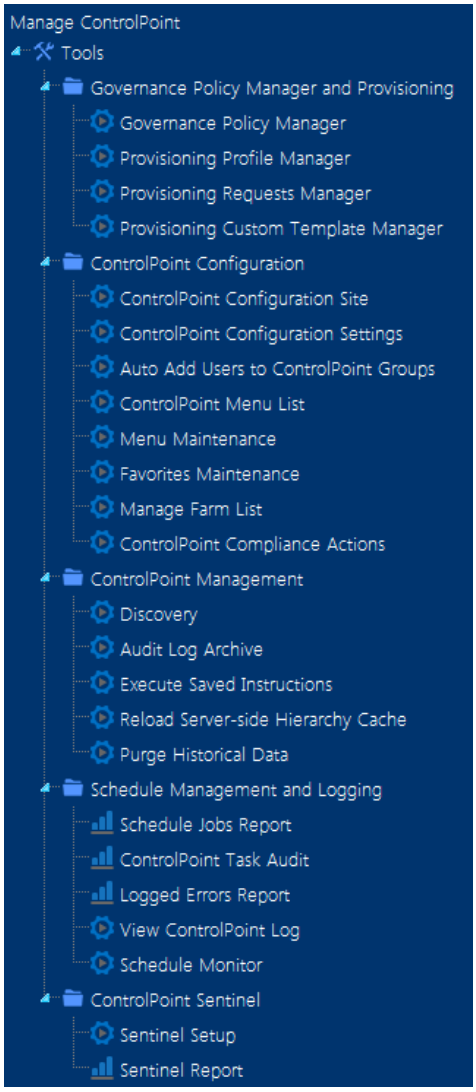
This menu contains all of the available items at the list level.



See also List-Level Default Menu Items in the *ControlPoint User's Guide*.

ManageCP

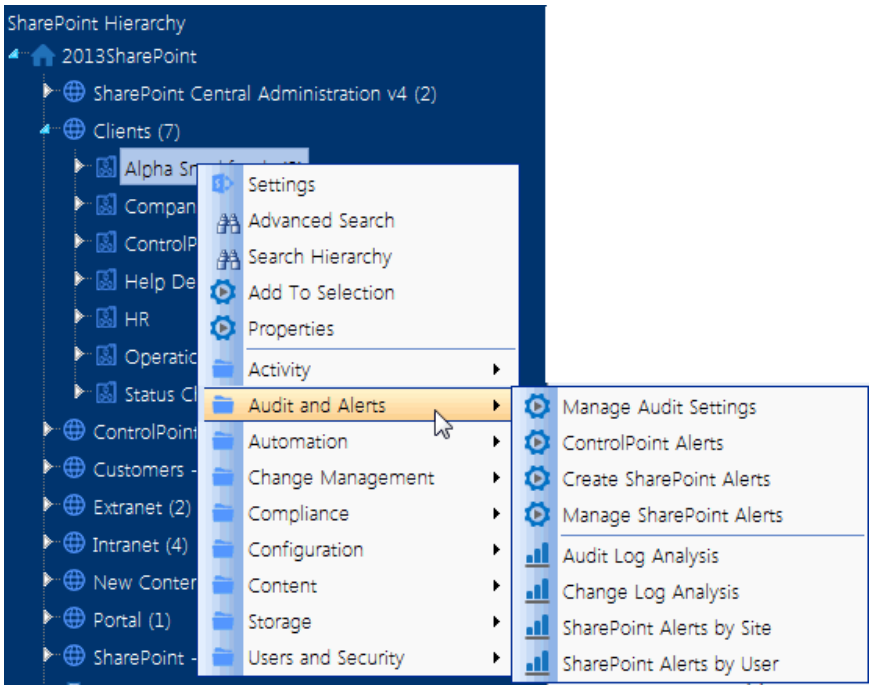
This menu contains all of the available items for managing the ControlPoint application as well as other hierarchy-independent functionality.



See also Manage ControlPoint Default Menu Items in the *ControlPoint User's Guide*.

SITEActions

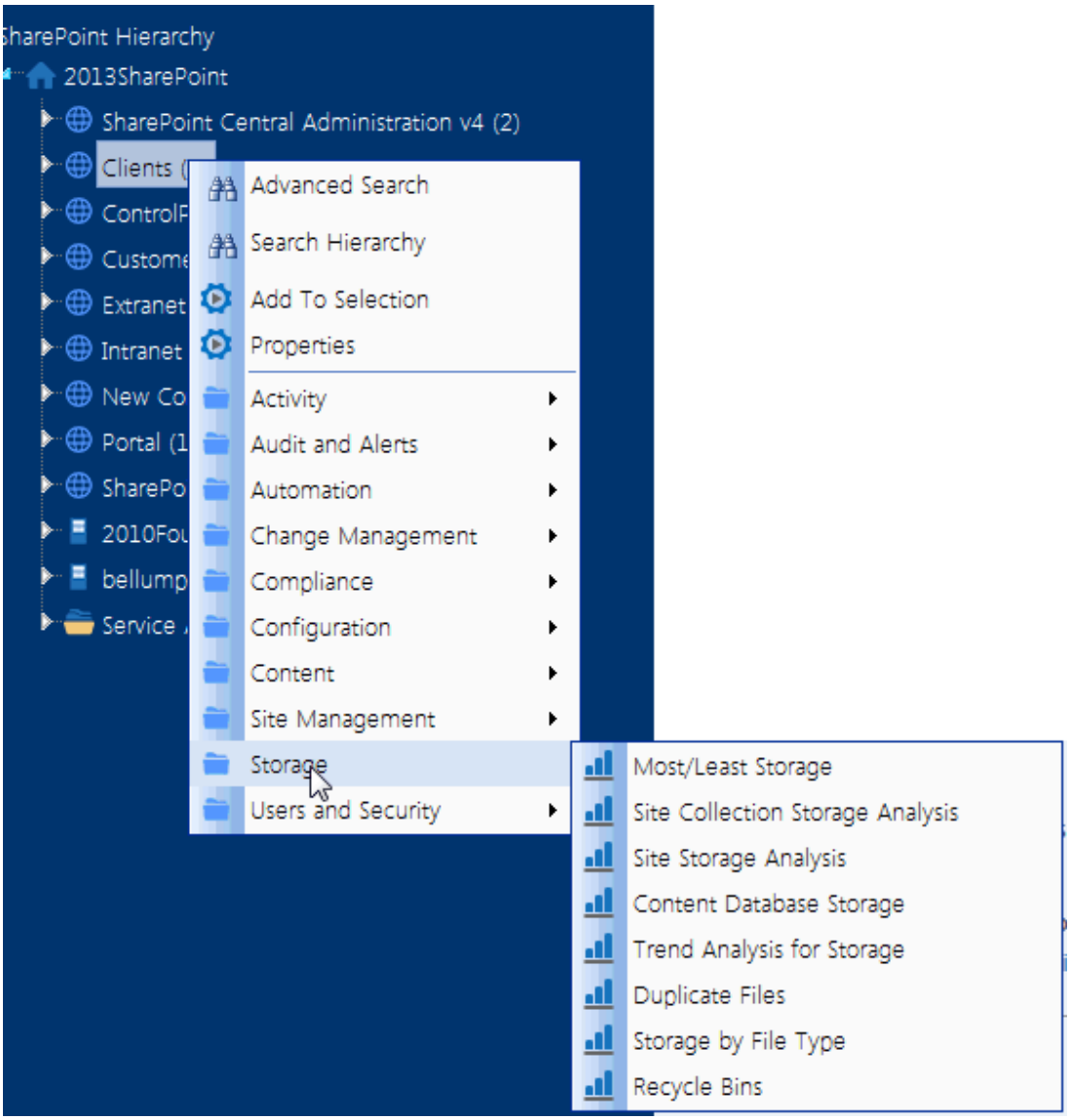
This menu contains all of the available items at the site collection level.



See also Site Collection-Level Default Menu Items in the *ControlPoint User Guide*.

WAPActions

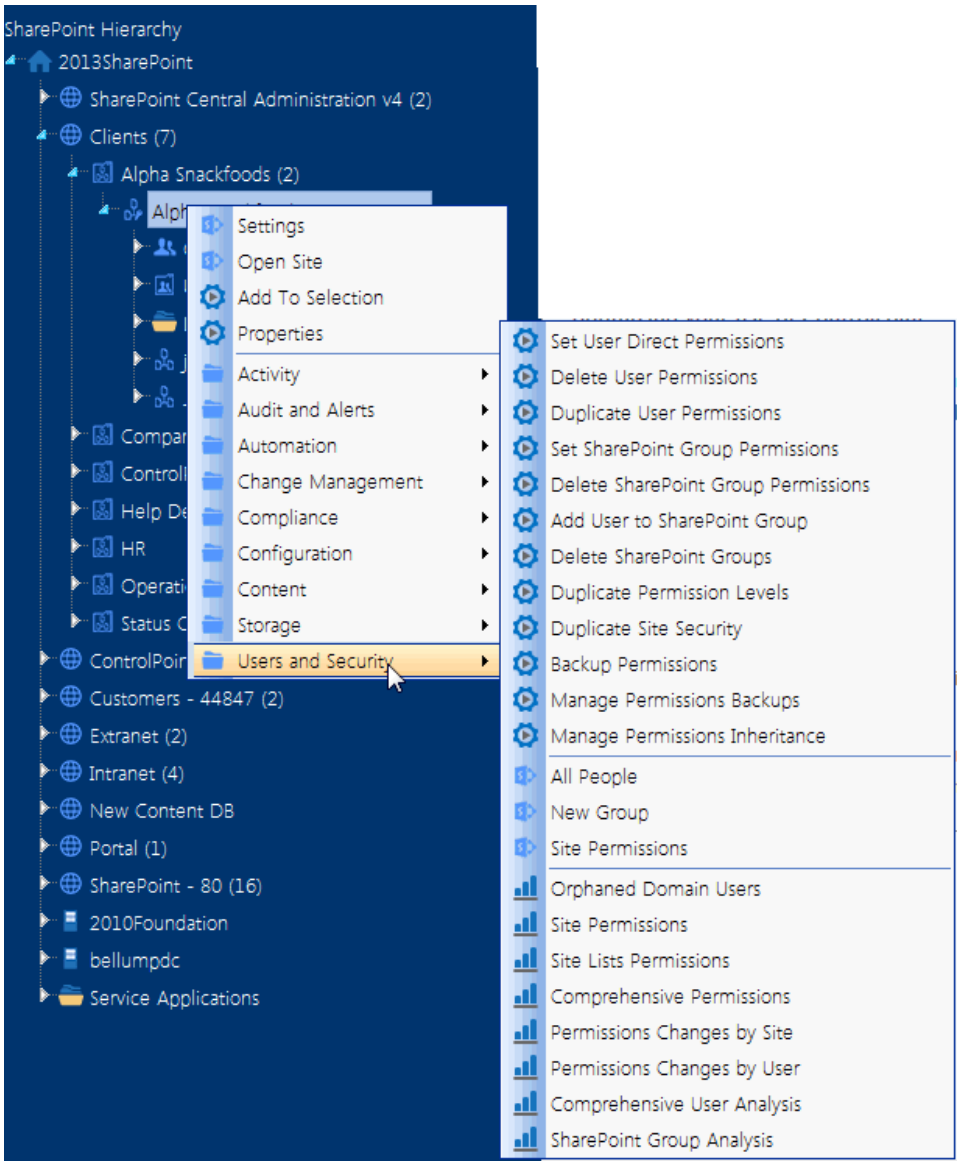
This menu contains all of the available items at the Web application level.



See also Web Application-Level Default Menu Items in the *ControlPoint User's Guide*.

WEBActions

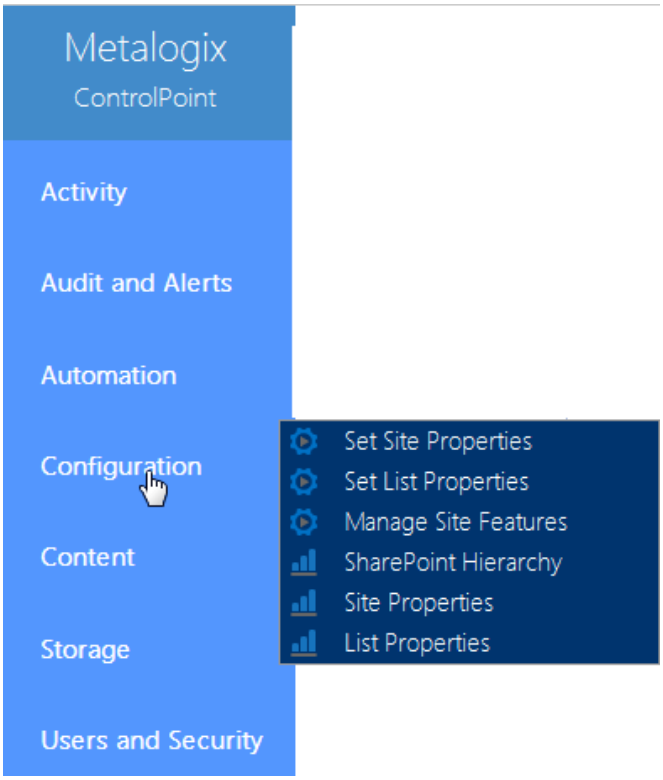
This menu contains all of the available items at the site level.



See also Site-Level Default Menu Items in the *ControlPoint User's Guide*.

SiteAdminActions

This menu contains all of the items that display in the Actions and Analysis panel of the left navigation pane when a ControlPoint operation is initiated—or ControlPoint For Site Admins is launched—from within a SharePoint site.

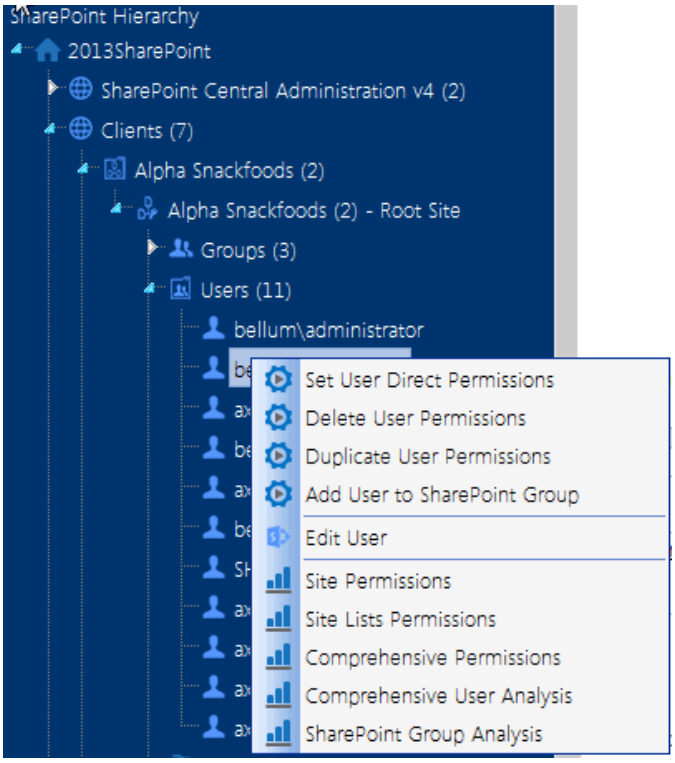


NOTE: For ControlPoint to be accessible from within a SharePoint site, ControlPoint Menus for Site Settings and/or ControlPoint for Site Admins must be activated, using the procedure(s) for Making ControlPoint Accessible from within SharePoint.

See also Site Admin Default Menu Items in the *ControlPoint User's Guide*.

UserACTIONS

This menu contains all of the right-click items at the user level.



See also User-Level Default Menu Items in the *ControlPoint User's Guide*.

Customizing ControlPoint Menus

From the ControlPoint Menu Maintenance page, ControlPoint Application Administrators can create custom menus to meet specific needs of different administrative groups.

NOTE: ControlPoint's base menu *structure* (SharePoint Hierarchy, Manage ControlPoint, Favorites, and Search Hierarchy panels) cannot be modified.

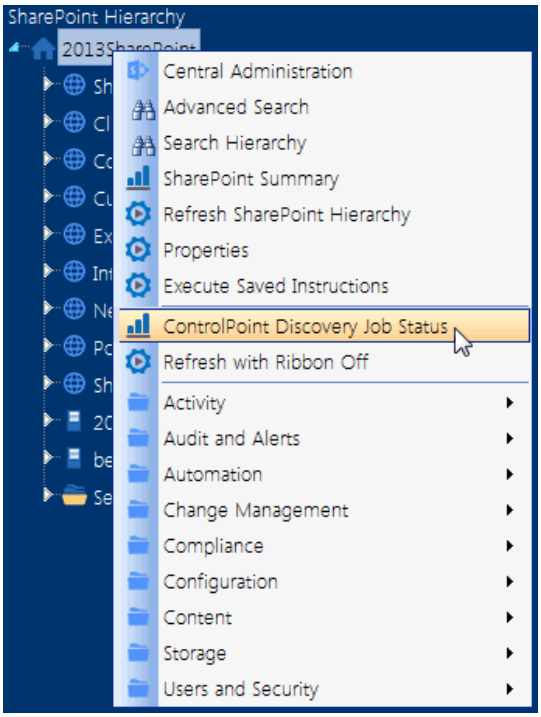
Guidelines for Creating Customized Menus for Different Groups of Users

If there are groups of ControlPoint users that should have similar rights to SharePoint and ControlPoint functions, the ControlPoint Application Administrator should first define groups for these users from within the ControlPoint Configuration site. See Setting Up ControlPoint Users and Groups.

When setting up users and groups and granting access to the ControlPoint application, ControlPoint Application Administrators should consider the roles of various groups of users in the organization to determine the features to which they should have access.

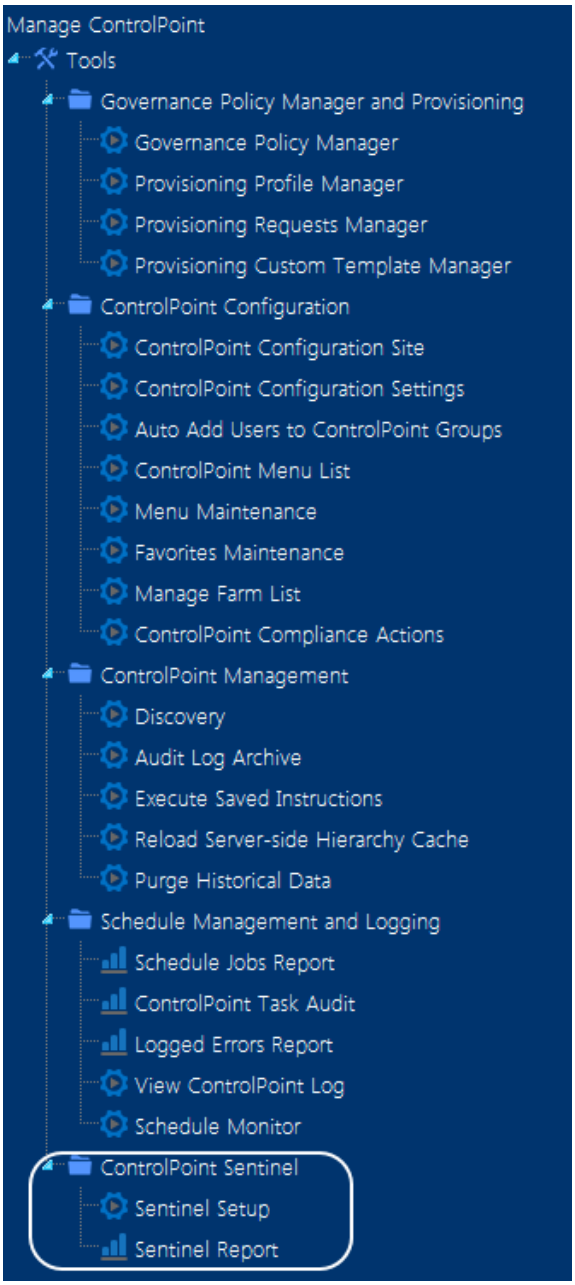
Example 1: Adding Frequently-Used Items to a ControlPoint Menu

If there is a SharePoint function that is used often by administrators in your organization, you can add that item to a custom menu. For example, if you frequently need to check a timer job status, you can add an item to a farm-level custom menu which links directly to the appropriate Central Administration page.

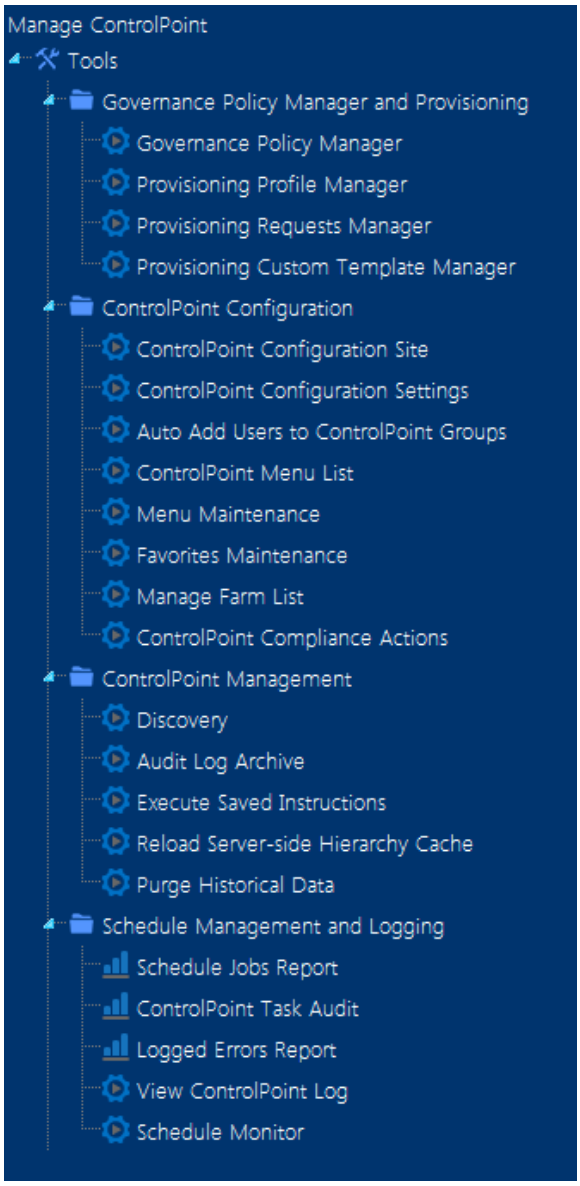


Example 2: Restricting Access to Advanced Functionality

The items for managing Sensitive Content and Anomalous Activity Detection are on the original" Manage ControlPoint menu provided by Metalogix (that is, ManageCP.xml). In the left navigation pane, these items display in the Manage ControlPoint panel.



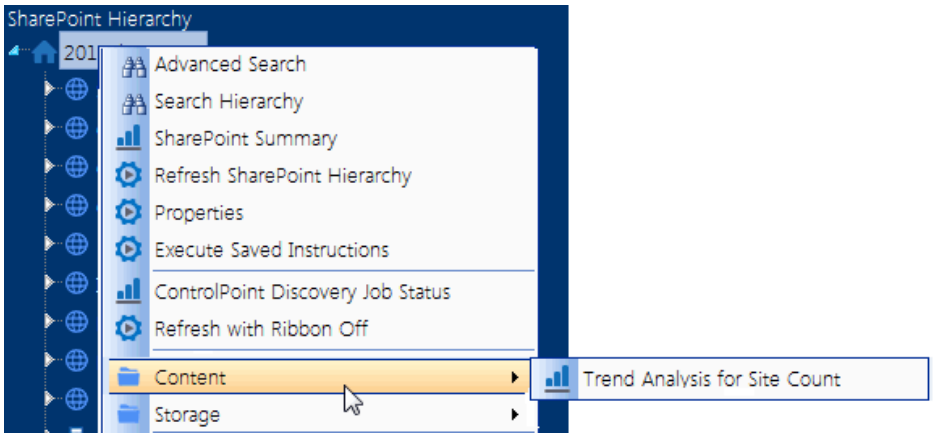
If you do not want the majority of administrators to have access to ControlPoint Sentinel functionality for aomalous activity detection,, you may want to create a customized Manage ControlPoint menu from which these privileges have been removed, and then restrict their access to the original ControlPoint-ManageCP menu.



You could then use this menu as the "default" menu on which additional customized menus are based.

Example 3: Groups with Access to a Subset of Features

If there is a group of users in your organization primarily responsible for monitoring storage utilization, you may want to create a group for these users. You can then create a customized ControlPoint menu that contains only items they need (in this example, SharePoint Summary Report, Storage Analysis tools, and Trend Analysis), while eliminating items that they might not need (such as Activity Analysis tools and additional Content Analysis tools) and/or should not have access to (such as tools for managing Configuration and Users and Security), by restricting their access to the original ControlPoint menu files.



You can also customize menus in this manner for the Business Administrators group if you want to "override" the security trimming imposed by ControlPoint original menus. (That is, you can create menus that give Business Users either more or less functionality than is provided by default.)

Additional Factors to Consider

By default, all custom menus inherit users and permissions from the ControlPoint Menus document library, which in turn inherits from the ControlPoint Configuration site collection. However, you can break this inheritance and assign unique permissions to individual menu files (that is, to restrict access to the original menus).

Additionally, if a user has permissions for more than one menu with the same target location (for example SharePoint Hierarchy- farm level), the menus are "merged" for display in the left navigation pane, with items unique to each menu preserved and duplicate items eliminated.

You should keep these factors in mind when planning and deploying customized menu. Use the information in the following table for guidance with some common scenarios.

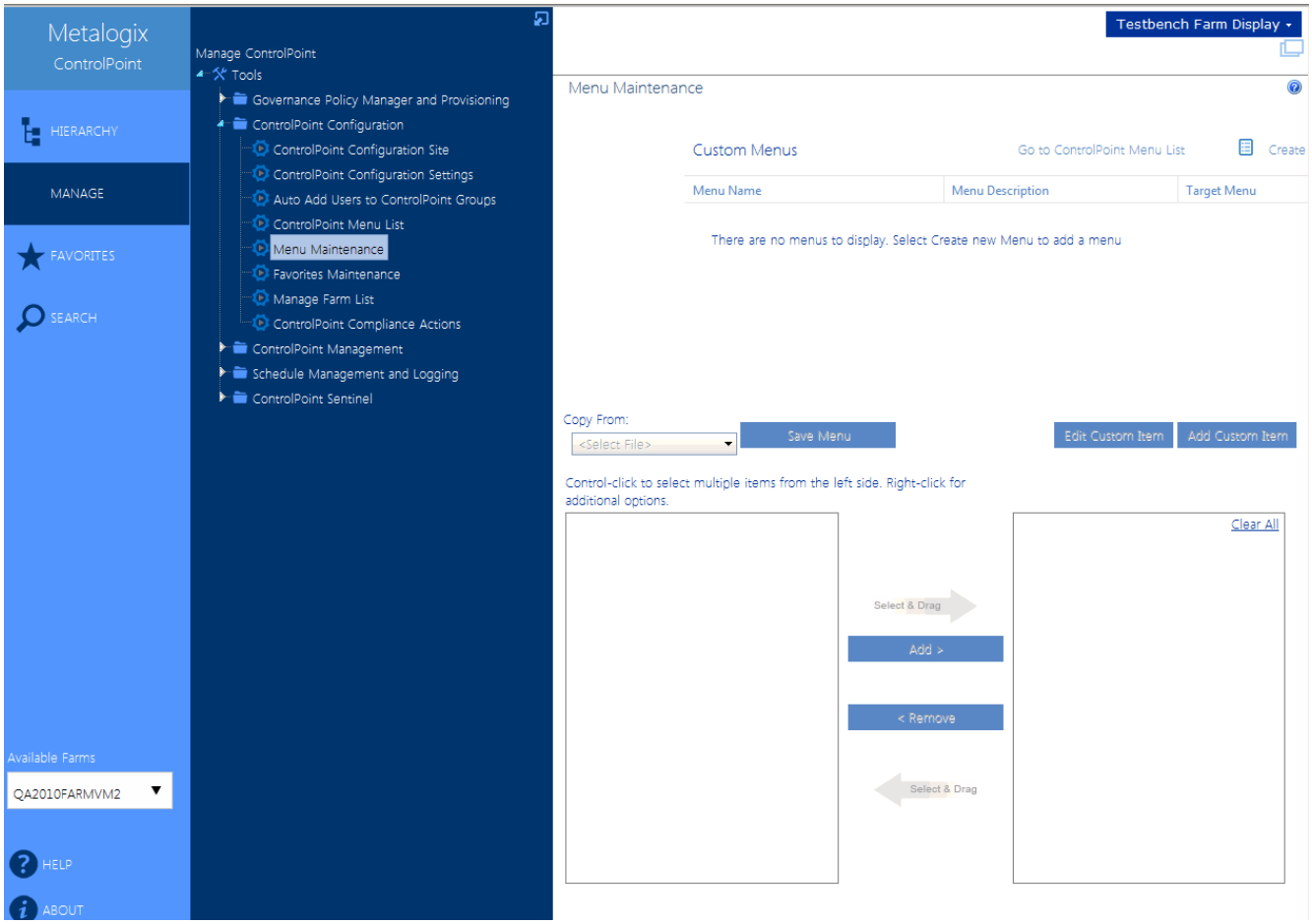
If you want to ...	Then ...
include one or more additional items to which all users should have access	• Create a custom menu file at the appropriate level. • Add the item(s). • Ensure that all users have read access to the menu file.

If you want to ...	Then ...
restrict access by any group to either a ControlPoint original menu or a custom menu	• Break the inheritance of the appropriate menu file(s) from the permissions of the ControlPoint site collection. • Remove the group's permissions to the file(s).
create a custom menu to which only some users should have access	• Create a custom menu file. • Set unique permissions for that file so that only certain users/groups have read access.

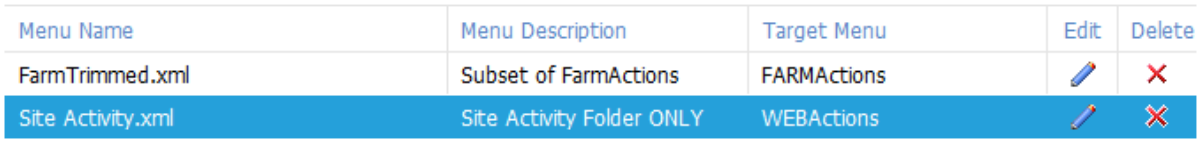
Accessing the ControlPoint Menu Maintenance Page

To access the Menu Maintenance page:

From the Manage ControlPoint tree, choose ControlPoint Configuration > Menu Maintenance.



Note that, if custom menus have already been created, they will display in the **Saved Menus** grid.



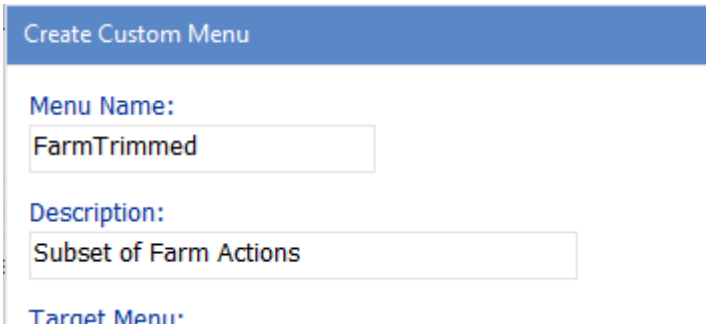
Creating a Custom Menu

To create a custom menu:

1 At the top of the Menu Maintenance page, click **Create Custom Menu**.

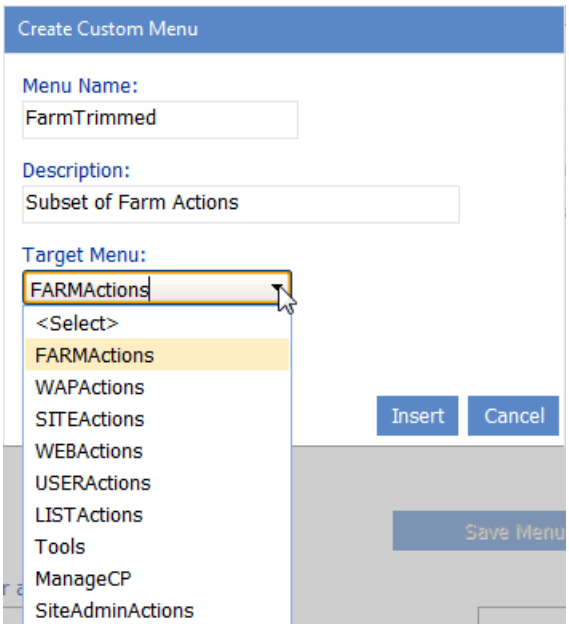


2 Complete the **Menu Details** with a **Menu Name** and **Description**.



Note that the Menu Name cannot contain spaces or special characters.

3 Select a **Target Menu** (that is the area of the ControlPoint left navigation pane that you want to customize). Use the information in the following table for guidance.



NOTE: The choice of target menu will determine which ControlPoint operations are available for selection and where they will display in the ControlPoint application interface.

If you want to customize the	Select ....
farm level right-click menu	**FARMActions**.
Web application level right-click menu	**WAPActions**.
site collection level right-click menu	**SITEActions**.
site or subsite level right-click menu	**WEBActions**.
list level right-click menu	**ListActions**.
Actions and Analysis menu items (if used as an alternative to the Manage ControlPoint panel)	**Tools**.
site admin menu (primarily for use by business administrators who are accessing ControlPoint from within a SharePoint site)	**SiteAdminActions**.
user-level right-click menu	**USERActions**.
Manage ControlPoint menu items	**ManageCP**.

IMPORTANT: Once you have saved a new menu, the Target Menu cannot be changed.

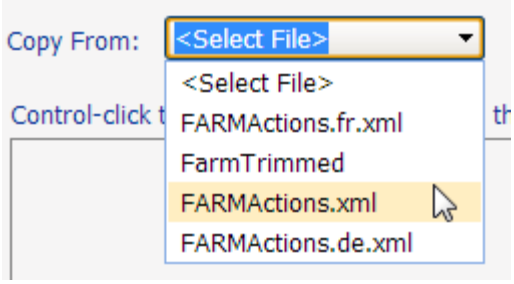
4 Click **[Update]**.

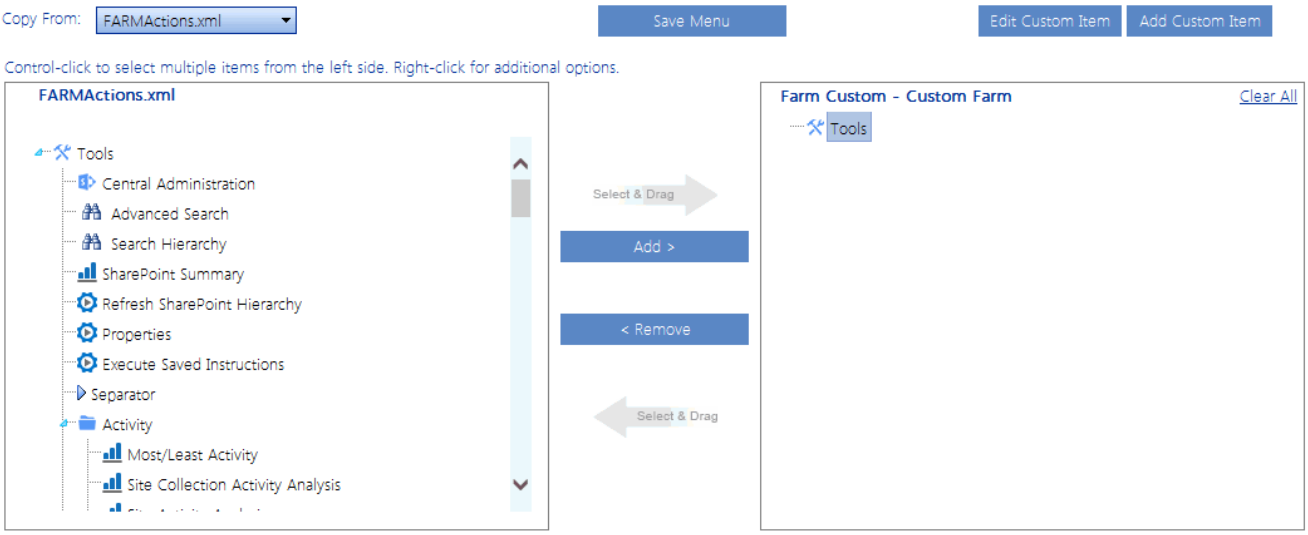
To add ControlPoint menu items to a custom menu:

NOTE: If you want to add links to SharePoint pages or custom items that do not currently exist in a ControlPoint menu (such as internal or external web sites or web-based applications), follow the procedure for Adding and Updating Custom Items in a Menu.

1 From the **Copy From** drop-down, select the menu from which you want to copy items.

Note that this drop-down includes both the "original" menu provided by Metalogix and any custom menus that have been created for that target.





2 In the list that displays in the left column, select each item that you want to add. 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.)

If you want to ...	Then ...
	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, either:

- drag and drop the item(s) onto the item below which you want to nest it.

OR

- highlight the item below which you want to nest the new item(s) then click the [**Add**] button.

To change the placement of items:

1 If you want to move multiple items at once, hold down the [**Ctrl**] or [**Shift**] key and highlight each item you want to move.

2 Drag and drop the item(s) onto the item below which you want to nest it.

To remove items:

1 In the right pane, highlight the item(s) you want to remove. (To select multiple items, hold down the [**Ctrl**] or [**Shift**] key.

2 Do one of the following:

3 drag and drop the item(s) to the left pane.

OR

- click the [**Remove**] button.
- To remove all items in the right pane, click the **Clear All** link.

To save the custom menu:

When you have finished adding items to the menu, click [**Save Menu**].

IMPORTANT: If you do *not* click [**Save Menu**] and receive a confirmation dialog, any changes you made will be lost when you navigate away from the page.

Now you can manage access to the customized menu.

Adding and Editing Custom Items in a Menu

From the ControlPoint Menu Maintenance or Favorites Maintenance page you can add and update custom items, such as frequently-accessed SharePoint pages, internal or external Web sites, or web-based applications, to a menu.

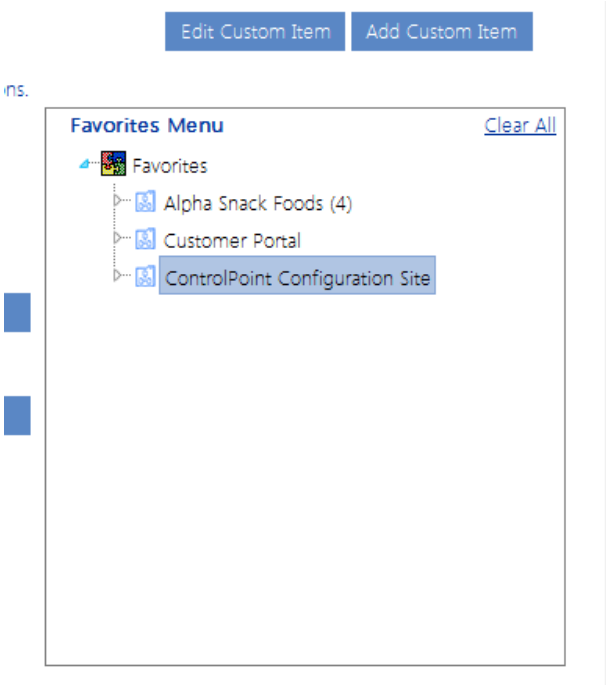
The procedure for adding an item to a ControlPoint menu is used by:

- ControlPoint Application Administrators who want to add custom items to a custom menu—via the Menu Maintenance page, and
- any administrator who wants to add custom items to his/her Favorites list—via the Favorites Maintenance page.

NOTE: The procedure below uses Favorites menu maintenance for illustration purposes. However, the procedural steps for ControlPoint application menu maintenance are identical.

To add custom item to a menu:

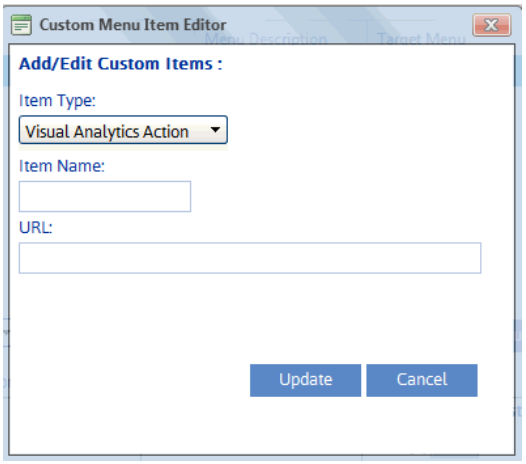
1 Highlight the item *below which* you want to place the new item.



NOTE: Custom *actions* can be placed below the top node of the menu or below a folder. Custom *folders* can be placed below the top node of the menu only.

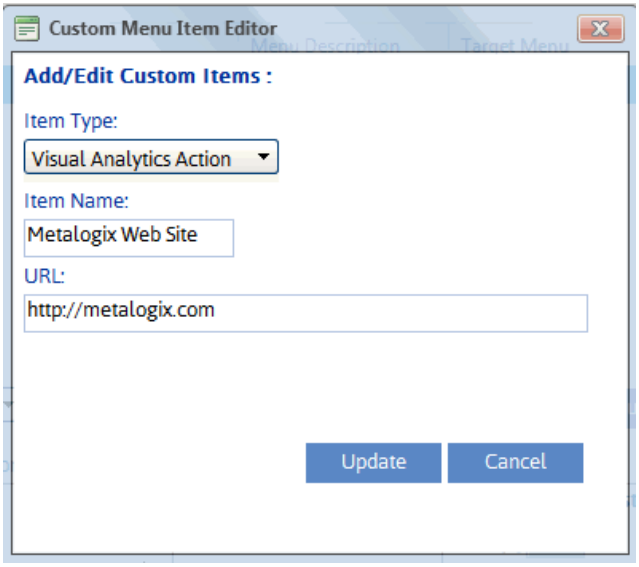
2 Click **[Add Custom Item]**..

3 From the **Item Type** drop-down, select the option that best characterizes your custom item.

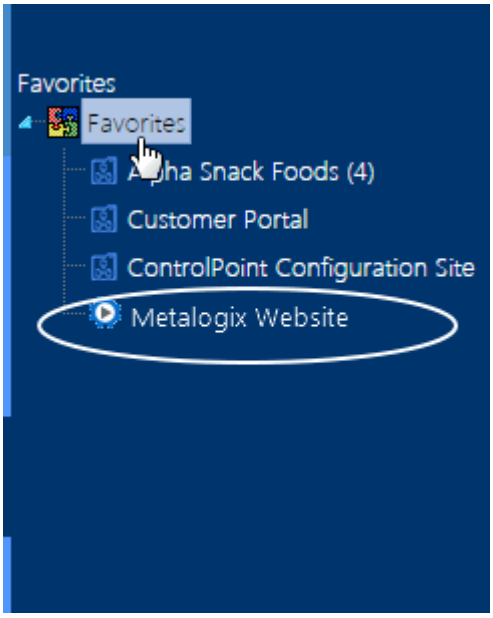


CAUTION: Once a custom item has been saved the Item Type cannot be changed.

4 Enter the **Item Name** and, unless the item is a folder, the **URL**.



5 Click **[Update]**.

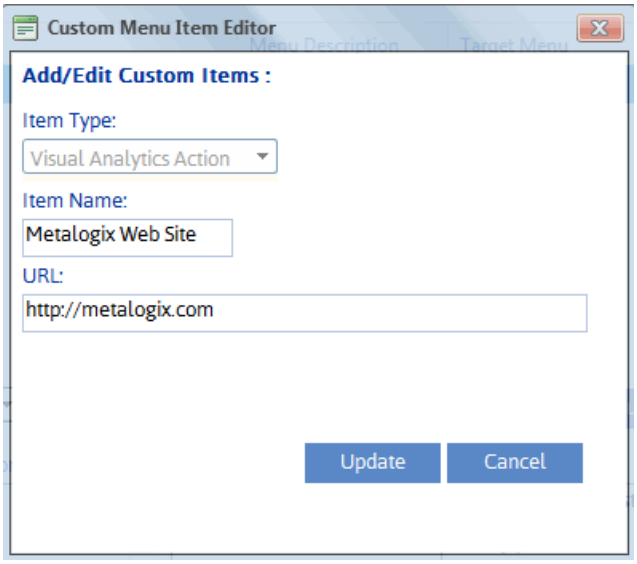


To edit an existing custom item:

1 Highlight the item you want to edit.

2 Click **[Edit Custom Item]**.

3 Modify the **Item Name** and/or **URL** as appropriate.



NOTE: For existing items, the Item Type drop-down is disabled.

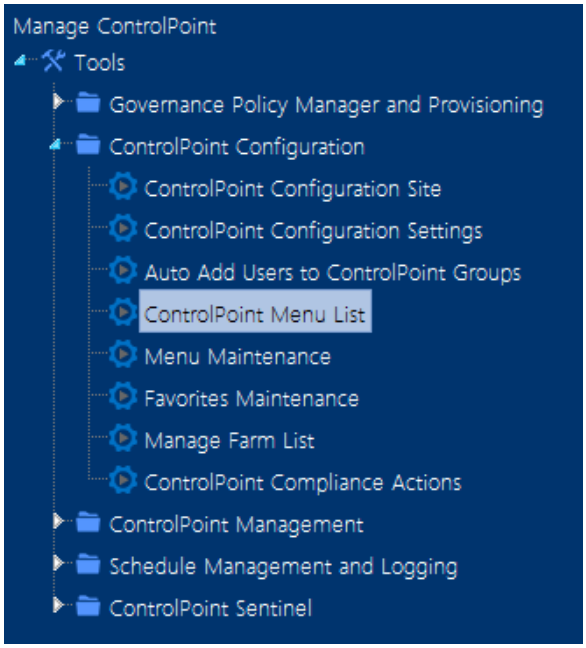
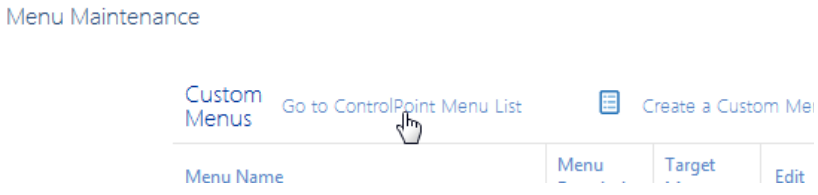
4 Click [**Update**]

Managing Access to ControlPoint Menus

From the ControlPoint Configuration Site, ControlPoint Application Administrators can manage access to ControlPoint menus (that is, determine which menus will be visible to specific administrators or groups of administrators).

To access the ControlPoint Configuration Site Menus list:

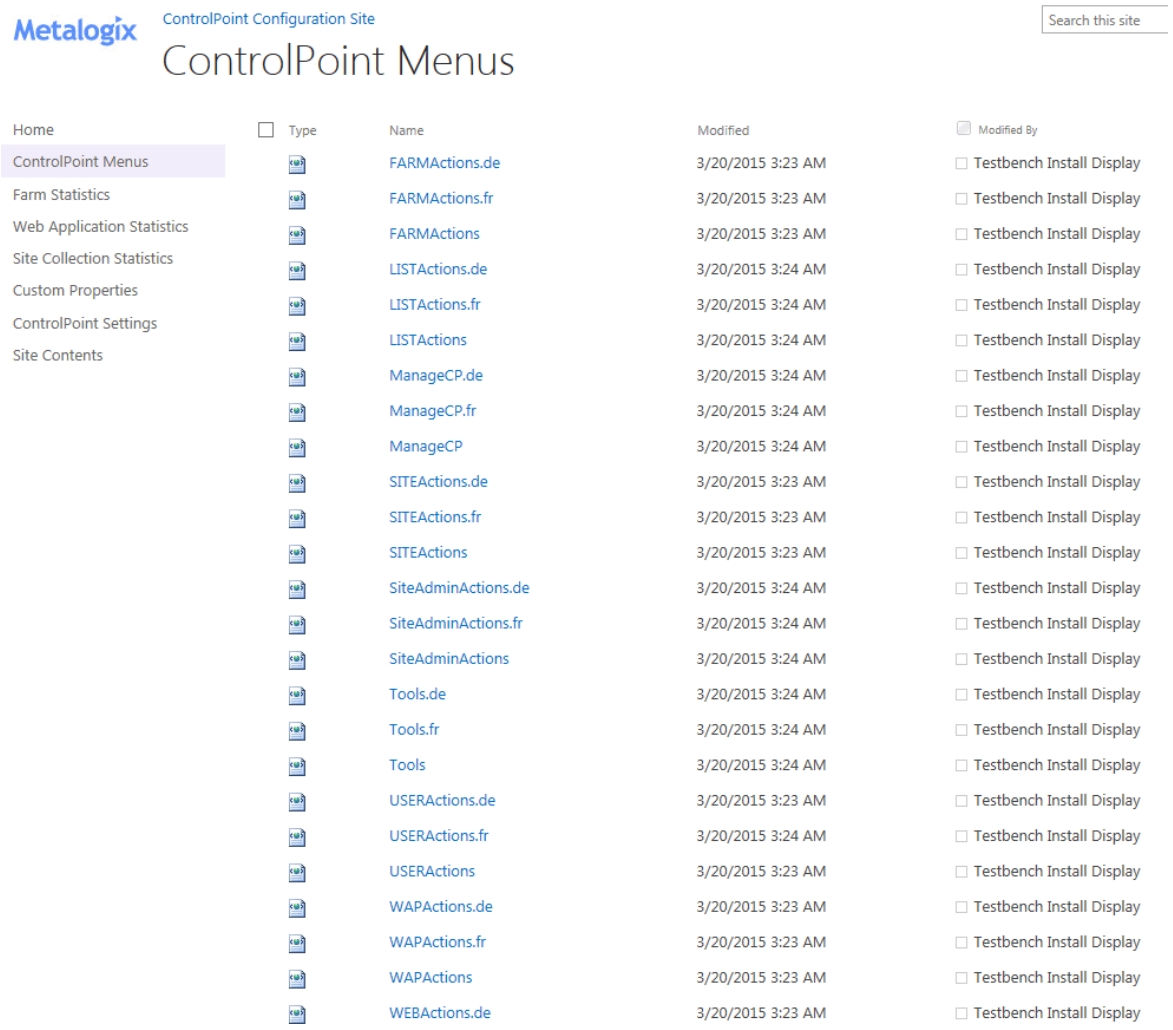
Use the information in the following table to determine the appropriate action to take.

If you are starting from ...	Then ...
the left navigation pane	from the Manage ControlPoint panel, choose ControlPoint Configuration > ControlPoint Menu List. 
within the ControlPoint Configuration site	navigate to the Axceler Menus document library.
the ControlPoint Menu Maintenance page	click the **Go to the ControlPoint Menu List** link 

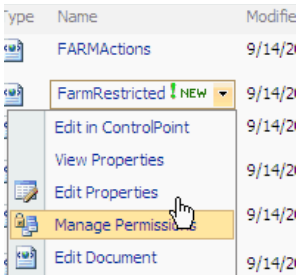
Note that, if you are using the SharePoint 2007 user interface, the ControlPoint Original Menus view is selected by default. You can, however, select a different view, including

- **Custom Menus** (to display only the menus customized for the farm), or

- **All Documents** (to display both original and custom menus).



Remember that, by default, all menus inherit users and permissions from the menu document library, which in turn inherits from the ControlPoint Configuration site collection. However, you can assign unique permissions to individual menus. Consult your SharePoint documentation for details on managing user permissions.



REMINDER: If an administrator has permissions for more than one menu with the same target location (for example SharePoint Hierarchy menu - farm level), the menus are "merged" for display in the left navigation pane, with items unique to each menu preserved and duplicate items eliminated. Remember to restrict

access to any menus (including Metalogix-provided original menus) that contain items that you do *not* want certain users/groups to see.

Editing and Deleting Custom Menus

Once a custom menu has been created you can:

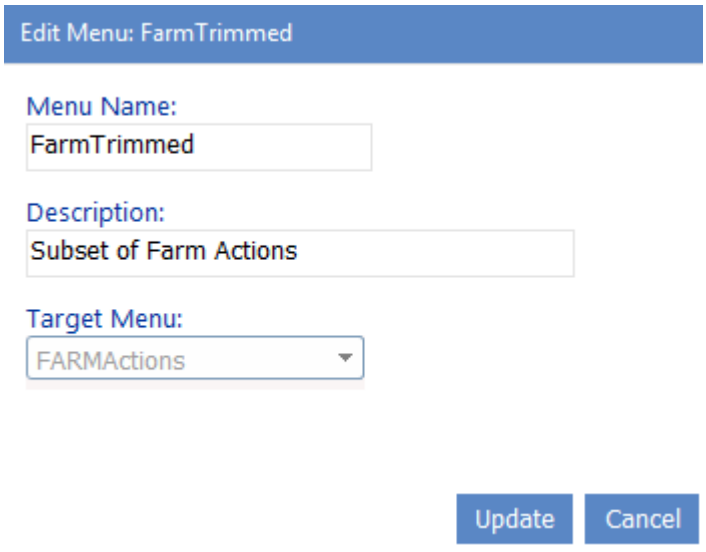
- change the menu's Name and/or Description
- modify the contents of the menu
- edit custom items
- delete the menu from ControlPoint.

To change a menu's Name and or Description:

1 In the grid at the top of the Menu Maintenance page, click the Edit link ( ) to the left of the custom menu whose whose name and/or description you want to change.



2 Update the **Menu Name** and/or **Description**, as necessary.



REMINDERS:

- The **Menu Name** cannot contain spaces or special characters.
- The **Target Menu** cannot be changed.

3 Click **[Update]**.

To modify the contents of a custom menu:

1 In the grid at the top of the Menu Maintenance page, highlight the menu whose contents you want to modify.

2 Add and remove items as needed, as described in the topic Creating a Custom Menu.

To edit a custom item in a menu:

1 From the selected items list, highlight the custom item that you want to edit.

2 Click **[Edit Custom Item]**.

3 Update the **Item Name** and/or **URL** as described in the topic Adding Custom Items in a Menu.

NOTE: The **Item Type** cannot be changed.

Adding Advanced ControlPoint Menu Items

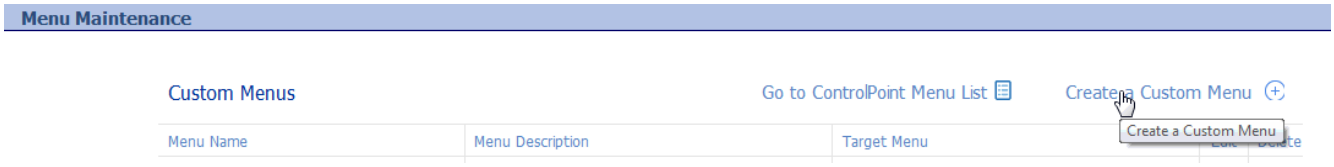
Because they serve a very specialized purpose, the following menu items are not included on any of the Axceler Menus:

- Manage Forest Access, and
- Archive Audit Logs.

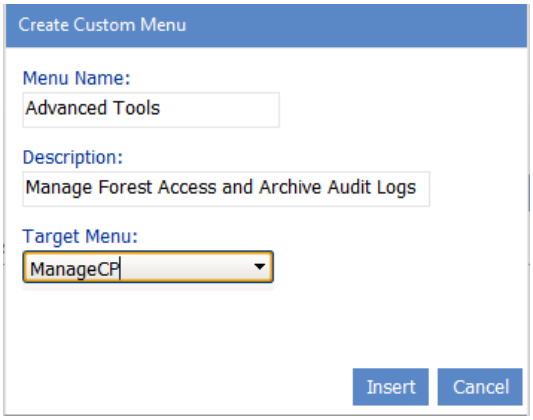
It is recommended that the ControlPoint Application Administrator create a custom Tools menu that contains one or both of these items *only*, then limit permissions to specific ControlPoint users or groups. Remember, customized menus are merged with any other ManageCP menu(s) for which ControlPoint users have permissions.

To create a custom menu with advanced menu items:

1 From the Menu Maintenance page, click **Create a Menu**.

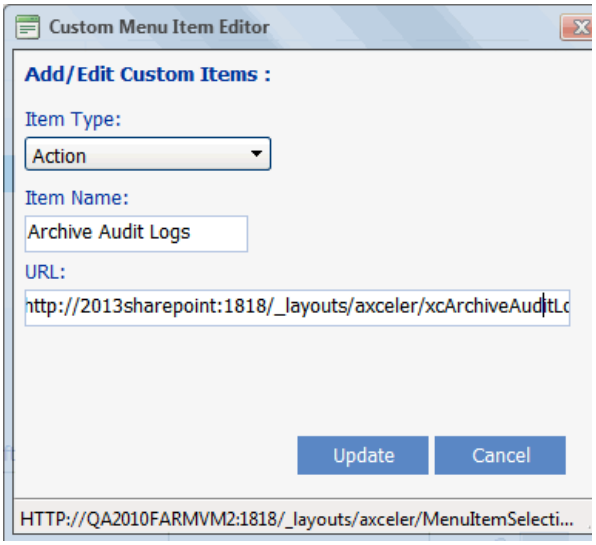


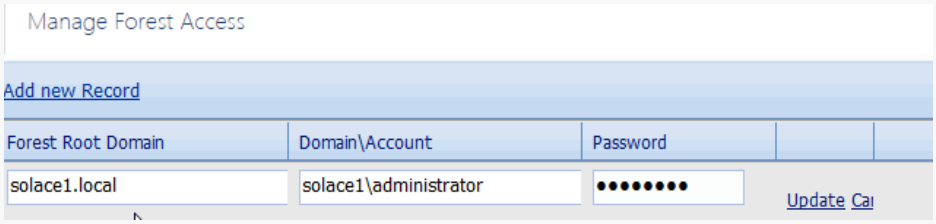
2 Enter a **Menu Name** and **Description** of your choosing, then from the **Target Menu** drop-down, select **ManageCP**.



3 Click **[Insert]**.

4 Add either or both advanced menu items using the procedure for Adding and Editing Custom Items in a Menu. Use the information in the following table for guidance.

For ...	Complete the Add/Edit Custom Items section as follows...
Archive Audit Logs	• For Item Name, enter Archive Audit Logs. • For **URL**, enter the following string: http://<*machine_name*>:<*portnumber*>/_layouts/Axceler/xcArchiveAuditLogs.aspx 
Manage Forest Access	• For **Item Name**, enter **Manage Forest Access**. • For **URL**, enter the following string: http://<*machine_name*>:<*portnumber*>/_layouts/Axceler/xcForestAccess.aspx

For ...	Complete the Add/Edit Custom Items section as follows...
	 • Click [**Add Child**].

NOTE: <*machine_name*> refers to the name of the machine on which ControlPoint was initially installed; it may also refer to a host header or load balancer name, if supported in your environment. <*portnumber*> refers to the port used by the ControlPoint application (1818 is the ControlPoint default).

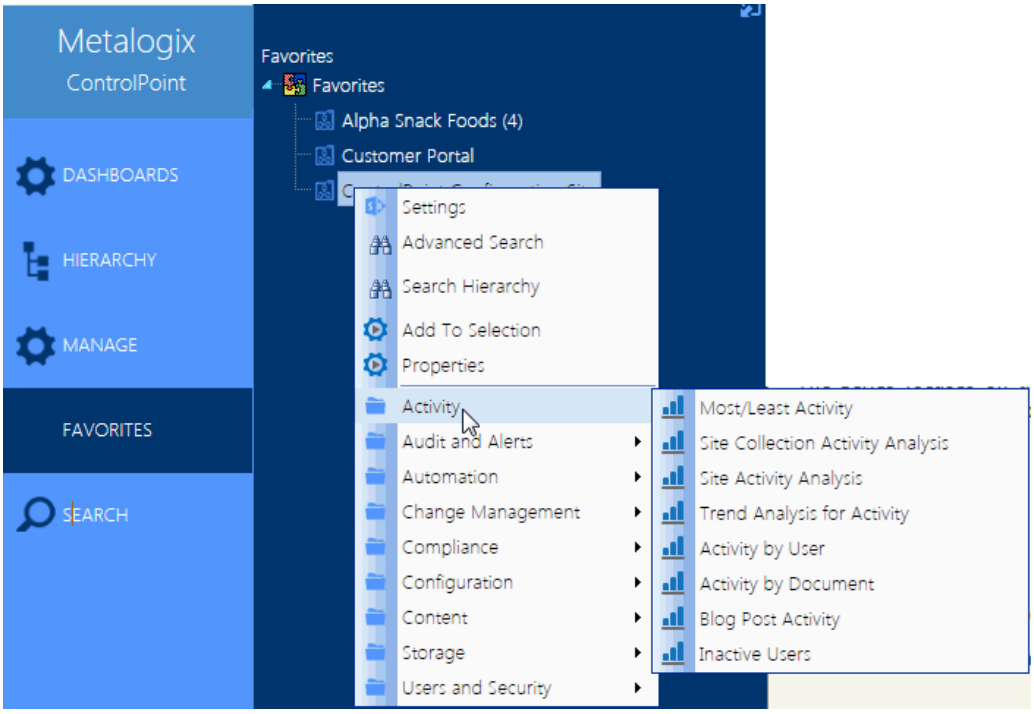
5 Click [**Save Menu**].

Now you can manage access to the menu.

Customizing Your Favorites

Each individual administrator can customize his or her own ControlPoint Favorites list to include frequently-used items, including SharePoint sites and ControlPoint actions and analyses.

When you add Web applications, site collections and sites to your Favorites list, you have access to all of the right-click menu options for which you have permissions.

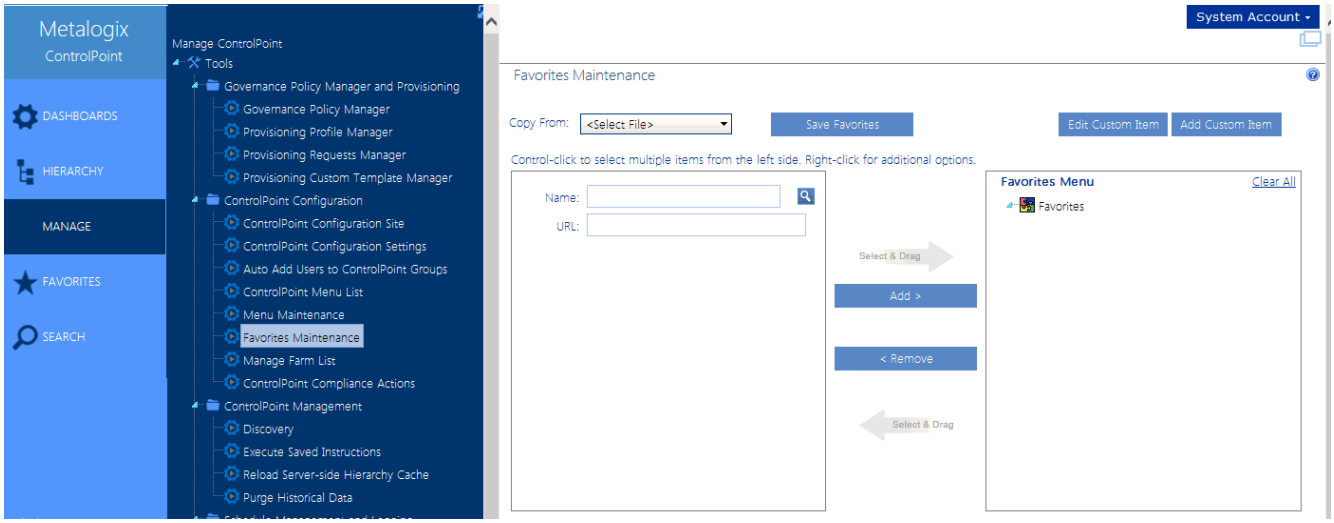


Custom items—such as links to SharePoint pages, internal or external web sites and web-based applications—can also be added.

NOTE: If you use ControlPoint to manage multiple farms, your Favorites will be carried over to every farm.

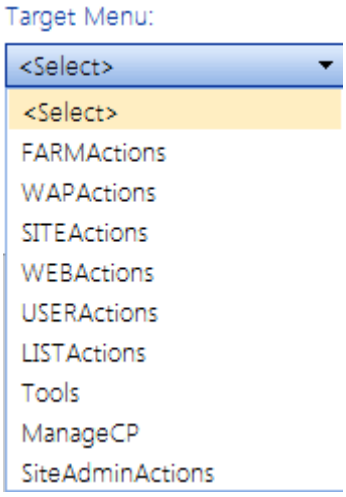
To access the Favorites Maintenance page:

From the Manage ControlPoint tree, choose ControlPoint > Favorites Maintenance.



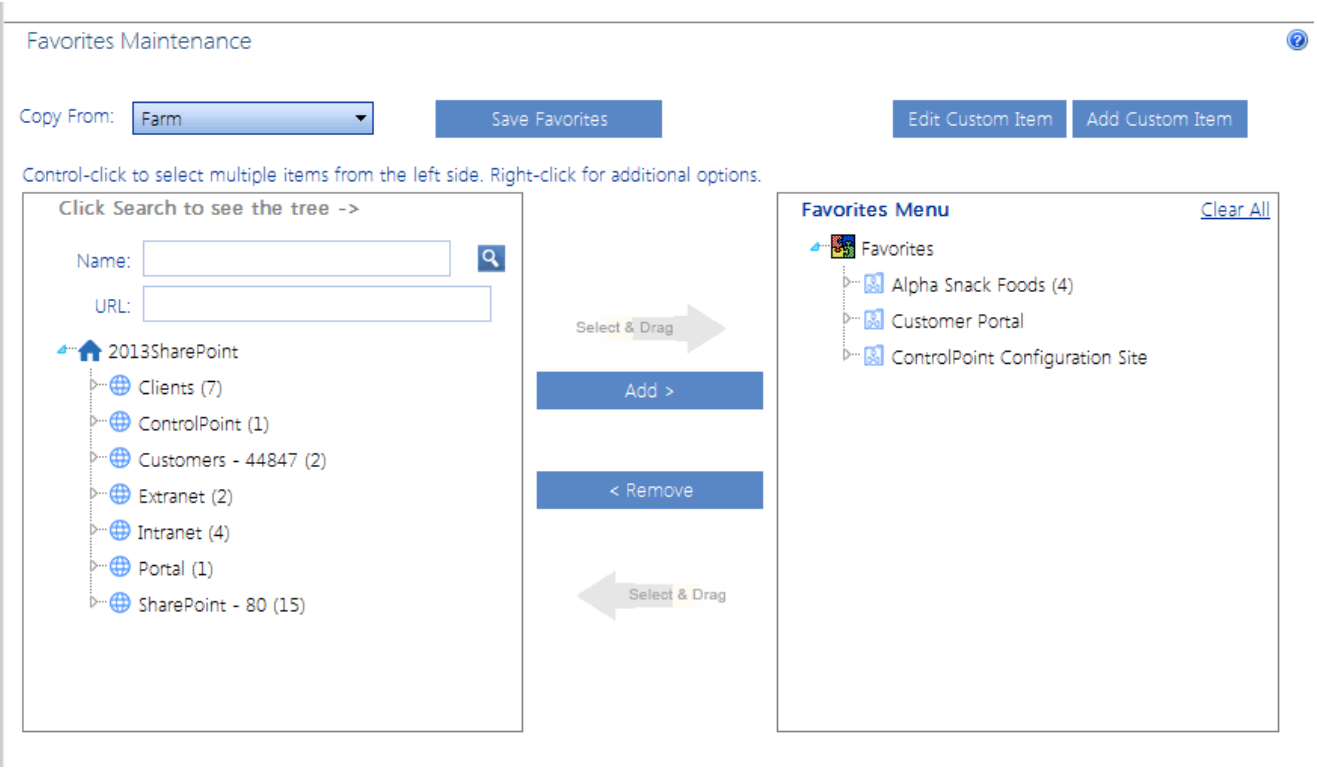
To add items to your Favorites:

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

If you want to ...	Then ...
browse the SharePoint Hierarchy for site collections and sites*	from the **Copy From** drop-down, select **Farm**. 
copy ControlPoint actions and analyses	from the **Copy From** drop-down, select a menu (.xml) file.

If you want to ...	Then ...
	Note that Tools.xml (and any customized versions of that file) contains the menu items that display only if ControlPoint is configured to display the Actions and Analysis tree as an alternative to Manage ControlPoint.
search for the site collections and sites that you want to add*	enter the site **Name** and/or **URL** and search within the SharePoint Hierarchy
add a custom menu item	follow the procedure for Adding and Updating Custom Items in a Menu.

*NOTE: In a multi-farm environment, you can only select items from the home farm (that is, the farm whose URL you used to launch ControlPoint). You can add objects from multiple farms to your Favorites, as long as the farm you *select* them from is currently the home farm.



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

If you want to ...	Then ...
select multiple items individually	hold down the [**Ctrl**] or [**Shift**] key and highlight each item you want to add.

If you want to ...	Then ...
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, either:

- drag and drop the item(s) onto the item below which you want to nest it.

OR

- highlight the item below which you want to nest the new item(s) then click the [**Add**] button.

To change the placement of items:

1 If you want to move multiple items at once, hold down the [**Ctrl**] or [**Shift**] key and highlight each item you want to move.

2 Drag and drop the item(s) onto the item below which you want to nest it.

To remove items:

1 In the right pane, highlight the item(s) you want to remove. (To select multiple items, hold down the [**Ctrl**] or [**Shift**] key.

2 Do one of the following:

- drag and drop the item(s) to the left pane.

OR

- click the [**Remove**] button.
- To remove all items in the right pane, click the **Clear All** link.

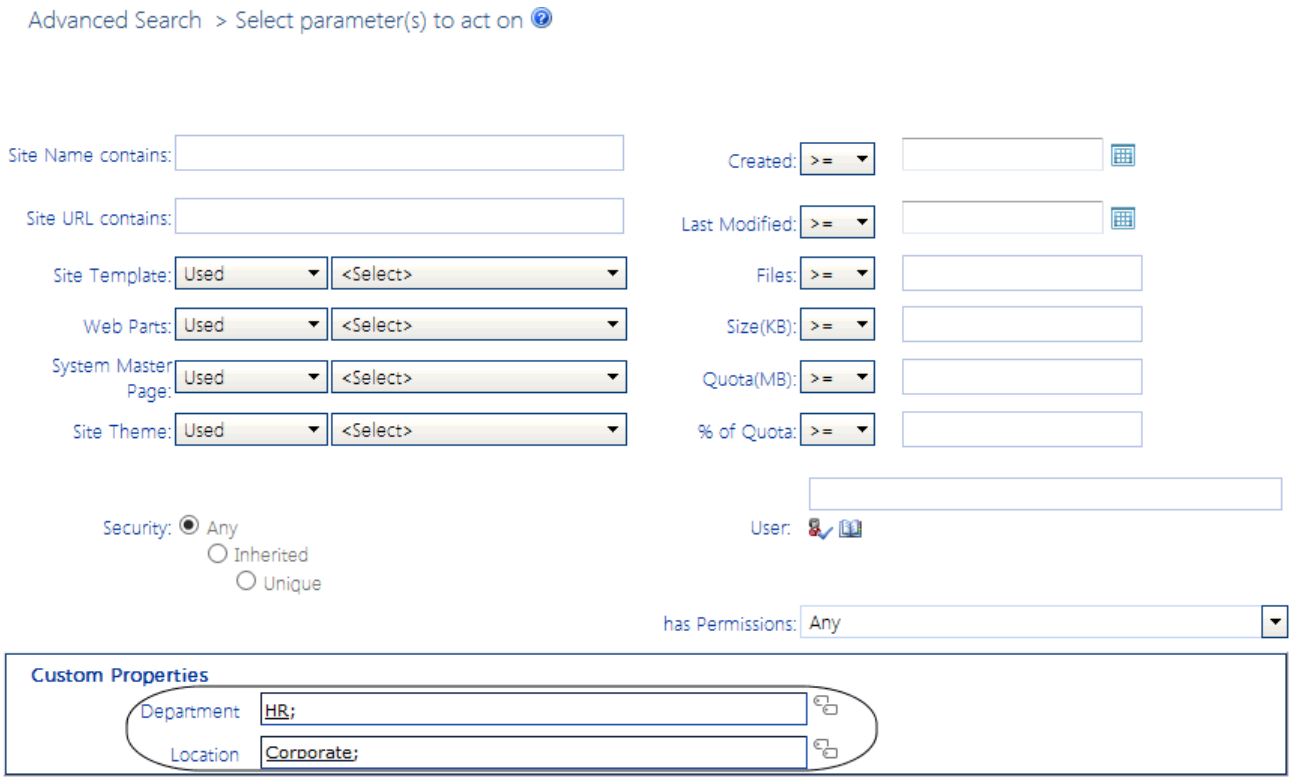
To save changes to your Favorites:

When you have finished adding items to your Favorites, click [**Save Favorites**].

IMPORTANT: If you do *not* click [**Save Favorites**] and receive a confirmation dialog, any changes you made will be lost when you navigate away from the page.

Defining Custom Properties for Use in ControlPoint Advanced Searches (SharePoint Server)

For SharePoint Server 2010 or 2013 farms that are subscribed to the Managed Metadata Service Application, ControlPoint Application Administrators can use Managed Metadata to define "Custom Properties" which can be applied to SharePoint sites via the ControlPoint Set Site Properties action. Unlike native SharePoint, which allows Managed Metadata to be applied only to a list column, ControlPoint allows you to" tag" a site with Managed Metadata, for use as parameters in ControlPoint Advanced Searches.

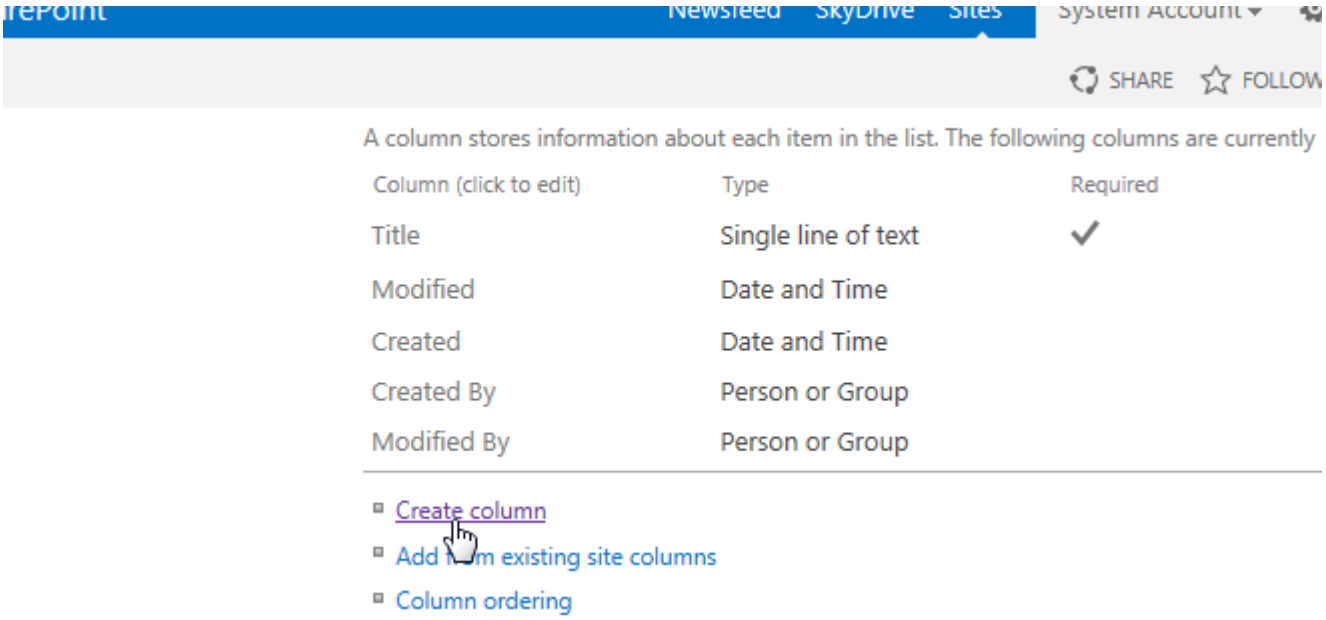


NOTE: For Custom Properties to be definable, the Web application that hosts ControlPoint Configuration Site Collection must be associated with the relevant Managed Metadata Service Application(s).

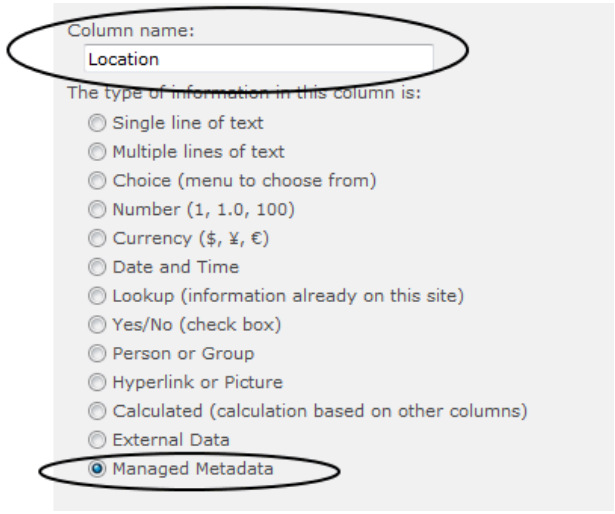
To define Custom Properties:

1 Open the **Settings** page for the ControlPoint Configuration Site's Custom Properties list.

2 Under Columns, click **Create column**.



3 Enter a **Column name** (that is, the name you want to assign to the Custom Property), and for column type, select **Managed Metadata**.



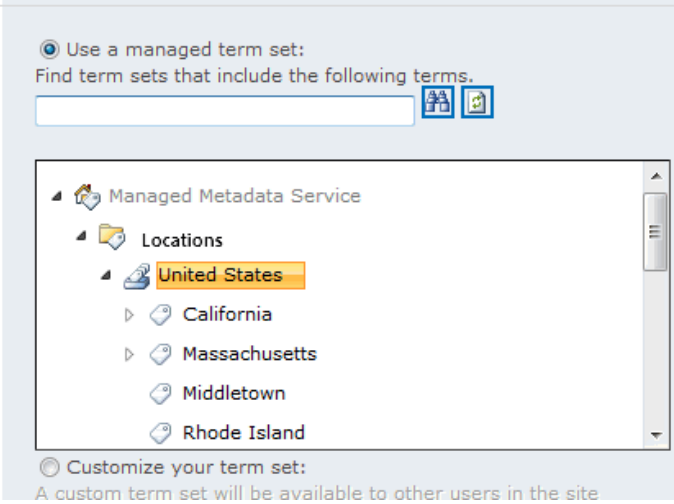
4 For Term Set Settings, either:

- select **Use a managed term set**, then select the term set you want to use.

OR

- select **Customize your term set**, then create the term set you want to use.

NOTE: Although list-specific term sets are not available to other *lists* in the farm when used within native SharePoint, term sets created within this list can be used as ControlPoint Custom Properties by all *sites* throughout the farm.



NOTE: Additional settings, such as Allow multiple values, Allow Fill-in, and Default value are not valid for Custom Properties

5 To save the custom property, click **[OK]**.

Custom Properties defined within this list will be available for selection in the Set Site Properties user interface.



NOTE: If you delete a Managed Metadata column from the Custom Properties list, it will no longer be selectable as a Custom Property, and any existing site associations will be lost.

Using Discovery to Collect Information for the ControlPoint Database Cache

Discovery is a farm-specific background task that collects information and stores it in the ControlPoint Services (xcAdmin) database cache for the following purposes:

- for use in ControlPoint data analysis and reporting
- to populate SharePoint permissions for members of the ControlPoint Business Administrators group
- to identify ControlPoint users who meet the criteria for "Admins" for scheduled analysis distribution, and

- to populate and update statistics lists used to create dashboards.

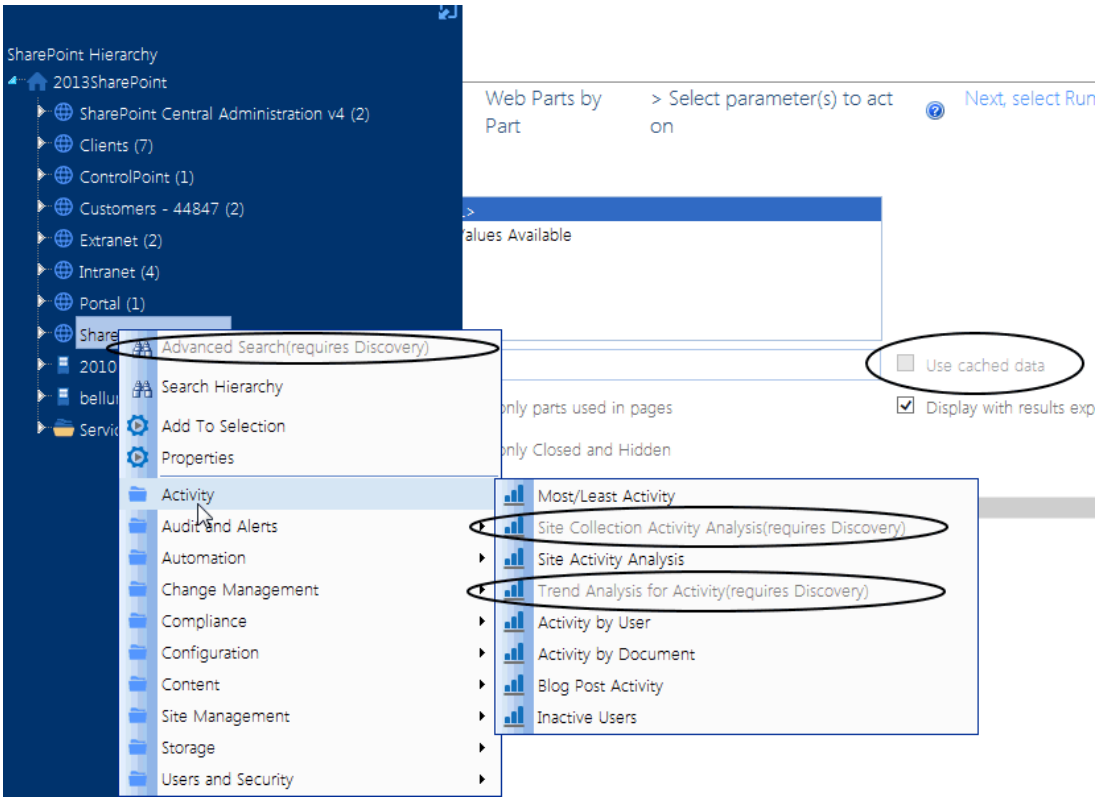
NOTE: Discovery can be a resource-intensive process, especially in a large SharePoint farm. If you regularly experience performance issues when the Discovery task is in progress, contact Metalogix Technical Support for help in fine-tuning the process to run more efficiently in your environment.

Nightly Full Discovery

Full Discovery—which encompasses an entire farm—is normally triggered by a SharePoint timer job to run nightly, after all SharePoint data usage jobs have completed. In addition to collecting data for analysis and reporting, Full Discovery records the SharePoint permissions of site administrators (that is, members of the ControlPoint Business Administrators group). See Making ControlPoint Available to Business Users (Site Administrators).

If you want to ensure that your ControlPoint analyses have the most recent cached data—you can run the Full Discovery process manually. Full Discovery can also be run on a server where ControlPoint is installed, either as a Windows scheduled task or in real time.

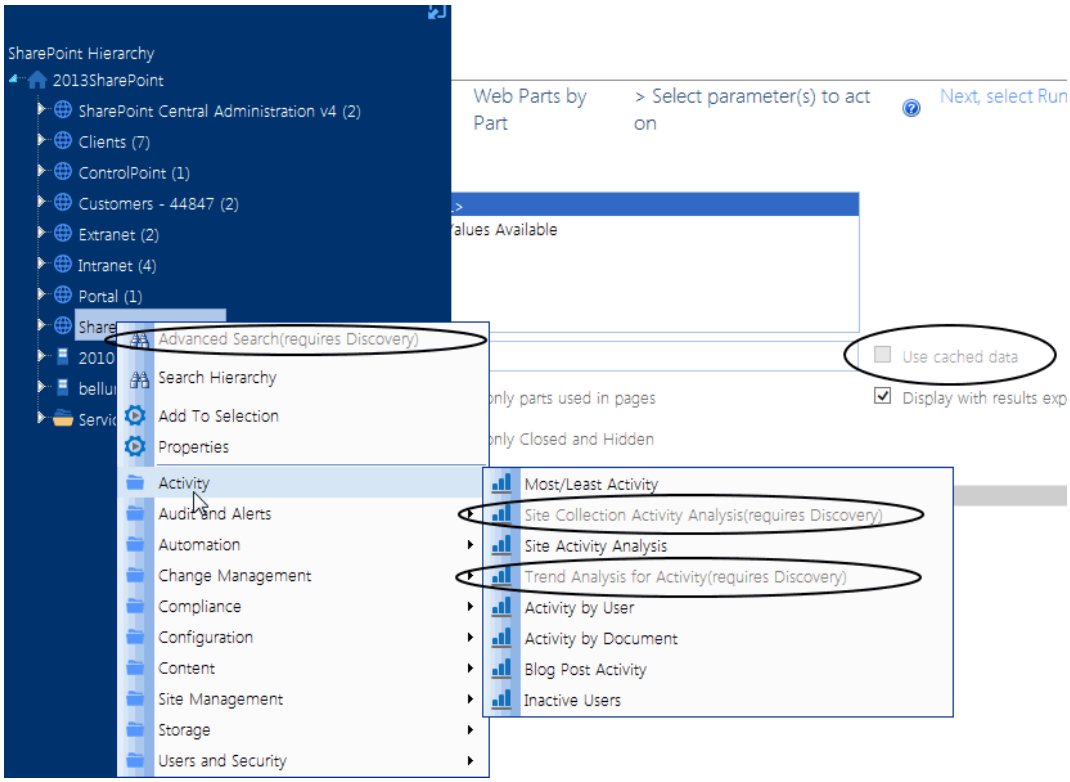
If ControlPoint was installed for the first time with version 5.3 or higher, the nightly Discovery job is disabled by default, as are operations and parameters that rely on cached data collected by Discovery.



ControlPoint Application Administrators can, however, enable both the nightly Discovery job itself and the operations and parameters that rely on it.

Enabling the Nightly Discovery Job

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.



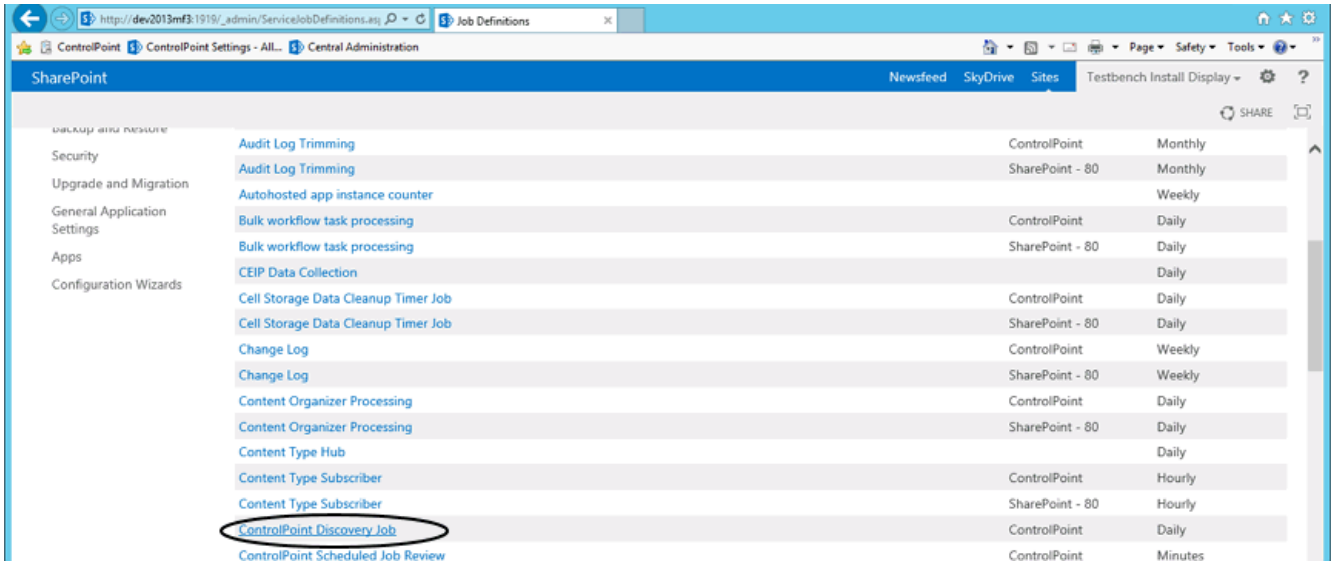
A Farm Administrator can, however, enable the nightly timer job via SharePoint Central Administration.

To enable the nightly Discovery timer job:

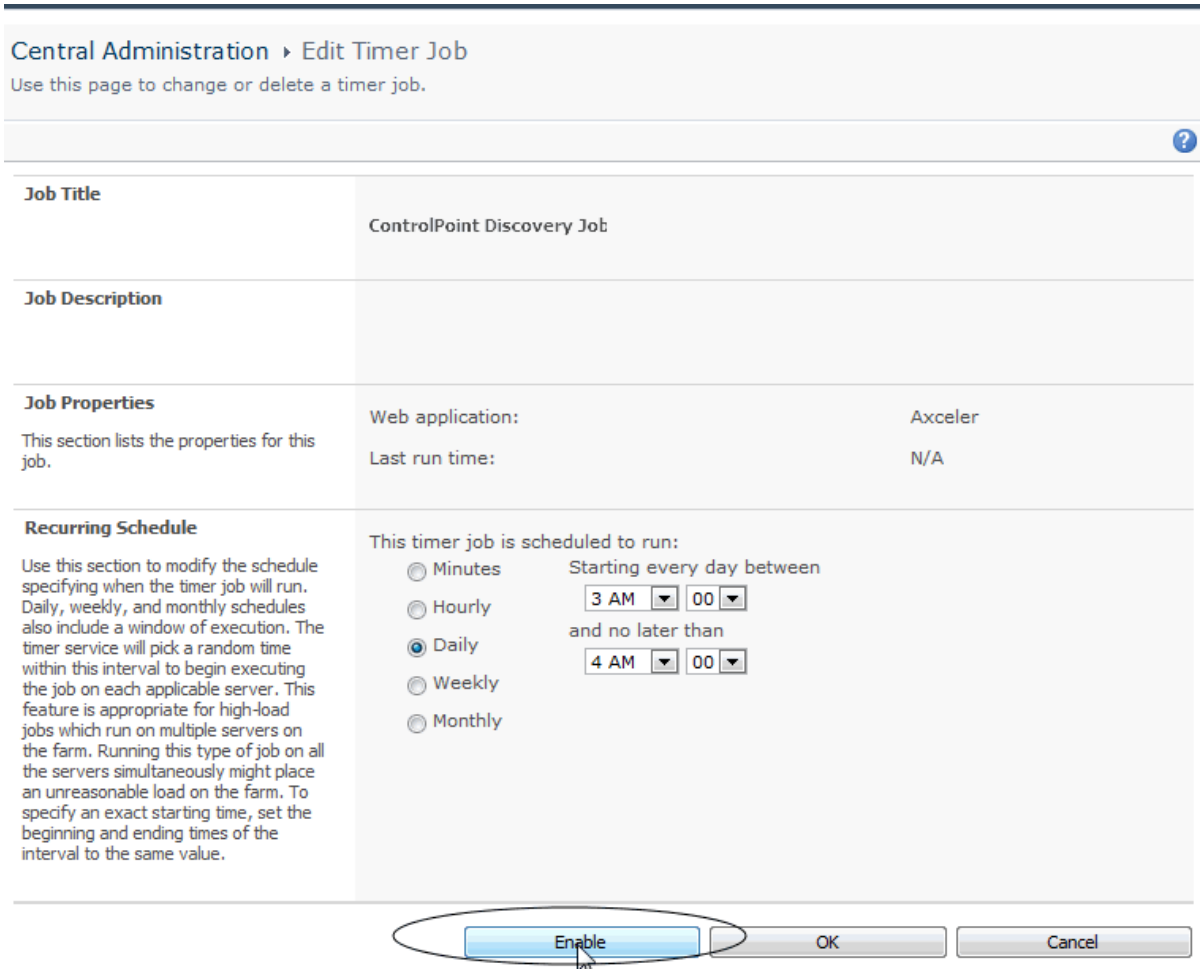
1 In SharePoint Central Administration, navigate to the Timer Job Status page.

2 From the left menu,choose Job Definitions.

3 Click the **ControlPoint Discovery Job** link.



4 Click **[Enable]**.



After Discovery has been run at least once (either nightly, manually, or from a Web front-end server), data becomes available for operations that rely on the ControlPoint cache. ControlPoint Application

Administrators can make relevant analyses and parameters available by Enabling Operations and Parameters that Rely on Discovery.

Updating the Nightly Discovery Schedule

Nightly Discovery is configured to run *after* all SharePoint usage analysis jobs have finished, which ensures that results of ControlPoint data analyses contain the most current cached data.

If the timing of an existing SharePoint usage analysis job has changed or a new job is added, you can update the schedule of the nightly Discovery job to ensure that it continues to run at the proper time (that is, after all of the new and existing usage analysis jobs have completed).

NOTE: It should only be necessary to update the nightly Full Discovery schedule if a SharePoint usage analysis job has been added and/or the timing of an existing job has changed.

If you need more precise control over the timing of the Discovery task on the Web front-end server where Discovery is run, it can be scheduled using Windows Task Scheduler. For more details, contact Metalogix Technical Support.

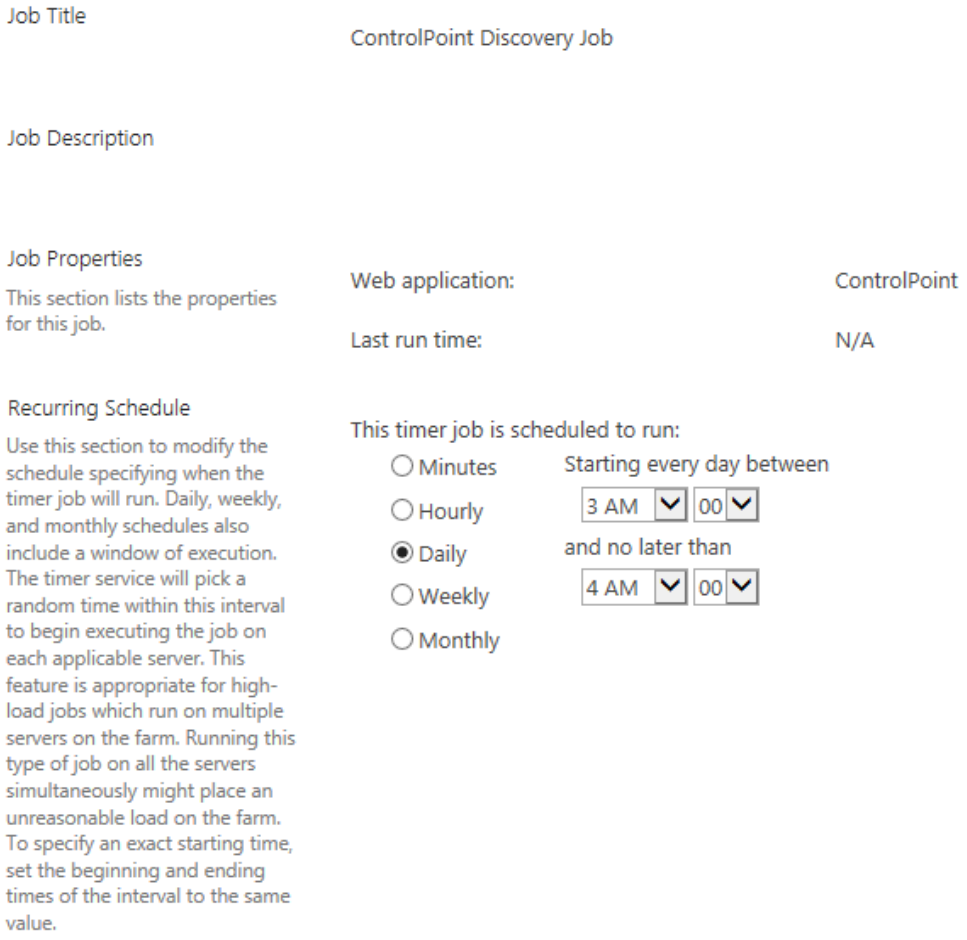
To update the Discovery schedule in SharePoint version 2010 and later:

1 Open the SharePoint Central Administration site and navigate to the Scheduled Jobs page.

2 Locate and click on the **ControlPoint Discovery Job.**

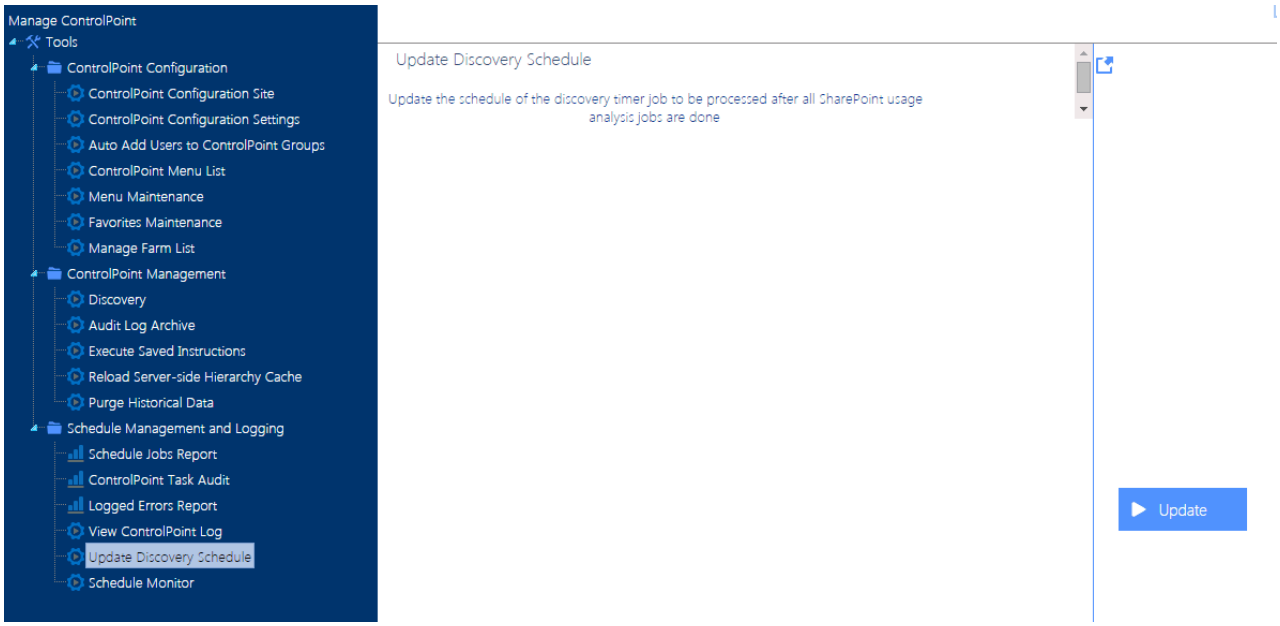
NOTE: During an upgrade from a version older than 6.0, the name 'Axceler' in the Discovery and Scheduled Job Review timer jobs is changed to 'ControlPoint'.

3 Update the **Recurring Schedule** section as needed.



To update the Nightly Discovery schedule in SharePoint 2007:

1 From the Manage ControlPoint tree, choose Update Discovery Schedule to display the Update Discovery Schedule page.



2 Click **[Update]**.

Running a Full or Partial Discovery Manually

You can run a Full Discovery on your entire farm or a Partial Discovery on selected Web applications/site collections either interactively or on a one-time or recurring schedule.

You may want to manually run a Full Discovery when:

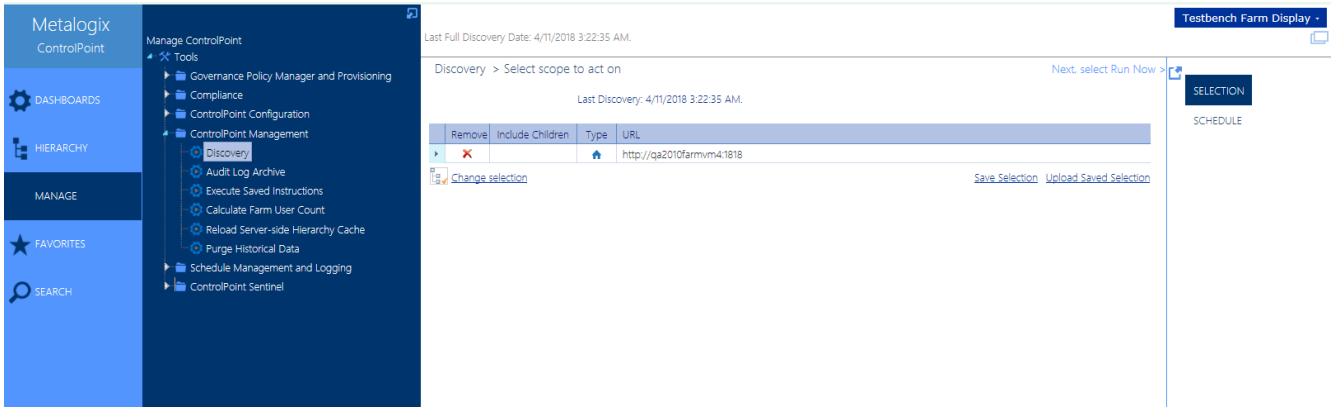
- the nightly Full Discovery job is disabled or has failed to run, or
- you want to perform an ad hoc update to the ControlPoint cache.

A Partial Discovery can be useful:

- when you want to update the ControlPoint cache for specific Web applications/site collections only without having to run a more resource-intensive Full Discovery. (For example, if you just granted new permissions to a user in the Business Administrators group and want sites to be visible to that user in the SharePoint Hierarchy, you can run a partial Discovery just on the Web application(s) containing the sites that the user manages.)
- for Web applications or site collections that you have excluded from the Full Discovery process. For example, some Web applications, such as those that contain My Sites, can greatly increase the Full Discovery run time. Web applications containing such sites may be excluded from the Full Discovery process and scheduled to run less frequently.

To run a Discovery manually:

1 From the Manage ControlPoint tree 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. NOTE: The default selection encompasses the entire farm, except for any Web applications and/or site collections that have been excluded from the Full Discovery process.
Partial Discovery	select the Web application(s)/site collection(s) on which you want to run Discovery, using the procedure for Changing Your Selection. NOTE: The Partial Discovery will include all Web applications/site collections that you explicitly select, regardless of whether they have been excluded from the 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.

Running Discovery from A Web Front-End Server

You can use the ControlPoint Utility (xcUtilities) to run Full Discovery from a remote desktop or console session on any Web front-end server on which ControlPoint is installed.

You may, for example, want to run Discovery as a Windows Scheduled Task:

- if you want to control the precise time at which the Discovery process starts.

- if your farm has multiple Web front-end servers and you want to make sure the Discovery process runs on a specific server.

NOTE: When Full Discovery is run by the timer job, SharePoint determines which Web front-end to use.

You can also use xcUtilities to run Discovery in real time.

Any Web Parts, Web applications, and/or urls that have been excluded from Full/nightly Discovery via ControlPoint Configuration Settings will be excluded from the process initiated from a Web front-end server as well.

Login Account Requirements

The account you use to log into the server machine must have the appropriate permissions within ControlPoint for the scope of the action being performed.

Location of the ControlPoint Utility (xcUtilities)

When ControlPoint is initially installed on the first Web front-end server in the farm, the files needed to run the ControlPoint Utility are located in the following default folder:
C:\Program Files\Metalogix\ControlPoint\ControlPointFeatures.

If you want to run the operation from another Web front-end server, you must first copy all of the files needed to run the ControlPoint Utility to that server. The easiest way to do this is to copy the entire ControlPointFeatures (or AxcelerFeature) folder. You can paste it to any location on the target server (that is, it is not necessary to use a specific directory path).

To schedule Full Discovery to run on a specific Web front-end server:

Note that the procedural steps for creating a Windows scheduled task are different for Server 2003 and Server 2008. Consult your Microsoft Server documentation for complete instructions.

If you choose to run nightly Discovery on a Web front-end server, remember to disable the timer job in Central Administration.

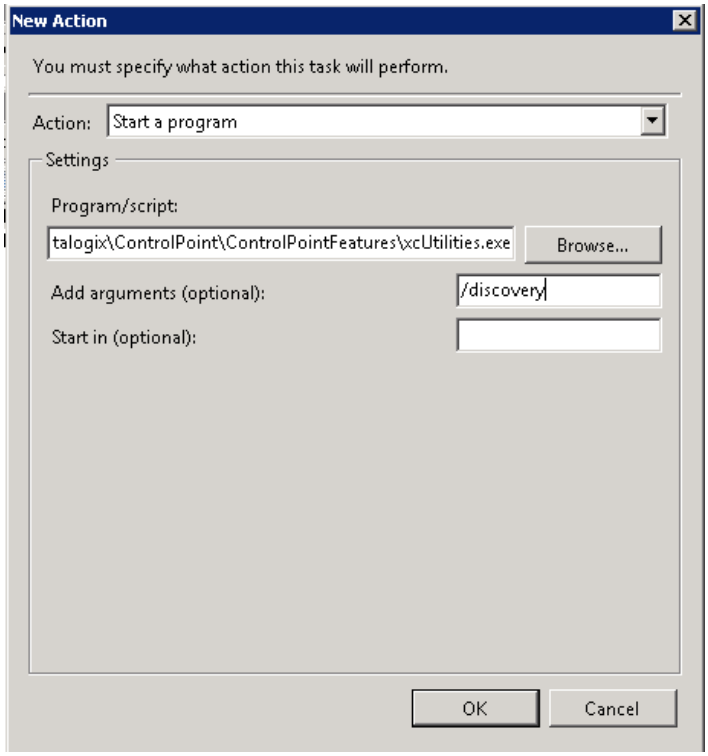
For Server 2008:

1 On the Web front-end server where you want Discovery to run, open the Windows Task Scheduler and initiate a scheduled task.

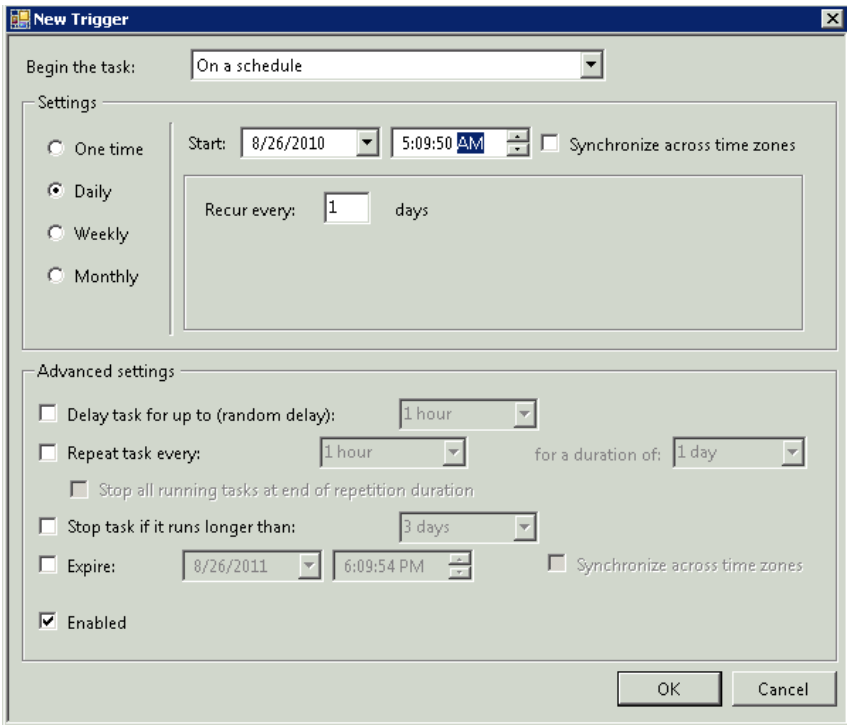
a) For **Program/script**, enter the path to the xcUtilities application executable. (See "Location of the ControlPoint Utility (xcUtilities)" earlier in this topic.)

EXAMPLE: **C:\Program Files\Metalogix\ControlPoint\ControlPointFeatures\xcUtilities.exe**

b) For **Add arguments**, enter **/discovery.**

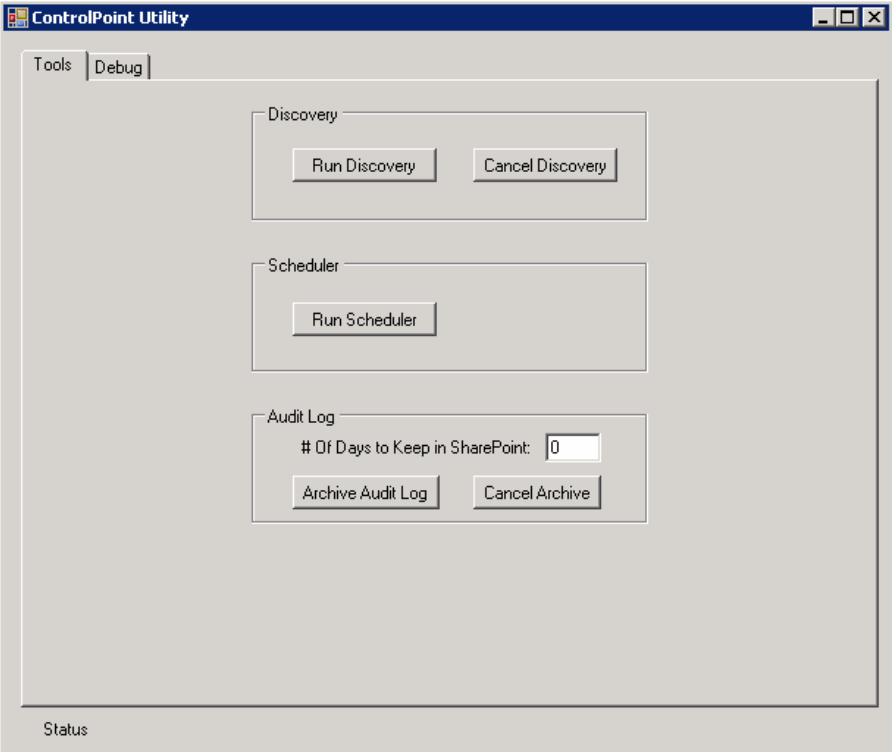


2 Complete the New Trigger dialog with the schedule time and frequency.



To run a real-time Full Discovery from a Web front-end server:

1 Open xcUtilities.exe. (See "Location of the ControlPoint Utility (xcUtilities)" earlier in this topic.)



2 On the Tools tab, click [**Run Discovery**].

Running the ControlPoint Scheduler from a Web Front-End Server

The ControlPoint Scheduler is the process that normally runs every 10 minutes to determine if any ControlPoint scheduled operations are due for execution. By default, it runs as a SharePoint timer job with the name "Axceler Scheduled Job Review."

You can also use the ControlPoint Utility (xcUtilities) to run the ControlPoint Scheduler—either as a Windows scheduled task or in real time—from a remote desktop or console session on any Web front-end server on which ControlPoint is installed.

For more information about the ControlPoint Scheduler, refer to the chapter on Scheduling ControlPoint Operations in the *ControlPoint User Guide*.

Login Account Requirements

The account you use to log into the server machine must have the appropriate permissions within ControlPoint for the operation being performed.

To schedule the ControlPoint Scheduler to run on a specific Web front-end server:

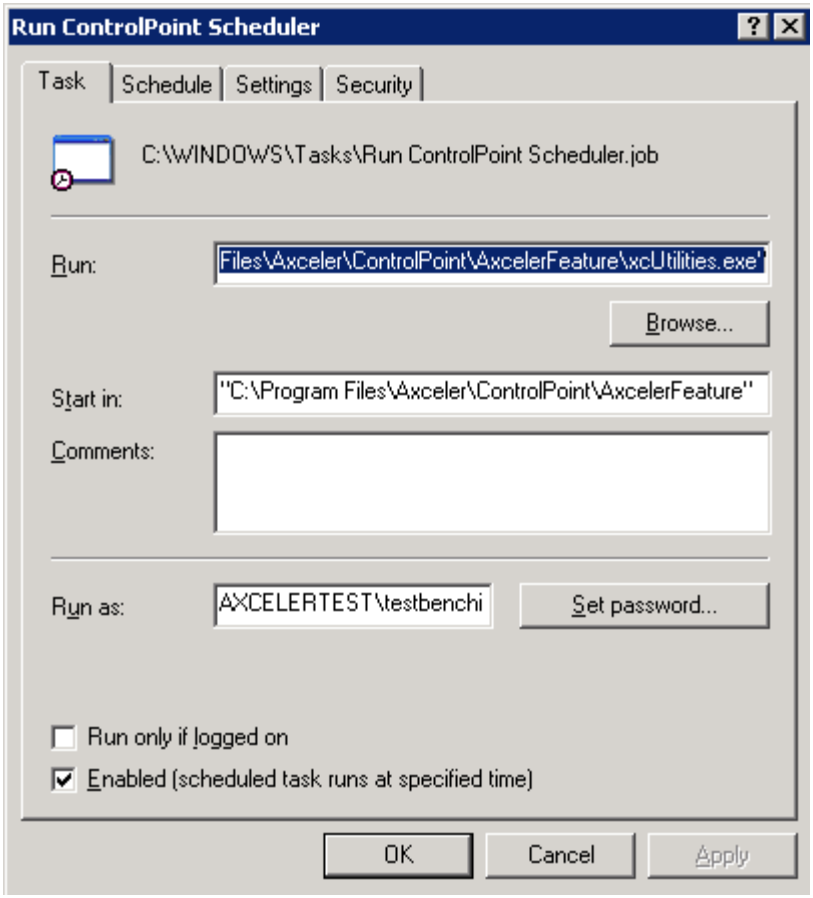
Note that the procedural steps for creating a Windows scheduled task are different for Server 2003 and Server 2008. Consult your Microsoft Server documentation for complete instructions.

If you choose to run the ControlPoint Scheduler on a Web front-end server in lieu of the ControlPoint Scheduled Job Review timer job, remember to disable the timer job in Central Administration.

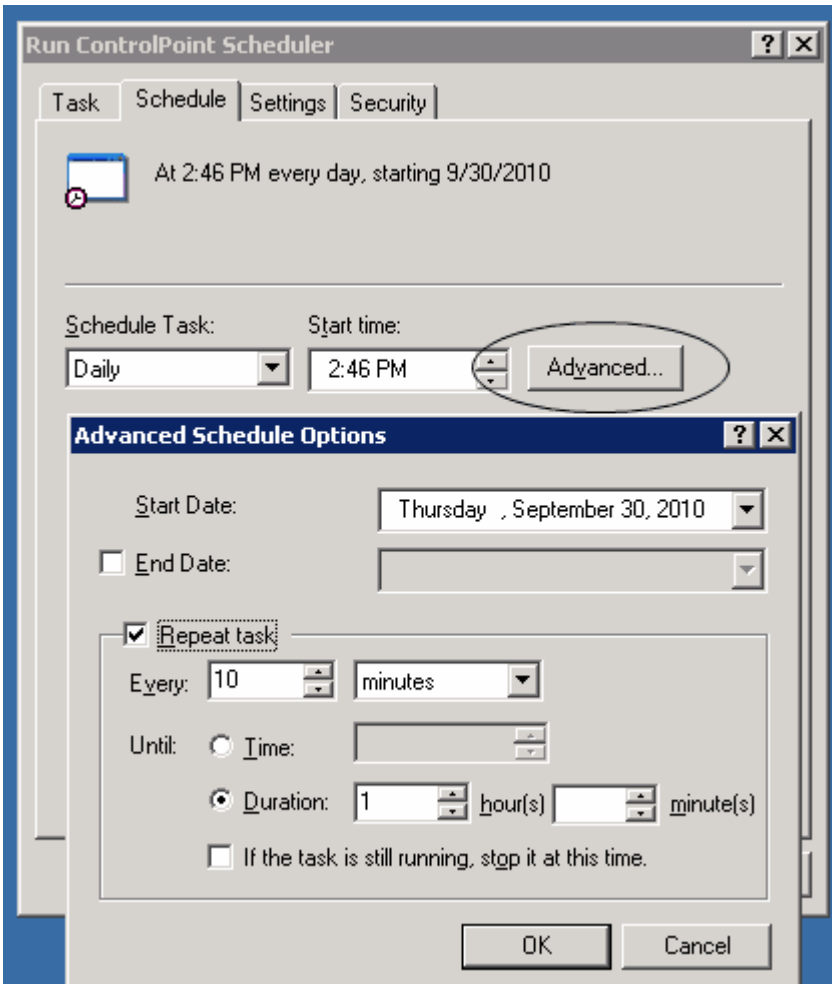
For Server 2003:

1 On the Web front-end server where you want the ControlPoint Scheduler run, open the Windows Task Scheduler and initiate a scheduled task.

2 Complete the Task tab Run field with the following string:
C:\Program Files\Metalogix\ControlPoint\ControlPointFeatures\xcUtilities.exe /scheduler



3 Complete the Schedule tab with the schedule time and frequency. (In this example, it is set up as a daily task that is repeated every 10 minutes.)



For Server 2008:

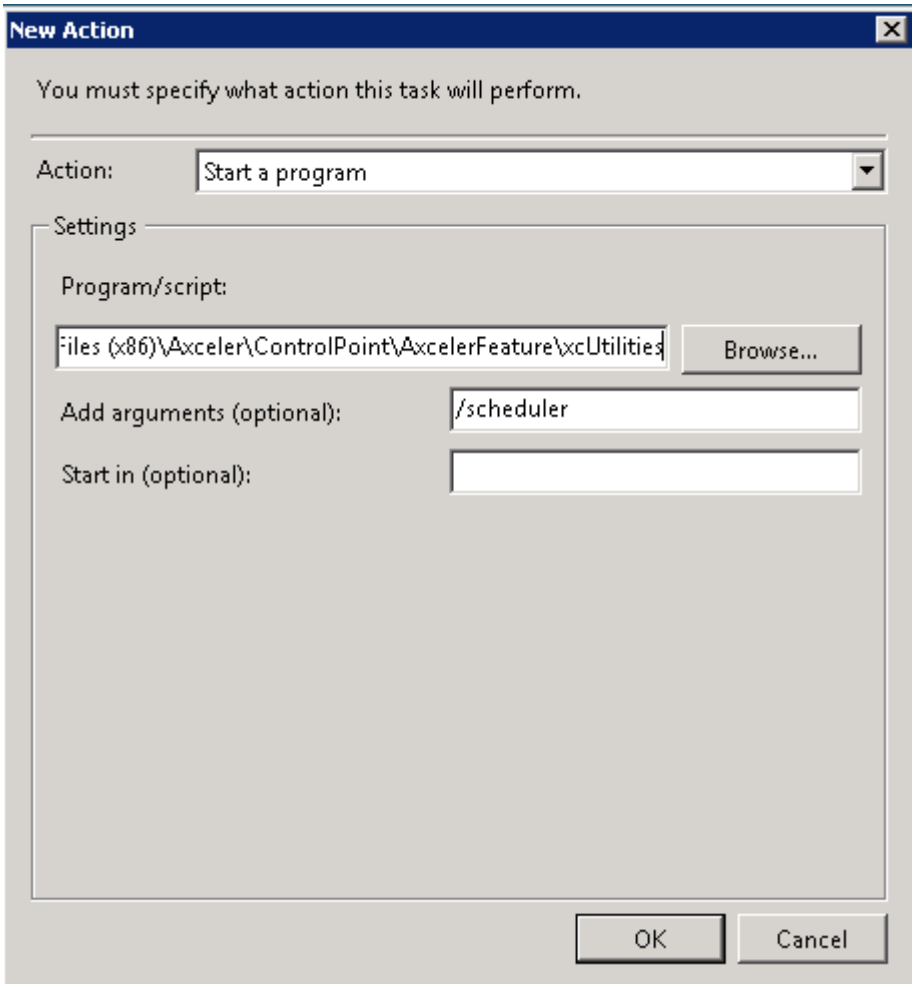
1 On the Web front-end server where you want the ControlPoint Scheduler to run, open the Windows Task Scheduler and initiate a scheduled task.

2 Complete the New Action dialog as follows:

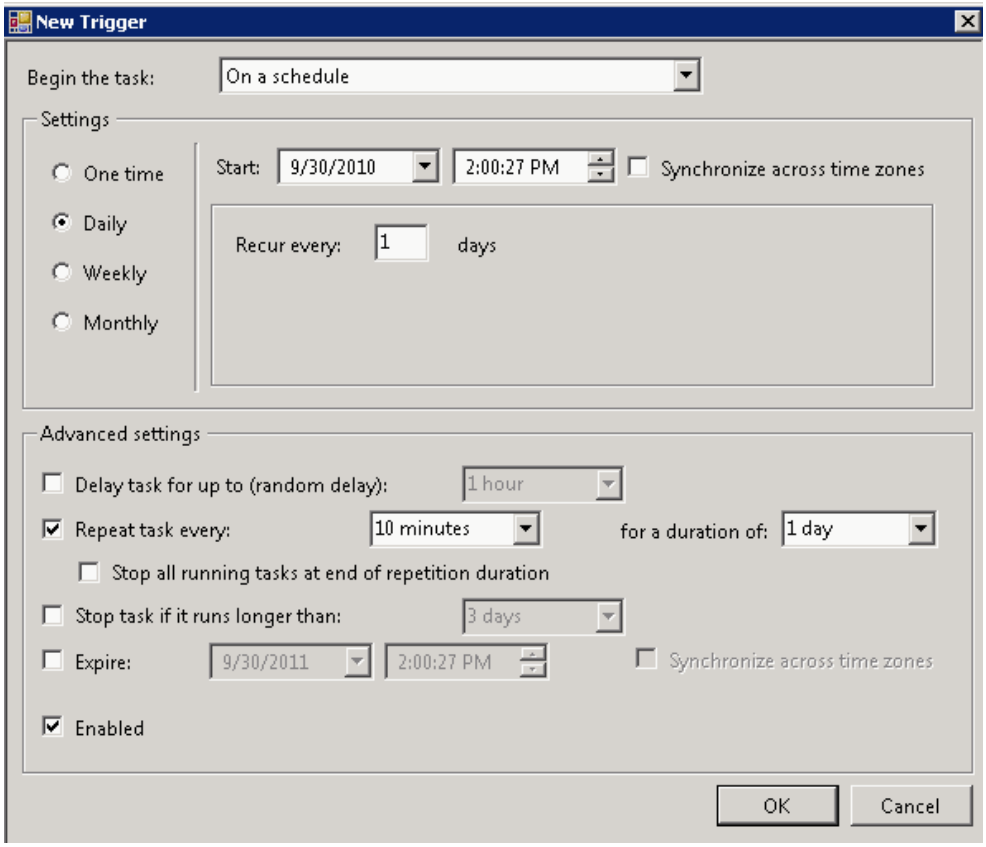
a) For **Action**, make sure **Start a program** is selected.

b) For **Program/script**, enter (or browse to) the following path:
C:\Program Files\Metalogix\ControlPoint\ControlPointFeatures\xcUtilities

c) For **Add arguments**, enter **/scheduler.**

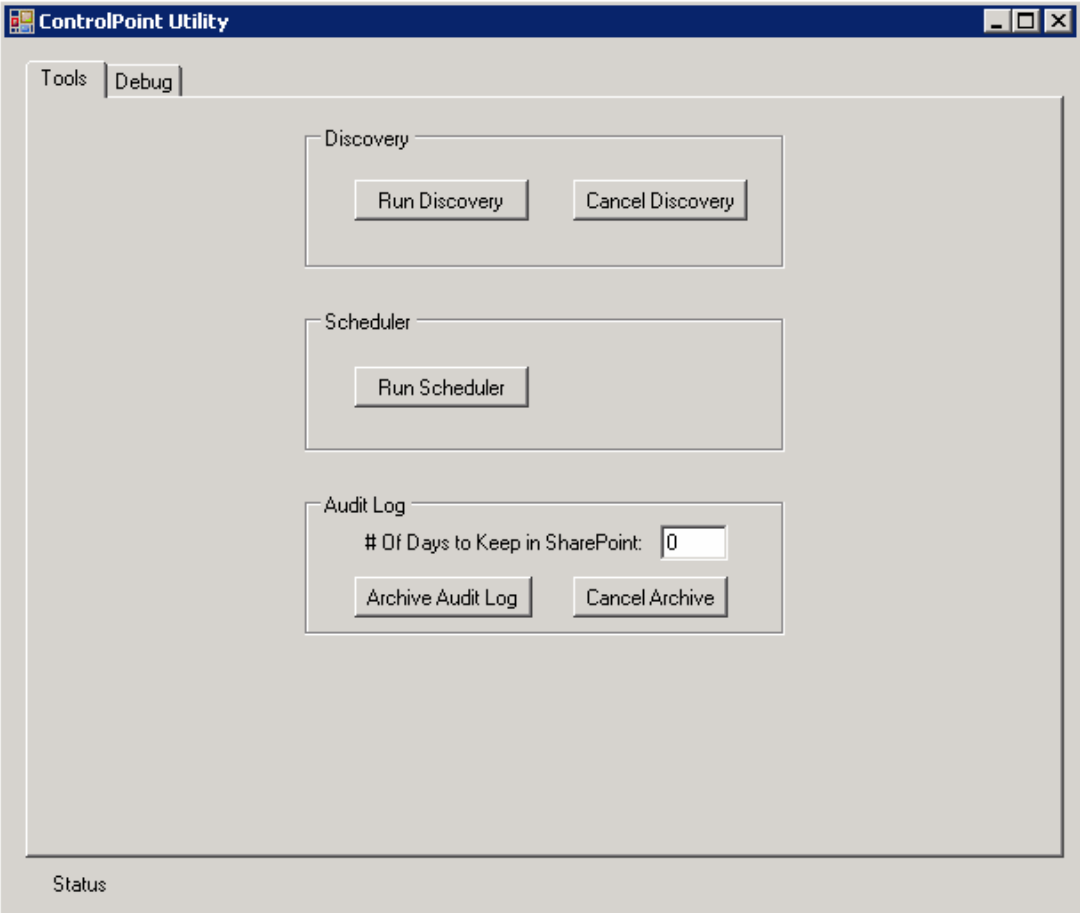


3 Complete the New Trigger dialog with the schedule time and frequency. (In this example, it is set up as a daily task that is repeated every 10 minutes.)



To run the ControlPoint Scheduler in real time from a Web front-end server:

1 Open xcUtilities.exe, located in **C:\Program Files\Metalogix\ControlPoint\ControlPointFeatures**.



2 On the Tools tab, click [**Run Scheduler**].

Accessing Members of Active Directory Groups in Different Domains or Forests

If you want to be able to view members of Active Directory groups in another domain or forest when analyzing users and permissions, one of the following trust relationships must exist:

- a **two-way trust** (that is, users from both domains or forests can access each other's resources without additional authentication)

OR

- a **one-way outgoing trust** relationship (that is, resources in the domain in which ControlPoint is installed are accessible to users in the user domain or forest. In this case, ControlPoint needs to be configured to access certain resources—such as Active Directory group members— in the other forest).

The Manage Forest Access feature lets you specify the account credentials that ControlPoint will use for authentication whenever it needs to retrieve Active Directory group members in a forest with which it has a

one-way outgoing trust relationship. The account ControlPoint uses for authentication must have a minimum of Read access to the other forest. As an added security measure, ControlPoint encrypts these credentials using the Advanced Encryption Standard (AES) algorithm before they are stored.

Note that, if your environment uses a one-way trust relationship and you do not configure ControlPoint to manage forest access:

- ControlPoint will still be able to report on permissions granted to users and groups in other domains, but you will not be able to expand Active Directory groups and view membership in those domains.

AND

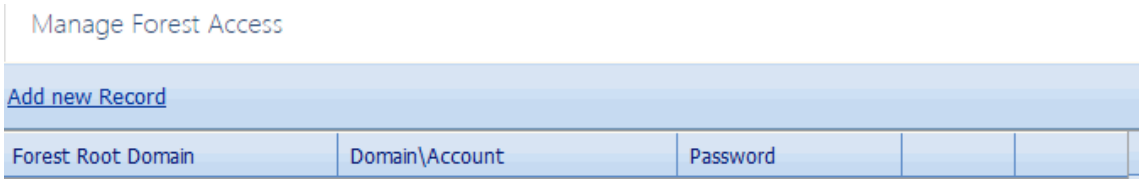
- If an Active Directory group is placed into the Business Administrators group, members of that Active Directory group will not be recognized as Business Administrators.

To access the Manage Forest Access feature:

- If the menu item has been added to ControlPoint and you have permissions for it, from the Manage ControlPoint panel, choose Manage Forest Access

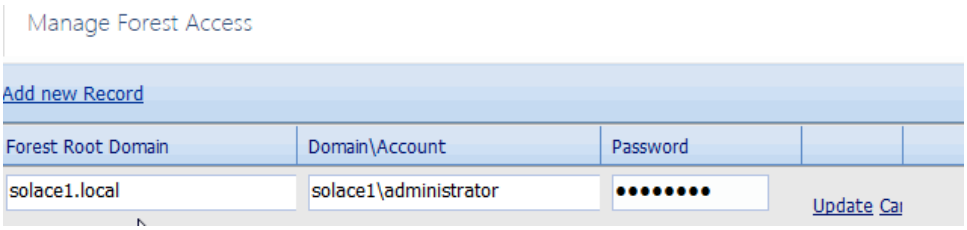
OR

- Replace the **xcMain.aspx** portion of the ControlPoint url with **xcForestAccess.aspx**.



To manage access to domains and forests with one-way outgoing trusts:

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

If you want to ...	Then ...
add a forest to the list	▪ Click the **Add new Record** link. ▪ For **Forest Root Domain**, enter the *fully qualified* domain name. ▪ Enter the **Domain\Account** you want ControlPoint to use for authentication, and the account **Password**.  ▪ Click the **Update** link.
update account credentials for a forest in	• Click the **Edit** link for the applicable record. • Update the appropriate field(s).

If you want to ...	Then ...
the list	CAUTION: The Password field will always be cleared when you open a record for editing and must be re-entered before a record can be updated, regardless of whether it has changed. • Click the **Update** link.
delete a forest from the list	Click the **Delete** link for the applicable record. (A confirmation dialog will display asking you if you want continue with the delete action.)

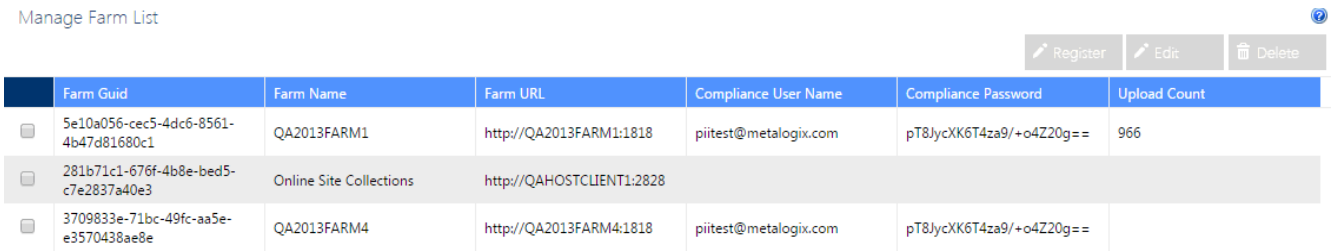
Managing Your Farm List

If you have a multi-farm installation of ControlPoint and have permissions to manage the ControlPoint farm list, you can:

- edit one of the following attributes:
  - a farm's name, and/or
  - the url used when switching farms from the ControlPoint application header
- delete farms that you have decommissioned or no longer manage through ControlPoint.
  Note that when you choose the delete a farm you can also choose whether or not to delete farm-related data (log files and cached data).

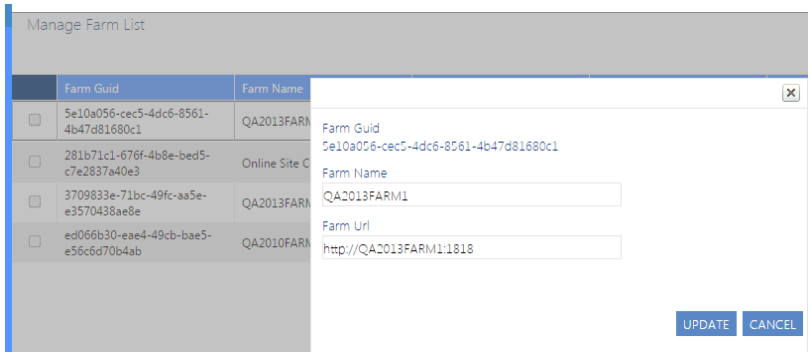
To Manage Your Farm List:

1 From the Manage ControlPoint panel, choose Manage Farm List



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

If you want to ...	Then ...
change the farm name and/or url	• Check the box to the left of the farm you want to edit, then click **[Edit]**.

If you want to ...	Then ...
	 • Update the applicable field(s). • Click **[Update]**.
delete the farm	• Click the **Delete** link. A pop-up dialog displays, asking you to delete the farm. To delete the farm, click [**Yes**]. A second pop-up dialog displays, asking whether you want delete farm-related data from the ControlPoint database. • Click the appropriate option.

Changes will be visible the next time the browser is refreshed.

Purging Historical Activity and Storage Data from the ControlPoint Services (xcAdmin) Database

The Purge Historical Data action lets you purge SharePoint activity and storage data—which is captured by the ControlPoint Discovery process and is used in analyzing historical data—from the ControlPoint Services (xcAdmin) database.

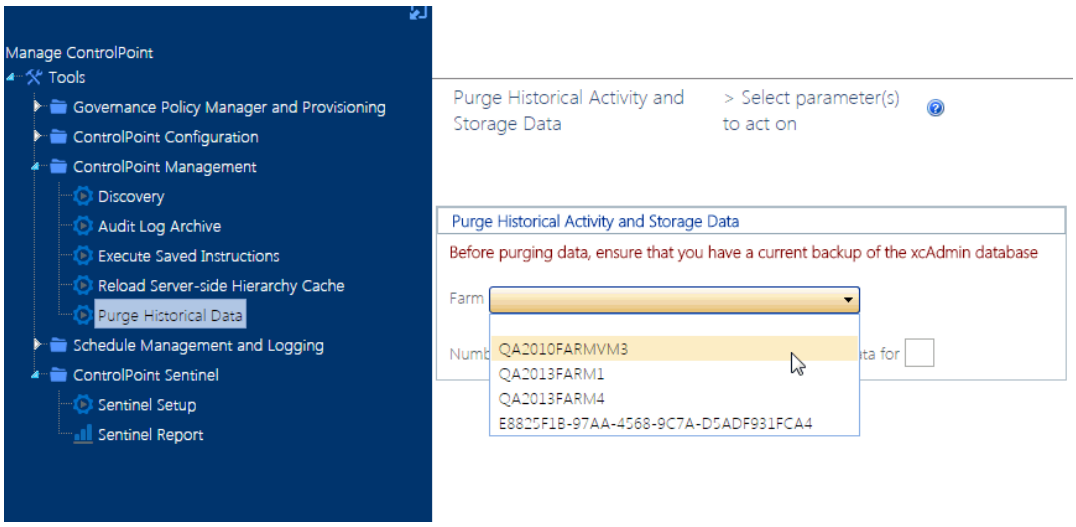
Data is purged from one farm per operation, and you can specify how many months' worth of data you want to retain.

Once data is deleted from the xcAdmin database it cannot be recovered and will no longer be available for inclusion in future ControlPoint activity and storage analyses. Therefore, it is recommended that you back up the database before performing this operation.

To purge activity and storage data:

1 From the Manage ControlPoint panel, choose ControlPoint Management > Purge Historical Data.

2 Select the **Farm** from which you want to purge historical data.



3 Enter the **Number of Number of months to keep historical activity and storage data for**.

CAUTION: If you enter 0, *all* historical activity and storage data will be deleted from the database.

Now you can either:

- 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 action that can be executed at a later time (by clicking [**Save Instructions**]). See Saving, Modifying and Executing XML Instructions for a ControlPoint Operation. in the *ControlPoint User's Guide*.

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 in the *ControlPoint User Guide*.

Enabling Server Details to Display in the SharePoint Summary Report

If you want to be able to include details about servers in your SharePoint farm in the SharePoint Summary report, the ControlPoint Service account must have permissions to request status information from each server that you want to include.

NOTE: Because the reporting of server details is a time-consuming process, it is an optional parameter in the SharePoint Summary Report user interface.

To ensure that the ControlPoint Service account has permissions to request server information, verify that:

- the ControlPoint Service account is a member of the local Administrators group on the target server
- the local Administrators group has "Remote Enable" Permissions for WMI on the target server
- remote WMI requests can be made on the target server.

Ensuring the Local Administrators Group has Remote Enable Permissions for WMI

NOTE: Remote Enable permissions is granted to the Local Administrators group by default.

1 From the server whose statistics you want to display, choose All Program > Administrative Tools > Computer Management.

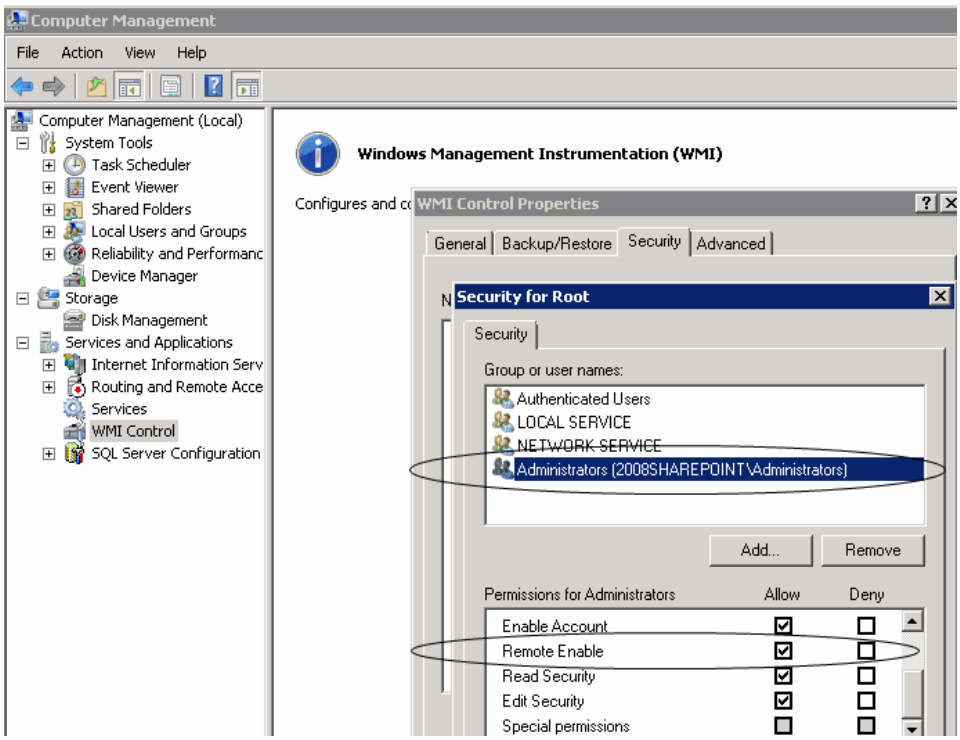
2 Expand the **Services and Applications** node.

3 Select **WMI Control**, right-click, and choose Properties.

4 Click the Security tab.

5 Click [**Security**].

6 Make sure **Remote Enable** is allowed for the local Administrators group.



7 If the target server is running Windows Firewall (a.k.a Internet Connection Firewall), run the following from the command prompt to allow remote WMI requests:

```
netsh firewall set service RemoteAdmin enable
```

Modifying ControlPoint Configuration Settings

ControlPoint Application Administrators can modify a number of ControlPoint configuration settings, including

- elements of the user interface
- environmental settings that can be "fine-tuned" to improve performance, and
- default security settings.

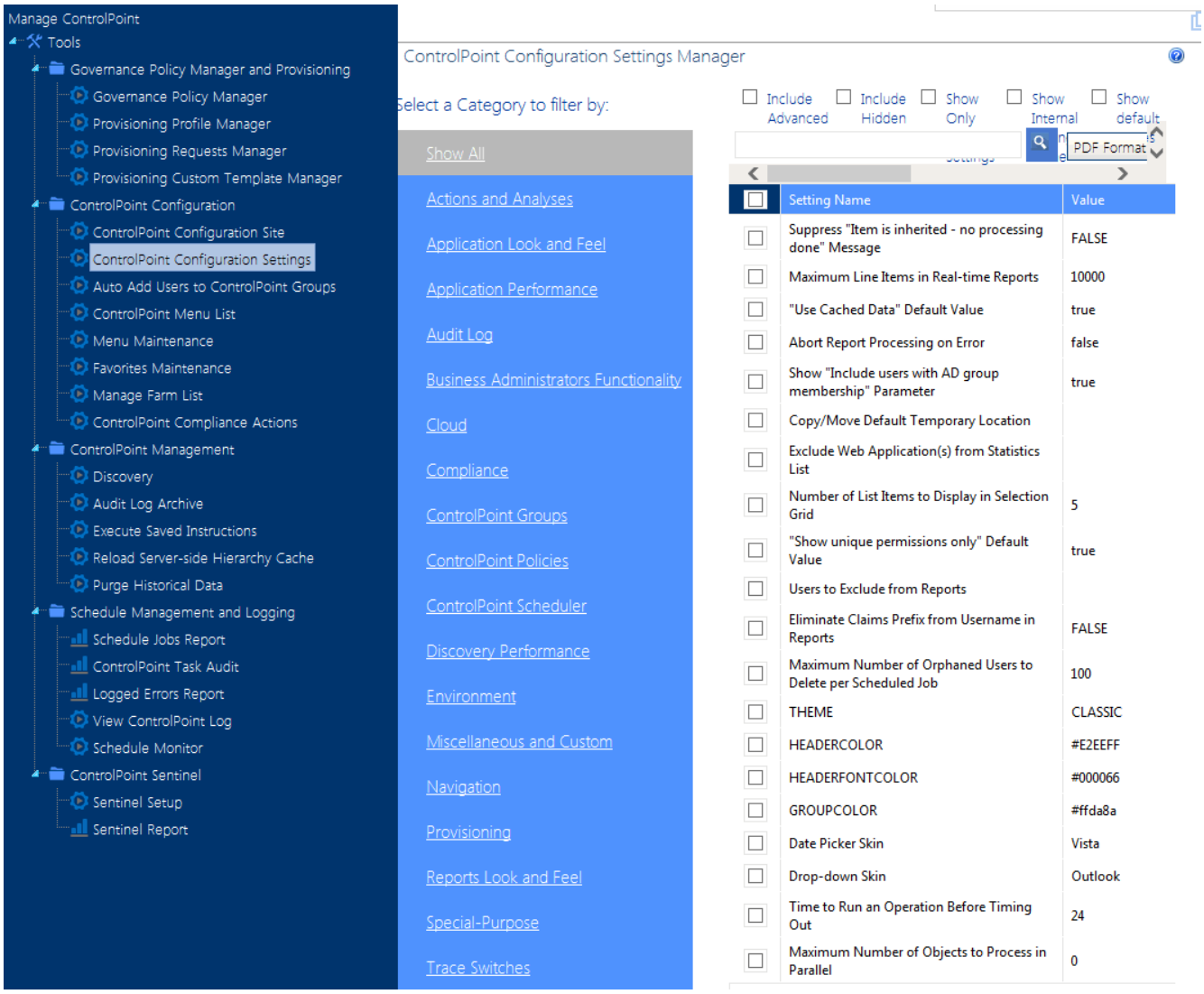
ControlPoint Application settings are modified via the ControlPoint Configuration Settings Manager page.

NOTE: If you first installed ControlPoint prior to version 6.0 and prefer to modify settings using the ControlPoint Configuration Site's ControlPoint Settings list, you may continue to do so.

ControlPoint Configuration Settings are farm-specific. If you are using ControlPoint in a multi-farm installation, these settings are managed separately for each farm.

To access the ControlPoint Settings list:

From the Manage ControlPoint panel, chose ControlPoint Configuration > ControlPoint Configuration Settings.



Permissions for this list are inherited from the ControlPoint Configuration site. Therefore, members of ControlPoint Application Administrators group have full control access and can modify settings.

Members of the Administrators group have read-access to the list, and therefore can view, but not modify, settings.

NOTE: ControlPoint Settings can also be edited via the ControlPoint Configuration Site - ControlPoint Settings list. ControlPoint Application Administrators may prefer this option if they have been using ControlPoint prior to version 6.0 and are accustomed to editing settings this way.

Setting Classifications:

ControlPoint Settings fall into the following classifications:

Basic - Generally the most commonly-configured settings,. Only Basic settings display in the ControlPoint Configuration Settings Manager page by default.

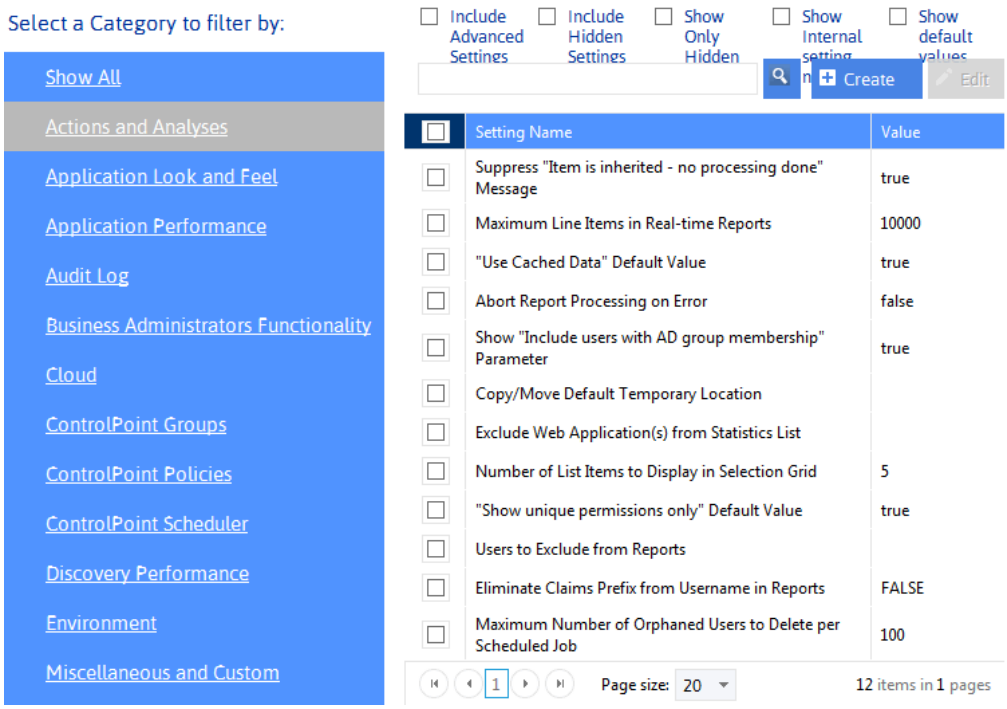
Advanced - Less commonly-used settings that you may want to modify to further customize ControlPoint to meet particular needs of your SharePoint environment or users. [

Created - Special-purpose settings that you can add to the ControlPoint Settings list if needed. Generally, these settings should only be configured under special circumstances and with guidance from Metalogix Technical Support. See also

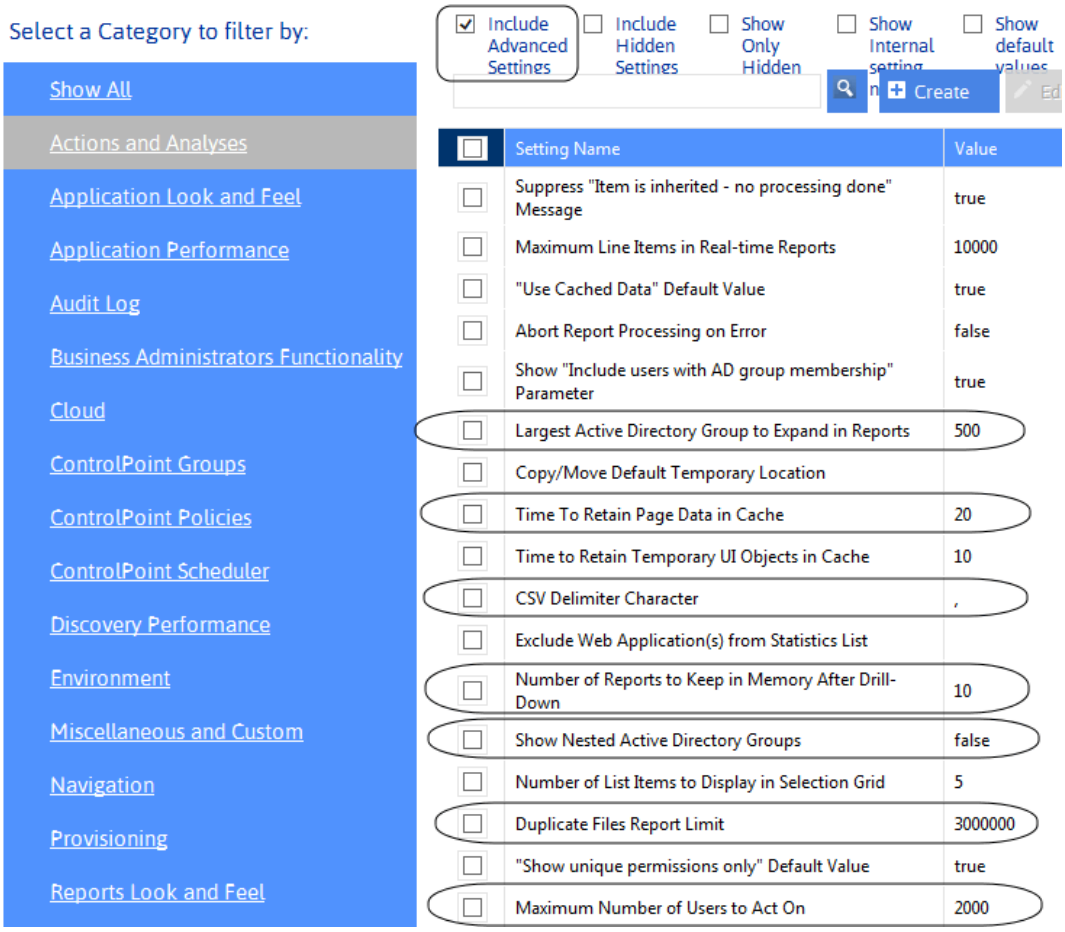
Filtering the ControlPoint Configuration Settings List

You can filter the ControlPoint Settings list using one or more of the following options:

- By choosing a **Category**



By choosing to **Include Advanced Settings**



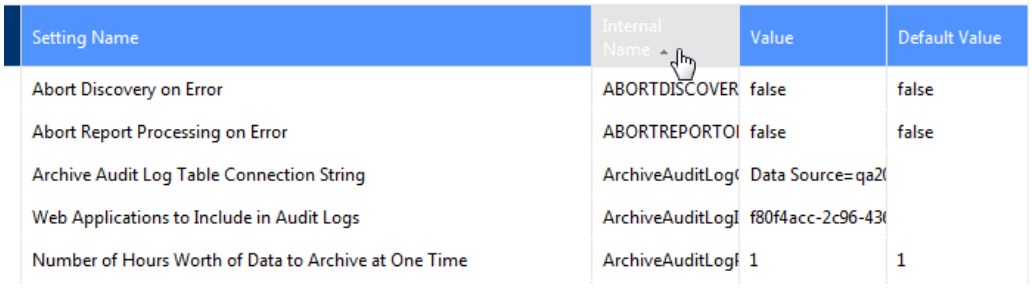
- If special-purpose settings have been created:
  - **Include Created Settings**, or
  - Show **Only Created Settings**

TIP: You can view created settings **Include Created Settings** and selecting the **Special Purpose** category.

Showing Additional Columns and Sorting by Column

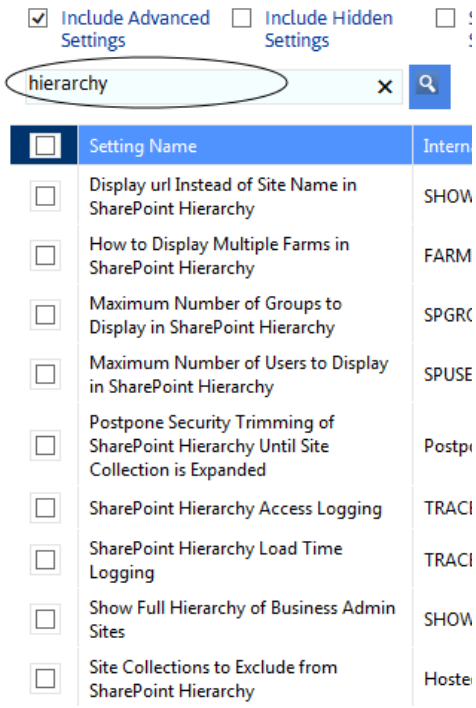
By default, the ControlPoint Configuration Settings list displays the **Setting Name** and current **Value**, but you can also choose to **Show Internal setting name** and/or **Show default values**. You can sort on any column.

For example, if you are a long-time ControlPoint user and are already familiar with internal setting names, you can sort by this column.



To search for a ControlPoint Setting by Setting Name:

Enter a full or partial text string in the search box, then click the magnifying glass icon .



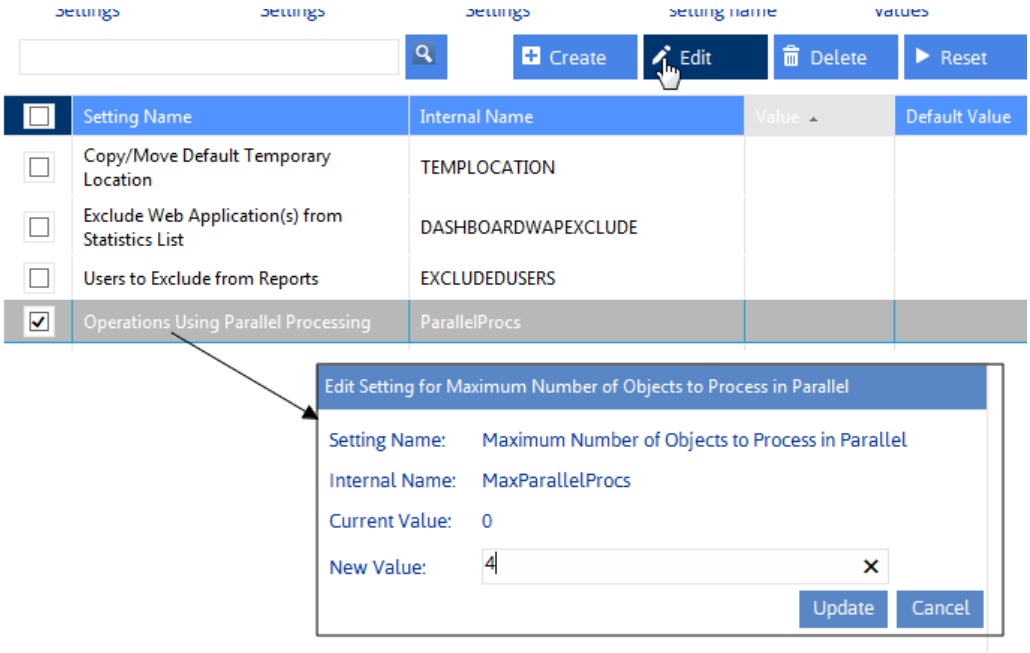
To edit a ControlPoint Setting:

1 Check the box to the left of the setting that you want to edit.

NOTE: You can edit only one setting at a time. If you select more than one, the **[Edit]** button becomes disabled.

2 Click **[Edit]**.

3 Update the **Value** field as appropriate. (Descriptions of configurable settings, along with guidelines for changing parameter values, follow.)



4 Click **[Update]**.

Changes to ControlPoint Settings take effect immediately.

Deleting ControlPoint Settings

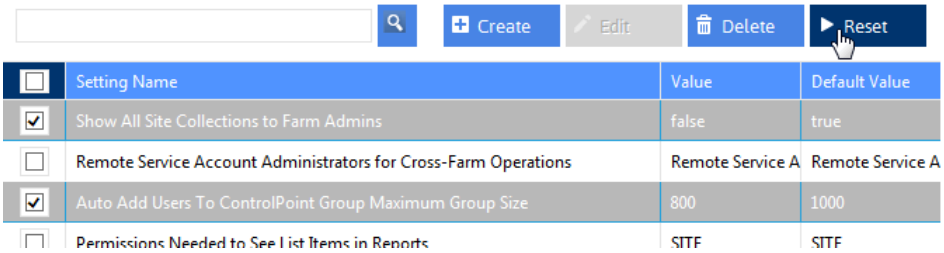
Only Created settings can be deleted.

To restore ControlPoint Setting default values:

1 Check the box to the left of each setting for which you want to restore the default value.

NOTE: For this operation, you may select multiple settings.

2 Click **[Reset]**.



Changing Default Settings for Actions and Analyses

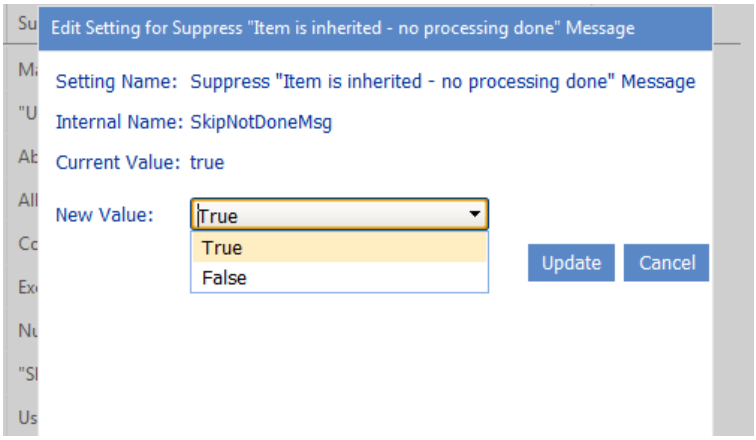
These configuration settings display in the ControlPoint Settings list under the category **Actions and Analyses**.

Supress "Item is inherited - no processing done" Message(SkipNotDoneMsg)

By default, when a permissions action includes SharePoint objects with inherited permissions, the following line displays in the ControlPoint Task Audit for each of these objects:

Security is inherited - no processing done

ControlPoint Application Administrators can, however, suppress this message for objects with inherited permissions by changing the Value of the ControlPoint Setting Supress "Item is inherited -no processing done" Message from *True* to *False*.



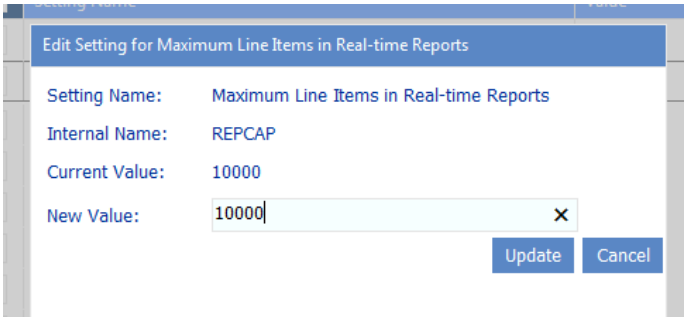
Maximum Line Items in Real-time (REPCAP)

By default, the maximum number of line items that can display in ControlPoint search or analysis results that is run interactively (that is, using the "Run Now" option) is 10000. This limit is set to provide administrators with predictable performance when generating an analysis and to keep the result set manageable.

If the limit is exceeded, the following message displays:

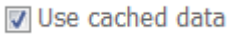
This report has more rows than the current row limit of xxxx, only first xxxx rows are displayed. You can raise the limit. It is specified in either REPCAP or SCHEDULEREPCAP.

ControlPoint Application Administrators can set this limit either higher or lower by changing the Value of the ControlPoint Setting **Maximum Line Items in Real-time Reports**.

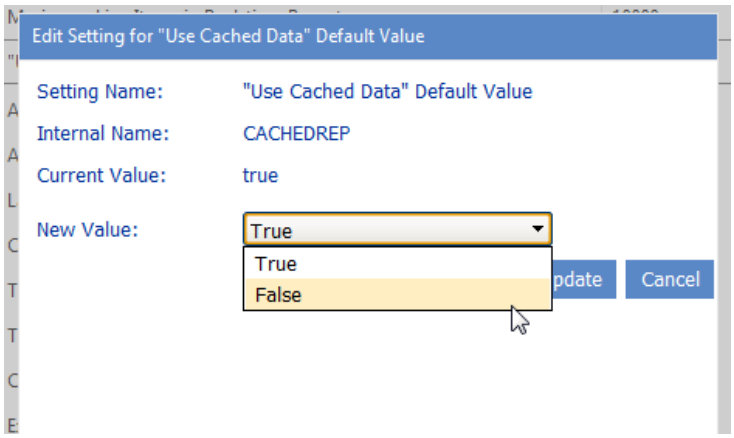


"Use Cached Data" Default Value (CACHEDREP)

When you are given the option of using cached or real-time data for data analysis and reporting, the ControlPoint default value is **Use cached data**. (See also Specifying Parameters for Your Analysis.)



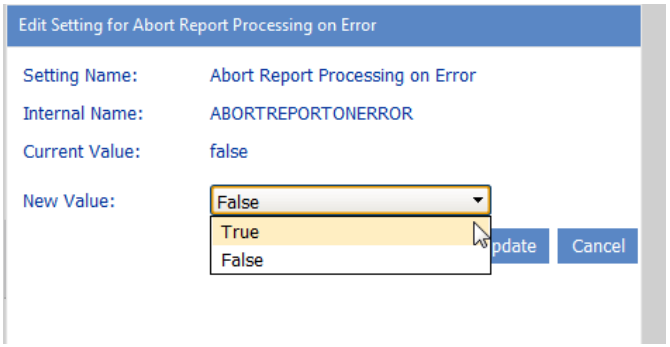
ControlPoint Application Administrators can, however, change the default option to real-time by changing the Value of the ControlPoint Setting CACHEDREP from *True* to *False*.



Abort Report Processing on Error (ABORTREPORTONERROR)

As of version 5.2.345.0, when a ControlPoint analysis includes lists and/or list items and errors are encountered, by default analysis processing will complete, with problematic list(s) and/or item(s) flagged with the text ***Error*** in the results.

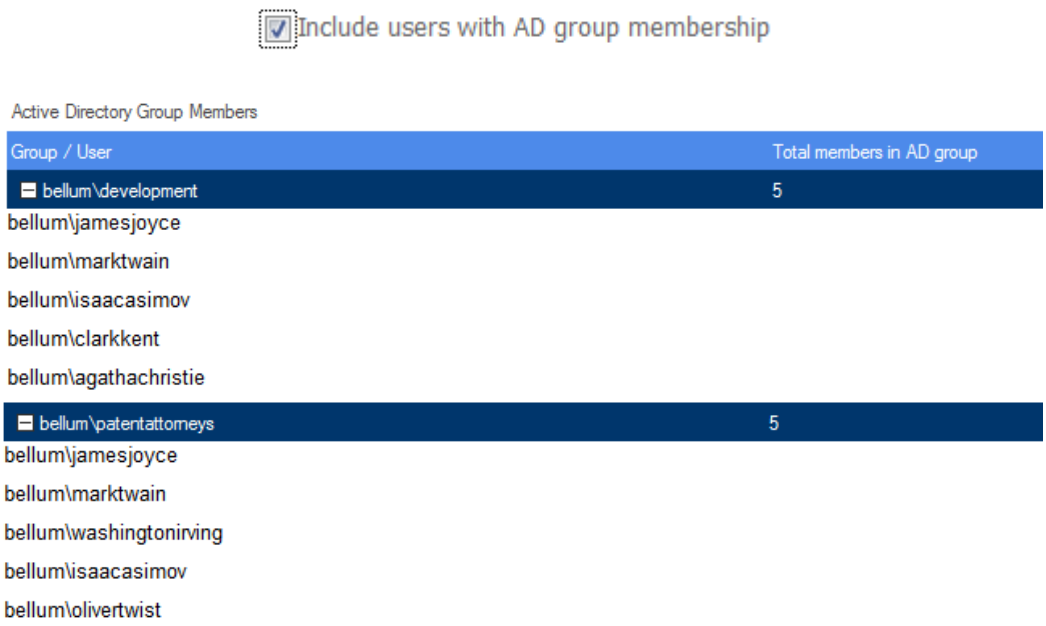
ControlPoint Application Administrators can, however, choose to have analysis processing be aborted and no results display by changing the Value of the ControlPoint Configuration Setting **Abort Report Processing on Error** from *false* to true.



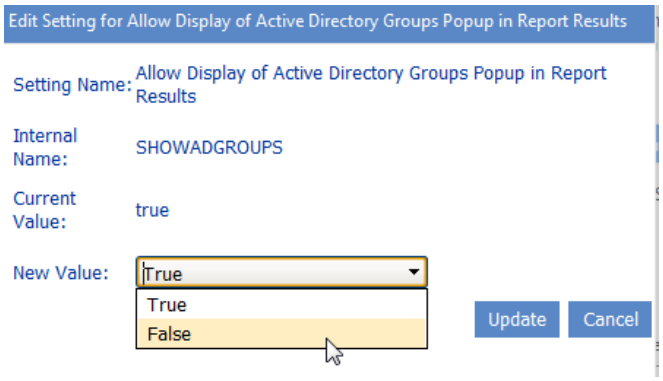
NOTE: Prior to version 5.2.345.0 the *default* value is true.

Display "Include users with AD group membership" Parameter (SHOWADGROUPS)

By default, if a permissions analysis is run using real-time data, users have the option to **Include users with AD group membership** in analysis results.



If it is important that membership in Active Directory groups *not* be viewable in ControlPoint, ControlPoint Application Administrators can restrict this feature by changing the Value of the ControlPoint Configuration Setting Allow Display of Ative Directory Groups Popup in Report Results T*rue* to *false*.

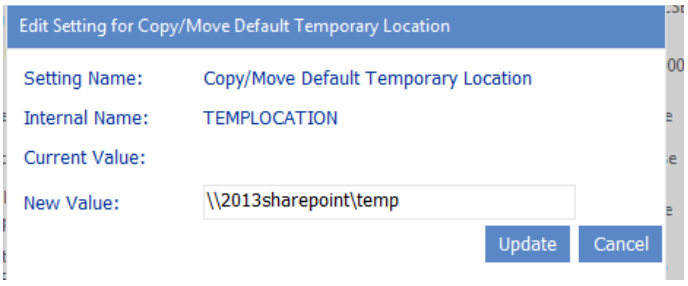


Copy/Move Default Temporary Location (TEMPLOCATION)

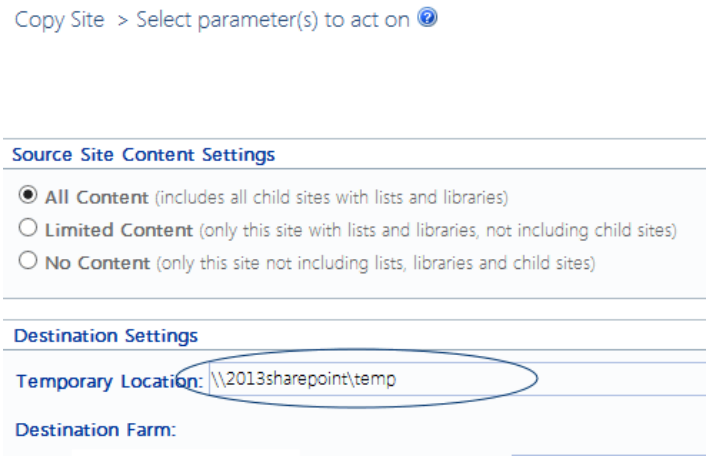
When ControlPoint is used to copy or move a site collection, site or list, a Temporary Location—where files will be stored until the copy/move is complete—must be specified.

The ControlPoint Application Administrator can specify an initial default temporary location for all copy/move operations, by entering either a network folder (not file) path or a url as the Value for the ControlPoint Setting **Copy/Move Default Temporary Location**.

NOTE: The administrator performing the operation (and in the case of cross-farm operations, the Service Accounts used on both the source and destination farm) must have Full Control access to the folder or path.



The Default Temporary Location is displayed the first time a user initiates a copy or move and can be overwritten in the Copy/Move user interface.



If a Value is not specified, the Temporary Location field will be blank and must be completed by each individual administrator. If an administrator enters a new/different path, it is retained as the user-specific default for that administrator.

Time to Retain Page Data in Cache (CACHEREPORT4)

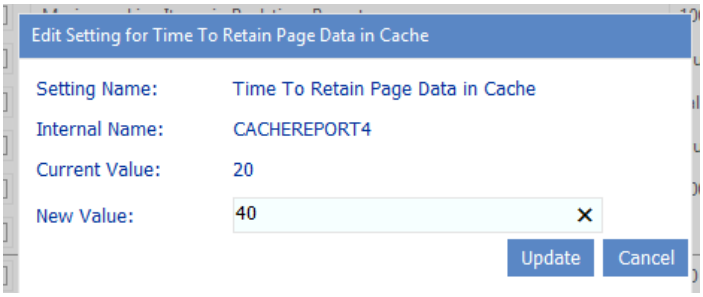
By default, information about an active ControlPoint operation is kept in a server memory cache for 20 minutes. Within this time period, a user can:

- initiate and run a ControlPoint action or analysis
- return to results of an analysis from which he/she has drilled down
- download search or analysis results.

After this time period has expired, the cache is cleared and the operation must be re-initiated.

ControlPoint Application Administrators can change the number of minutes that analysis data is held in server memory cache by modifying the Value of the ControlPoint Setting **Time to Retain Page Data in Cache**.

NOTE: This is an Advanced Setting.



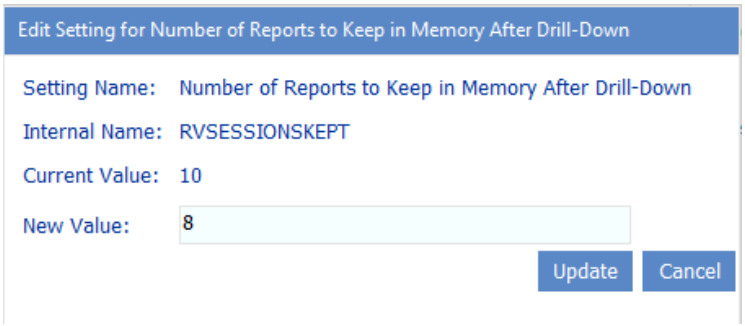
If you increase this value, a ControlPoint operation will remain "active" for a longer period of time. Keep in mind, however, that the higher the value is set the longer information about the operation will consume memory, which may be a burden on server resources (specifically, the size of the application pool process supporting the Web application that hosts the ControlPoint Configuration Site collection).

If you decrease this value and the server cache is cleared before a ControlPoint operation (such as a Copy/Move) has completed, the Task Audit that is generated at the conclusion of the operation will contain no data. (However, a completed Task Audit for the operation can still be invoked from the Manage ControlPoint panel).

Time to Retain Temporary UI Objects in Cache (UICACHEDURATION)

By default, ControlPoint retains temporary UI-related objects in server memory for 10 minutes. ControlPoint Application Administrators can, however, change the number of minutes that analysis data is held in server memory cache by modifying the Value of the ControlPoint Setting **Time to Retain Temporary UI Objects in Cache**.

NOTE: This is an Advanced Setting.

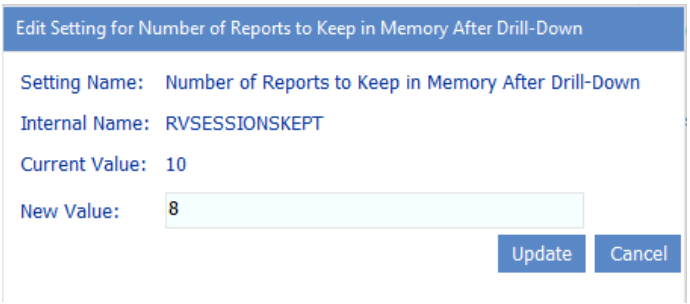


This setting is designed to be used in conjunction with—and set to a lower value than—Time to Retain Page Data in Cache (CACHEREPORT4) to enable the cache to be cleared more quickly.

Number of Reports to Keep in Memory After Drill-Down (RVSESSIONSKEPT)

By default, if a ControlPoint user has checked the **Open drill-downs in new window** parameter for a ControlPoint analysis, the Report Viewer will keep information for up to 10 of these analyses for each user in server memory before the window containing the results of the original analysis expires. ControlPoint Application Administrators can change this limit, however, by changing the Value of the ControlPoint Setting **Number of Reports to Keep in Memory After Drill-Down**.

NOTE: This is an Advanced Setting.



NOTE: This setting applies only when a user drills down *in a new window*.

If you increase this value, a user will be allowed to open more drill-down windows before having to re-initiate the original analysis. Keep in mind, however, that the higher the value is set the more information will consume memory, which may place a burden on server resources (specifically, the size of the application pool process supporting the Web application that hosts the ControlPoint Configuration Site collection).

Exclude Web Application(s) from Statistics List (DASHBOARDWAPEXCLUDE)

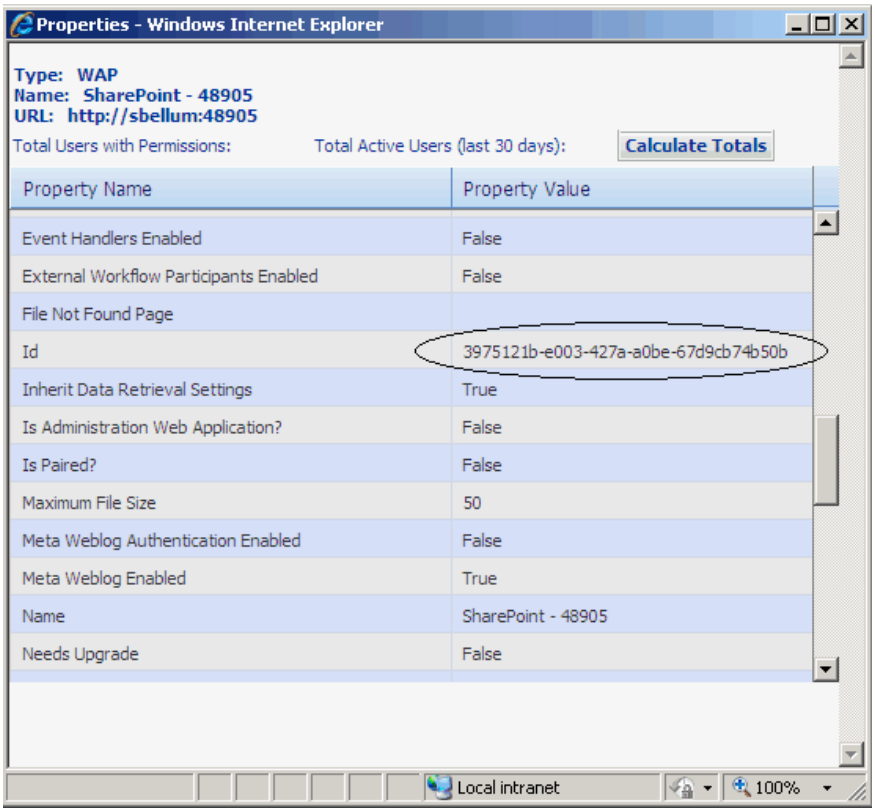
By default, the site collection statistics list that is created for use by dashboards includes all site collections in the farm.

ControlPoint Application Administrations can, however, exclude all of the site collections within one or more Web applications (up to a maximum of 6) from the Site Collection Statistics list. For example, you may choose not to monitor statistics for a large number of MySites.

To exclude a Web application from the Site Collection Statistics list, enter the Web application's GUID as the Value of the ControlPoint Setting **Exclude Web Application(s) from Statistics List**. Use the following guidelines:

1 To locate a Web application's GUID, select the Web application in the ControlPoint Farm Hierarchy, right-click and choose **Properties**.

2 Copy the Id's Property Value and paste it directly into the Value field.

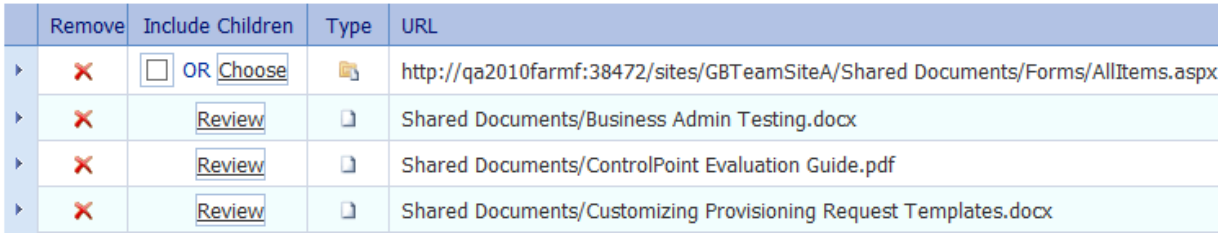


3 Repeat steps 1 and 2 for each Web application you want to exclude (up to a maximum of 6). Use a

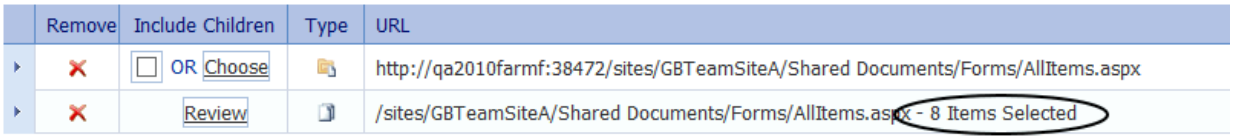
comma (,) to separate each GUID in the list.

Number of List Items to Display in Selection Grid (DISPLAYSINGLELISTITEMS)

By default, when you select list items on which to perform a ControlPoint action or analysis, up to five individual items/folders will display in the Selection panel.

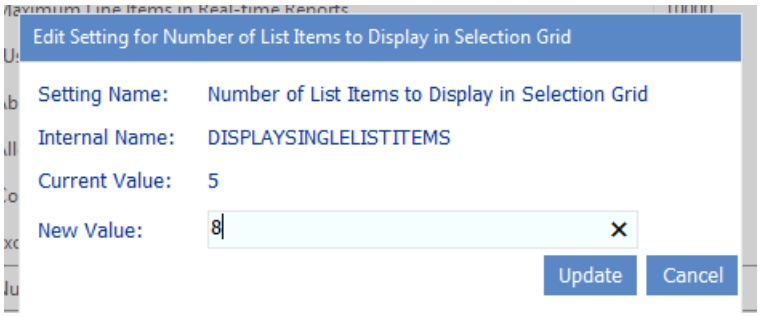


When the selection includes six or more items, a single line item displays that identifies the number of items selected.



The purpose of this threshold is to make the most efficient use of the limited viewing area in the Selection panel.

ControlPoint Application Administrators can, however, change this threshold by updating the Value of the ControlPoint Configuration Setting **Number of List Items to Display in Selection Grid**.



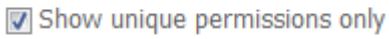
Use Activity Min. Date as Start Date (UseActivityDbDate)

By default, when an Activity Analysis includes a date range, there are no restrictions on the **Start Date** users can select, even if it precedes the earliest date that activity that is retained in the database. ControlPoint Application Administrators can, however, restrict the Start Date that can be selected (that is, prohibit users from selecting a Start Date earlier than the first date of available activity) by changing the Value of the ControlPoint Setting UseActivityDbDate from *False* to *True*.

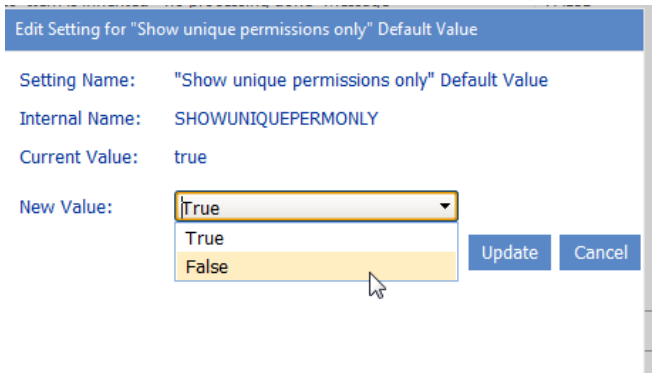
If this value is set to *True*, page load time may take significantly longer.

Show unique permissions only" Default Value (SHOWUNIQUEPERMONLY)

When a permissions analyses is initiated, users have the option of including only objects with unique (non-inherited) permissions or objects with both inherited and non-inherited permissions. Having **Show unique permissions only** selected is the ControlPoint default.



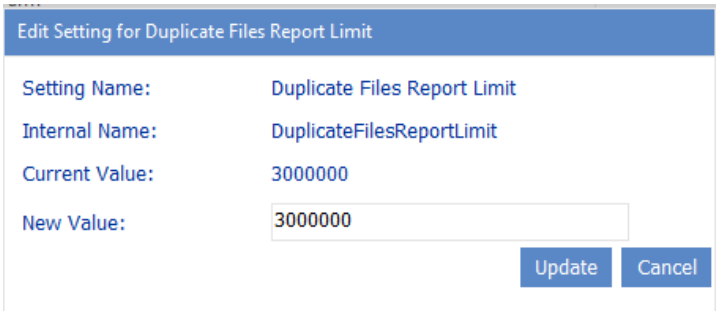
ControlPoint Application Administrators can, however, change the default (so that Show Unique Permissions Only is unselected) by changing the parameter value of the ControlPoint Configuration Setting **"Show unique permissions only" Default Value** from true to false.



Duplicate Files Report Limit (DuplicateFilesReportLimit)

By default, when a Duplicate File analysis is run, up to 3000000 (three million) files can be evaluated for duplicates. ControlPoint Application Administrators can, however, increase this number by changing the Value of the ControlPoint Setting **Duplicate Files Report Limit**.

NOTE: This is an Advanced Setting.



NOTE: If you set too high a limit, out-of-memory exceptions may occur, particularly on 32-bit operating systems.

Users to Exclude from Reports (EXCLUDEDUSERS)

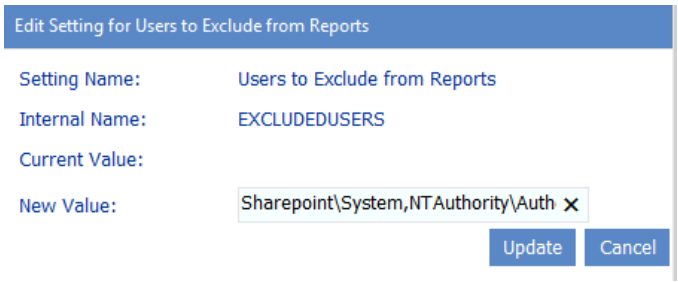
By default, unless one or more users are specified in the People Picker, all SharePoint users are included in the following ControlPoint analyses:

- Site Permissions
- Comprehensive Permissions
- Site Collection Activity
- Site Activity
- Activity by User
- Activity by Document
- Inactive Users

ControlPoint Application Administrators can, however, exclude certain users and/or Active Directory groups from these analyses by entering the user account name(s) as the Value for the ControlPoint Configuration Setting **Users to Exclude from Reports**. Enter multiple account names as a comma-separated list.

You may, for example, want to exclude common system accounts such as Sharepoint\System and NTAuthority\Authenticated Users.

NOTE: You must exclude users based on *full account names* (sometimes known as pre-Windows 2000account names in Active Directory), not display names. For example, you cannot exclude system accounts by entering the display name System Account.

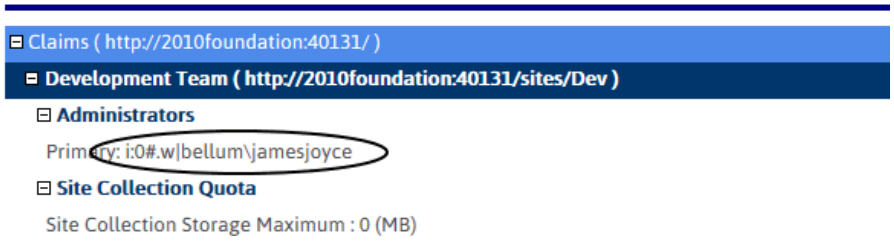


You can still run permissions and activity reports on excluded users if you enter them in the People Picker.

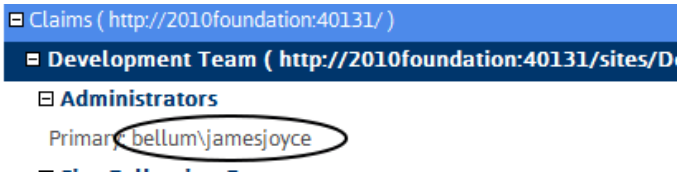
NOTE: You can exclude users from audit log analyses via the ControlPoint Configuration Setting Users to Exclude from Audit Log Analyses.

Eliminate Claims Prefix from Username in Reports (UseCleanedLoginNameInReports)

By default, the names of claims-authenticated user names display with the claims prefix (for example, i:0#.w|) in results of several ControlPoint analyses.

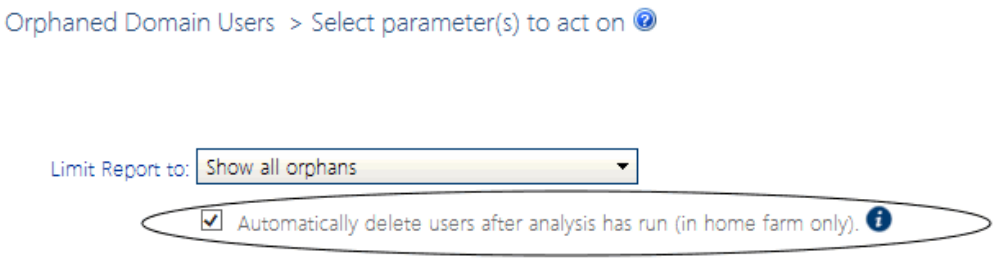


ControlPoint Application Administrators can, however, choose to have claims user names display "cleaned up" (that is, without the prefix) by changing the Value of the ControlPoint Configuration Setting UseCleanedLoginNameInReports from *False* to *True*.

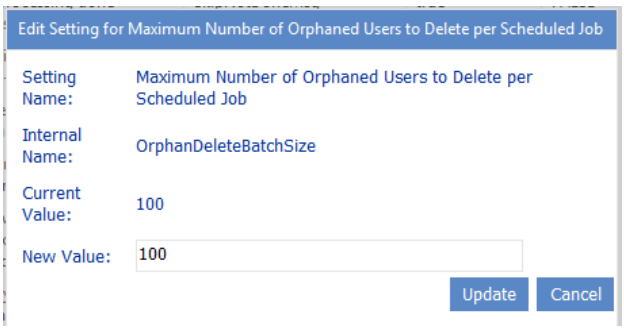


Maximum Number of Orphaned Users to Delete Per Scheduled Batch (OrphanDeleteBatchSize)

If you run an Orphaned Domain Users analysis and choose to **Automatically delete users after analysis has run**, 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 Value of the ControlPoint Setting OrphanedDeleteBatchSize (100 by default). ControlPoint Application Administrators may, however, choose to either *increase* this value (if, for example, they want all users to be deleted in a single scheduled job or *decrease* it (for example, to avoid having a single scheduled job run for an excessively long time).

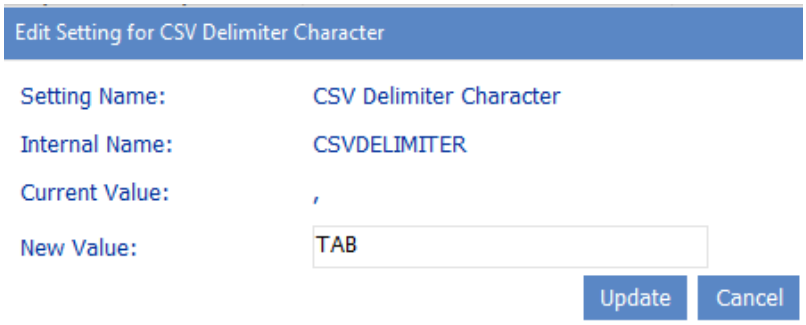


CSV Delimiter Character (CSVDELIMETER)

By default, ControlPoint uses a comma (,) as a delimiter to separate data in search and analysis results when the **Download Report Data as CSV** option is used. ControlPoint Application Administrators can, however, specify a different delimiter to use by modifying the Value of the ControlPoint Setting **CSV Delimiter Character**. (This might be necessary if some of the content in analysis results—such as site names—contain commas.)

Note that this setting does *not* apply when the **CSV (comma delimited)** option in selected from the report toolbar drop-down.

NOTE: This is an Advanced Setting.



NOTE: If you want to use a tab for the delimiter, enter **TAB**.

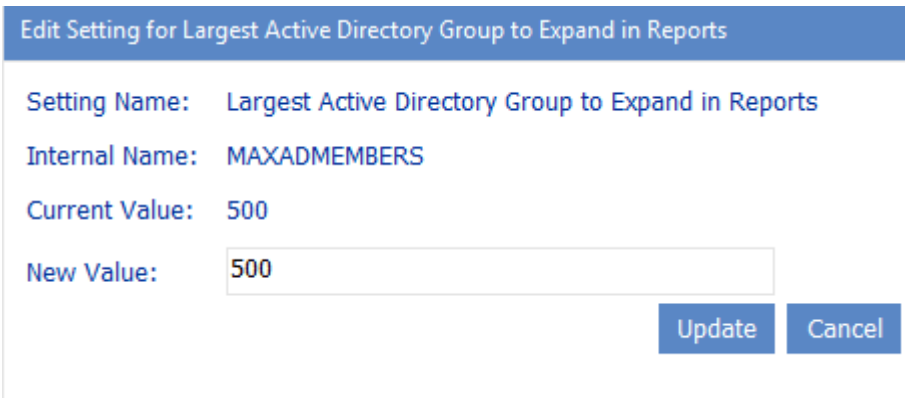
If you use a delimiter other than a comma and plan to use Excel as your analysis tool, when performing the Download Report Data as CSV operation, choose the [**Save**] option then *import* the saved file into Excel. If you try to open the csv file *directly* in Excel, only commas will be recognized as delimiters.

Largest Active Directory Group to Expand in Reports (MAXMEMBERS)

By default, when a ControlPoint permissions analysis is generated with the **Expand Active Directory Groups** box checked, users in Active Directory groups display as separate line items in analysis results only if the group contains 500 or fewer members.

ControlPoint Application Administrators can, however, change this number by modifying the Value of the ControlPoint Setting **Largest Active Directory Group to Expand in Reports**.

NOTE: This is an Advanced Setting.



For example, you may not want to display members of very large groups, such as all employees or department members.

NOTE: Built-in groups, such as NT Authority\authenticated users, will not be expanded, regardless of the number of users:

Maximum Number of Users to Act On (MAXUSERSFORACTION)

By default, when you want to execute a ControlPoint action that operates on SharePoint users, up to two thousand (2000) users may be included in the operation, as determined by the People Picker entry. Before executing the action, ControlPoint evaluates the number of users included in the People Picker entry, and if it exceeds the maximum number allowed, the action is not carried out and the following message is recorded in the ControlPoint Task Audit:

The number of users ([*numusers]*) has exceeded the allowable threshold of [*maxusers].*

This setting is especially useful as a "safety net" when an operation allows wildcards to be used in the People Picker and could potentially act on more users than intended.

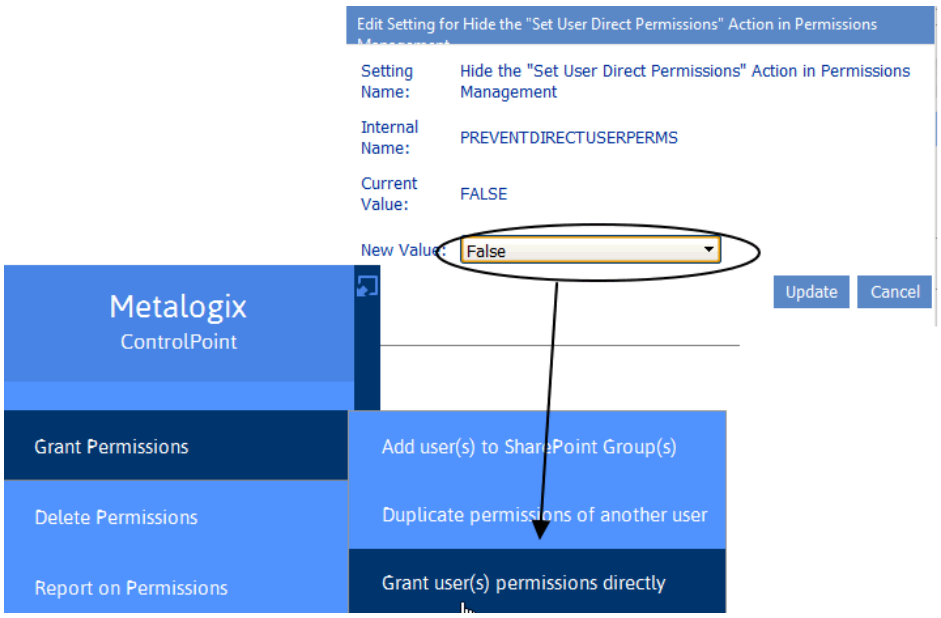
ControlPoint Application Administrators can, however, specify a different limit by changing the Value of the ControlPoint Configuration Setting **Maximum Number of Users to Act on**.

NOTE: This is an Advanced Setting.

NOTE: This setting does *not* apply to users within the scope of a SharePoint User Profile property selection, for which no maximum is enforced.

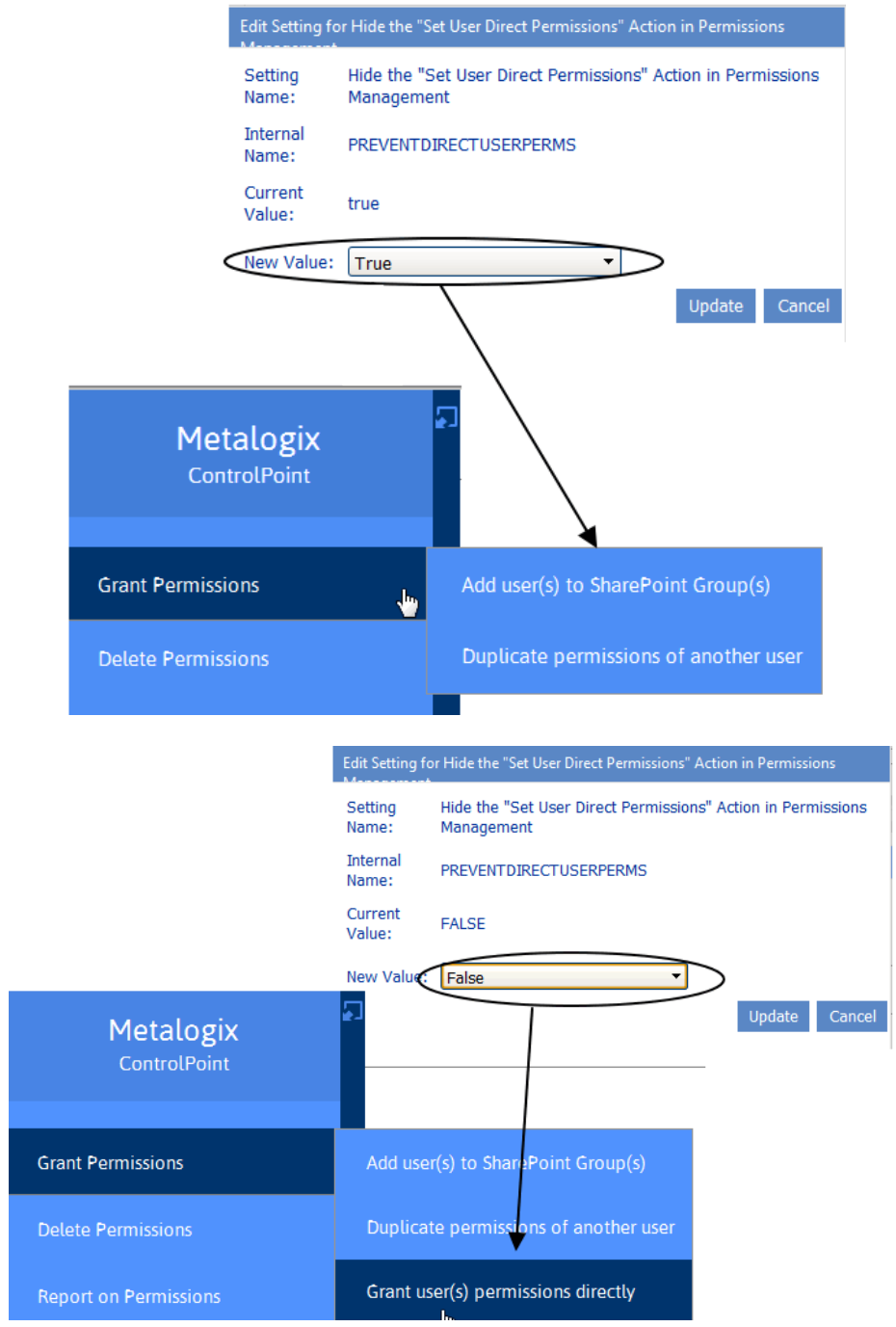
Hide the "Set User Direct Permissions" Action in Permissions Management (PREVENTUSERPERMS)

By default, the Permissions Management for Site Admins option includes the option to **Grant user(s) permissions directly**.



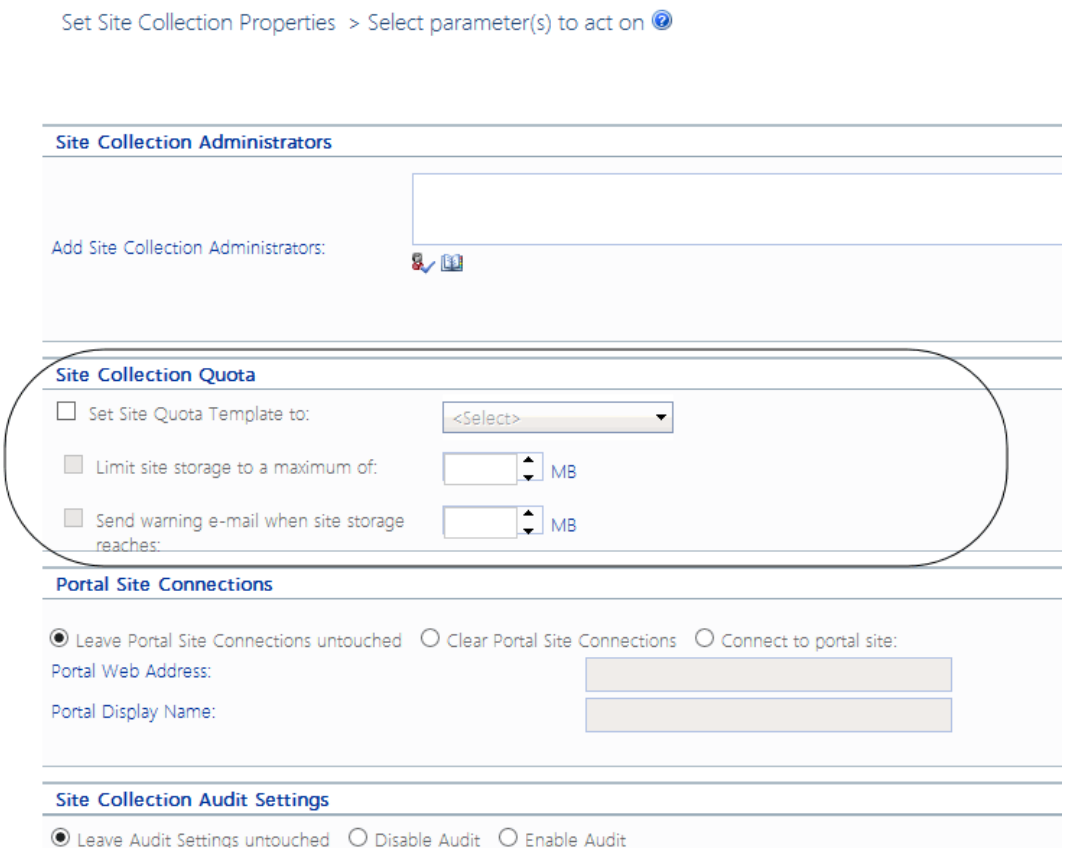
However,ControlPoint Application Administrators can hide this option (if, for example, your organization adheres to the SharePoint best practice of allowing permissions to be granted only via SharePoint groups) by changing the Value of the ControlPoint Configuration Setting Hide the "Set User Direct Permissions" Action in Permissions Management (PREVENTDIRECTPERMS) from *false* to *true*.

NOTE: This is an Advanced Setting.


Edit Setting for Hide the "Set User Direct Permissions" Action in Permissions
Setting Name:
Hide the "Set User Direct Permissions" Action in Permissions Management
Internal Name:
PREVENTDIRECTUSERPERMS
Current Value:
true
New Value:
True
Update
Cancel
Metalogix
ControlPoint
Grant Permissions
Delete Permissions
Add user(s) to SharePoint Group(s)
Duplicate permissions of another user
Edit Setting for Hide the "Set User Direct Permissions" Action in Permissions
Setting Name:
Hide the "Set User Direct Permissions" Action in Permissions Management
Internal Name:
PREVENTDIRECTUSERPERMS
Current Value:
FALSE
New Value:
False
Update
Cancel
Metalogix
ControlPoint
Grant Permissions
Delete Permissions
Report on Permissions
Add user(s) to SharePoint Group(s)
Duplicate permissions of another user
Grant user(s) permissions directly

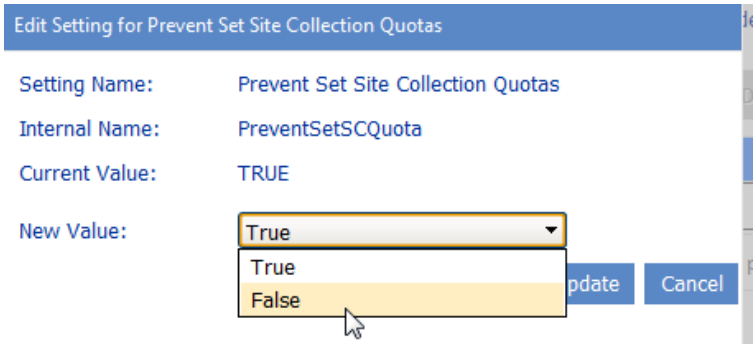
Prevent Set Site Collection Quotas (PreventSetSCQuota)

By default, a ControlPoint user can set a site collection quota via the Set Site Collection Properties action only if he/she is a Farm Administrator or has been given elevated privileges via the security override ACTSECOVRW.

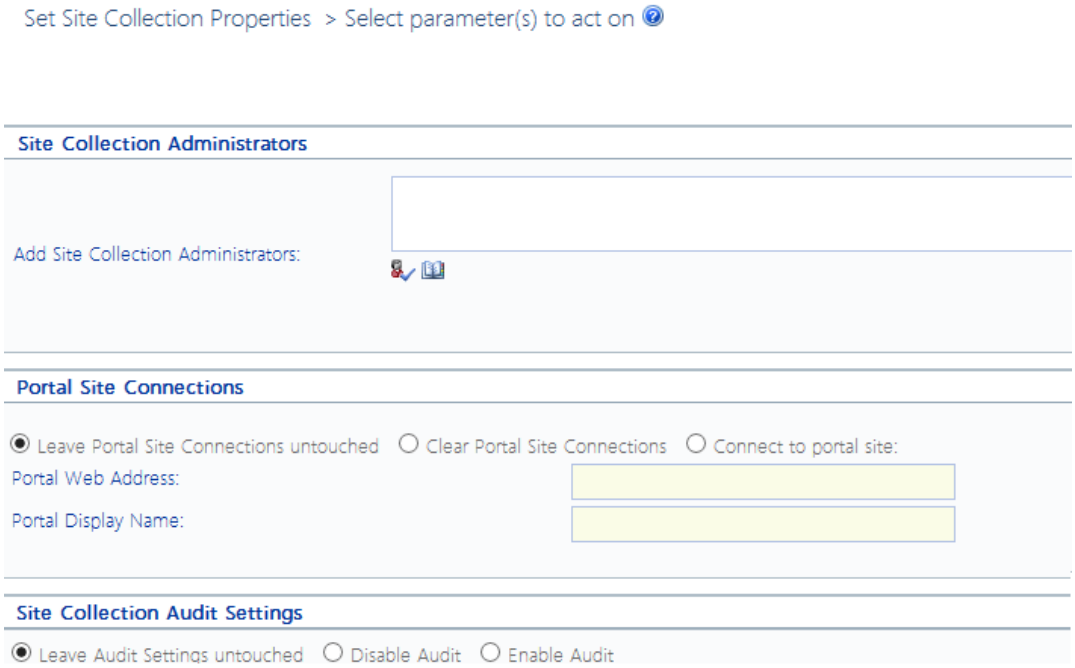


ControlPoint Application Administrators can, however, allow all ControlPoint users to set quotas for site collections that they manage by changing the Value of the ControlPoint Configuration Setting **Prevent Set Site Collection Quotas** from *True* to *False*.

NOTE: This is an Advanced Setting.

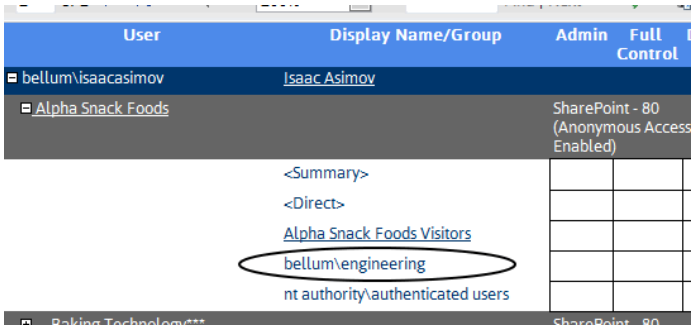


When Prevent Site Collection Quotas is set to Truee (the default value), the Site Collection Quota will not be visible to unauthorized ControlPoint users.



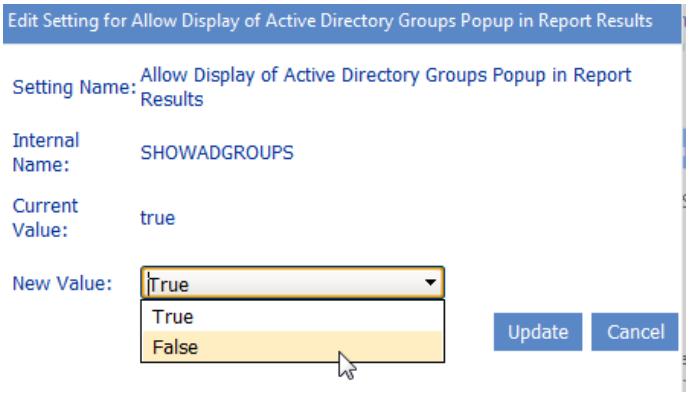
Show Nested Active Directory Groups (PROCESSADHIERARCHY)

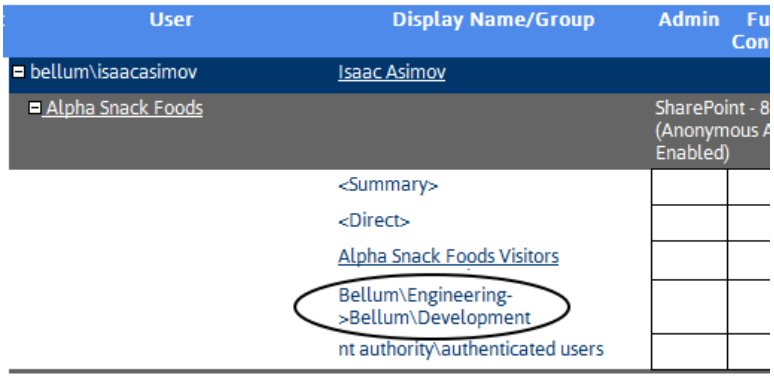
By default, when you generate a Permissions analysis and choose to **Include users with AD group membership**, only the top-most group that a user is a member of displays in analysis results (that is, if the user is a member of a subgroup within that group, the path to that subgroup is not shown).



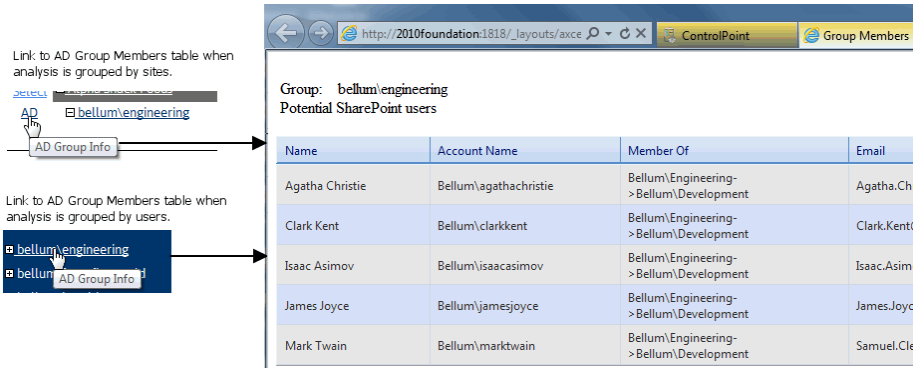
ControlPoint Application Administrators can, however, choose to have the entire group hierarchy (that is, the path to any *subgroup* of which the user is a member) display in analysis results by changing the Show Nested Active Directory Groups Value from *False* to *True*.

NOTE: This is an Advanced Setting.



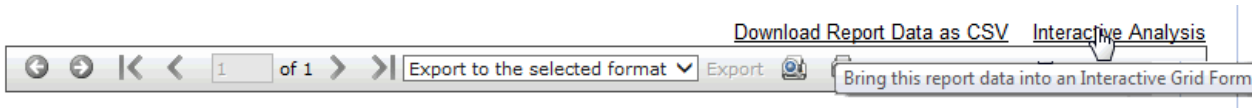


NOTE: When the entire AD hierarchy must be processed, performance may be impacted. Remember that you can also view the full Active Directory hierarchy by opening the AD Group Membership dialog.



Hide Interactive Analysis Link (RESTRICTSL)

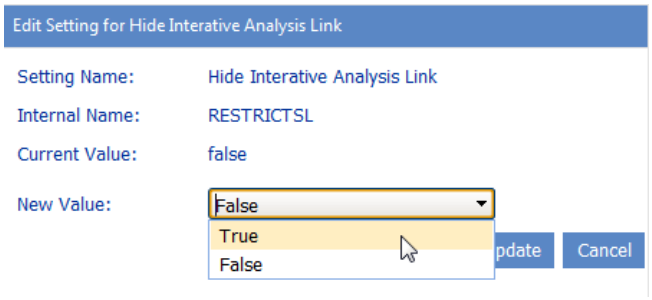
By default, when ControlPoint is used to manage a 2007 or 2010 SharePoint farm, all ControlPoint users can initiate an interactive analyses via a link that displays in the analysis results header.



NOTE: The Interactive Analysis feature is not available for SharePoint 2013 or later.

ControlPoint users can run Interactive analyses only if Microsoft Silverlight is installed on the local machine. (If it is not already installed, when the Interactive Analysis link is clicked they will be prompted to download it from the Microsoft Silverlight website.) If you want to restrict this functionality—for example, if your company policy prohibits local installation of Silverlight—you can hide the Interactive Analysis link by changing the Value of the ControlPoint Configuration Setting **Hide Interactive Analysis** from *false* to *true*.

NOTE: This is an Advanced Setting.

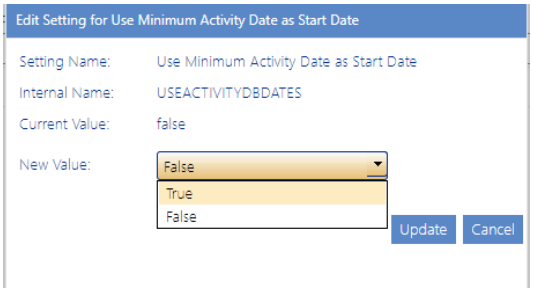


Use Minimum Activity Date as Start Date (USEACTIVITYDBDATES)

By default, when an Activity analysis is invoked, users are allowed to enter a **Start Date** that precedes the earliest record of activity retained in the database. ControlPoint Application Administrators can, however *prevent* an earlier Start Date from being entered by changing the Value of the ControlPoint Configuration Setting **Use Minimum Activity Date as Start Date** from *False* to *True*.

NOTE: This is an Advanced Setting.

WARNING: Depending on the size of your SharePoint environment, setting this value to True may result in significantly longer page load times, as ControlPoint must perform a query to determine the first valid Start Date that can be entered.



NOTE: If this value is set to False, ControlPoint can only retrieve data as far back as the oldest record of activity retained in the database, regardless of the Start Date entered.

Changing Default Settings to Improve Application Performance

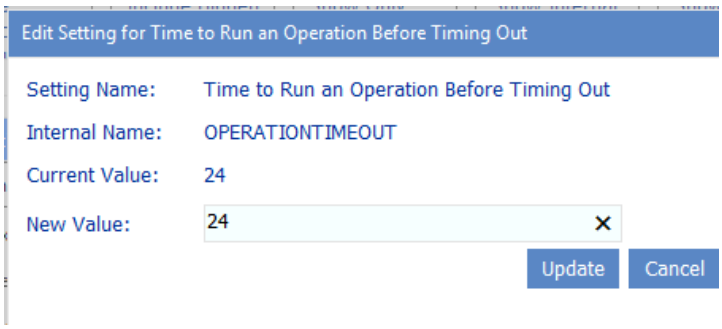
These configuration settings display in the ControlPoint Settings list under the category **Application Performance**.

Time to Run an Operation Before Timing Out (OPERATIONTIMEOUT)

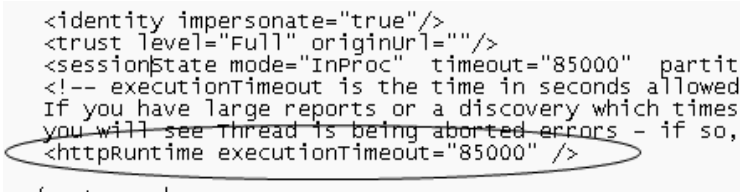
When you initiate an operation in ControlPoint, ControlPoint will use WCF to start the operation on all farms that are part of the operation. By default, this WCF request will time out if it has not been completed within 24 hours. For an operation performed on a home farm, a timeout message will be recorded in ControlPoint Administration Log (xcAdmin.log) stating that the operation was taking too long; however, the operation will be completed normally and you will see results in the ControlPoint user interface. For a remote farm in a multi-farm installation, the same message will be recorded, but the operation will *not* be completed but the user interface will "hang" until it is cancelled.

ControlPoint Application Administrators can change the amount of time it takes for an operation to complete before timing out by updating the Value of the ControlPoint Configuration Setting **Time to Run an Operation Before Timing Out**.

Note that this time is expressed in *hours*.



If this value is increased, the execution timeout value in the ControlPoint web.config file should also be increased to the same threshold (although, in this case, the time is expressed in *seconds*).



Maximum Number of Objects to Processed in Parallel (MaxParallelProcs)

By default, ControlPoint Discovery processes up to two site collections/sites simultaneously, for improved performance over sequential processing. For Actions and reports, sequential processing is used by default

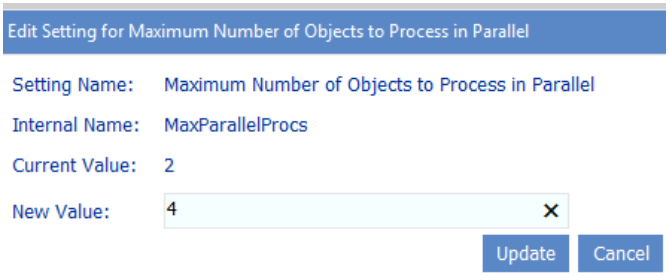
(that is, the objects involved (site collection, site, subsite, lists, and so on) are processed one at a time, in hierarchical order). ControlPoint Application Administrators may, however, choose to

- increase or decrease the maximum number of objects that should be processed simultaneously (i.e., in parallel), and/or
- specify the operation(s) (Discovery, Actions, and/or Reports) for which parallel processing should/should not be used.

It is recommended the **Maximum Number of Objects to Process in Parallel** Value be set to the number of cores on the server machine where the processing occurs.

If you are encountering errors during the processing of operations for which parallel processing is used, it is recommended that you gradually decrease the **Maximum Number of Objects to Process in Parallel** Value.

If the **Maximum Number of Objects to Process in Parallel** Value is set to 0 or 1, no parallel processing will occur (that is, objects for all operations will be processed sequentially).



NOTE: If the value is greater than 1 and the value of Operations Using Parallel Processing (ParallelProcs) is blank, parallel processing will apply to Discovery. Otherwise,it will apply to operations specified for

Operations Using Parallel Processing (ParallelProcs)

By default, ControlPoint Discovery processes up to two site collections/sites simultaneously, for improved performance over sequential processing. For actions and reports, sequential processing is used by default (that is, the objects involved (site collection, site, subsite, lists, and so on) are processed one at a time, in hierarchical order). ControlPoint Application Administrators may, however, choose to

- increase or decrease the maximum number of objects that should be processed simultaneously (i.e., in parallel), and/or
- specify the operation(s) (Discovery, Actions, and/or Reports) for which parallel processing should/should not be used.

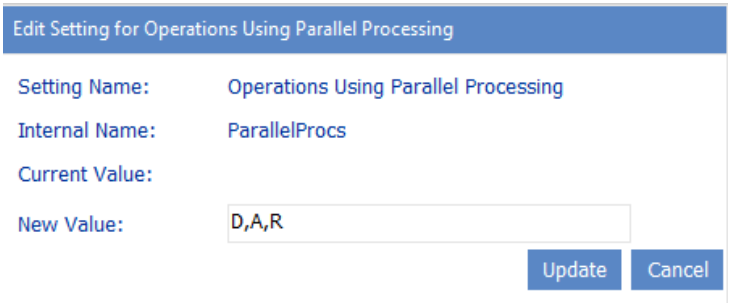
Specify the operations for which parallel processing should be used by completing the Value of the ControlPoint Setting ParallelProcs with one or more of the following values:

- **D** (Discovery)
- **A** (Actions)

- **R** (Reports)

Enter multiple values as a comma-separated list.

NOTE: If the **Operations Using Parallel Processing** Value is blank, parallel processing will apply to Discovery only.

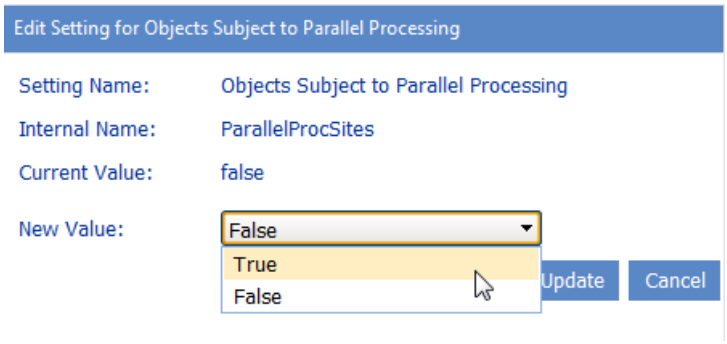


For this setting to be operational, the Value of the setting Maximum Number of Objects to Processed in Parallel.

Objects Subject to Parallel Processing (ParallelProcSites)

By default, when **Maximum Number of Objects to Process in Parallel** is set to a value greater than 1, ControlPoint processes operations in parallel at the site collection level. ControlPoint Application Administrators can, however, have parallel operations processed at the site level by changing the Value of the ControlPoint Setting **Objects Subject to Parallel Processing** from *false* to *true*.

NOTE: This is an Advanced Setting.



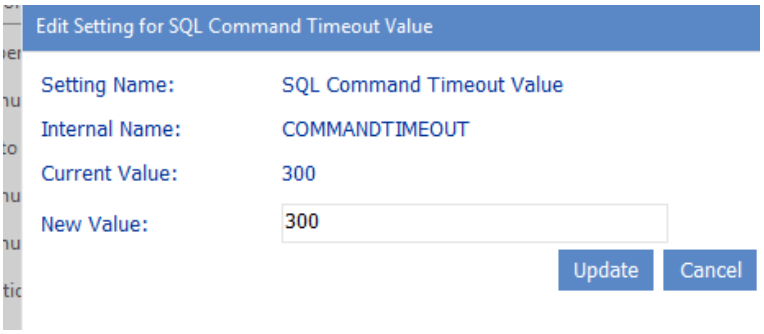
SQL Command Timeout Value (COMMANDTIMEOUT)

By default, the ControlPoint SQL Command timeout value is set to 300 seconds. This value represents the amount of time that ControlPoint will wait for a SQL command to execute before issuing the following message:

[Method Name]Timeout Exception: The server has timed out.

The default value should be sufficient in most cases. However, for an exceptionally large or busy farm, the ControlPoint Application Administrator may need to increase the Value of the ControlPoint Setting **SQL Command Timeout Value**.

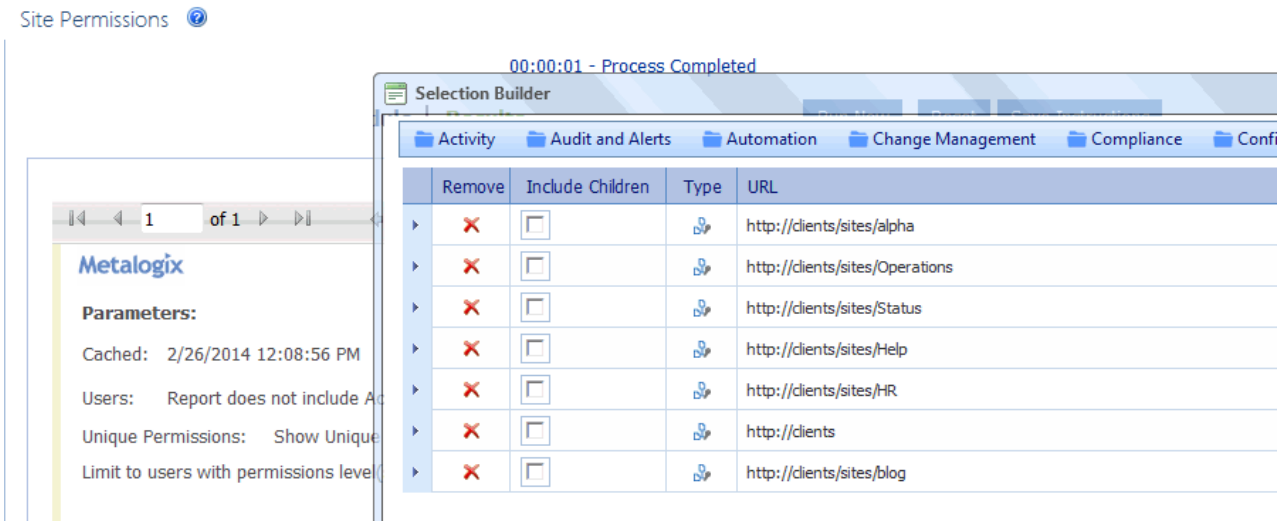
NOTE: This is an Advanced Setting.



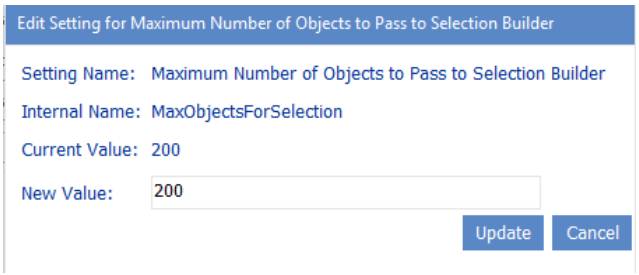
NOTE: Remember, this value is specified in *seconds*.

Maximum Number of Objects to Pass to the Selection Builder (MaxObjectsForSelection)

By default, when a ControlPoint user wants to initiate an operation from search or data analysis results, an unlimited number of SharePoint sites can be added to the Selection Builder.



A large number of objects passed to the Selection Builder may, however, significantly drain system resources. ControlPoint Application Administrators can limit the number of sites that are added to the SelectionBuilder by changing the Value of the ControlPoint Setting **Maximum Number of Objects to Pass to Selection Builder**. (Note that **0** is used as the default value to represent "unlimited.")

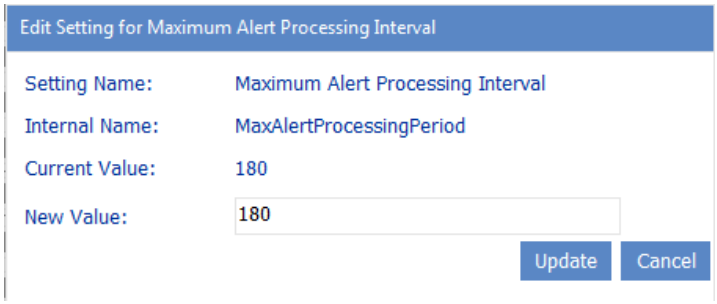


If the specified number is met, no additional sites will be added to the Selection Builder and the user will be presented with a warning message.

Maximum Alert Processing Interval (MaxAlertProcessingPeriod)

By default, if a ControlPoint Alerts action is scheduled to run on a recurring basis at an interval measured in *minutes*, ControlPoint will include180 minutes worth of historical data the first time the job runs.
(Each subsequent run will include all events that occurred since the last successfully-completed job run.)

ControlPoint Application Administrators can, however specify a different time period by changing the Value of the ControlPoint Setting **Maximum Alert Processing Interval**.



NOTE: This setting applies only when ControlPoint Alerts are scheduled to run on a recurring basis at an interval measured in minutes.

Number of Seconds After Which Browser Reports Server Timeout (SERVERTIMEOUT)

By default, the ControlPoint server timeout value is set to 60 minutes, or 3600 seconds. (The normal browser timeout value is 1.5 minutes.) This value represents the amount of time that the browser will wait for an action or analysis to complete on the server before issuing the following message:

An action or analysis you requested is taking longer than expected. If you requested an analysis, try changing the option to use data from the cache, or narrow the scope of the analysis. If Discovery was running at the time you made your request, try again after Discovery completes.

The default value should be sufficient in most cases. To avoid his issue, administrators can:

- narrow the scope of their action or analysis (in the case of some analyses, you can also use cached instead of real-time data)
- if the Discovery process is running, wait for it to complete.
- perform the action or analysis on a scheduled basis.

ControlPoint Application Administrators can modify server timeout by changing the Value of the ControlPoint Setting **Number of Seconds After Which Browser Reports Server Timeout**.



For example:

- If you are managing a very large farm and you want to be able to perform very large, time consuming actions and analyses, you may want to *increase* this value.

  NOTE: The size of a search or analysis is also limited by the maximum number of line items that can be displayed in results. See Maximum Line Items in Real-time Reports (REPCAP).

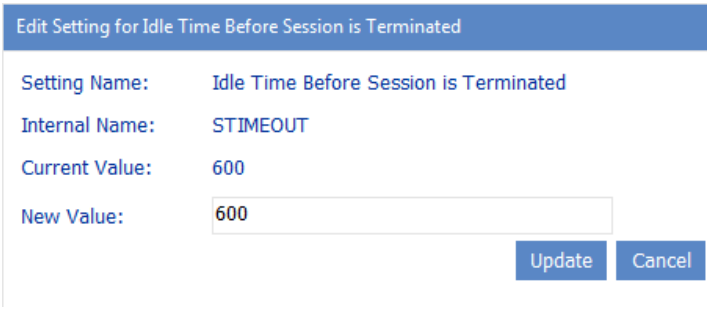
- If you are managing a smaller farm and/or would like to have a server timeout reported more quickly, you can decrease this value.

NOTE: Remember that this value is specified in *seconds*.

Idle Time Before Session is Terminated (STIMEOUT)

By default, the ControlPoint application session timeout property is set to 600. This value represents the number of minutes between requests after which a ControlPoint session times out. ControlPoint Application Administrators can modify the session timeout by changing the Value of the ControlPoint Setting **Idle Time Before Session is Terminated**.

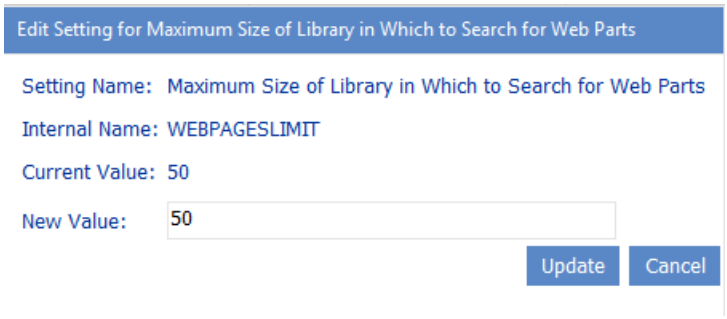
NOTE: This is an Advanced Setting.



NOTE: Remember that this value is specified in *minutes*. The maximum value for this setting is 525600.

Maximum Size of Library in Which to Search for Web Part Pages (WEBPAGESLIMIT)

When either Discovery or an interactive Web Part analysis is run, document libraries are searched for Web Part Pages from which Web Parts are collected. Because this can be a resource-intensive process, by default only document libraries that have 50 items or fewer are searched. ControlPoint Application Administrators can, however, specify a different threshold by changing the Value of the ControlPoint Setting **Maximum Size of Library in Which to Search for Web Part Pages**.



Note that, at a higher threshold, more Web Part Pages will be searched, but the process will become more resource-intensive.

NOTE: If you want to include all document libraries in your search, regardless of size, set the threshold to **0**.

Audit Log Configuration Settings

These configuration settings display in the ControlPoint Settings list under the category **Audit Log**.

For settings in this category that apply to ControlPoint Sentinel for Anomalous Activity Detection, see Changing Settings for Aomalous Activity Detection.

ArchiveAuditLog Configuration Settings

The following three settings are exclusive to ControlPoint Archive Audit Log Data processing:

- **Archive Audit Log Table Connection String**
- **Web Applications to Include in Audit Logs**
- **Number of Hours Worth of Data to Archive at One Time**.

For information on using these configuration settings within the context of audit log data archiving, see Archiving SharePoint Audit Log Data.

Number of Days to Keep Audit Records (AUDITMAXDAYS)

When auditing is enabled for a SharePoint site collection (either from within SharePoint or using the ControlPoint Set Site Collection Properties feature), SharePoint keeps records of audited actions and events in the content database(s). It is from this history that ControlPoint Audit Log analyses can be run.

ControlPoint provides an option to purge audit data so that content databases are not overloaded. By default, no purging is done (as indicated by a Value of 0). ControlPoint Application Administrators can change this retention period by modifying the Value for the ControlPoint Setting Number of Days to Keep Audit Records (AUDITMAXDAYS).

Audit history is purged up to the number of days specified by the ControlPoint Discovery process



If the default Value is kept, the audit records will never be purged. Keep in mind however, the longer audit history is retained, the more storage space it will use in content databases. Alternatively, you can archive audit log data to free up storage space using ControlPoint xcUtilities. See Archiving SharePoint Audit Log Data.

Tips for Archiving a Large Accumulation of Audit Data

If you have many months or even years' worth of accumulated data to purge, doing all of it in a single operation can be resource-intensive and can perform slowly. It is recommended, therefore, that you initially set AUDITMAXDAYS to a larger number, then incrementally reduce that number before each subsequent Discovery run until you have reached the number of days' worth that you want to retain on an ongoing basis.

EXAMPLE:

Suppose 1,000 days' worth of audit log data has accumulated on your farm, but going forward you only want to retain 60 days' worth. Depending on the size of your farm, purging 940 days worth of data in a single operation might significantly slow down the Discovery job. To avoid this problem, you may want to initially set the AUDITMAXDAYS Value to 800 (that is, purge 200 days' worth) of audit log data. After the Discovery job has completed, you may want to bring the number down to 600 (that is, purge another 200 or so days' worth), and so on, until you have reduced the amount of audit log data in the database to a manageable amount. You can then set and leave the Value at 60, saving only the amount that you want to retain on an ongoing basis.

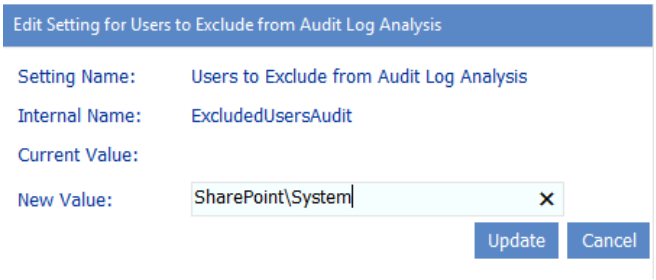
Excluding Users from Audit Log Analyses (ExcludeUsersAudit)

By default, unless one or more users are specified in the People Picker, all SharePoint users are included in the ControlPoint Audit Log analysis.

ControlPoint Application Administrators can, however, exclude certain users from these analyses by entering the user account name(s) as the Value for the ControlPoint Configuration Setting Users to Exclude from Audit Log Analyses (ExcludedUsersAudit). Enter multiple account names as a comma-separated list.

You may, for example, want to exclude common system accounts such as SharePoint\System.

NOTE: You must exclude users based on *full account names* (sometimes known as pre-Windows 2000 account names in Active Directory), not display names. For example, you cannot exclude system accounts by entering the display name System Account.

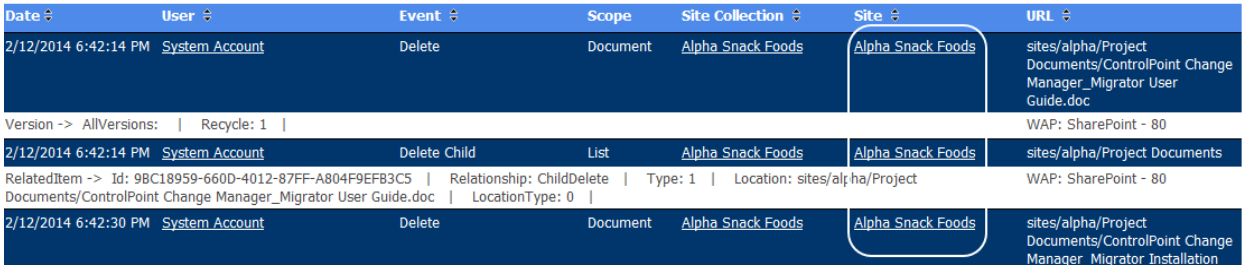


Note that you can still run Audit Log analyses on excluded users if you enter them in the People Picker.

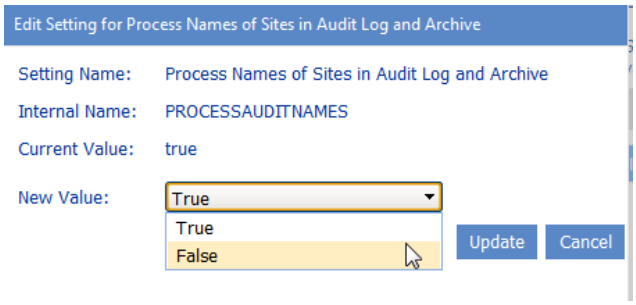
NOTE: Users can be excluded from permissions and activity analyses via the ControlPoint Configuration Setting Users to Exclude from Reports (EXCLUDEDUSERS).

Specifying Whether to Display Site Names in Audit Log Analyses (PROCESSAUDITNAMES)

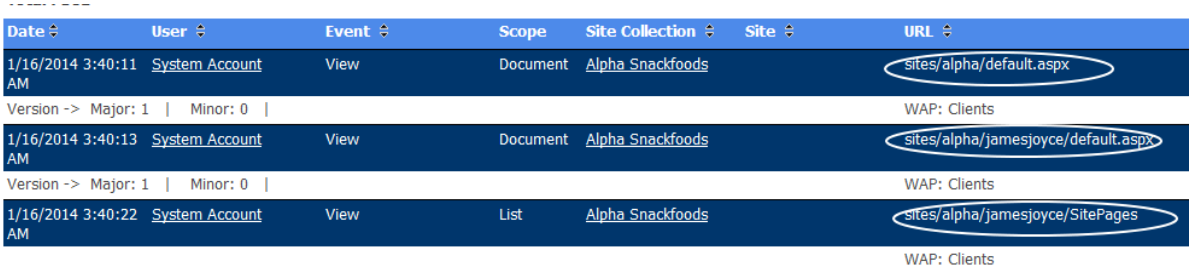
By default, ControlPoint Audit Log analysis results include name of the **Site** on which audited activity occurred. The process required for ControlPoint to collect this information is time-consuming and may affect performance, especially if the scope of the analysis is large.



ControlPoint Application Administrators can, however, prevent this process from being carried out by changing the ControlPoint Configuration Setting PROCESSAUDITNAMES from True to False.



Note that, if PROCESSAUDITNAMES is set to false, you can use the url to identify the site where audited activity occurred.



Changing Settings for Anomalous Activity Detection

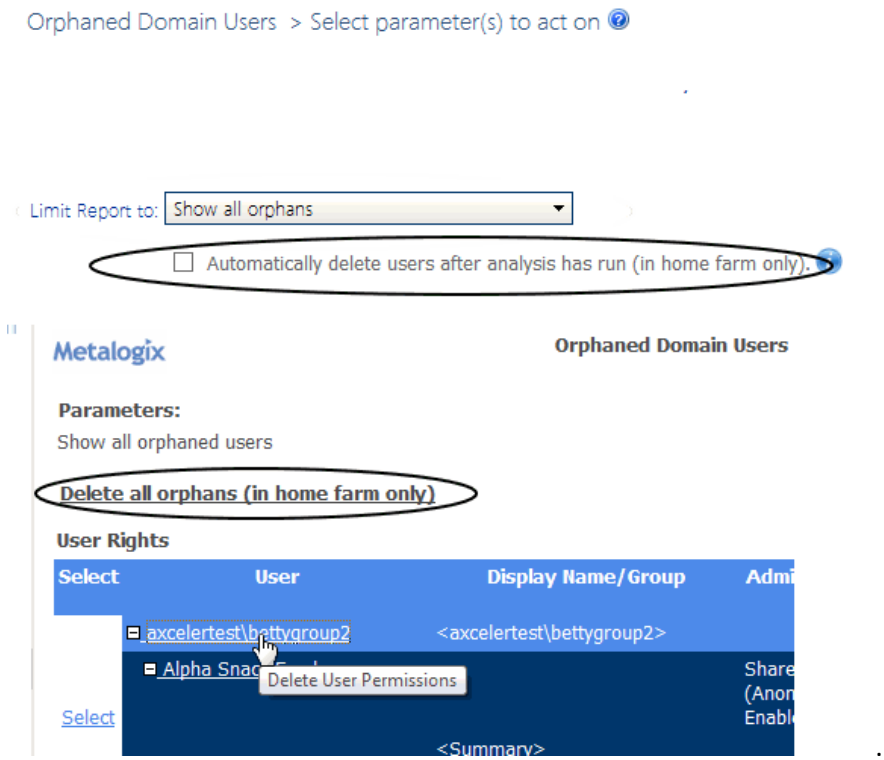
ControlPoint Sentinel Anomalous Activity Detection settings display under the category **Audit Log**:

Restricting Functionality for Members of the Business Administrators Group

These configuration settings display in the ControlPoint Settings list under the category **Business Administrators Functionality**.

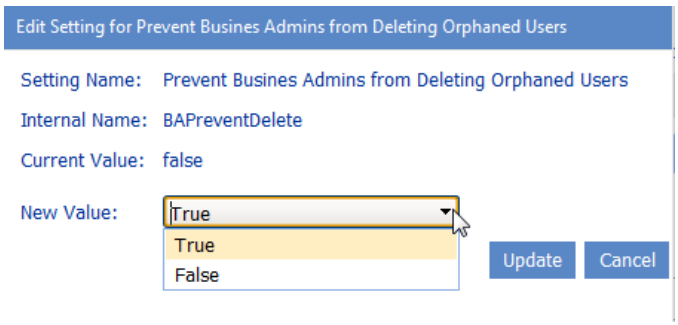
Prevent Business Admins from Deleting Orphaned users (BAPreventDelete)

By default, Orphaned Domain User analysis results allow users to access the ControlPoint Delete Users action via hyperlinked user names and a **Delete All orphans** link in the results header.



ControlPoint Application Administrators can, however, hide the Delete All link and disable user hyperlinks for members of the Business Administrators group by changing the Value of the ControlPoint Configuration Setting **Prevent Business Admins from Deleting Orphaned Users** from *false* to *true*.

NOTE: This is an Advanced Setting.



Prevent Business Admins from Running Cacheable Reports in Real Time (BAPreventRealTime)

By default, all ControlPoint users have the choice of running the ControlPoint Site Collection Storage analysis and many ControlPoint permissions analyses using either real-time data or data from the ControlPoint cache.

To help free up server resources and improve performance, especially in environments that include a large number of Business Administrators, the ControlPoint Application Administrator can prevent members of the Business Administrators group from choosing real-time data by changing the Value of the ControlPoint Configuration Setting **Prevent Business Admins from Running Cacheable Reports in Real Time** from *False* to *True*.



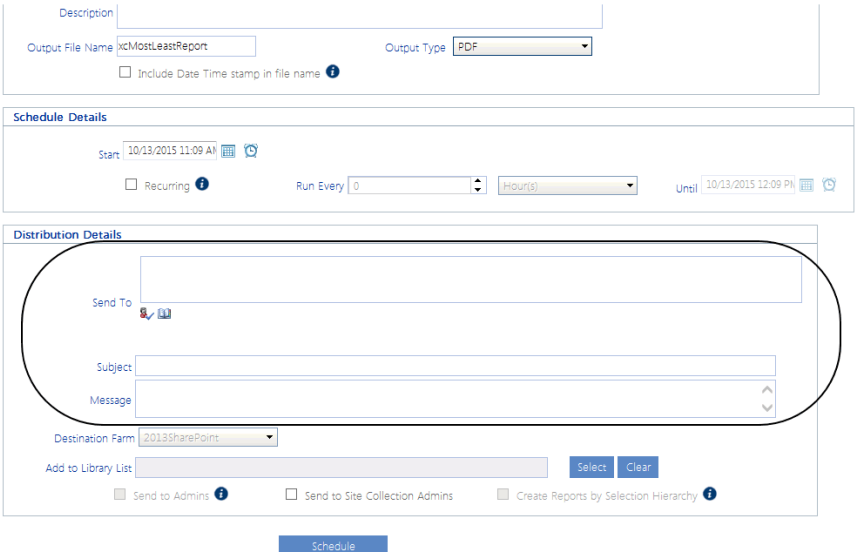
Note that, when BaPreventRealTime=true:

- the **Use Cached Data** parameter in permissions analyses will be checked and disabled.
- the **real-time** option will be missing from the Site Collection Storage Analysis **View Storage for**: drop-down.

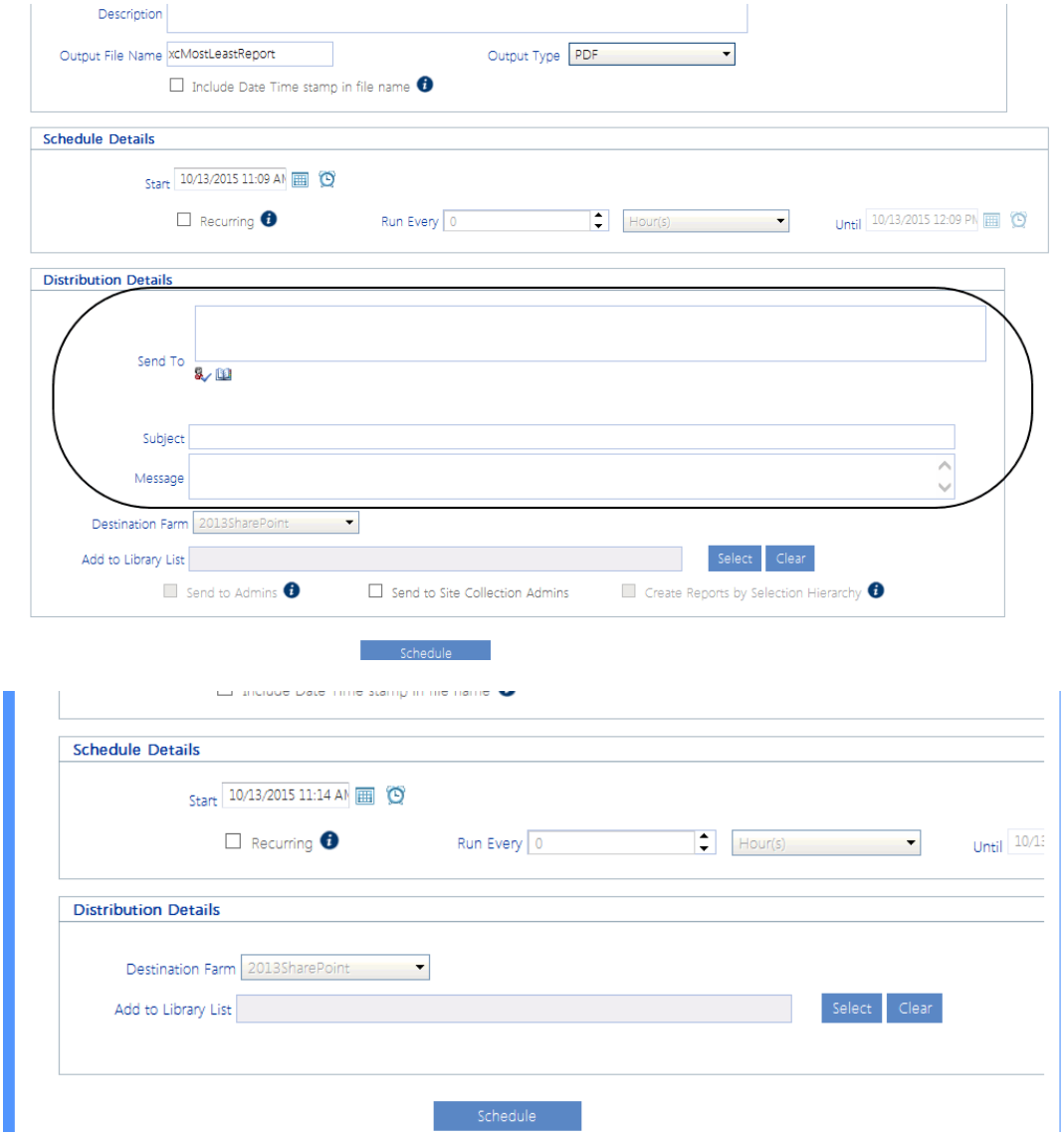
If the option to use real-time data is disabled, members of the Business Administrators group will also be unable to **Expand Active Directory Groups** or select users based on a SharePoint User Profile Property.

Preventing Members of the Business Administrators Group from Emailing Scheduled Analyses (BAPreventScheduledEmail)

By default, all ControlPoint users have the option of emailing results of scheduled analyses to the recipients of their choice.



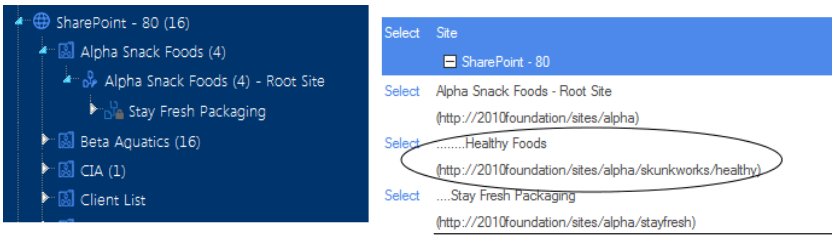
ControlPoint Application Administrators can, however, hide this option from members of the Business Administrators group (for example, to limit the number of extremely large files that need to be handled by the email server) by changing the Value of the ControlPoint Configuration Setting BAPreventScheduleEmail from *False* to *True*.



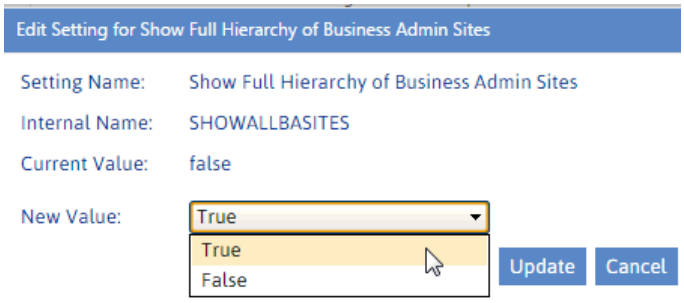
Show Full Hierarchy of Business Admin Sites

By default, if a member of the ControlPoint Business Administrators group has permissions to manage a subsite at any level below a site collection's root site but does *not* have permissions to manage its parent, the subsite does not display in the ControlPoint SharePoint Hierarchy or object pickers.

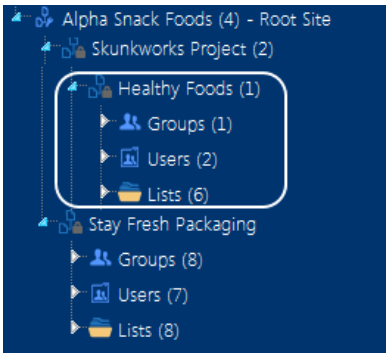
The subsite will, however, be included in a ControlPoint operation if it is within the scope of the selection.



ControlPoint Application Administrators can, however allow these sites to display by changing the Value of the ControlPoint Configuration Setting **Show Full Hierarchy of Business Admin Sites** from *false* to *true*.



Note that any parent sites within the hierarchy that the Business Administrator does not have permissions to manage will appear disabled.



NOTE: Depending on the number of sites and depth of the hierarchy, sites may take longer to load when the hierarchy is expanded if **Show Full Hierarchy of Business Admin Sites** is set to true.

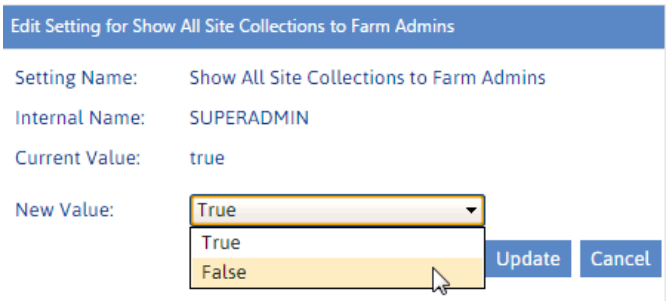
Changing Default Settings for ControlPoint User Groups

These configuration settings display in the ControlPoint Settings list under the category **ControlPoint Groups**.

Show All Site Collections to Farm Admins (SUPERADMIN)

By default, icons for site collections to which SharePoint farm administrators do not have access appear grayed out in the ControlPoint SharePoint Hierarchy. When an icon is grayed out, farm administrators cannot access the site collection/site (or any child objects to which they do not have access) from within ControlPoint. They can, however, use the ControlPoint Set Site Collection Properties feature to add themselves as site collection administrators.

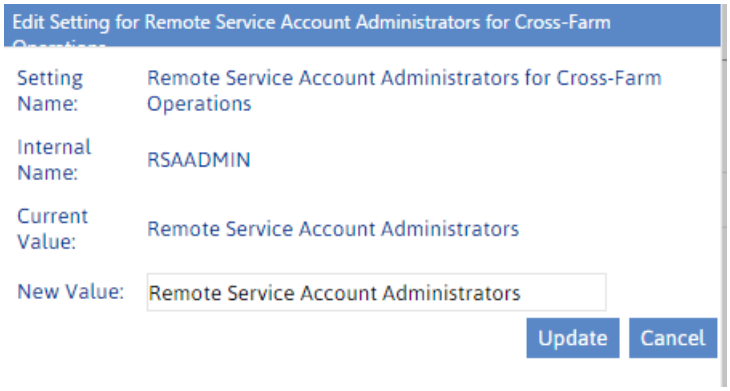
If the SharePoint farm includes site collections that contain highly sensitive or confidential data that should remain "locked down" or if corporate policy dictates that farm administrators should not see sites to which they do not have access, ControlPoint Application Administrators can change the Value of the ControlPoint Setting **Show All Site Collections to Farm Admins** from *True* to *False* so that site collections to which farm administrators do not have access are *not* displayed in the SharePoint Hierarchy.



Remote Service Account Administrators for Cross-Farm Operations (RSAADMIN)

One of the user groups that is created in the ControlPoint Configuration Site when ControlPoint is first installed allows farms with different service accounts to authorize with each other when a cross-farm copy or move is performed.

The default name that ControlPoint assigns to this group is Remote Service Account Administrators. Because of special configuration requirements, if a different name is assigned to this group then the ControlPoint Application Administrator must update the Value of the ControlPoint Setting **Remote Service Account Administrators for Cross Farm Operations** with the new name so that ControlPoint will continue to recognize it.



Auto Add Users To ControlPoint Group Maximum Group Size (CPGroupMemberLimit)

By default, when the Auto Add Users to ControlPoint Groups action is used, any individual ControlPoint user group can have up to 1000 members.

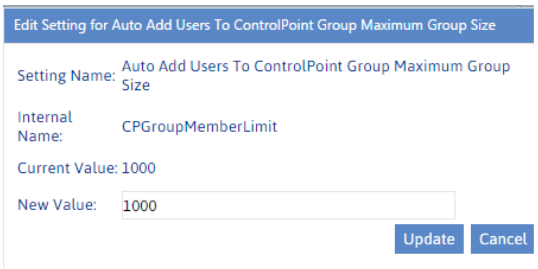
When a ControlPoint group reaches its maximum number of users, ControlPoint automatically creates a new group with the same permissions as the "base" group.

EXAMPLE:

If you want all users who are members of site Owners groups to be added to the ControlPoint Business Administrators group, and more than 1000 users meet that criterion:

- when Business Administrators group membership reaches 1000, a new group named Business Administrators_1 will be created and the next 1000 users will be added to that group.
- when Business Administrators_1 group membership reaches 1000, a group named Business Administrators_2 will be created, and so on.

ControlPoint Application Administrators can change this limit by updating the Value of the ControlPoint Configuration Setting
Auto Add Users To ControlPoint Group Maximum Group Size.



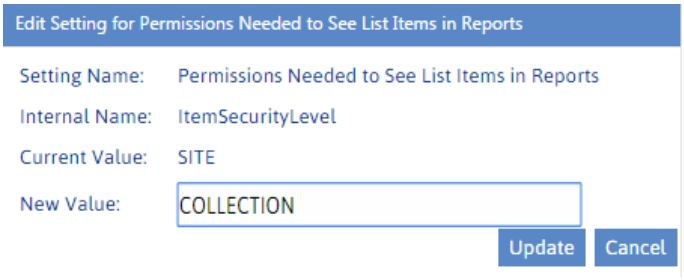
NOTE: This limit is enforced only when the Auto Add Users to ControlPoint Group action is used.

Permissions Needed to See List Items in Reports (ItemSecurityLevel)

By default, the following ControlPoint analyses show list items, even those to which a ControlPoint user does not have permissions:

- Activity by User and
- Activity by Document

- Site Lists and Libraries Storage



The ControlPoint Application Administrator can, however, tighten security trimming so that only ControlPoint users who are site collection administrators can see list items in these analyses by changing the Value of the ControlPoint Configuration Setting **Permissions Needed to See List Items in Reports** from *SITE* to *COLLECTION*.

Business Administrators Group Name (BADMIN)

One of the user groups that is created in the ControlPoint Configuration Site when ControlPoint is first installed is intended for business users (Site Administrators) who use ControlPoint to manage their own sites. See Making ControlPoint Available to Business Users (Site Administrators) in the *ControlPoint User's Guide*.

The default name that ControlPoint assigns to this group is Business Administrators. Because of special configuration requirements, if a different name is assigned to this group then the ControlPoint Application Administrator must update the Value of the ControlPoint Setting **Business Administrators Group Name** with the new name so that ControlPoint will continue to recognize it.

NOTE: This is an Advanced Setting.



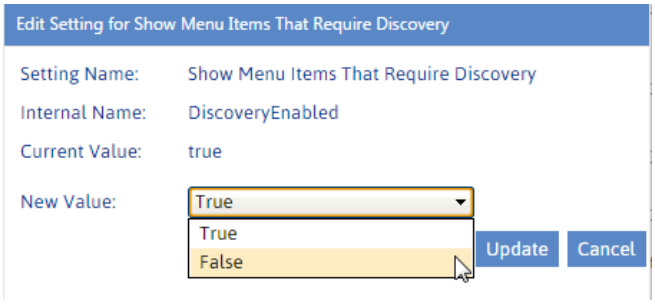
Changing Settings to Improve Discovery Performance

These configuration settings display in the ControlPoint Settings list under the category **Discovery Performance**.

Show Menu Items That Require Discovery (DiscoveryEnabled)

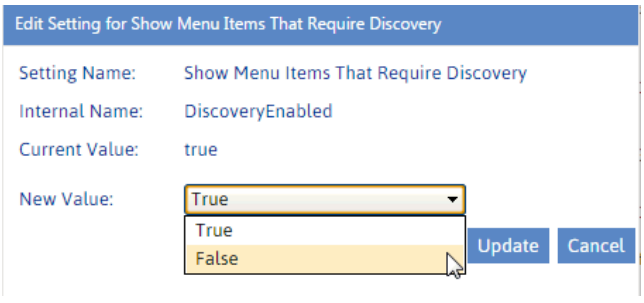
If ControlPoint was first installed with version 5.3 or higher*, Nightly Discovery is disabled by default, as are the operations and parameters which depend on data collected by the Discovery process. These are:

- Advanced Search
- the following ControlPoint analyses:
  - Site Collection Activity
  - Trend Analyses



- the following ControlPoint analysis parameters (where applicable):
  - the **Use cached data** option
  - the Site Collection Storage **View storage for** option.

ControlPoint Application Administrators can choose to enable the Nightly Discovery job (via SharePoint Central Administration) or run Discovery manuallyor from the Web front end server where ControlPoint is installed. Once Discovery has run at least once, ControlPoint Application Administrators may choose to enable the applicable operations and parameters by changing the Value of the ControlPoint Setting **Show Menu Items That Require Discovery** from *False* to *True*.

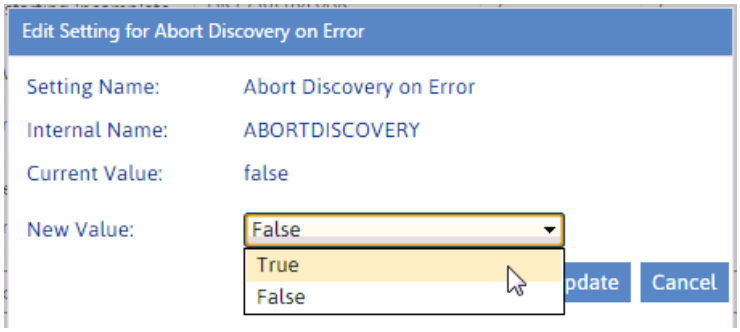


*NOTE: If ControlPoint was originally installed prior to version 5.3, the Nightly Discovery job will be enabled, as will the operations and parameters that rely on it (that is, **Show Menu Items That Require Discovery** will be set to *True* by default).

Abort Discovery on Error (ABORTDISCOVERY)

By default, if the ControlPoint Discovery process encounters an issue with SharePoint environment (for example, a site that is locked or has been incorrectly or incompletely created, a document that is missing a document ID), the item is skipped and the Discovery process continues. A Discovery Exception is recorded in the ControlPoint Administration Log (xcAdmin.log).

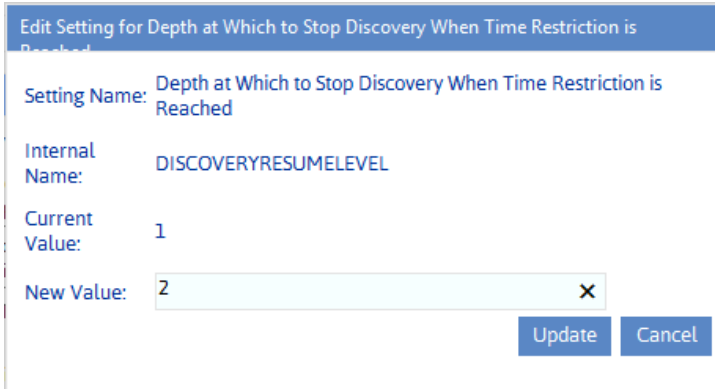
The default value may be kept if administrators do not want the Discovery process to be interrupted. However, if it is preferable that Discovery stop running when an exception is encountered, ControlPoint Application Administrators can change the Value of the ControlPoint Setting **Abort Discovery on Error** from *False* to *True*. Administrators are alerted to an aborted Full Discovery by the "*Discovery has not been run today...*" message in the ControlPoint application header.



Depth at Which to Stop Discovey When Time Restriction is Reached (DISCOVERYRESUMELEVEL)

By default, when the Maximum Discovery Run Time limit is reached, the Full Discovery process will stop after it has finished processing the current site collection. For farms with deeply nested sites, however, ControlPoint Application Administrators may want to specify a location within the site collection at which Discovery will stop by changing the Value of the ControlPoint Configuration Setting **Depth at Which to Stop Discovery When Time Restriction is Reached**.

The number you enter represents the depth below the site collection (which is represented by **1**, the default value) within the site being processed where you want Full Discovery to resume the next time it runs.



When the **Depth at Which to Stop Discovery When Time Restriction is Reached** limit is reached, Discovery will finish processing the current site and its immediate children. It will stop when it reaches the specified level within the next site in the site collection.

Discovery Pause Time to Allow Other Operations (DISCOVERYSLEEP)

ControlPoint Discovery is task that collects cached information for data analysis and reporting.

Because Discovery is a resource-intensive process, it is configured to pause at regular intervals to allow other processes to access a greater share of the machine's CPU and disk resources.

ControlPoint Application Administrators can change this pause time by modifying the Value of the ControlPoint Settings **Discovery Pause Time to Allow Other Operations**. This value represents the number of milliseconds that Discovery pauses to let other processes proceed.

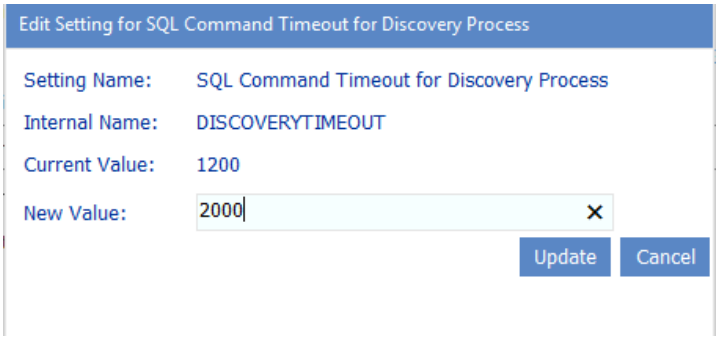


If the **Discovery Pause Time to Allow Other Operations** value is *decreased*, the Discovery process will take less time to complete, but users will experience slower response times while it runs. Conversely, if this value is *increased*, the Discovery process will take longer to complete, but users will experience faster response times.

TIP: If Discovery is run *only* as a nightly process and system usage is low at that time, the default value is usually sufficient. If Discovery is run manually while users are active, and/or usage is high when nightly Discovery is run, it may be advantageous to increase the **Discovery Pause Time to Allow Other Operations** time.

SQL Command Timeout for Discovery Process (DISCOVERYTIMEOUT)

By default, any single call to SQL server during the Discovery process will time out after 1200 seconds (20 minutes). If Discovery does not complete successfully and the ControlPoint Administration Log (xcAdmin.log) indicates that a timeout has occurred, ControlPoint Application Administrators can increase the **SQL Command Timeout for Discovery** Value.



Maximum Discovery Run Time (DISCOVERYTIMERESTRICTION)

As of version 5.2.345.0, Full Discovery can run a maximum of 1260 minutes (21 hours) at one time. If ControlPoint has a particularly large farm to discover and Discovery has not completed within that timeframe, it will continue where it left off the next time it is run, either manually or on schedule. ControlPoint Application Administrators may want to decrease the time restriction—to ensure that Discovery is not consuming system resources during peak usage times—by updating the Value of the ControlPoint Configuration Setting **Maximum Discovery Run Time**.



NOTE: If the Value is blank, Full Discovery will be processed in a single run.

The location within a site collection where Discovery will stop when the time restriction is reached is determined by the Configuration Setting Depth at Which to Stop Discovery When Time Restriction is Reached.

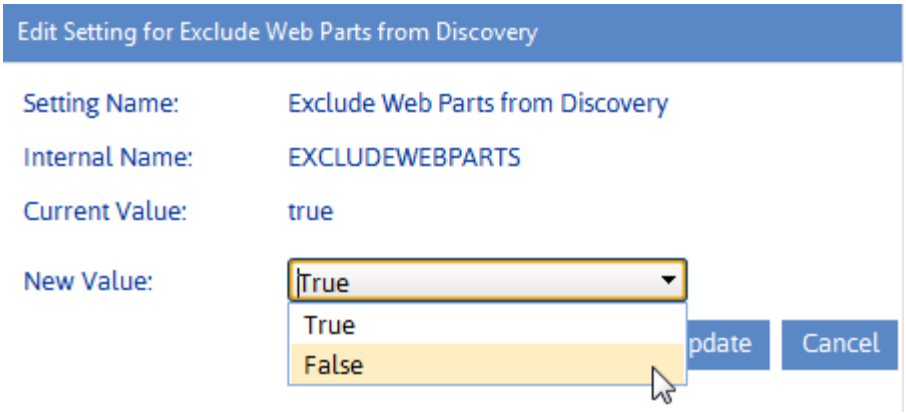
Exclude Web Parts from the Discovery (EXCLUDEWEBPARTS)

As of version 5.2.345.0, the ControlPoint Discovery process does *not,* by default, collect data about Web Parts used in your environment, which would enable administrators to generate Web Parts analyses from the ControlPoint database cache. This is because, depending on the number of Web Parts in your environment, a significant amount of the total processing time may be required. It is important to note, however, that when Web Parts are excluded from Discovery:

- Web Parts analyses can only be run on real-time (not cached) data, and

- the following list boxes will *not* be populated (that is, you will not have the option of selecting from a list of Web Parts):
  - Advanced Search - Web Parts Used
  - Web Parts by Part / Web Parts by Site - **Web Parts**.

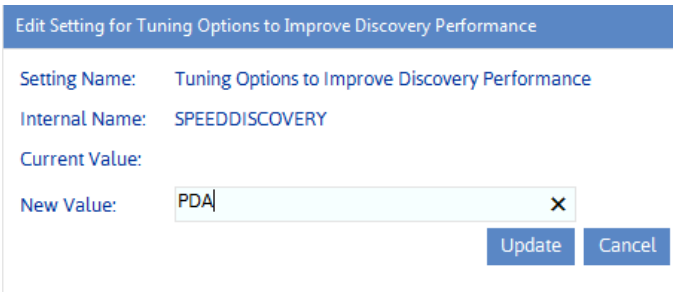
To *include* Web Parts from the Discovery process, change the Value of the ControlPoint Setting **Exclude Web Parts from Discovery** from *True* to F*alse*.



NOTE: If you installed ControlPoint prior to version 5.2.345.0, the *default* value will be false.

Tuning Options to Improve Discovery Performance (SPEEDDISCOVERY)

As of version 6.0. the default value of the ControlPoint Setting **Tuning Options to Improve Discovery Performance** is **PDA**:. Each component of this value is described in the following table.



Value Component	Description
P	*Partial* Discovery does not discover the following elements within a site collection *if they have not changed*: • activity • permissions of all SharePoint users • Web parts, and

Value Component	Description
	• SharePoint permissions for members of the Business Administrators group
D	*Full* Discovery does not discover the following elements within a site collection *if they have not changed*: • activity • permissions of all SharePoint users • Web parts, and • SharePoint permissions for members of the Business Administrators group
A	All activity is calculated at the end of Discovery (which requires fewer queries for better performance)

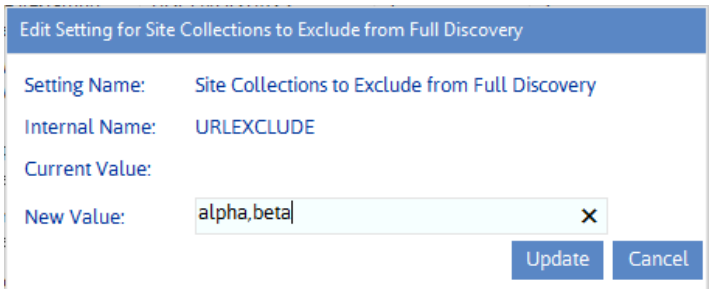
If ControlPoint was initially installed prior to version 6.0, it is recommended that the Value be set to **PDA** to optimize Discovery performance.

Site Collections to Exclude from Full Discovery (URLEXCLUDE)

By default, the ControlPoint Full Discovery process runs on all site collections within your SharePoint farm. ControlPoint Application Administrations can, however, *exclude* site collections whose url contains a specified text string from both the nightly Full Discovery process and any manual Discovery that is run on the entire farm. (Administrators still have the option of running a Partial Discovery on these site collections, either as-needed or on a one-time or recurring schedule).

Remember that data in analyses run from cache can only be reported *up to* the date of the last Discovery

To exclude site collections that contain a particular text string from the Full Discovery process, enter the string as the Value for the ControlPoint Setting **Site Collections to Exclude from Full Discovery**. Enter multiple text strings as a comma-separated list.



CAUTION: If any part of a site collection's url contains the text string you specified, it will be excluded from Full Discovery. Use caution in selecting strings to be sure you do not exclude more than you intend. For example, the excluded string of "Test" would exclude "My Test Site Collection" but would also exclude "Product Testing."

Web Applications to Exclude from Full Discovery (WAPEXCLUDE)

By default, the ControlPoint Full Discovery process runs on all Web applications in a SharePoint farm. ControlPoint Application Administrations can, however, *exclude* one or more (up to a maximum of 6) Web applications from both the nightly Full Discovery process and any manual Discovery that is run on the entire farm. (Administrators still have the option of running a Partial Discovery on these Web applications, either as-needed or on a one-time or recurring schedule).

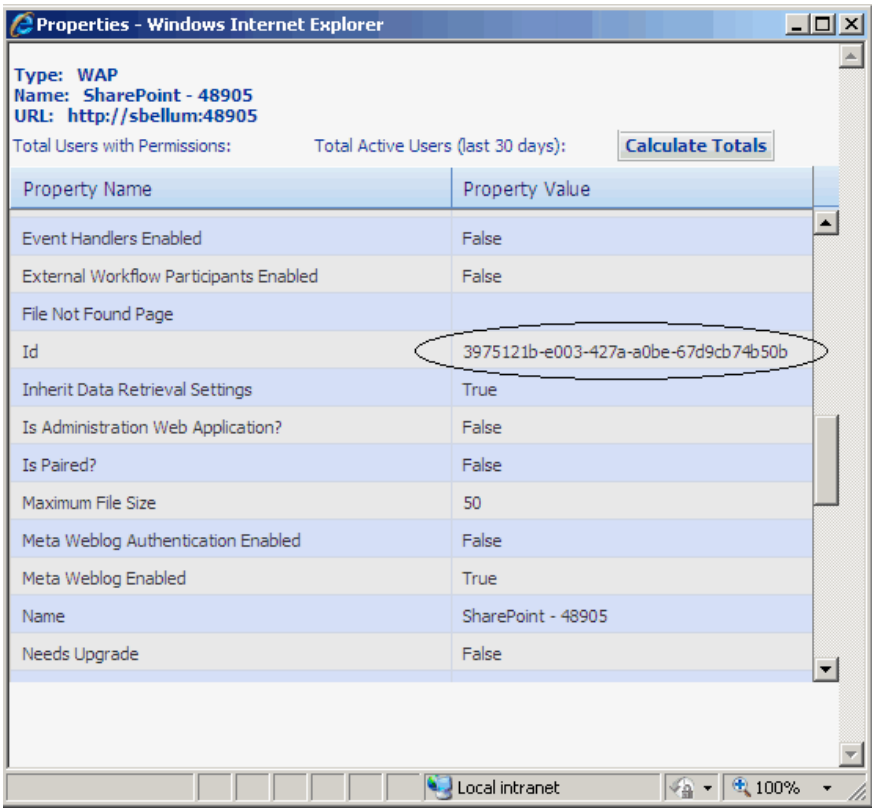
It may be useful, for example, if the Web application that hosts your MySites is large and time-consuming to "discover." You can exclude that Web application from the Full Discovery process and run a Partial Discovery on a less frequent schedule, when system usage as low (such as on the weekend). See also Running a Full or Partial Discovery Manually in the *ControlPoint User's Guide*.

Remember that activity data in analyses run from cache can only be reported *up to* the date of the last Discovery

To exclude a Web application from the Full Discovery process, enter the Web application's GUID as the Value of the ControlPoint Setting **Web Applications to Exclude from Full Discovery**. Use the following guidelines:

1 To locate a Web application's GUID, select the Web application in the ControlPoint Farm Hierarchy, right-click and choose **Properties**.

2 Copy the Id's Property Value and paste it directly into the Value field.



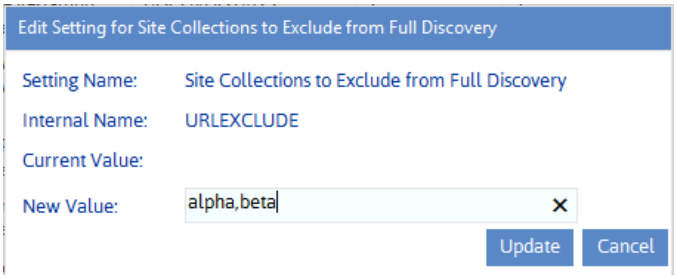
3 Repeat steps 1 and 2 for each Web application you want to exclude (up to a maximum of 6). Use a comma (,) to separate each GUID in the list.

Changing Settings to Accommodate Special Environmental Factors

These configuration settings display in the ControlPoint Settings list under the category **Environment**.

Alternate Access Mapping Zone for Navigation and Report Links (URLZONE)

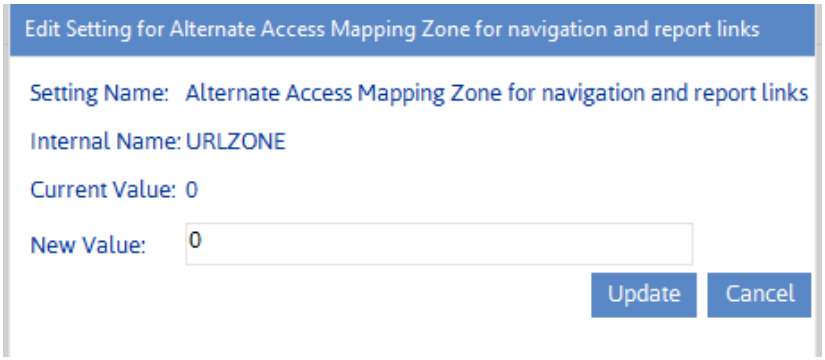
By default, the url specified for a Web application's Default zone is used to open SharePoint pages from within the ControlPoint application interface.



If you use alternate access mappings, ControlPoint may be unable to use the url in the Default zone because of the way it is configured. For example, if you are using TLS or SSL to implement https and the Default zone uses the https protocol, ControlPoint would not be able to access the site directly from that url. Therefore, it would have to be configured to use the url in a zone that would allow direct access.

ControlPoint Application Administrators can change the zone that ControlPoint uses by modifying the Value of the ControlPoint Setting **Alternate Access Mapping Zone for Navigation and Report Links**.

NOTE: This is an Advanced Setting.



Valid values are

- **0** (Default)
- **1** (Intranet)
- **2** (Internet)
- **3** (Custom)

- **4** (Extranet)
- **-1** (always use the url for the zone from which the user accessed ControlPoint)

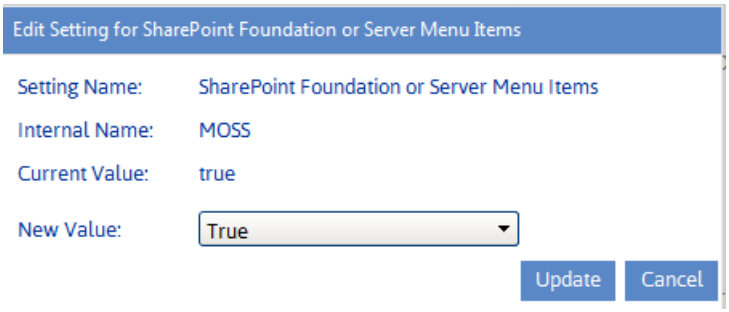
Enable SharePoint Server Functionality (MOSS)

When ControlPoint is first installed the installer automatically detects whether the SharePoint farm is Foundation-only or Server and automatically populates the Value in the ControlPoint Settings list item MOSS with the appropriate value:

- "MOSS" value = *true* (for MOSS/Server), or
- "MOSS" value = *false* (for WSS/Foundation-only)

Note on terminology: WSS is the 2007 equivalent of SharePoint Foundation, and MOSS is the 2007 equivalent of SharePoint Server.

If the SharePoint environment changes (for example, the farm is upgraded from WSS-only to MOSS) a ControlPoint Application Administrator must update the Value of the ControlPoint Setting MOSS in order to run fully functional ControlPoint Activity analyses and to enable menu access to those SharePoint functions that are not available in a WSS-only farm.



Changing Default Settings for Navigation

These configuration settings display in the ControlPoint Settings list under the category **Navigation**.

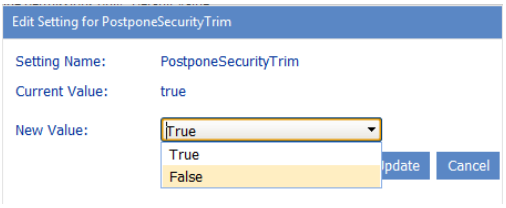
Postpone Security Trimming of SharePoint Hierarchy Until Site Collection is Expanded (PostponeSecurityTrim)

By default, the site collections to which a ControlPoint user has access are calculated the first time a Web application is expanded or when the SharePoint Hierarchy or page is refreshed.



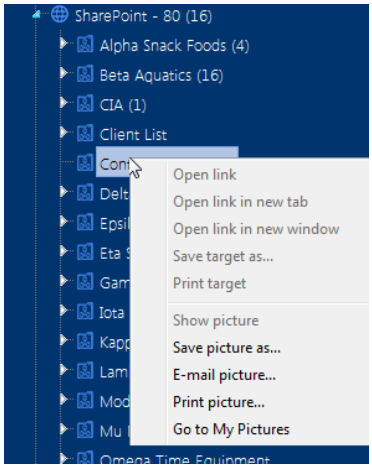
In an especially large SharePoint environment in which the user administers a large number of site collections within a Web application, the load-time may be significant. ControlPoint Application Administrators can, therefore, postpone security trimming until a Site Collection is expanded by changing the value of the ControlPoint Setting **Do Not Security-Trim SharePont Hierarchy Until Site Collection Expansion (PostponeSecurityTrim)** from *false* to *true*.

NOTE: When this setting is enabled it applies to all ControlPoint users *except* members of the Business Administrators group whose permissions are determined during the Discovery process..



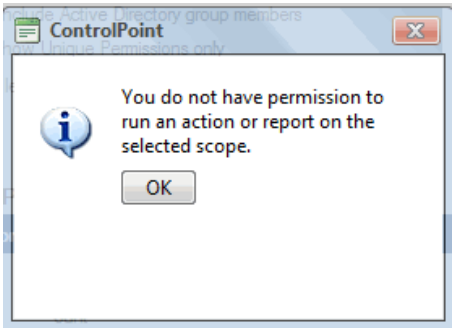
When this setting is true:

- All of the site collections within the SharePoint farm will display in the SharePoint Hierarchy, and
- security trimming will occur when a site collection is expanded; that is:
  - none of the sites below the site collection will display in the hierarchy, and
  - the ControlPoint right-click menu will be replaced with your browser-s right-click menu.



If a user attempts to perform an operation on a site collection for which he or she does not have permissions *before* the site collection is expanded, a pop-up with following message displays when a ControlPoint operation is invoked:

You do not have permissions to run an action or report on the selected scope.



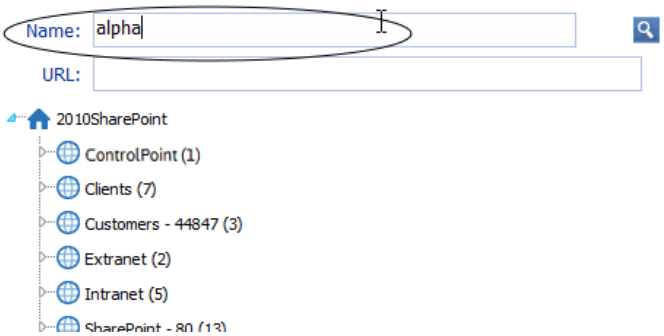
NOTE: Because *all* site collections will display in the SharePoint Hierarchy when this setting is enabled, it is recommended for use only with exceptionally large SharePoint environments where long loading time is an issue, and ideally, for which ControlPoint users are administrators for most (or all) of the site collections.

Search Using Cached Data (CACHEDSEARCH)

By default, ControlPoint uses real time data to search the SharePoint Hierarchy for operations such as:

- Search Hierarchy
- Change Selection

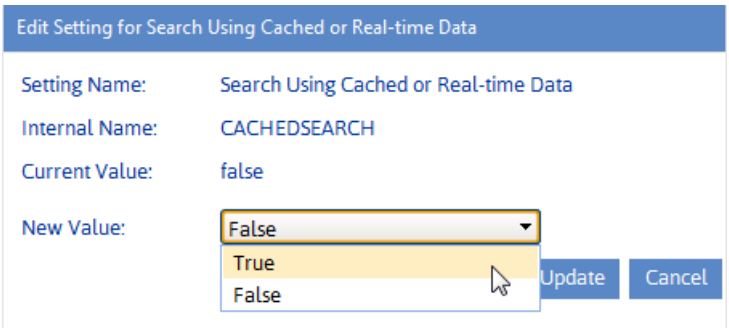
- Copy/Move destination selection



The use of real-time data means that search results are always current and will include even sites that were created immediately before the search was initiated. It may also take more time to complete a search, depending on its scope. If ControlPoint users routinely conduct searches that include a large numbers of objects, ControlPoint Application Administrators can configure ControlPoint to use data from the ControlPoint database cache (and thus speed up searches) by changing the Value of the ControlPoint Setting **Search Using Cached Data** from *false* to *true*.

NOTE: This setting applies to the *search* functionality only. The full browse tree always uses real-time data.

If cached data is used, search results will not include sites for which users only have permissions via a Web application policy.



NOTE: Data from this cache is current as of the last Discovery run.

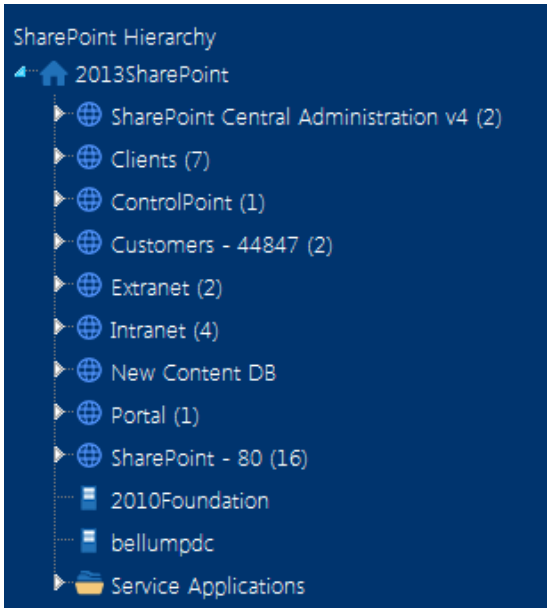
How to Display Multiple Farms in SharePoint Hierarchy (FARMNAVIGATION)

By default, if ControlPoint is running as a multi-farm installation, all farms in the installation display in the SharePoint Hierarchy, with the home farm expanded and the remote farms collapsed. ControlPoint Application Administrators can, however, change the way farms display in the SharePoint Hierarchy by updating the Value of the ControlPoint Configuration Setting **How to Display Multiple Farms in SharePoint Hierarchy**.

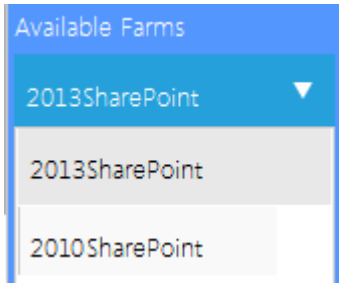


Valid values are:

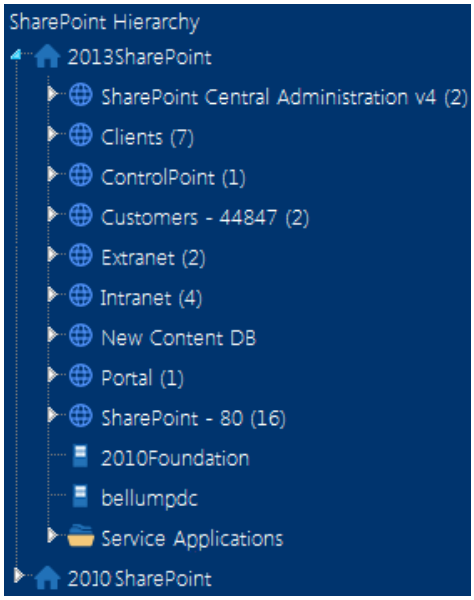
1 - Display home farm only.



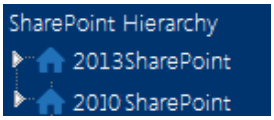
If you choose this option, users can switch between farms using the drop-down in the ControlPoint application header.



2 (default) - Display home farm expanded and remote farm(s) collapsed



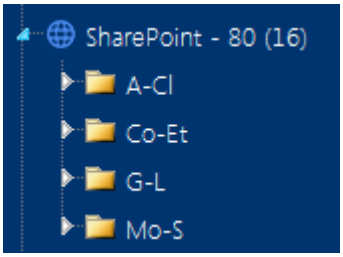
3 - Display all farms collapsed



Maximum Number of Objects to Display Before Foldering (NAVCAP)

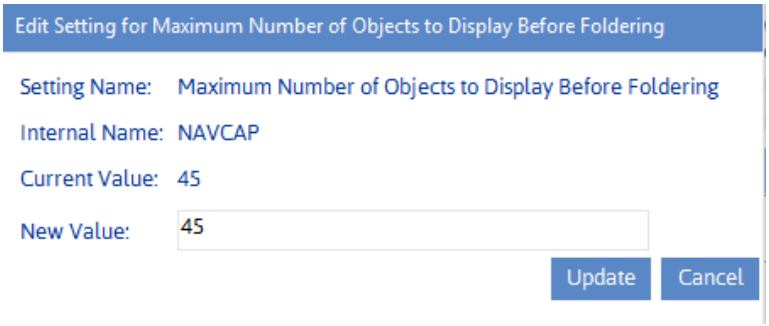
By default, the maximum number of child objects (that is, site collections, sites or lists) that can display directly beneath a single parent in the left navigation pane is 45. (That is, up to 45 site collections can display beneath a Web application, up to 45 sites beneath a site collection, and so on). This limit is set to provide you with predictable performance when opening nodes within the navigation tree; it takes additional time to open a node that contains a large number of objects.

If the number of child objects beneath a particular node exceeds the set limit, ControlPoint generates a series of subfolders which contain subsets of objects, grouped alphabetically, as shown in the example below.



ControlPoint Application Administrators can modify this number by changing the Value of the ControlPoint Setting **Maximum Number of Objects to Display Before Foldering**.

NOTE: While you may want to decrease this value, it is generally recommended that you not increase it, as performance may be negatively impacted and may trigger a warning message in the browser.

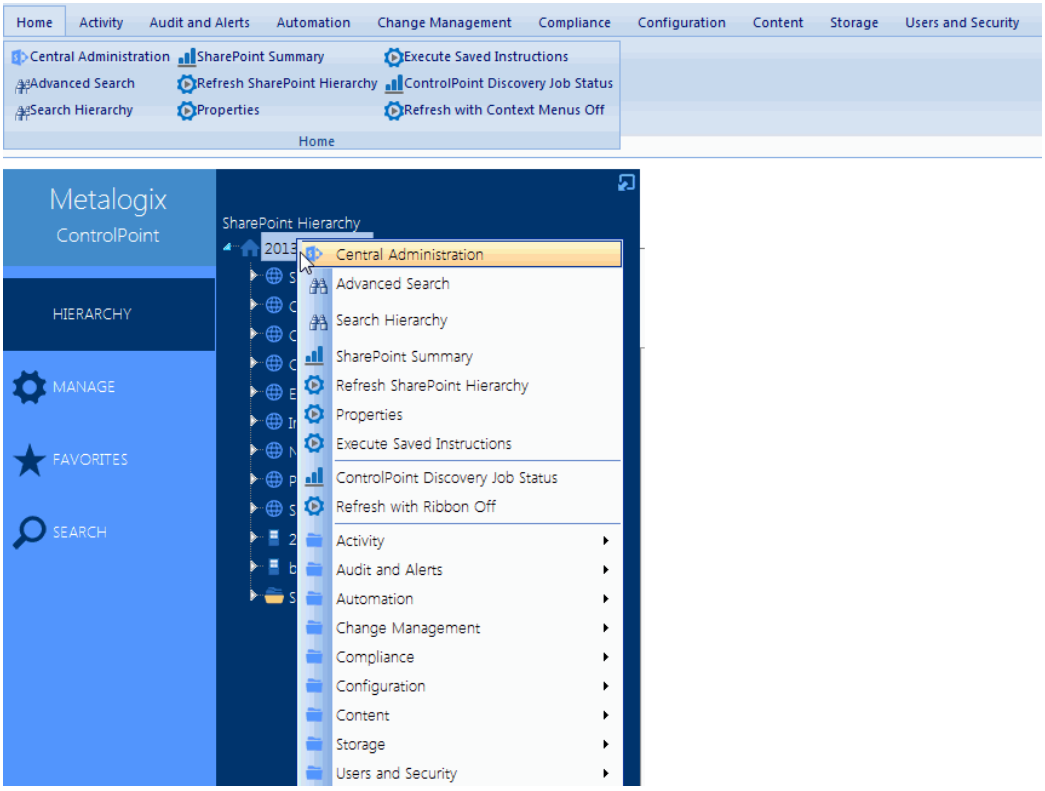


This setting applies to site collections, sites, and lists. The maximum number of SharePoint *users* and *groups* that display beneath a site are configured via different parameters. See:

- Maximum Number of SharePoint Groups to Display in SharePoint Hierarchy (SPGROUPCAP)
- Maximum Number of Users to Display in SharePoint Hierarchy (SPUSERCAP)

Menu Style(s) Available to ControlPoint Users (NAVIGATIONMODE)

By default, the ControlPoint application allows for the use of both context menus in the left navigation pane and ribbon-style menus in the application header.

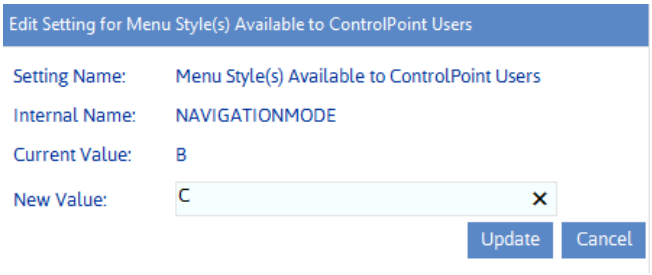


When both are enabled, individual ControlPoint users have the action of turning one or the other on or off for their own ControlPoint sessions.

ControlPoint Application Administrators can, however, specified which style(s) of menus are available for the farm by updating the Value of the ControlPoint Setting **Menu Style(s) Available to ControlPoint Users**.

Valid values are:

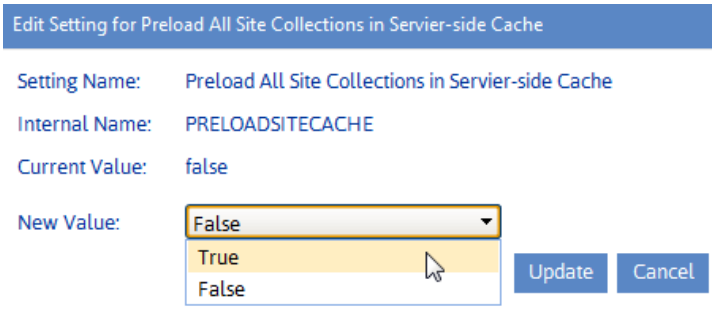
- **B** (both, which is the default option)
- **C** (context only)
- **R** (ribbon only)



Preload All Site Collections in Server-side Cache (PRELOADSITECACHE)

By default, whenever you expand a Web application in the SharePoint Hierarchy, site collections are loaded —and any folders within which site collections are grouped are built—in real time. For Web applications that contain an excessively large number of site collections (such as thousands of MySites), the time it takes to expand a Web application may be prohibitively long.

ControlPoint Application Administrators can configure ControlPoint to load site collections and folders from a server-side memory cache—so that the contents of Web applications can be displayed immediately—by changing the Value for the ControlPoint Setting **Preload All Site Collections in Server-side Cache** from *false* to *true*.



This server-side cache is updated on the first request to ControlPoint after its application pool is recycled. If IIS is configured for a nightly recycle, the restart would occur shortly thereafter. Normally the first request is from the ControlPoint Scheduled Job Review task. The server-side cache can also be refreshed on an as-needed basis from the Manage ControlPoint panel.

NOTE: The child objects within a site collection are not affected by this setting and will always load in real-time.

Whenever the **Preload All Site Collections in Server-side Cache** Value is changed, the application pool must be recycled for the change to take effect.

Show SharePoint Groups with No Permissions in Hierarchy (ShowNoPermSPGroup)

By default, SharePoint groups display in the SharePoint Hierarchy and group pickers only if they have an associated permissions level. This prevents the navigation tree from being cluttered with groups that do not have an associated permissions level, and therefore are not being actively used in SharePoint.

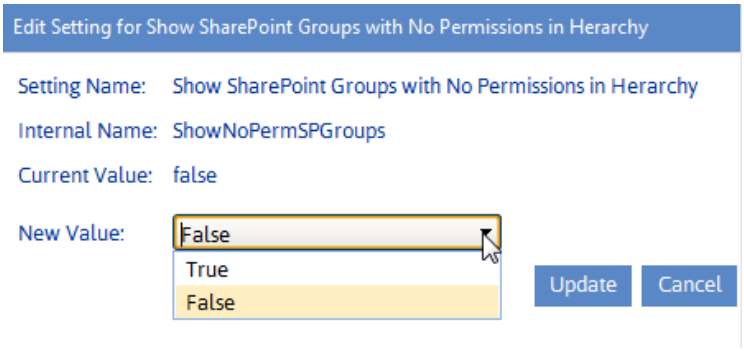
ControlPoint Application Administrators can, however, choose to display groups without permissions in the ControlPoint application interface by changing the Value of the ControlPoint Configuration Setting ShowNoPermSPGroup from the default (false) to either:

- **True** (to have groups without permissions display in both the SharePoint Hierarchy and group pickers)

OR

- **False** (to have groups without permissions display in group pickers but *not* in the SharePoint Hierarchy).

For example, you may choose not to clutter the SharePoint Hierarchy with groups that have no permissions, yet you may want to have them available to choose from when performing a ControlPoint action such as Set SharePoint Group Permissions.



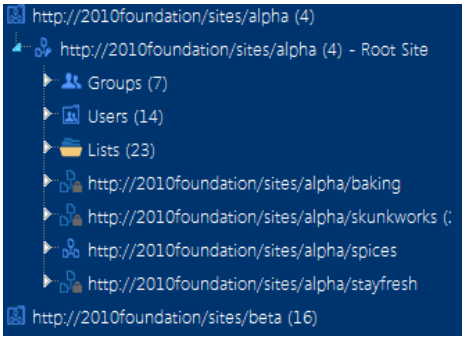
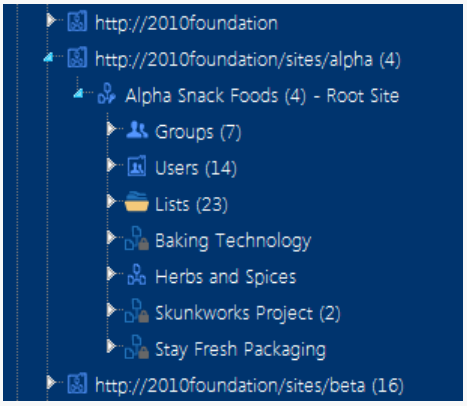
Display url or Site Name in SharePoint Hierarchy (SHOWURLASTITLE)

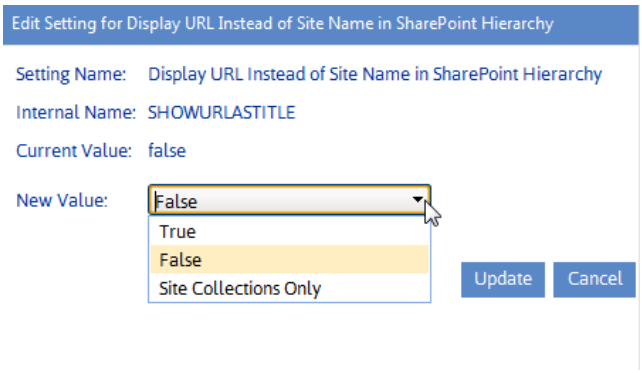
By default, SharePoint site collections and sites are identified by Title in the SharePoint Hierarchy, Search Hierarchy, and other areas of the application that include a browse tree (such as Change Selection and Copy/Move destination selection).



ControlPoint Application Administrators can, however, choose to display site collections and sites by changing the Value of the ControlPoint Configuration Setting Display url or Site Name in SharePoint Hierarchy to one of the options below.

If you want to have...	Then change the Value for SHOWURLASTITLE to ...
both site collections and sites identified by url	**true**.

If you want to have...	Then change the Value for SHOWURLASTITLE to ...
	
• site collections identified by url and • sites identified by name	**SiteColOnly**. 



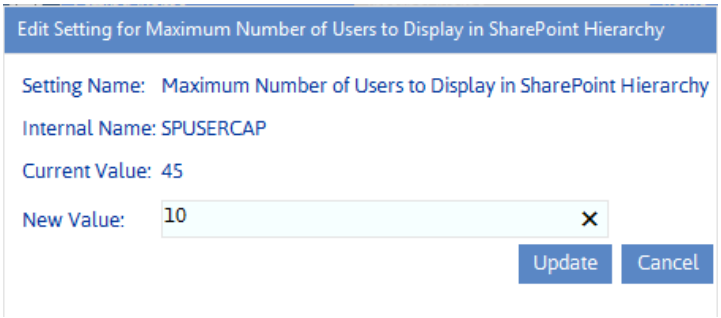
Regardless of the setting, the alternate way of displaying the title—along with the object's GUID—can be viewed as a tool tip when the cursor is placed over the object icon.

Maximum Number of Users to Display in SharePoint Hierarchy (SPUSERCAP)

By default, up to 45 SharePoint **Users** can display beneath a site in the SharePoint Hierarchy

(Note that the Users folder contains only SharePoint users who have been granted *direct* permissions for a site.)

ControlPoint Application Administrators can, however, modify this number by changing the **Maximum Number of Users to Display in SharePoint Hierarchy** Value.

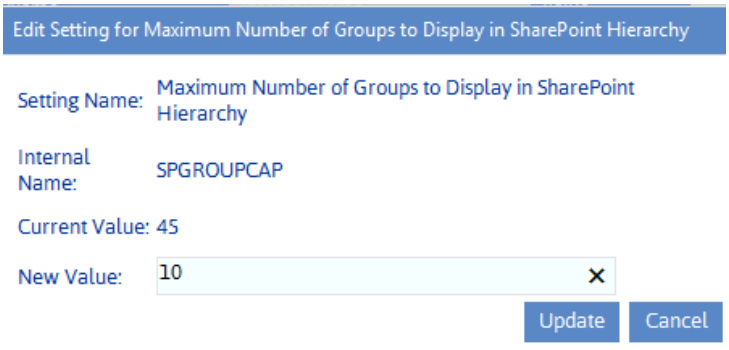


If the number of SharePoint users is greater than the specified parameter value, the list will be truncated. For example, if you set the **Maximum Number of Users to Display in SharePoint Hierarchy** Value to 10, and 12 users have direct permissions to a site, *the first 10 users* (in alphabetical order) will display in the Users folder. (Remember, however, that the total number of users with direct permissions for the site displays in parentheses to the right of the user folder.

Maximum Number of SharePoint Groups to Display in SharePoint Hierarchy (SPGROUPCAP)

By default, up to 45 SharePoint **Groups** can display beneath a site in the SharePoint Hierarchy

ControlPoint Application Administrators can, however, modify this number by changing the **Maximum Number of SharePoint Groups to Display in SharePoint Hierarchy** Value.



If the number of SharePoint groups with permissions to a site is greater than the specified parameter value, the list will be truncated. For example, if you set the **Maximum Number of SharePoint Groups to Display in SharePoint**

Hierarchy Value to 10, and 12 groups have permissions to a site, the first 10 groups (in alphabetical order) will display in the Groups folder. (Remember, however, that the total number of groups with permissions for the site displays in parentheses to the right of the Group folder.)

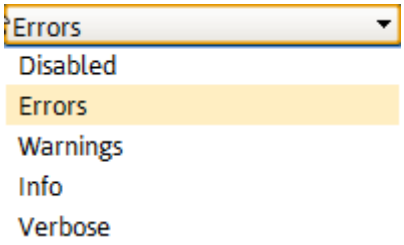
Changing Trace Switch Logging Levels

ControlPoint contains a number of trace switches that control the type and level of detail that is captured in the ControlPoint Administration (xcAdmin) log. Metalogix Technical Support may suggest that one or more of these be changed for diagnosis and troubleshooting purposes.

NOTE Trace switches are Advanced settings.

Valid values for all trace switches, listed from least to most detail, are:

- Disabled
- Error (the default)
- Warnings
- Info
- Verbose



Note that as the logging level increases, the amount of detail is "additive." For example, if you select the logging level Info, then Errors and Warnings will also be included.

If you want to change the logging level for...	Edit the following setting ...
the SharePoint hierarchy building for navigation and selection	SharePoint Hierarchy Access Logging
the amount of time it takes the SharePoint Hierarchy to load	SharePoint Hierarchy Load Time Logging
reports and actions general processing	Traverse Entry Logging
	Additional Traverse Entry Logging
the interaction between ControlPoint and databases	Database Interaction Logging
the validation of SharePoint users by ControlPoint	SharePoint Access Logging

If you want to change the logging level for...	Edit the following setting ...
aspx page major events	aspx Page Major Event Logging
the interaction between ControlPoint and Active Directory	Active Directory Interactions Logging
operations performed by the ControlPoint Scheduler	ControlPoint Scheduler Logging
the management of linked SharePoint groups	Manage Linked SharePoint Group Logging
WCF Services calls	WCF Service Call Logging
ControlPoint Policies and Site Provisioning operations	ControlPoint Policies Logging
copy/move at set site properties operations	Copy/Move and Set Site Properties Logging
Interactive Analysis (SharePoint 2010)	Interactive Analysis Logging
non-specific events	Non-Specific Event Logging
Audit Log archiving	Audit Log Archive Logging
Workflow reporting for the Comprehensive User Analysis	Comprehensive User Workflow Report Logging
access to the Managed Metadata Service Application database	Managed Metadata Service Application Database Access Logging
ControlPoint operations performed via PowerShell	PowerShell Processing Logging
Set List properties operations	Set List Properties Logging
Social Activity Analysis processing	Social Activity Analysis Logging
ControlPoint Statistics Lists calculations	Statistics Lists Calculation Logging
the ControlPoint Database Recovery operation	ControlPoint Database Recovery Logging

Changing Default Settings for Compliance

These configuration settings display in the ControlPoint Settings list under the category **Compliance**, and apply when your ControlPoint license includes Compliance functionality.

Compliance Alert Email Text

When a Compliance Action Rule specifies that an alert be sent, ControlPoint automatically sends an email for the applicable severity level to the appropriate user(s)..

ControlPoint Application Administrators can, however, modify the default text, as described in the following table.

If you want to change the text of the email that is sent to alerted user(s) when ...	Then change the Parameter of the ControlPoint Setting	From the default text...
the threat level is Mild	**ComplianceMildLevelThreatsEmailBody**	The document @@DocumentName@@ in the location @@ListUrl@@ contains content that has been identified as posing a Mild level of threat, and Metalogix ControlPoint has taken the following compliance action: @@Action@@.
the threat level is Moderate	**ComplianceModerateLevelThreatsEmailBody**	The document @@DocumentName@@ in the location @@ListUrl@@ contains content that has been identified as posing a Moderate level of threat, and Metalogix ControlPoint has taken the following compliance action: @@Action@@.
the threat level is Severe	**ComplianceSevereLevelThreatsEmailBody**	The docment @@DocumentName@@ in the location @@ListUrl@@ contains content that has been identified as posing a Severe level of threat, and Metalogix controlPoint has taken the following compliance action: @@Action@@.

Where the following variables are used:

- @@DocumentName@@ is the name of the item that contains the non-compliant content.
- @@ListUrl@@ is the location of the list that contains the non-compliant item

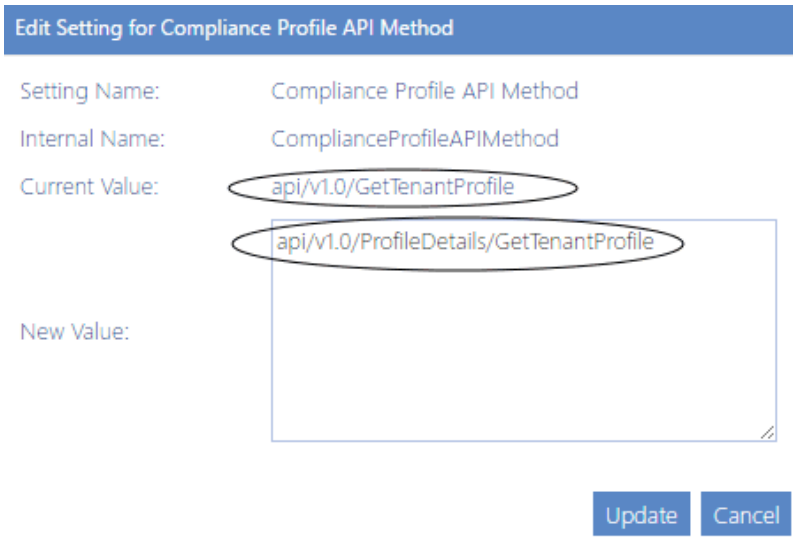
- @@Action@@ is the Compliance Action that has been carried out.

Compliance Profile API Method (ComplianceProfileAPIMethod)

The ControlPoint compliance Profile API method is the endpoint to the Web Service that retrieves Profiles for use in identifying Sensitive Content.

If ControlPoint was *first* installed prior *to* version 7.0, the ControlPoint Application Administer must update the Value of the ControlPoint Configuration Setting Compliance Profile API Method from **api/v1.0/GetTenantProfile** to **api/v1.0/ProfileDetails/GetTenantProfile**.

NOTE: This is an Advanced setting.



Compliance Endpoints

By default, endpoints for Sensitive Content Manager point to Sensitive Content Manager (Cloud edition). If, however, your environment uses Sensitive Content Manager Server (the on-premises version), the Value of each of these endpoints must be changed to point to the server on which Sensitive Content Manager Server is installed. Use the information in the following table for guidance.

NOTE: These are Advanced settings.

Endpoint	Description	Default (Cloud Services) Value	SCM Server Value
Web Services Endpoint for Compliance Authentication (ComplianceAuthURL)	The URL for Metalogix Cloud Services or Sensitive Content Manager on premises	https://login.onmetalogix.com	http://<server.domain>

Endpoint	Description	Default (Cloud Services) Value	SCM Server Value
	authentication server for authenticating user when sending files.		(*or if installed on multipe servers*: http://<server.domain>:port)
ComplianceProfileAuthURL	The URL for Metalogix Cloud Services or Sensitive Content Manager on premises authentication server for authenticating user to retrieve profiles.	https://login.onmetalogix.com	http://<server.domain> (*or if installed on multipe servers*: http://<server.domain>:port)
Web Services Endpoint for Compliance Profile Requests (ComplianceProfileURL)	The URL for Metalogix Cloud Services or Sensitive Manager on premises service for retrieving profiles.	https://scm.onmetalogix.com	http://<server.domain> (*or if installed on multipe servers*: http://<server.domain>:port)
Web Services Endpoint for Compliance Scan Upload (ComplianceUploadURL)	The URL for Metalogix Cloud Services or Sensitive Content Manager on premises service for sending files	https://files.onmetalogix.com	http://<server.domain> (*or if installed on multipe servers*: http://<server.domain>:port)
Web Services Endpoint for Compliance Scan Results (ComplianceResultsURL)	The URL for Metalogix Cloud Services or Sensitive Content Manager on premises service for retrieving files job results	https://cajobs.onmetalogix.com	http://<server.domain> (*or if installed on multipe servers*: http://<server.domain>:port)

Managing Site Provisioning Settings

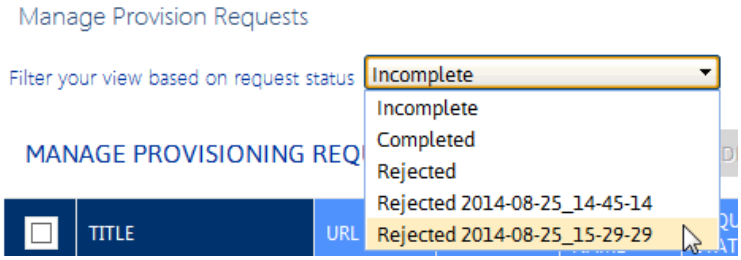
These configuration settings display in the ControlPoint Settings list under the category **Provisioning**.

Maximum Number of Provisioning Requests in Completed an Rejected Folders

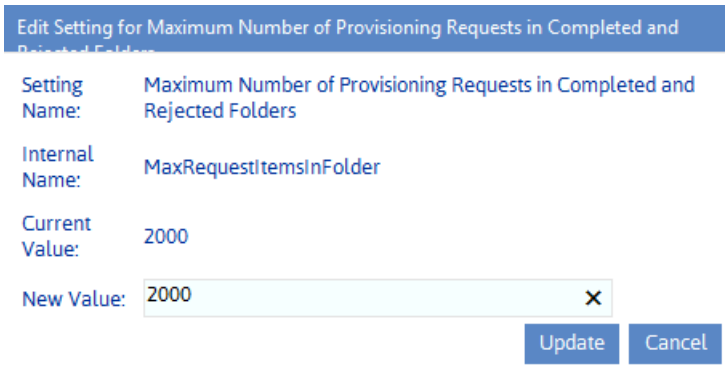
By default, ControlPoint keeps a maximum of 2000 items in each of the following Site Provisioning Manager View filters:

- **Completed**
- **Rejected**

When this limit is reached, ControlPoint creates an "archive" view with a date and time stamp. A new archive view is created every time the specified limit is reached.



ControlPoint Application Administrators can, however, specify a different maximum number of requests to display in a view by changing the Value of the ControlPoint Setting **Maximum Numer of Provisioning Requests in Completed and Rejected Foder**.



Changing the Subject and/or Body of Provisioning Request Emails

You can change the default subject line and/or body text of the emails that are automatically sent to the requester of a new site collection or site, as described in the following table.

NOTE: These are Advanced Settings.

If you want to change ...	Then change the Parameter of the ControlPoint Setting	From the default text...
the subject line of the email that is sent to the requester when a site provisioning request is received and registered	**Subject Line for Provisioning Request Registered email**	Your request for a new site.

the text of the email that is sent to the requester when a site provisioning request is received and registered	**Text for Provisioning Request Registered email**	Your request for '@@REQUESTNAME@@' with id @@REQUESTKEY@@ has been registered.
the Subject line of the email that is sent to the requester when a request has been approved, then completed	**Subject Line for Provisioning Request Completed email**	Your new site is ready for use.
the text of the email that is sent to the requester when a request has been approved, then completed	**Text for Provisioning Request Completed email**	Your request '@@REQUESTKEY@@' has been completed and is ready for use.
the subject line of the email that is sent to the requester when a site provisioning request is rejected	**RequestRejectedEmailSubject**	Your request for a new site or site collection has been rejected.
the text of the email that is sent to the requester when a site provisioning request is rejected	**Text for Provisioning Request Rejected email**	Unfortunately, your request for '@@REQUESTNAME@@' at @@REQUESTURL@@ with id @@REQUESTKEY@@ has been rejected.

NOTE: '@@REQUESTKEY@@' is a variable that is populated with the confirmation GUID that is generated when a request is submitted. @@REQUESTNAME@@' is a variable that is populated with the name requested for the the site.

Configuring the Site Provisioning Workflow Settings (SharePoint Server)

As an alternative to approving site provisioning requests manually, via the Manage Site Provisioning Requests interface, you can use a workflow—either a SharePoint "out or the box" approval workflow or one that was created or customized using SharePoint Designer—to manage the Site Provisioning approval process.

If you are using a workflow, the following ControlPoint Settings must be configured:

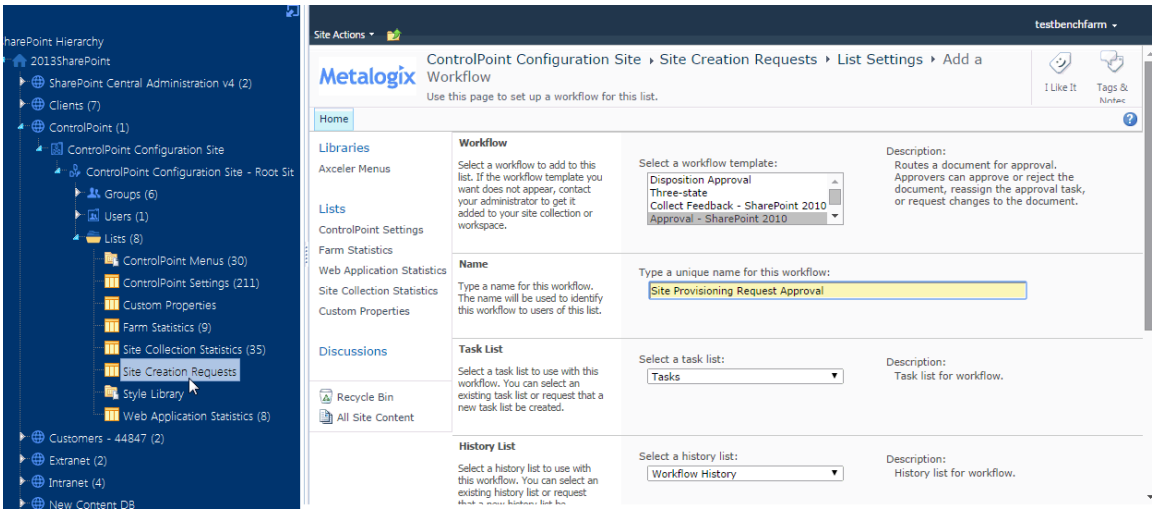
- **WorkflowName**
- **Workflow Account**
- **WorkflowApprovedValue**
- **WorkflowRejectedValue**

In addition, if you want to be able to have workflows auto-start, extra configuration may be required.

NOTE: SharePoint Approval workflows are not available for SharePoint Foundation.

Before configuring Site Provisioning workflow settings:

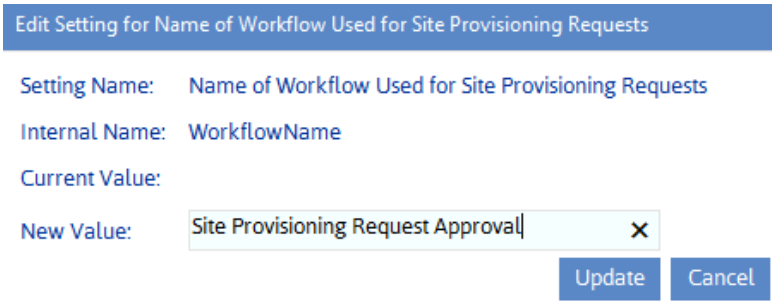
Add and configure the approval workflow you want to use on the ControlPoint Configuration Site - Site Creation Requests list following standard SharePoint practices.



Specifying the Name of the Workflow Used for Site Provisioning Requests

To identify the workflow that should be used for the Site Provisioning approval process, enter the name of the workflow as the Value of the ControlPoint Setting **Name of Workflow Used for Site Provisioning Requests**.

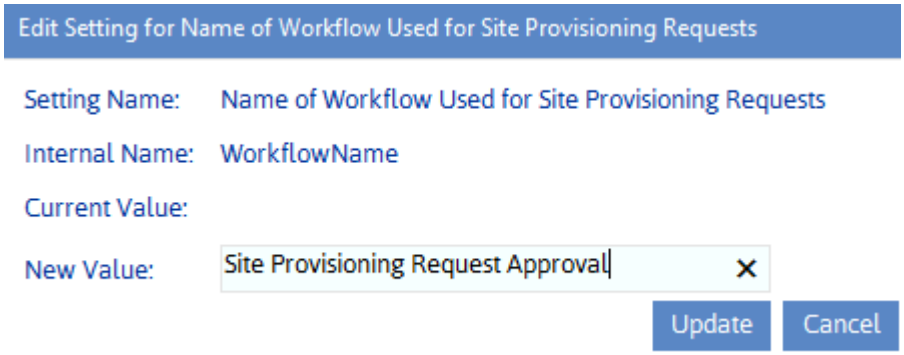
Note that having a Value for this setting enables display of the workflow column in the Manage Provision Requests grid.



Specifying the Account for Starting the Provisioning Approval Workflow

Most ControlPoint operations are performed by the ControlPoint Service Account on behalf of the logged in user. However, because SharePoint does not allow a system account to start a workflow, you must specify a different account to use for this purpose. The account that you specify for **Account for Starting the Provisioning Approval Workflow** must have permissions to start a workflow on the ControlPoint Configuration Site - Site Creation Requests list.

NOTE: For the **Value**, be sure to enter the *full* user login name.

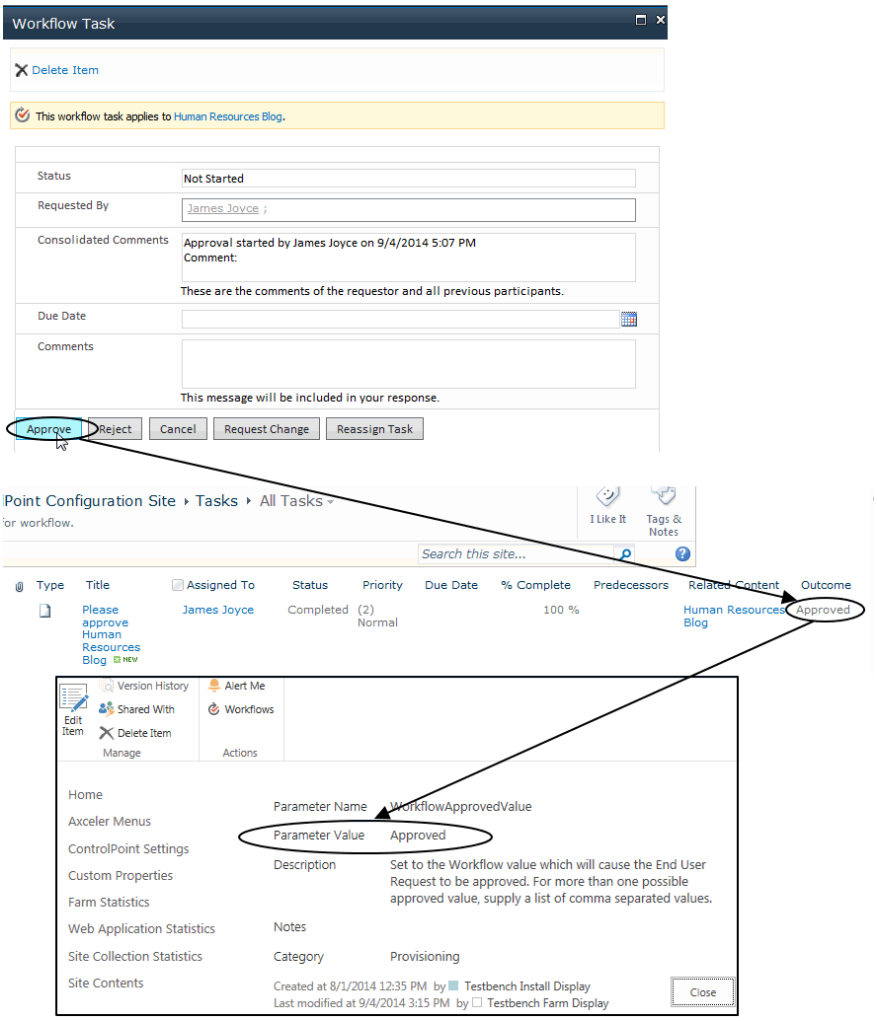


Specifying Provisioning Request Approval Value(s) for the Workflow

Any status that indicates an approval in the SharePoint workflow used for the Site Provisioning approval process must be synchronized with the "Approved" status in ControlPoint. This will allow a "custom" status —and will even allow more than one possible status—to be used to indicate approval of a Site Provisioning request.

To do this, enter the Approved status (or statuses) associated with the workflow as the Value of the ControlPoint Setting **Provisioning Request Approval Value for Workflow**.

NOTE: Enter multiple values as a comma-separated list (for example, Approved,OK).

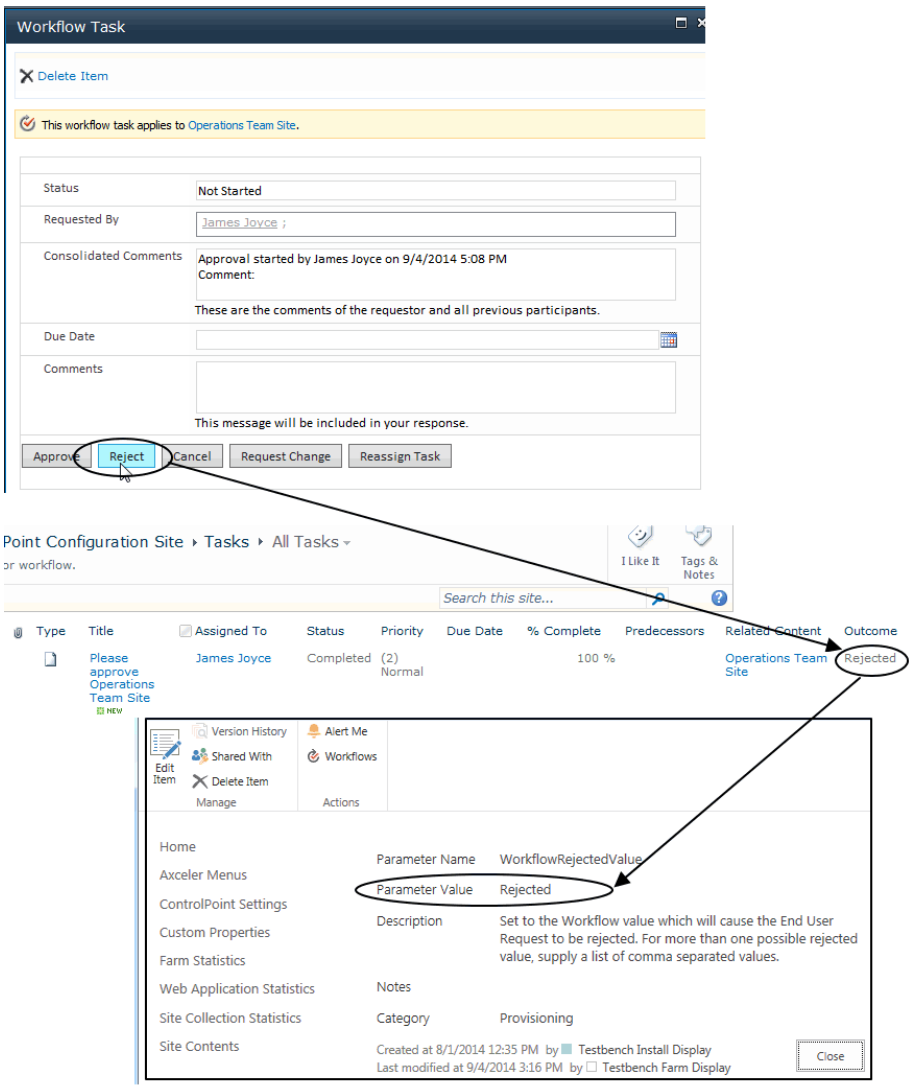


Specifying Provisioning Request Rejected Value(s) for the Workflow

Any status that indicates a rejection in the SharePoint workflow used for the Site Provisioning approval process must be synchronized it the "Rejected" status in ControlPoint. This will allow a "custom" status—and will even allow more than one possible status—to be used to indicate rejection of a Site Provisioning request.

To do this, enter the Rejected status (or statuses) associated with the workflow as the Value of the ControlPoint Setting **Provisioning Request Rejected Value for Workflow**.

NOTE: Enter multiple values as a comma-separated list (for example, Rejected,No).

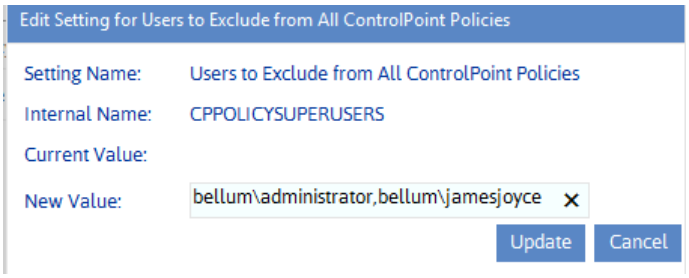


Specifying Global Settings for ControlPoint Policies

These configuration settings display in the ControlPoint Settings list under the category **ControlPoint Policies**.

Users to Exclude from All ControlPoint Policies (CPPOLICYSUPERUSERS)

By default, when you apply a ControlPoint policy to users, all users included in the **User Selection** will be included in the policy. ControlPoint Application Administrators can, however, exclude specified users from *all* ControlPoint policies by entering one or more user names (in the format domain\user) in the Value field of the ControlPoint Configuration Setting **Users to Exclude from All ControlPoint Policies**. Enter multiple names as a comma-separated list.



For example, you may want to exclude from all policies:

- the ControlPoint Service Account, to allow administrators to perform actions such as Delete Site and Copy/Move actions in ControlPoint. (Remember, ControlPoint actions are actually carried out by the ControlPoint Service Account rather than the logged in user).
- all accounts operating as the System Account (sharepoint\system), which may include, but not be limited to, the ControlPoint Service Account.
- farm administrators.

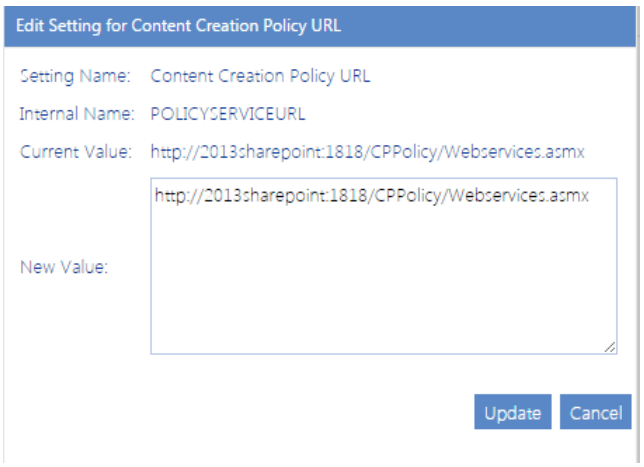
NOTE: You must exclude users based on *full account names* (sometimes known as pre-Windows 2000account names in Active Directory), not display names. For example, you cannot exclude system accounts by entering the display name System Account.

Users specified in this setting will *always* be excluded from *all* policies, including any policies to which they have been explicitly added.

Content Creation Policy url (POLICYSERVICEURL)

When a ControlPoint policy is created that uses a content creation rule, a custom Web service must be set up which runs whenever content is added to a site within the scope of the policy. For example, you may want to be notified whenever a document is posted that contains "flagged" content.

If such a policy is to be implemented, the full service url to the location of the Web service must be the Value for the ControlPoint Configuration Setting **Content Creation Policy url**.



NOTE: In order to simulate the environment in which it will be used, it is recommended that the functionality be tested on the Web front-end server on which ControlPoint is installed while logged in as the ControlPoint Service account.

See also "Creating a Custom Web Service for Use with a ControlPoint Content Creation Policy" in the document *Running ControlPoint Actions Programmatically.*

Setting Preferences for the ControlPoint Scheduler

These configuration settings display in the ControlPoint Settings list under the category **ControlPoint Scheduler**.

Maximum Number of Scheduled Jobs to Submit at One Time (MAXSUBMIT)

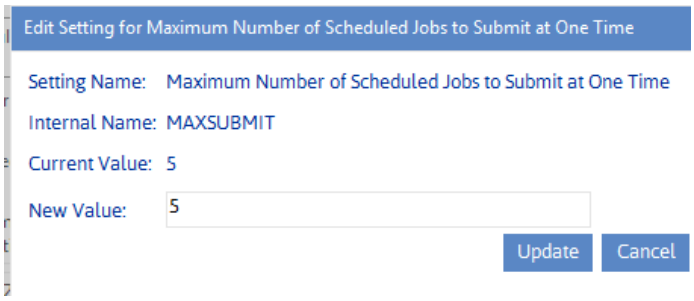
By default, up to five scheduled jobs can run at any one time. For example, if three scheduled jobs are running at the time the ControlPoint scheduler task next checks the queue for pending jobs, an additional two jobs will be submitted.

ControlPoint Application Administrators can change this number by updating the Value of the ControlPoint Setting **Maximum Number of Scheduled Jobs to Submit at One Time**.

For example:

- You may want to *increase* this number if jobs are generally scheduled to run when system usage is low, to allow more of them to run concurrently.

- You may want to *decrease* this number if interactive performance of your farm is being affected by the processing of scheduled jobs.



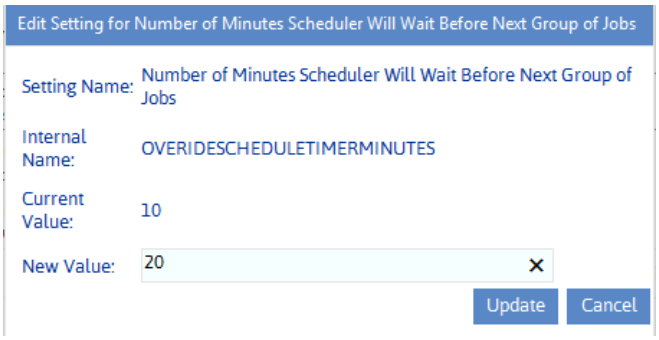
This setting can be used in conjunction with Number of Minutes Scheduler Will Wait Before Next Group of Jobs (OVERIDESCHEDULETIMERMINUTES) to fine-tune the behavior of the ControlPoint scheduler.

Number of Minutes Scheduler Will Wait Before Next Group of Jobs (OVERIDESCHEDULETIMERMINUTES)

The SharePoint timer service prompts the ControlPoint scheduler task to run every 10 minutes. By default, it checks for and initiates the execution of scheduled jobs during every "wake-up."

The ControlPoint Application Administrator can, however, have jobs run less frequently by increasing the Value of the ControlPoint Setting **Number of Minutes Scheduler Will Wait Before Next Group of Jobs** by increments of 10.

NOTE: Ten minutes is the *minimum* value that can be specified, as that is the interval at which the SharePoint timer task actually runs.



When this setting has been increased, the following message will display in the Schedule Details section of the scheduler interface:

The ControlPoint scheduler is currently set to submit jobs that are due for processing every XX minutes.

This setting can be used in conjunction with Maximum Number of Scheduled Jobs to Submit at One Time to fine-tune the performance of the ControlPoint scheduler.

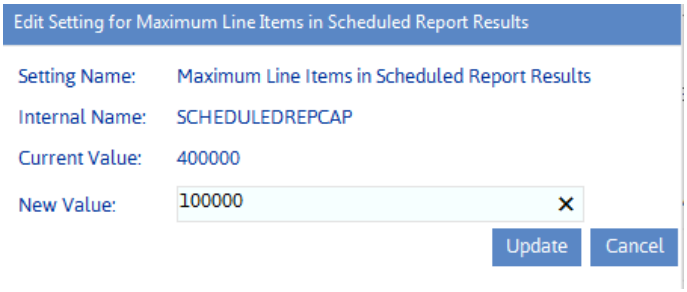
Maximum Line Items in Scheduled Report Results (SCHEDULEDREPCAP)

By default, when a ControlPoint analysis is run on a schedule, up to 40,000 line items can be returned.

If the number of line items exceeds the maximum number, ControlPoint generates the following message, which displays in the analysis output file, in place of results:

This report has more rows than the current row limit of xxxx. You can raise the limit. You can also narrow the scope or parameters of the analysis.

You can change the maximum number of line items in a scheduled analysis by changing the Value of the ControlPoint Setting **Maximum Line Items in Scheduled Report Results**.



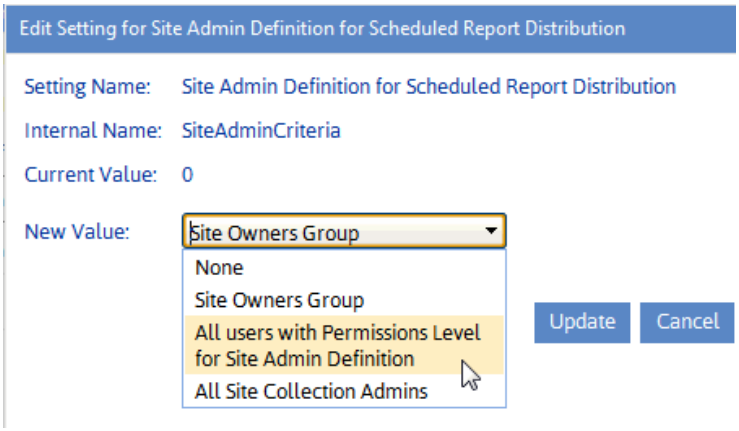
For example, this value may be *increased* if the output of exceptionally large analyses are routinely posted to a SharePoint library. Conversely, this value may be *decreased* if analysis output is generally emailed to distribution lists and your mail system imposes attachment size limits.

Defining "Admins" for Scheduled Analysis Results Distribution (SiteAdminCriteria)

ControlPoint provides the option of having scheduled analysis results distributed to administrators responsible for sites within the selected scope. ControlPoint Application Administrators must specify the users and/or groups that should fall within the definition of "Admins" by updating the Value of the ControlPoint Configuration Setting **SiteAdminCriteria** with one or more of the following values:

- Members of the Site Owners Group
- All users with a permissions level specified in the ControlPoint Configuration Setting Permissions Level for Site Admin Definition for Scheduled Report Distribution .
- All members of the Site Collection Administrators group.

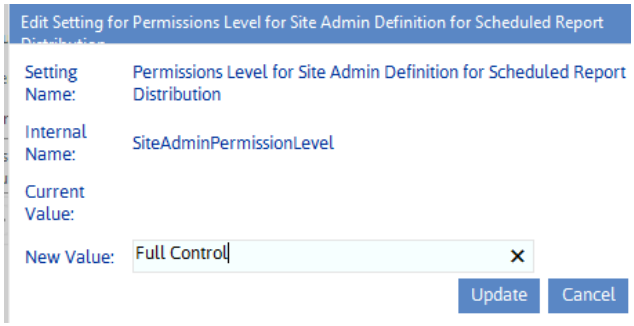
Enter multiple values as a comma-separated list.



NOTE: Users who meet site admin criteria are captured during the Discovery process.

Permissions Level for Site Admin Definition for Scheduled Report Distribution (SiteAdminPermissionLevel)

The ControlPoint Configuration Setting SiteAdminCriteria can be set to include users with a specified permissions level in the definition of "Admins" for the distribution of scheduled analysis results. ControlPoint Application Administrators can specify that permissions level as the Value of the ControlPoint Configuration Setting **SiteAdminPermissionLevel**.



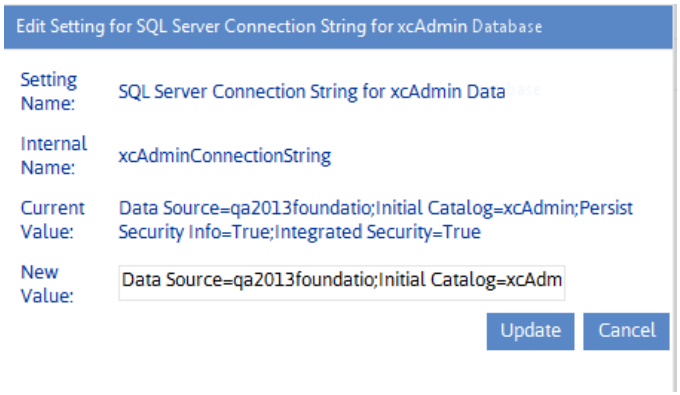
NOTE: Only one permissions level may be entered.

Miscellaneous and Custom Configuration Settings

These configuration settings display in the ControlPoint Settings list under the category **Miscellaneous and Custom**.

SQL Server Connection String for xcAdmin Database (xcAdminConnectionString)

The ControlPoint Setting **SQL Sever Connection String for xcAdmin Database** is populated at the time ControlPoint is installed, based on the SQL server identified as the location for the ControlPoint Services Database.



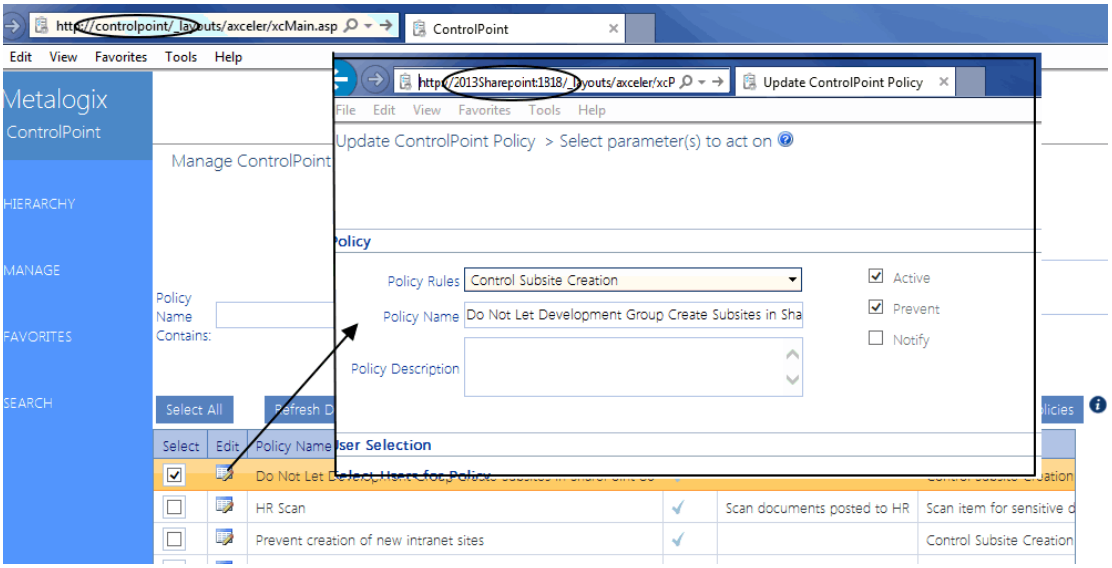
The xcAdminConnectionString Value should be modified only under rare and special circumstances (for example, if the location of the ControlPoint Services database has changed).

NOTE: If you change the location of the ControlPoint Administration database (xcadmin) during a Modify installation, the value for this setting will be updated automatically.

Url for ControlPoint Outside the Default Zone (INBOUNDCONTROLPOINTURL)

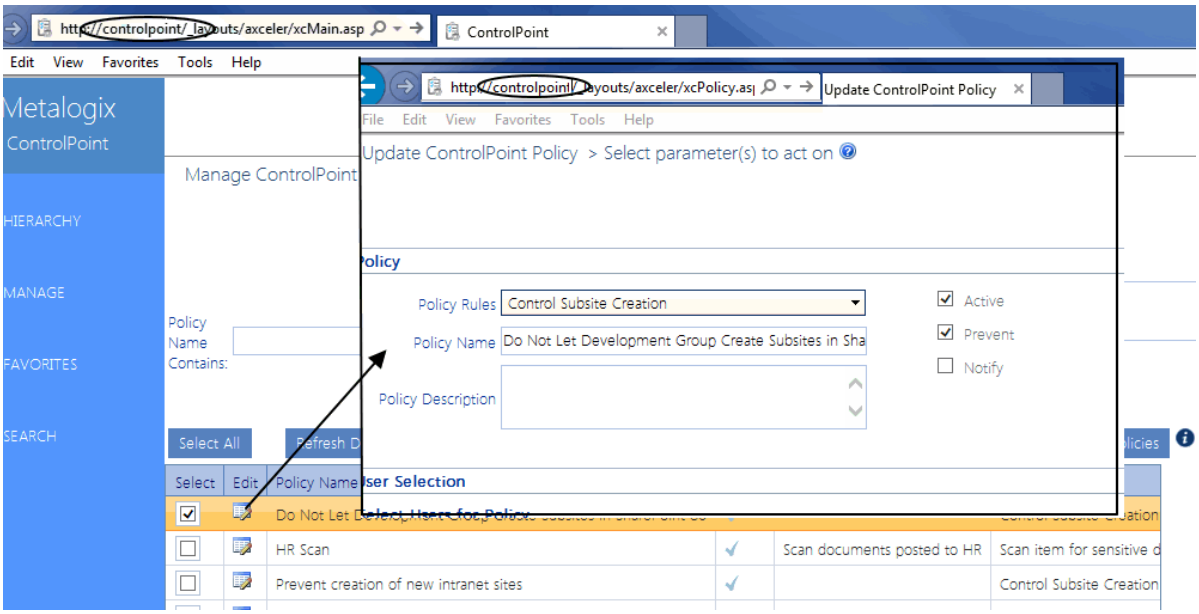
When ControlPoint is first installed, the ControlPoint Setting **Inbound ControlPoint URL** is populated with the value http://<MACHINENAME>:<portnumber> where MACHINENAME is the name of the server on which ControlPoint is installed and <portnumber> is the port number used for the ControlPoint Web application.

If an alternate access mapping or SSL is used to access ControlPoint, this default URL will continue to be used to access another ControlPoint page from within the the application.



ControlPoint Application can, however, ensure that the alternate URL is used instead by specifying it as the value of the ControlPoint Setting **Inbound ControlPoint URL**.

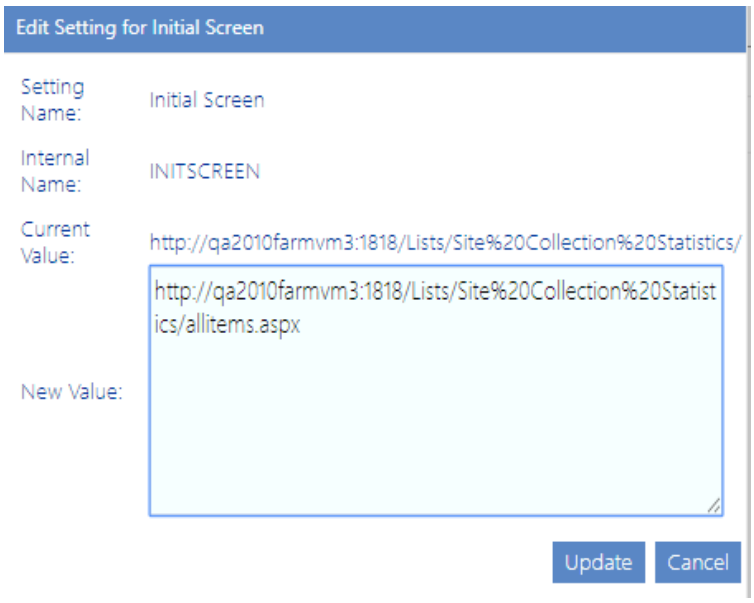
NOTE: This is an Advanced Setting.

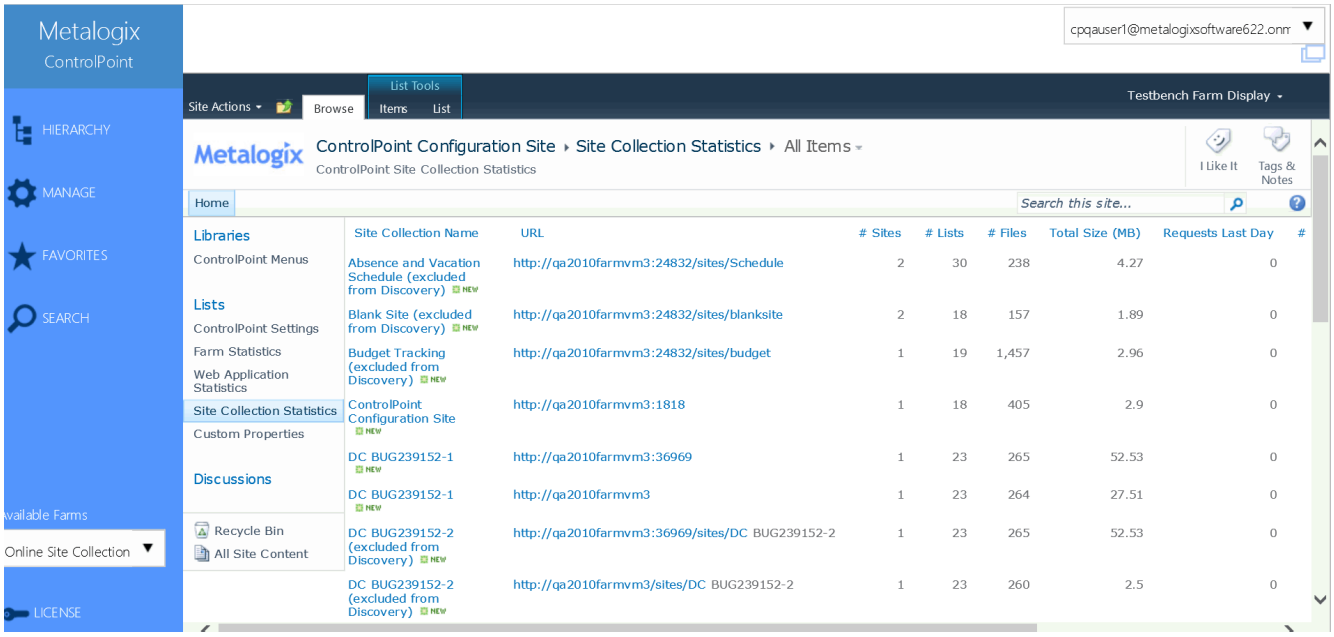


Initial Screen (INITSCREEN)

If the ControlPoint Setting No Dashboard is set to *True*, ControlPoint Application Administrators can customize the content that displays when users log into ControlPoint or refresh their browsers by entering a web page url as the Value of the ControlPoint Setting **Initial Screen**.

NOTE: This is an Advanced Setting.

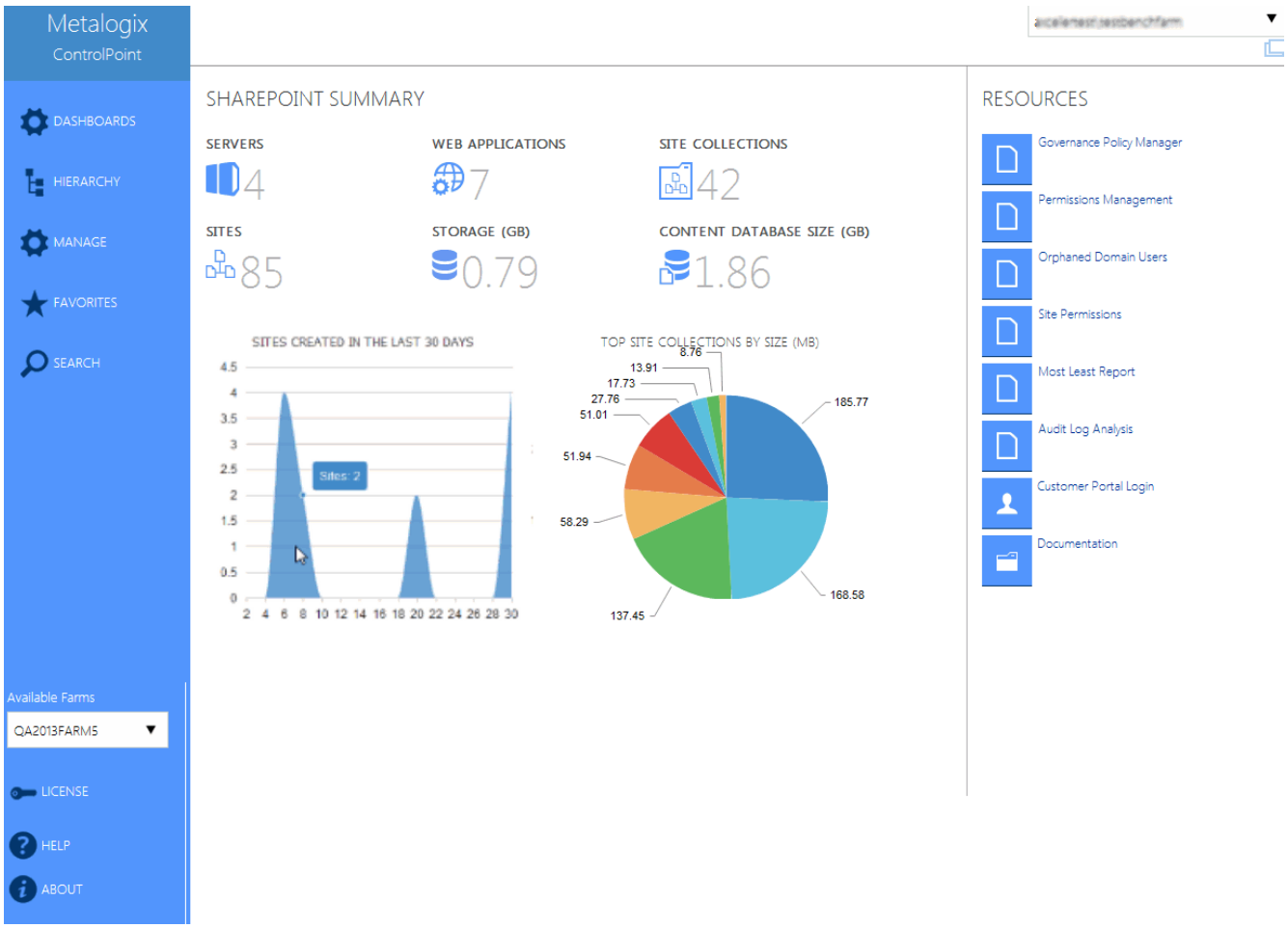




If you are using Chrome as your browser and the Content Security Policy (CSP) is enabled for the web page, ControlPoint will be unable to load the page content.

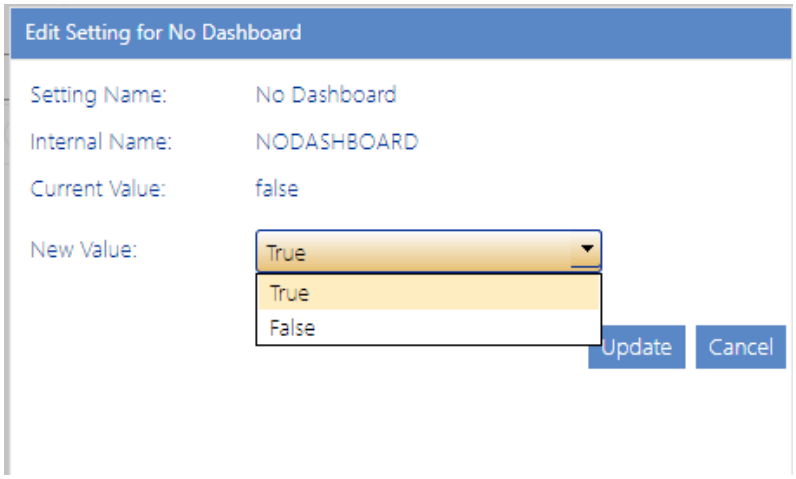
No Dashboard (NODASHBOARD)

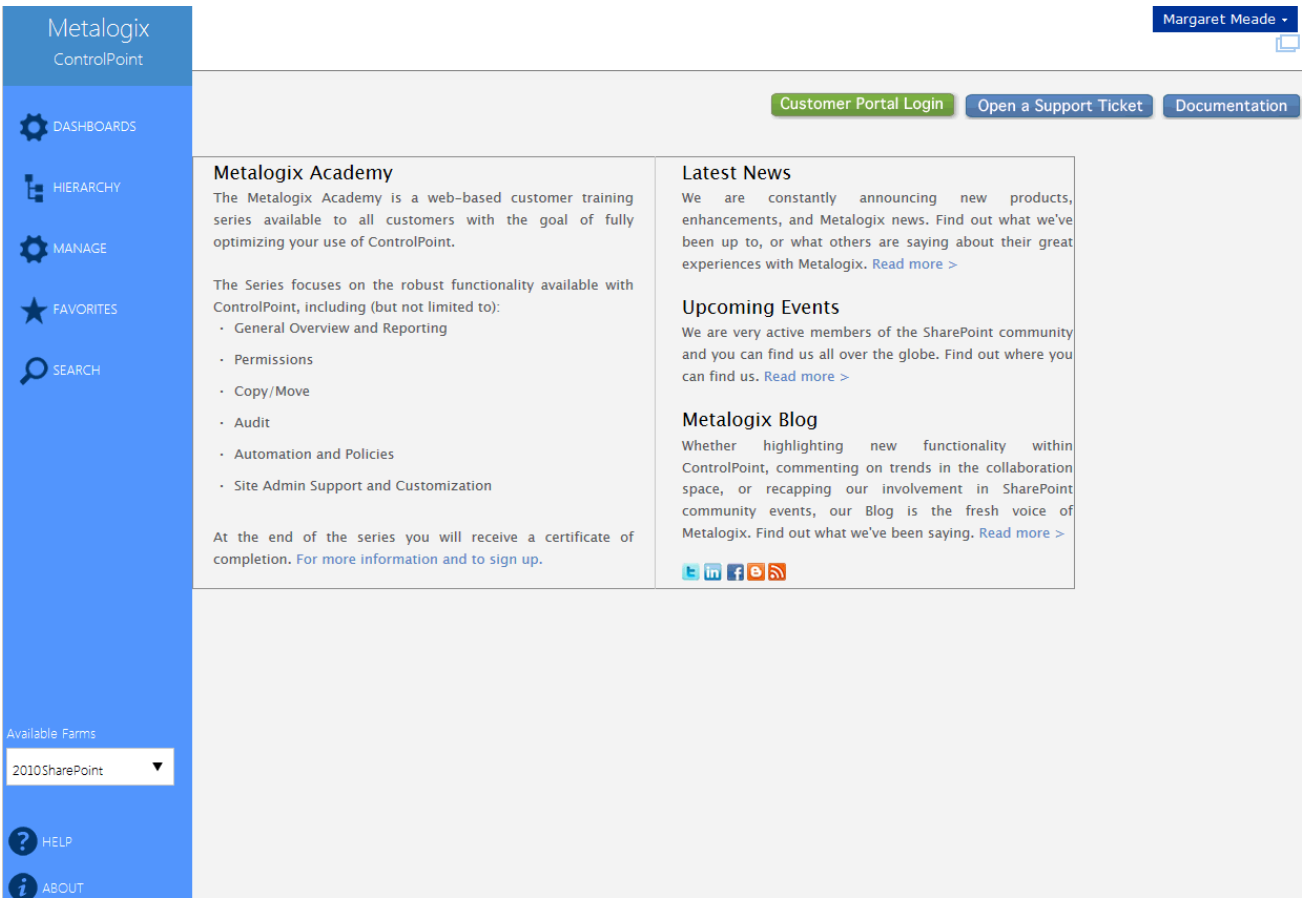
By default, if you are using ControlPoint with SharePoint 2013 or 2016 (non-Native installation)whenever you log into ControlPoint or refresh your browser, the right pane displays a dashboard which includes statistics about your SharePoint as well as links to popular ControlPoint features.



ControlPoint Application Administrators can, however, choose to display the Metalogix ControlPoint Cafe site (which is the default page for SharePoint 2010 and 2007 Standard and all Native installations) instead, by changing the Value of the ControlPoint Setting **No Dashboard** from *False* to *True*.

NOTE: This is an Advanced Setting.



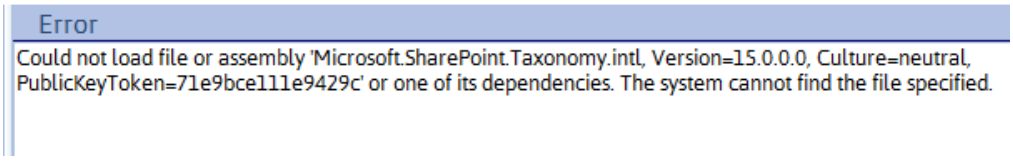


This setting can also be used in conjunction with the setting Initial Screen to display a web page of your choice.

Special-Purpose Configuration Settings

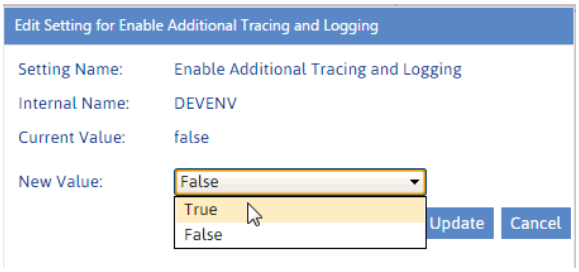
Enable Additional Tracing and Logging (DEVENV)

By default, whenever an exception is thrown, a brief message displays in the ControlPoint user interface.

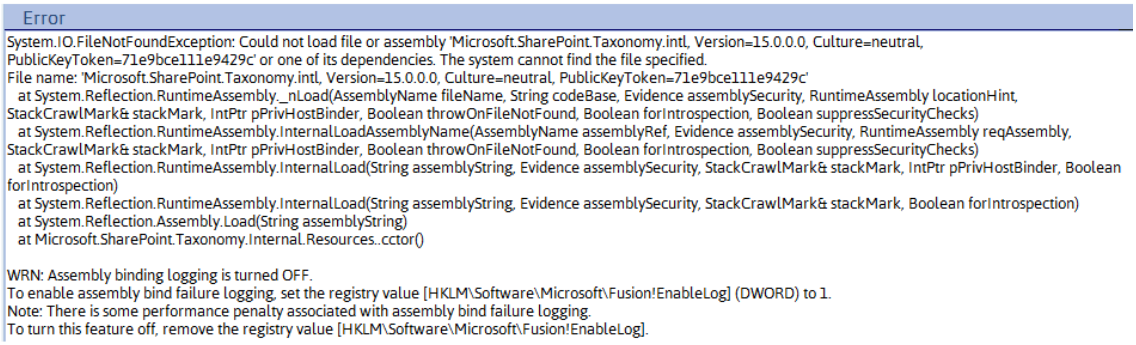


ControlPoint Application Administrators can, however, make additional logging and tracing available by changing the Value of the ControlPoint Setting **Advanced Logging and Tracking** from *false* to *true*.

NOTE: This is an Advanced Setting.



This additional logging and tracing and is used to assist Metalogix Technical Support with troubleshooting and problem-solving.



Cross-Farm SSP Configuration

The following settings allow ControlPoint to access activity data when a cross-farm Service Application (for SharePoint 2010 and later) or Shared Service Provider (for SharePoint 2007) is created on a farm other than the one on which ControlPoint is installed.

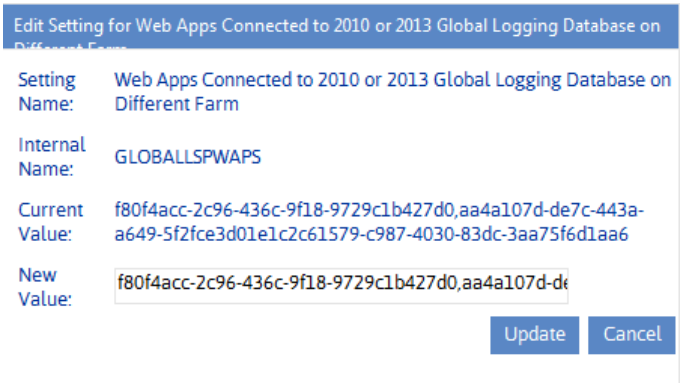
NOTE: These are Advanced Settings.

Global Logging Database Connection Settings

- **Connection String for 2010 or later Global Logging Database on Different Farm (GLOBALSP) or Connection String for 2007 Global Logging Database on Different Farm (GlobalSSP)**

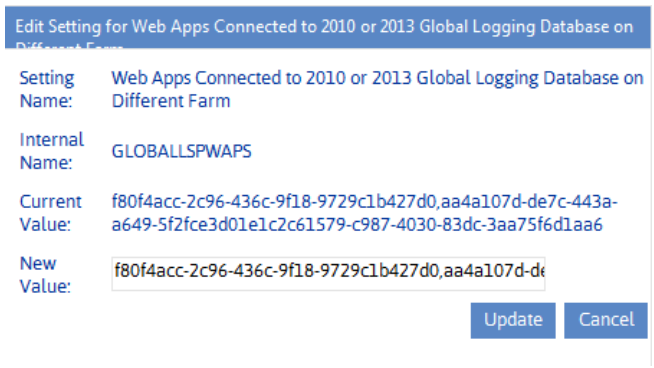


- **Web Apps Connected to 2010 or later Global Logging Database on Different Farm (GLOBALLSPWAPS)** or **Web Apps Connected to 2007 Global Logging Database on Different Farm (GlobalSPWAPs)**



Global Web Analytics Database Connection Settings (SharePoint 2010 and later)

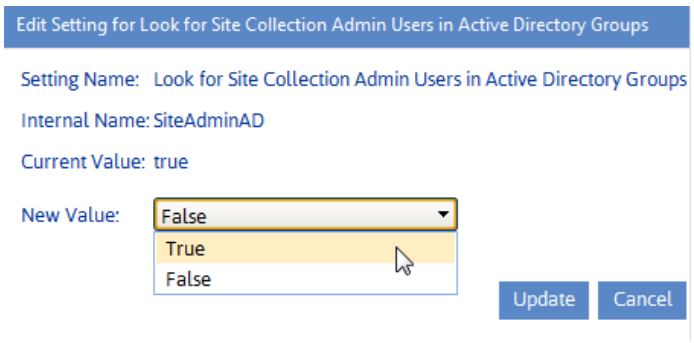
- **Connection String for 2010 or later Web Analytics Reporting Database on Different Farm (GLOBALWASP)**
- **Web Apps Connected to Web Analytics Reporting Database on different Farm (GLOBALWASPWAPS)**



Look for Site Collection Admin Users in Active Directory Groups (SiteAdminAD)

By default, if an Active Directory Group is a Site Collection Administrator, ControlPoint does not look inside the group to determine if a logged in user is a member of that group in order to calculate permissions.

ControlPoint Application Administrtors can, however, have ControlPoint look for Site Collection Administrators within Active Directory groups by changing the ControlPoint Setting Look for Site collection Admin Users in Active Directory Groups (SiteAdminAD) from *false* to *true*.



NOTE: Be aware that if ControlPoint is required to look for users within Active Directory groups, processing time may increase.

Created (Hidden) Settings

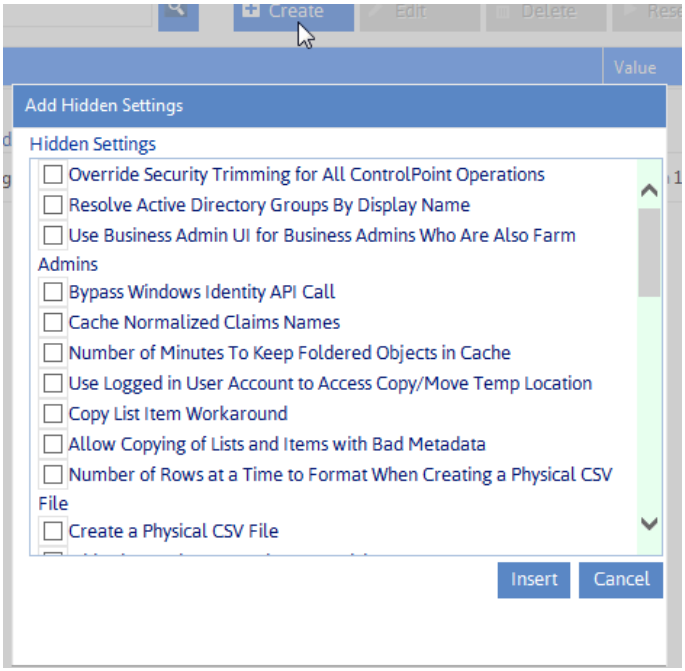
"Created" settings are special-purpose settings that you can add to the ControlPoint Settings list if needed. Generally, these settings should only be configured under special circumstances and with guidance from Metalogix Technical Support.

NOTE: When a setting is created, it is added to the category **Special Purpose**.

To create a ControlPoint Setting:

1 From the ControlPoint Configuration Settings Manager, click **[Create]**.

2 Check the box to the left of each setting you want to create.



3 Click **[Insert]**.

To delete a Created setting:

NOTE: You can only delete settings that are classified as "Created." (That is, Basic and Advanced settings cannot be deleted.)

1 In the ControlPoint Settings list, check the box to the left of each created setting you want to delete.

2 Click **[Delete]**.

When you delete a Created setting, it is removed from the current ControlPoint Settings list and once again becomes available from the Add Created Settings list.

Created Settings to Override ControlPoint Default Security

By default, ControlPoint is security trimmed to enforce SharePoint permissions. ControlPoint Application Administrators can, however, override these permissions to allow user groups that have been defined in the ControlPoint Configuration site to perform ControlPoint analyses and/or actions on site collections and sites for which they do not have management permissions.

You can use security overrides in conjunction with Customizing ControlPoint Menus to tailor your ControlPoint environment to best suit the needs of your organization.

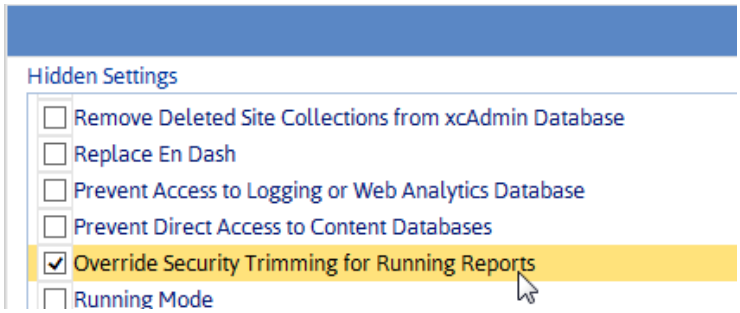
NOTE: These settings do not override a user's permissions for the SharePoint sites themselves. (For example, it will not give a user permission to open a SharePoint site or make changes via SharePoint site settings pages if they have not been granted permissions to do so in SharePoint. Nor will a user who does not have permissions for Central Administration be able to use ControlPoint menu items that directly invoke Central Administration pages.)

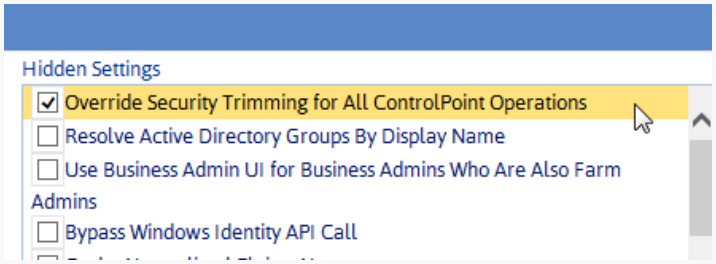
To add security override to ControlPoint

NOTE: Because the use of security overrides should involve careful consideration and planning, they are createable (hidden) settings.

1 From the ControlPoint Configuration Settings Manager, click **[Create]** .

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

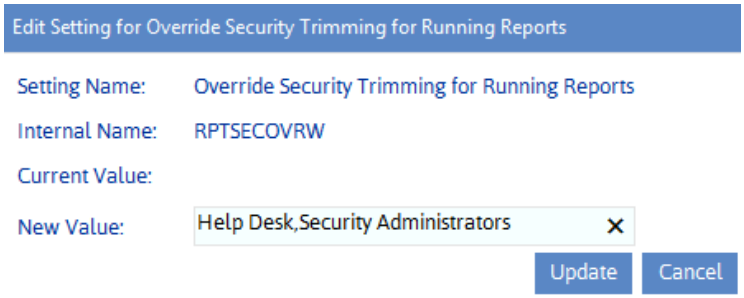
If you want to ...	Choose ...
allow members of one or more ControlPoint user groups to perform data analyses for any site collection or site in the farm	**Override Security Trimming for Running Reports**. 
allow members of one or more ControlPoint user groups to perform ControlPoint actions *and* analyses on any site collection/site in the farm	**Override Security Trimming for All ControlPoint Operations**.

If you want to ...	Choose ...
	 CAUTION: Because implications of taking actions are much more significant than viewing data, it is recommended that ControlPoint Application Administrators use extreme care when configuring this setting. (Remember that you can also customize ControlPoint menus to give groups of users access to a subset of actions. See Guidelines for Creating Customized Menus for Different Groups of Users.)

3 Navigate to the new setting and open it for editing.

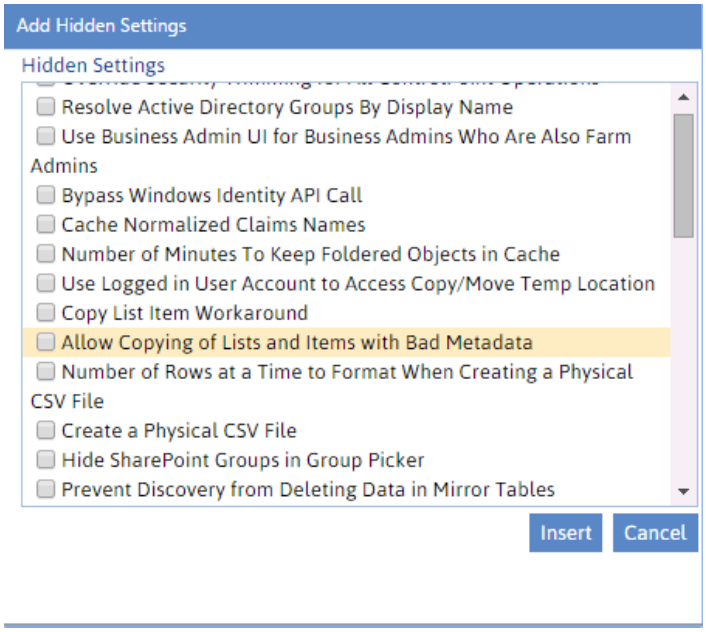
4 For **New Value**, enter the name of each ControlPoint group whose security trimming you want to override.

NOTE: If you want to extend this privilege to more than one group, enter the group names in a comma-separated list (with no spaces between group names). If you want to extend it to all ControlPoint groups, enter **ALL**.



Additional Created Settings

Because of potential environmental implications, the majority of "created" settings should be configured only under special circumstances and with guidance from Metalogix Technical Support.


Add Hidden Settings
Hidden Settings
Resolve Active Directory Groups By Display Name
Use Business Admin UI for Business Admins Who Are Also Farm Admins
Bypass Windows Identity API Call
Cache Normalized Claims Names
Number of Minutes To Keep Foldered Objects in Cache
Use Logged in User Account to Access Copy/Move Temp Location
Copy List Item Workaround
Allow Copying of Lists and Items with Bad Metadata
Number of Rows at a Time to Format When Creating a Physical CSV File
Create a Physical CSV File
Hide SharePoint Groups in Group Picker
Prevent Discovery from Deleting Data in Mirror Tables
Insert
Cancel

Archiving SharePoint Audit Log Data

ControlPoint xcUtilities is a utility that includes functionality for moving SharePoint audit log data from content databases in your SharePoint farm to an external database, allowing you to free up space in content databases without losing this data. For example, archiving would be valuable if your organization is subject to regulations that require certain types of audit data be retained. The schema for the external database is provided, allowing you to report and analyze archived data using standard SQL-based tools.

If your organization is not subject to regulatory requirements and/or you simply want to purge SharePoint audit log data from content databases, use the ControlPoint Setting Number of Days to Keep Audit Records.

By default, the process archives data from all Web applications. You can, however, choose to include only Web applications that you specify (for example, only those that contain audit log data that is subject to regulatory requirements) using ControlPoint Configuration settings.

How the Audit Log Archiving Process Works

As part of the setup process, the table where archived audit log data will be stored is created in an external SQL database.

Whenever the archive process is run (which may be from the xcUtilities interface, from a command line, the ControlPoint application interface, or through Windows Task Scheduler), the process carries out the following actions:

1 Checks the parameter value of the ControlPoint Configuration Setting ArchiveAuditLogIncludeWeb Applications for a list of Web applications for which audit log data should be archived. If the parameter value is null, all Web applications will be included in the archive process.

EXCEPTION: If the archive process was initiated from the ControlPoint application interface, all selected objects will be included, regardless of this setting.

See also Specifying the Web Applications to Include in the Archiving Process.

2 For each Web application to be processed:

a) Uses the date for the earliest audit record in the content database(s) for the selected Web application as the start date.

b) Retrieves audit log records within the Web application that were created between the start date and the next process interval date, as determined by the ControlPoint Configuration Setting ArchiveAuditLogProcessInterval.

NOTE: By default, the process interval is one (1) hour, but this value can be changed. See Changing the Archive Audit Log Process Interval (Optional).

c) Writes the audit data for the process interval to the external database table as a database transaction.

NOTE: If an exception occurs, data will not be committed to the external database, the transaction will be rolled back, and the archiving process will stop. Exception conditions will be captured in the ControlPoint Task Audit.

d) Once the audit records have been committed to the external database, deletes the corresponding records from the content database.

NOTE: If an exception occurs during the deletion of audit records for a site collection, all the records for the site collection with the current task ID will be removed from the external database (to prevent duplication of data that still exists in the content database), and the archiving process will stop. Exception conditions will be captured in the ControlPoint Task Audit.

e) Advances to the next process interval and repeats substeps b) - d) until the last date to be processed (as determined by the user-specified "number of days to keep in SharePoint") is reached.

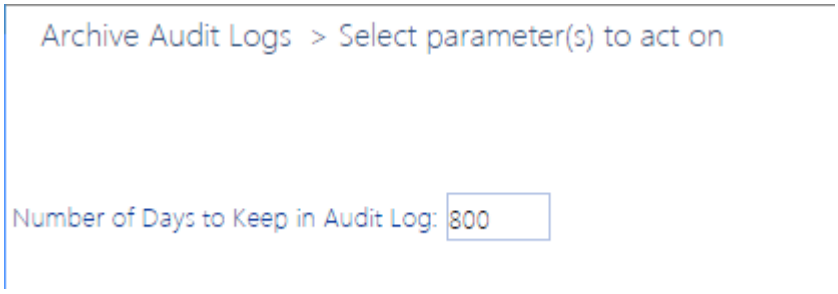
3 Repeats Step 2 for each Web application to be processed.

Tips for Archiving a Large Accumulation of Audit Data

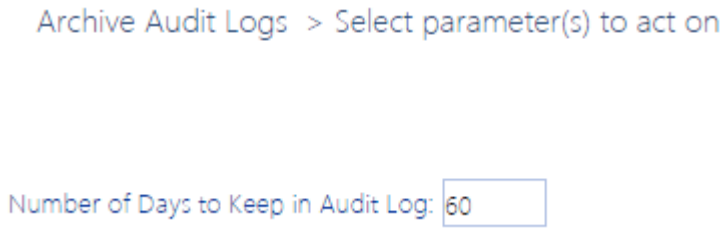
If you have many months or even years' worth of accumulated data to archive, doing all of it in a single operation can be resource-intensive and can perform slowly. When you run the audit log archive process, however, you have the option of specifying the number of days' worth of audit log data to keep in the database. If, however, you have many months or even years' worth of accumulated data to archive, doing all of it in a single operation can be resource-intensive and can bog down your system. It is recommended, therefore, that when you initially run the archiving operation you specify a relatively large amount of data to retain, then incrementally reduce that number with each subsequent run of the operation until you have reached the number of days' worth that you want to retain on an ongoing basis.

EXAMPLE:

Suppose 1,000 days' worth of audit log data has accumulated on your farm, but going forward you only want to retain 60 days' worth. Depending on the size of your farm, archiving 940 days worth of data in a single operation might tie up the system for several hours. To avoid this problem, the first time you run the process you may want to choose to save 800 days' worth (that is, archive 200 days' worth) of audit log data.



The next time you run the operation, you may want to bring the number down to 600 (that is, archive another 200 or so days' worth), and so on, until you have reduced the amount of audit log data in the database to a manageable amount. You can then schedule the operation to run on a regular basis, saving only the amount that you want to retain on an ongoing basis.



Setting Up the Audit Log Data Archive

The archive setup process consists of the following tasks:

- Creating the Audit_Log_Transfer Database table, where archived audit log data will be stored.
- Adding the connection string for the database where the Audit_Log_Transfer Database table resides to the ControlPoint application.

Creating the Audit_Log_Transfer Database Table

The first step in the process of setting up an audit log data archive is to create the Audit_Log_Transfer table. You can create this table on the server and in the database of your choice. It is important to note, however, that the archiving process does not compress audit log data, but rather transfers it “as is” from the content database tables to the Audit_Log_Transfer table. (Think of this table as a data warehouse.) Therefore, you should keep space requirements in mind when selecting the location for this table, especially if you are archiving data from large, active site collections for which an extremely large number of audit records may be generated.

Log in Account Requirements:

On the server that hosts the database to which you want to archive audit log data, you must be logged in with an account that has permissions to create a new database table in the selected database.

TIP: You may want to consider logging in as the ControlPoint Service Account. Because it is the account that actually writes records into the database, you would not need to grant permissions to any other account.

To create the Audit_Log_Transfer Database Table:

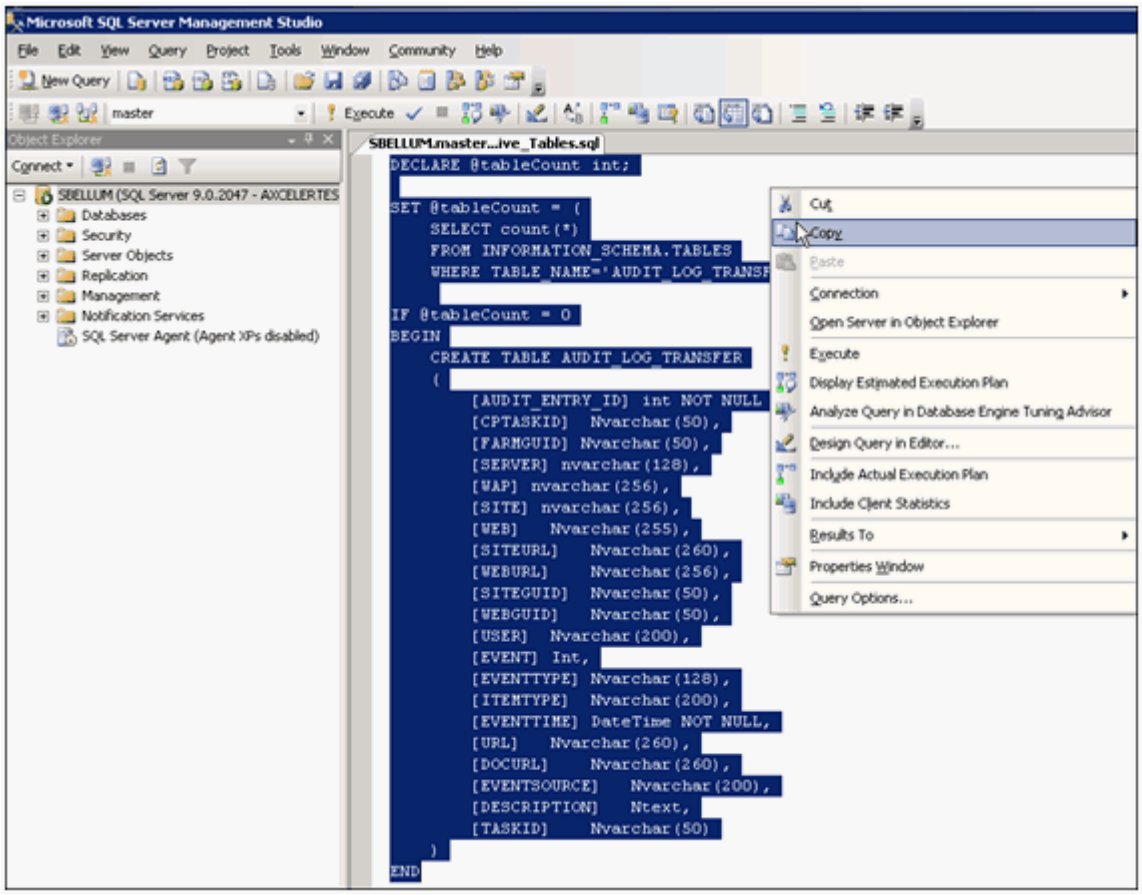
1 If you want the audit archive data to reside in a new database, create that database on the appropriate server.

2 On the Web front-end server on which ControlPoint was initially installed, navigate to the folder **C:\Program Files\Metalogix\ControlPoint\ControlPointFeatures**.

3 If you will be creating the Audit_Log_Transfer Database Table on a different server, copy the file **script_create_audit_archive_tables.adt** to that server.

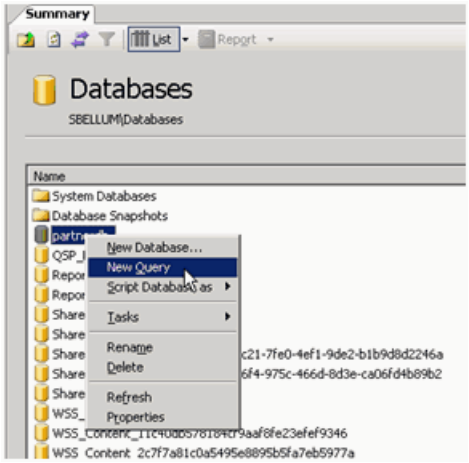
4 Open the file **script_create_audit_archive_tables.adt** in SQL Server Management Studio.

5 Copy all of the text in the file.



6 In the Object Explorer (left pane), select the database in which you want to create the archive table.

7 Right click and choose **New Query**.



8 Paste the text that you copied into the right pane.

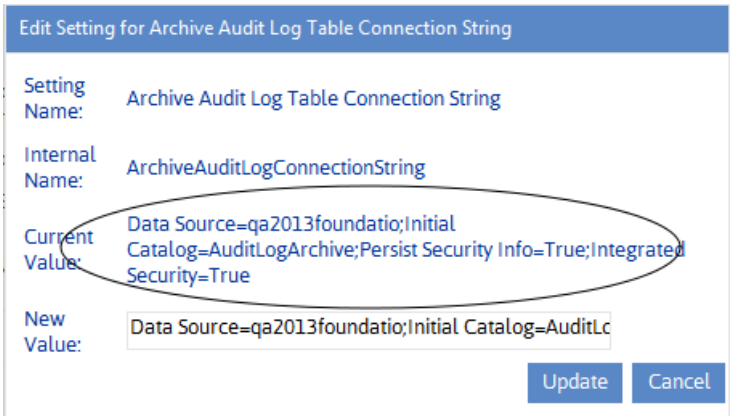
9 From the **Query** menu or toolbar, choose **Execute** to create the Audit_Log_Transfer table in the selected database.

Archive Audit Log Table Connection String (ArchiveAuditLogConnectionString)

Before the archive process can be run, you must add the connection string for the database on which the Audit_Log_Transfer Database Table was created to the ControlPoint Configuration Setting **Archive Audit Log Table Connection String**.

TIP: You can copy and paste the Value from the ControlPoint Configuration Setting SQL Server Connection String for XcAdmin Database, and update the following values:

- For **Data Source=**, the name of the server on which the Audit_Log_Transfer Database Table resides.
- For **Initial Catalog=**, the name of the database in which the Audit_Log_Transfer Database Table was created.



Running the Archive Audit Log Process

You can run the archive audit log process using any of the following methods:

- For the entire farm or for individual Web applications, from the ControlPoint application interface
- On the server where ControlPoint xcUtilities resides:
  - From the xcUtilities interface
  - From a command line
  - On a one-time or recurring basis, through Windows Task Scheduler

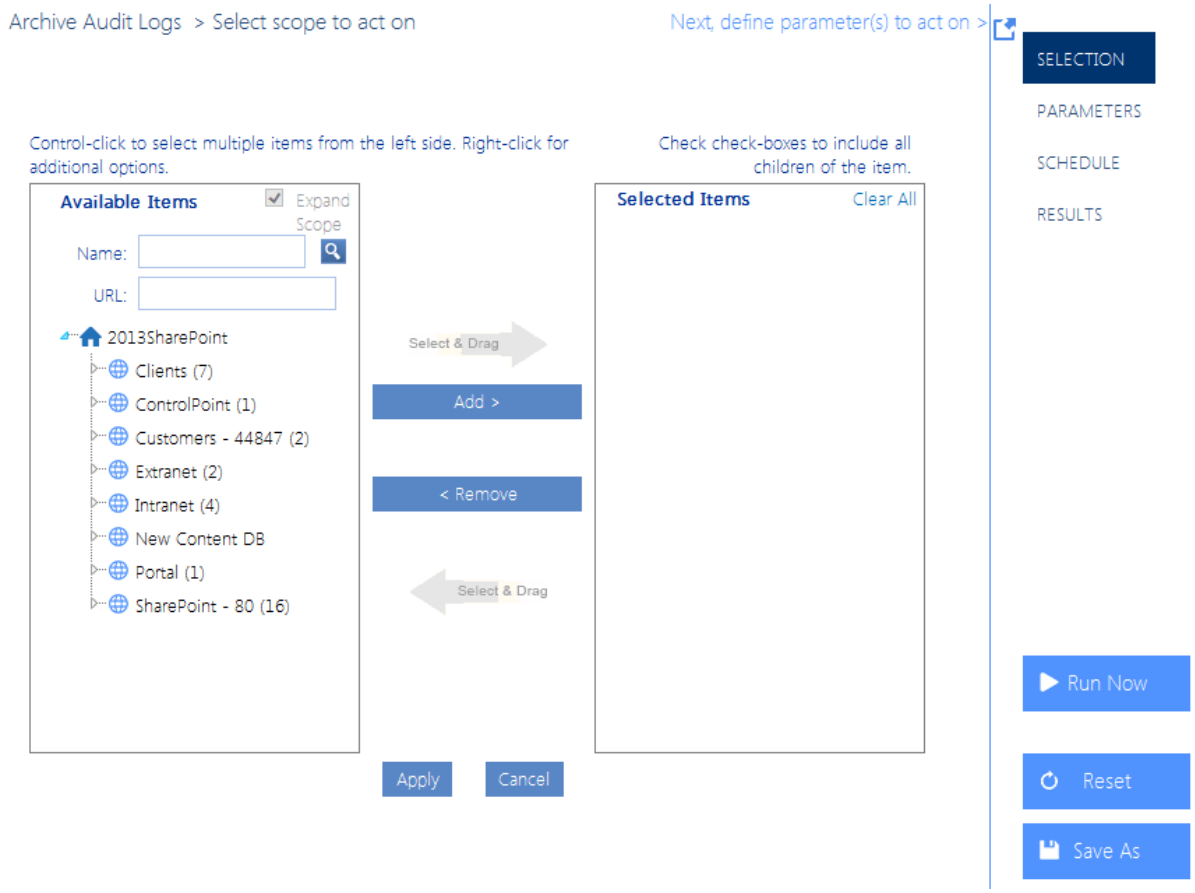
Log in Account Requirement:

On the server that hosts the content databases containing the audit log data you want to archive, you must be logged in with an account that has administrative privileges for every Web application that you intend to include in the archive process.

Running the Archive Process from the ControlPoint Application Interface

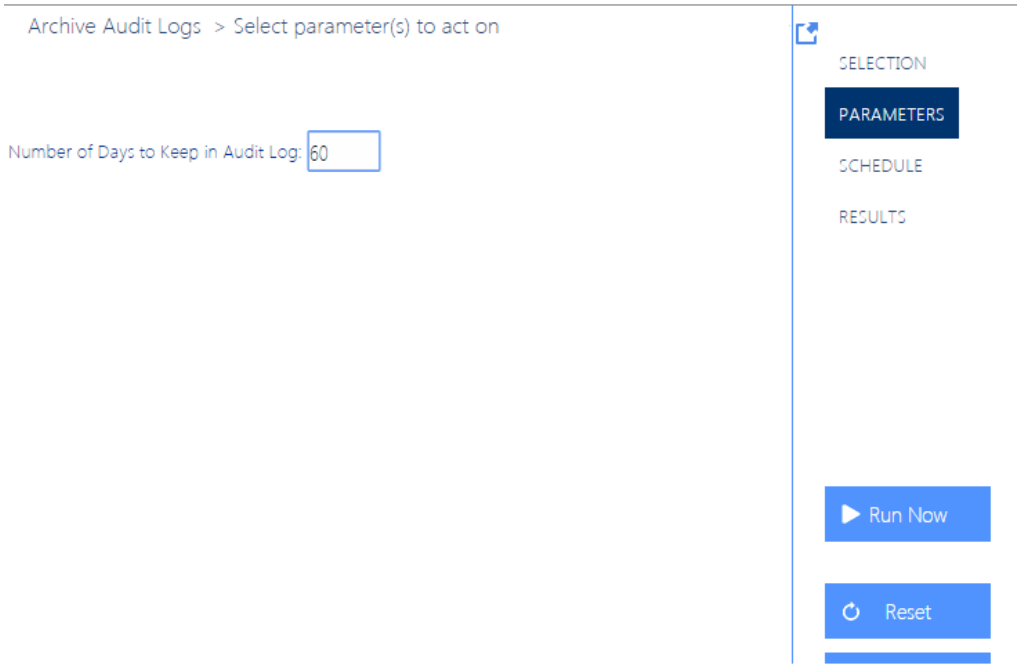
You can archive audit log data for the entire farm or for individual Web applications from the ControlPoint application interface. This is especially useful before moving a site collection, because once a site collection has been deleted from the source location its audit log data remains in the content database and becomes "orphaned."

1 From the Manage ControlPint tree, choose ControlPoint Management > Audit Log Archive.



2 In the Available items section, select either the farm node or the individual Web applications whose audit log data you want to archive.

3 Select the Parameters tab then enter the **Number of Days to Keep in Audit Logs** (that is, any audit log data that has been captured before this time period will be archived). If you want to archive all audit log data before deleting or moving a site collection, enter 0.



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.

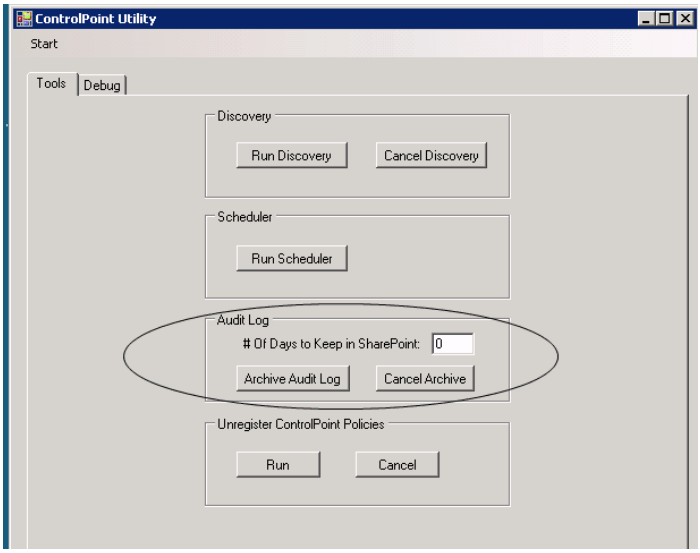
Running the Archive Process from the ControlPoint xcUtilities Interface

To run the archive process from the ControlPoint xcUtilities interface:

1 On the Web front-end server where the archive was set up, open xcUtilities.exe, located in **C:\Program Files\Metalogix\ ControlPoint\ControlPointFeatures**.

2 Under **Archive Audit Log**, enter the **# Of Days to Keep in SharePoint**.

Any audit log data that has been captured before this time period will be archived.



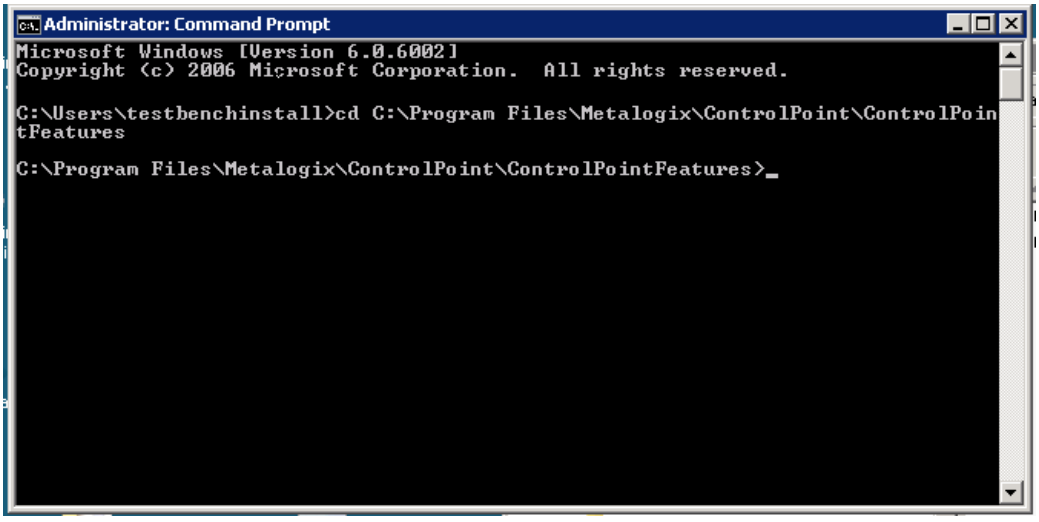
3 To initiate the archive process, click [**Archive Audit Log**].

NOTE: If you click [**Cancel Archive**] after the process has been initiated, the utility will finish archiving data for the current process interval before terminating.

Running the Archive Process from a Command Line

To run the archive process from a command line:

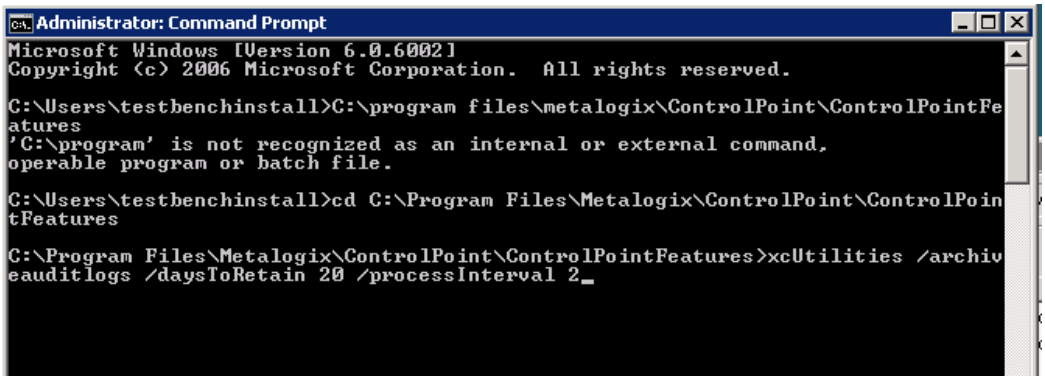
1 On the Web front-end server where the archive was set up, open a command window and point to **C:\Program Files\Metalogix\ControlPoint\CotrolPointFeatures**.



2 Enter the string: **xcUtilities /archiveauditlogs /daystoretain <#days>**

where <# days> is an integer representing the number of days worth of audit log that you want to retain (that is, any audit log data that has been captured before this time period will be archived).

NOTE: You can also include the optional argument **/processInterval <override>** if you want to override the ControlPoint Configuration Setting **ArchiveAuditLogProcessInterval** with an integer representing the number of hours' worth of archive data to process at one time.



Scheduling the Archive Process via Windows Task Scheduler

Note that the procedural steps for creating a Windows scheduled task are different for Server 2003 and Server 2008. Consult your Microsoft Server documentation for complete instructions.

To schedule the archive process:

For Server 2003:

1 On the Web front-end server where the archive was set up, open the Windows Task Scheduler and Initiate a scheduled task.

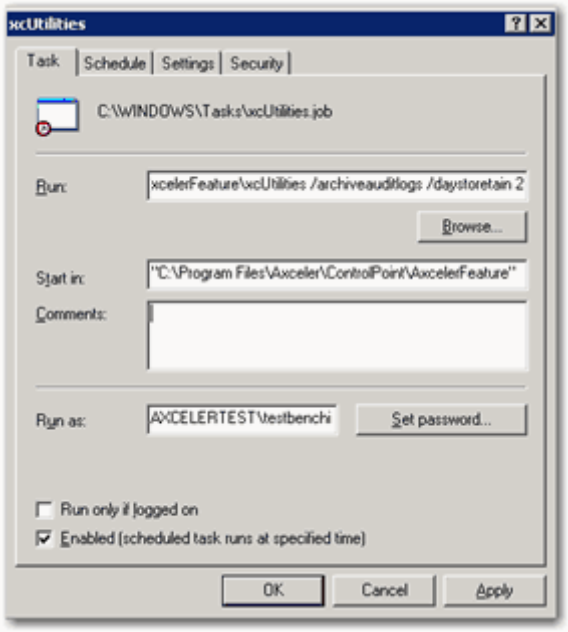
2 Complete the Task tab **Run** field with the following string:

C:\Program Files\Metalogix (or **Axceler**)**\ControlPoint\ControlPointFeatures** (or **AxcelerFeature**) **\xcUtilities /archiveauditlogs /daystoretain <#days>**

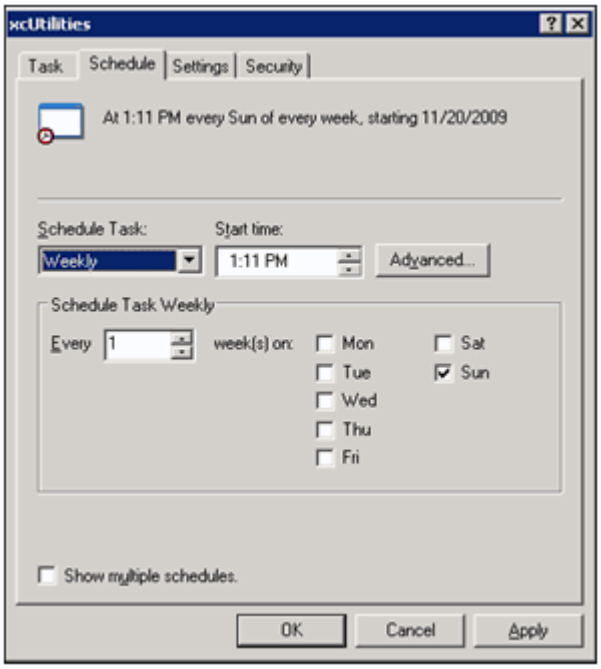
NOTE: For a 64-bit operating system, the program directory is **Program Files (x86)** only if you first installed ControlPoint prior to version 4.5.

where **<# days>** is an integer representing the number of days worth of audit log data that you want to retain (that is, any audit log data that has been captured before this number of days will be archived).

NOTE: You can also include the optional argument **/processInterval <override>** if you want to override the ControlPoint Configuration Setting **ArchiveAuditLogProcessInterval** with an integer representing the number of hours' worth of archive data to process at one time.



3 Complete the **Schedule** tab with the scheduling information that is appropriate for your environment.



For Server 2008 and 2012:

4 On the Web front-end server where the archive was set up, open the Windows Task Scheduler and Initiate a scheduled task.

5 Complete the **Action** dialog as follows:

a) For **Action**, make sure **Start a Program** is selected.

b) For **Program/script**, enter (or browse to) the following path:

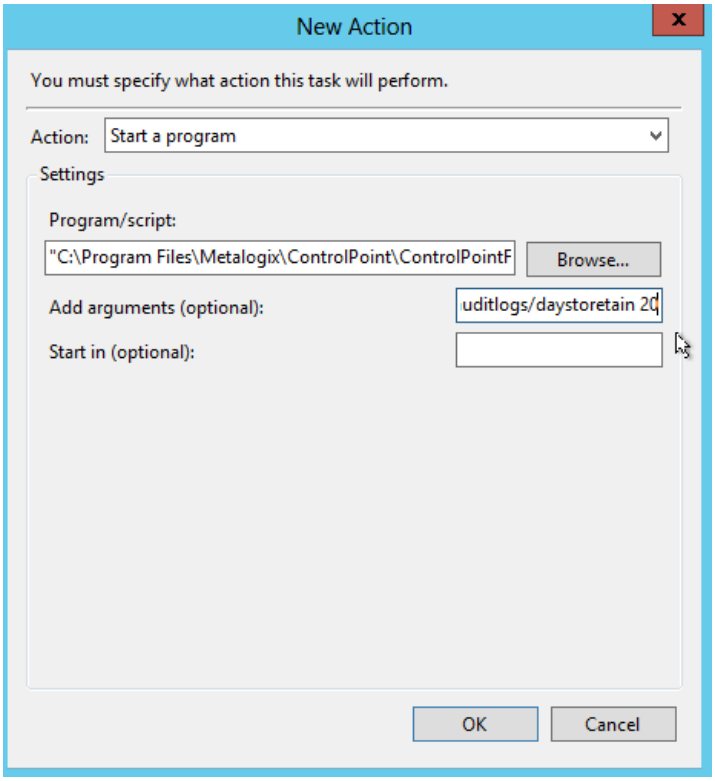
C:\Program Files\Metalogix (or **Axceler**)**\ControlPoint\ControlPointFeatures** (or **AxcelerFeature**)**\xcUtilities**

NOTE: For a 64-bit operating system, the program directory is **Program Files (x86)** only if you first installed ControlPoint prior to version 4.5.

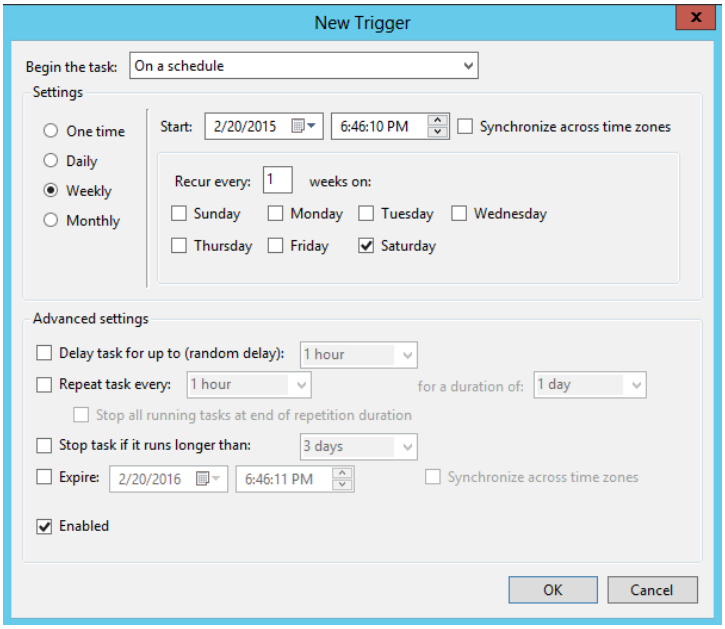
c) For **Add arguments**, enter **/archiveauditlogs /daystoretain <#days>**

where **<# days>** is an integer representing the number of days worth of audit log data that you want to retain (that is, any audit log data that has been captured before this number of days will be archived).

NOTE: You can also include the optional argument **/processInterval <override>** if you want to override the ControlPoint Configuration Setting **ArchiveAuditLogProcessInterval** with an integer representing the number of days' worth of archive data to process at one time.



6 Complete the **Trigger** dialog with the scheduling information that is appropriate for your environment.



Managing Archive Audit Log Configuration Settings

The following archive audit log configuration settings are managed within the ControlPoint Configuration site:

- **ArchiveAuditLogConnectionString** – the connection string for the database where the Audit_Log_Transfer Database table resides. See Adding the Database Connection String to ControlPoint .
- **ArchiveAuditLogIncludedWebApplications** –a list of Web application GUIDs that you want to include in the archive process (if different than the default, which is all Web applications in the SharePoint farm).
- **ArchiveAuditLogProcessInterval**— the number of hours' worth of data that is processed at one time (if different from the default, which is one (1) hour).

See also Modifying ControlPoint Configuration Settings.

Specifying the Web Applications to Include in the Archiving Process

By default, the ControlPoint audit log archive process runs on all Web applications in the SharePoint farm. ControlPoint Application Administrations can, however, specify which Web applications that they want to include in the process (for example, only those that are subject to regulatory requirements).

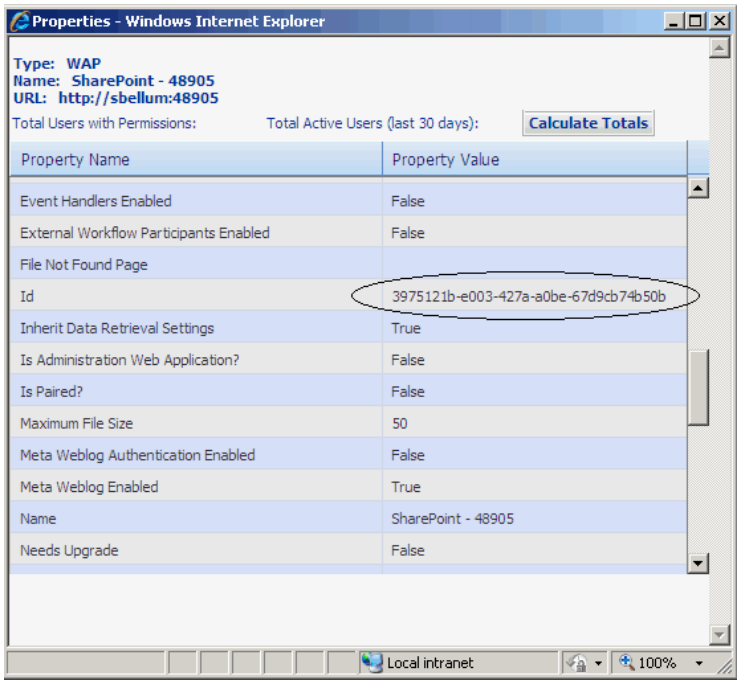
NOTE: Web applications that you choose to include in the audit log archiving process will automatically be excluded from the purge process (as determined by the Number of Days to Keep Audit Records_ , to ensure that the purge process will not run before data is archived.

To specify Web applications to include in the archiving process:

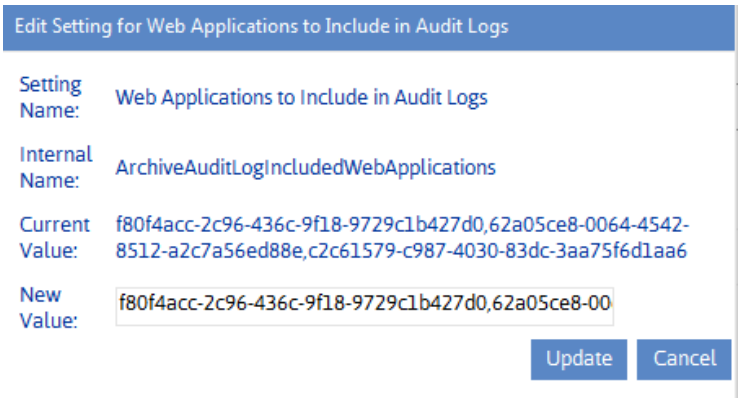
Enter the Web application's GUID as the Value of the ControlPoint Setting Edit Settings for **Web Applications to Include in Audit Logs**.

TIP:

- To locate a Web application's GUID, select the Web application in the ControlPoint SharePoint Hierarchy, right-click and choose Properties.
- Copy the ID Property Value and paste it directly into the **Web Applications to Include in Audit Logs** Value field.



NOTE: Enter multiple Web applications as a comma-separated list.

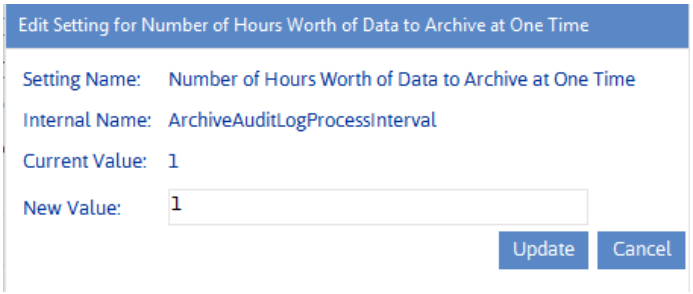


TIP: Use the Notes field to record the *names* of included Web applications, as you cannot as easily retrieve a Web application's name based on its GUID.

Changing the Archive Audit Log Process Interval (Optional)

By default, the archive audit log utility processes one hour's worth of audit log data at a time. Generally, it is recommended that you keep the default setting, especially if you have a large amount of data to be archived, as the more data that is archived at one time the greater the demand on server resources.

ControlPoint Application Administrators can, however, increase the number of hours' worth of data that is processed at one time by changing the Value of the ControlPoint Configuration Setting **Archive Audit Log Process Interval**.



Troubleshooting

This troubleshooting guide:

- identifies where to find log files that can be used to help diagnose issues you may be experiencing with ControlPoint, and
- describes some common issues that you may encounter when using ControlPoint and suggestions on how to resolve them.

Note that the this guide is by no means exhaustive. Factors unique to your environment, such as the size, configuration, and complexity of your SharePoint farm as well as interactions between SharePoint, ControlPoint, other applications and processes, may also need to be taken into consideration.

ControlPoint Log Files

There are a number of log files that can help in troubleshooting ControlPoint issues.

NOTE: If you cannot diagnose your issue using the information in this guide and need to contact Metalogix Technical Support, have any applicable log file(s) readily available to help the Technical Support Specialist better assist you.

Installation Log (xcControlPoint.log)

`ControlPoint.log`:

- is the log file where the progress of a ControlPoint installation is recorded, and
- is located on the machine on which ControlPoint was installed for the farm, in the directory **C:\Program Files\Metalogix\ControlPoint\ControlPointFeatures**.

Licensing and Activation Log File (xcClient.log)

`xcClient.log`:

- is the log file where ControlPoint license activation and management is recorded, and
- is located on the machine on which ControlPoint was installed for the farm, in the directory **C:\Program Files\Metalogix\ControlPoint\ControlPointFeatures**.

ControlPoint Web Config File (web.config)

`web.config`:

- is the configuration file for the Web application that hosts the ControlPoint Configuration Site Collection, and
- is located in the in the following **SharePoint hive** subdirectory: **\TEMPLATE\LAYOUTS\Axceler**.

Note that any changes to the web.config file will cause a restart of the application pool for the Web application that hosts ControlPoint Configuration Site Collection.

ControlPoint Administration Log (xcAdmin.log)

`xcAdmin.log`:

- is the log file where the following information is recorded:
  - ControlPoint application errors
  - the progress of both nightly and interactive Full Discovery tasks, and
- is accessible from the machine on which ControlPoint was installed for the farm, in the following **SharePoint hive** subdirectory: **\TEMPLATE\LAYOUTS\Axceler\log**.

Logged Errors Report

The Logged Errors Report:

- reports ControlPoint application errors for a specified time period, and
- is available from the ControlPoint Actions and Analyses panel.

To generate a Logged Errors Report:

1 From the Manage ControlPoint panel, choose Schedule Management and Logging > Logged Errors Report.

2 Enter the **Start Date** and **End Date** for the time period you want to cover.

Now you can:

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

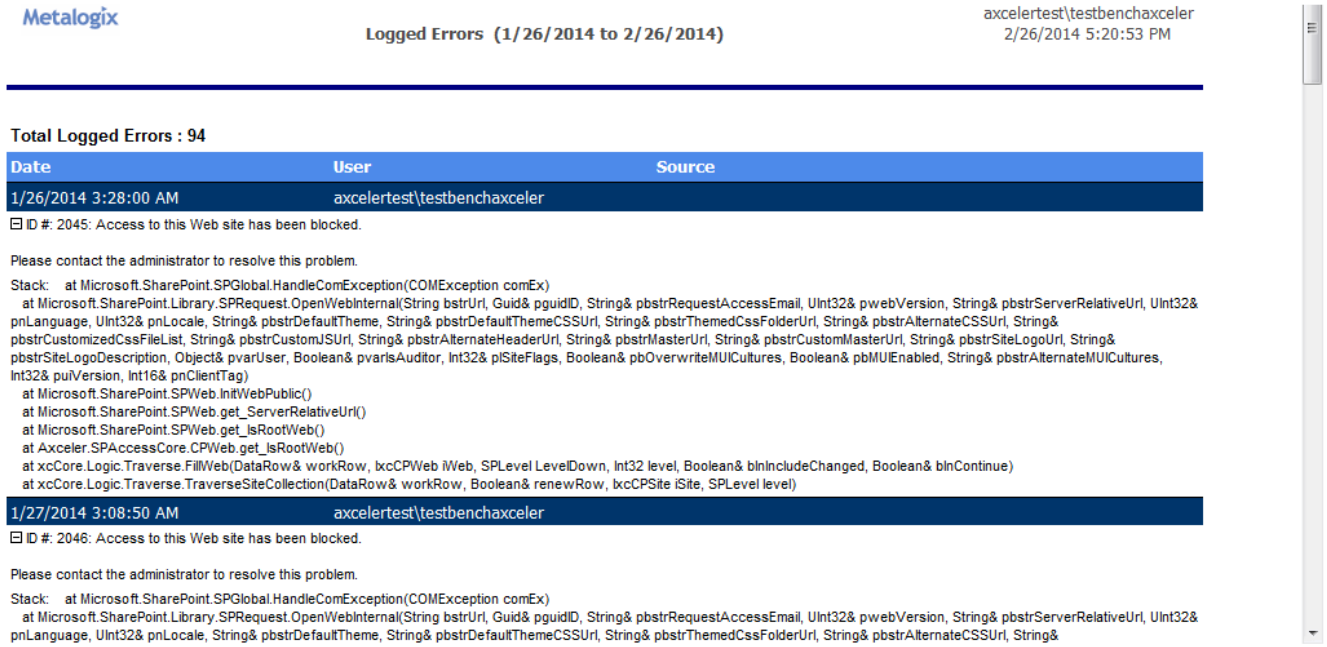
OR

- schedule the analysis 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**]). See Saving, Modifying and Executing Instructions for a ControlPoint Operation.

The errors returned by this report are similar to those recorded in the Administration log, which is available to ControlPoint Application Administrators. It does not, however, trace activities like the progress of both nightly and interactive Full Discovery tasks, as the Administration log does.



Metalogix

Logged Errors (1/26/2014 to 2/26/2014)

axcelertest\testbenchaxceler
2/26/2014 5:20:53 PM

Total Logged Errors : 94

Date	User	Source
1/26/2014 3:28:00 AM	axcelertest\testbenchaxceler	

⊟ ID #: 2045: Access to this Web site has been blocked.

Please contact the administrator to resolve this problem.

Stack: at Microsoft.SharePoint.SPGlobal.HandleComException(COMException comEx)
at Microsoft.SharePoint.Library.SPRequest.OpenWebInternal(String bstrUrl, Guid& pguidID, String& pbstrRequestAccessEmail, UInt32& pwebVersion, String& pbstrServerRelativeUrl, UInt32& pnLanguage, UInt32& pnLocale, String& pbstrDefaultTheme, String& pbstrDefaultThemeCSSUrl, String& pbstrThemedCssFolderUrl, String& pbstrAlternateCSSUrl, String& pbstrCustomizedCssFileList, String& pbstrCustomJSUrl, String& pbstrAlternateHeaderUrl, String& pbstrMasterUrl, String& pbstrCustomMasterUrl, String& pbstrSiteLogoUrl, String& pbstrSiteLogoDescription, Object& pvarUser, Boolean& pvarIsAuditor, Int32& plSiteFlags, Boolean& pbOverwriteMUICultures, Boolean& pbMUIEnabled, String& pbstrAlternateMUICultures, Int32& puiVersion, Int16& pnClientTag)
at Microsoft.SharePoint.SPWeb.InitWebPublic()
at Microsoft.SharePoint.SPWeb.get_ServerRelativeUrl()
at Microsoft.SharePoint.SPWeb.get_IsRootWeb()
at Axceler.SPAccessCore.CPWeb.get_IsRootWeb()
at xcCore.Logic.Traverse.FillWeb(DataRow& workRow, IxcCPWeb iWeb, SPLevel LevelDown, Int32 level, Boolean& blnIncludeChanged, Boolean& blnContinue)
at xcCore.Logic.Traverse.TraverseSiteCollection(DataRow& workRow, Boolean& renewRow, IxcCPSite iSite, SPLevel level)

1/27/2014 3:08:50 AM	axcelertest\testbenchaxceler	

⊟ ID #: 2046: Access to this Web site has been blocked.

Please contact the administrator to resolve this problem.

Stack: at Microsoft.SharePoint.SPGlobal.HandleComException(COMException comEx)
at Microsoft.SharePoint.Library.SPRequest.OpenWebInternal(String bstrUrl, Guid& pguidID, String& pbstrRequestAccessEmail, UInt32& pwebVersion, String& pbstrServerRelativeUrl, UInt32& pnLanguage, UInt32& pnLocale, String& pbstrDefaultTheme, String& pbstrDefaultThemeCSSUrl, String& pbstrThemedCssFolderUrl, String& pbstrAlternateCSSUrl, String&

Troubleshooting License Issues

Cannot Open Database "xcAdmin" Requested by the Login

Message (in the Activate ControlPoint Licenses dialog)

Cannot open database "xcAdmin" requested by the login. The login failed. Login failed for user [username]

Reason

You did not log into the server machine using the ControlPoint installation account.

Resolution

Dismiss the error dialog, close the Activate ControlPoint License dialog, and log back into the machine using the account that was used to install ControlPoint

No Valid License Found for Your Farm

Message (in the ControlPoint application header)

No valid license found for your farm

Possible Reason

- You have not activated your ControlPoint license for the currently-selected farm.

OR

- An attempt was made to copy a license key from one farm to another.

Resolution

Follow the procedure for Activating ControlPoint for Additional Farms

NOTE: If you want to transfer your license from an inactive farm to an active one, contact Metalogix Technical Support for assistance.

License Not Yet Recorded

Message (in the ControlPoint application header)

No valid license found

Possible Reason

You have installed ControlPoint but have not yet activated it.

Resolution

Follow the procedure for Activating your ControlPoint License in the *ControlPoint Installation and Upgrade* Guide.

No Valid License Found for WFEs

Message (in the ControlPoint application header)

No Valid License Found for <number> WFE-s

Reason

The number of Web front-end servers in your SharePoint environment exceeds the number covered by your ControlPoint license.

Resolution

Contact Metalogix Technical Support to have your license updated to include the additional Web front-end servers.

Your License Has Expired

Message (in the ControlPoint application header)

Your license has expired

Reason

Your evaluation period has expired.

Resolution:

Contact Metalogix Technical Support to have your license upgraded to a full version. Once your license has been upgraded, follow the procedure for Renewing or Changing the Terms of Your ControlPoint License .

If You Cannot Resolve an Issue with Your ControlPoint License

Contact Metalogix Technical Support. Have the contents of the licensing and activation log readily available so that the Technical Support Specialist can better assist you.

Troubleshooting Configuration Errors

Configuration errors generally display in the right (workspace) pane, when you first open the ControlPoint application or when you attempt to run a ControlPoint operation.

Blank Page/Unexpected Error

Possible Reason

If you attempt to open ControlPoint and a blank page displays (with or without a message such as *Error* or *An unexpected error has occurred*) it may because your farm uses multiple Web front-end servers and you failed to properly configure ControlPoint for all of them.

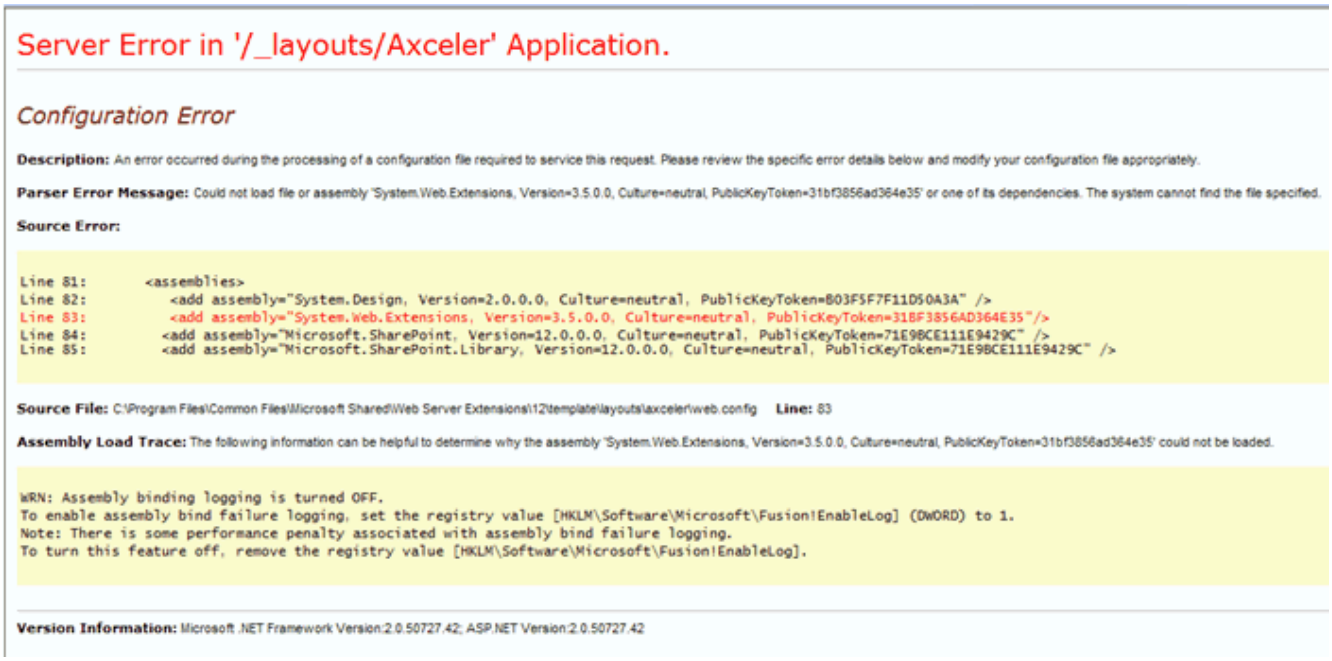
Resolution

Follow *all* of the instructions for Configuring ControlPoint for Additional Front-End Servers.

Could Not Load File or Assembly

Parser Error Message

Could not load file or assembly "System Web Extensions. Version - ...



Reason

If you see this error as soon as you open ControlPoint, the applicable version of the .NET Framework has not been installed on *all* of the Web front-end servers in your farm.

Resolution

Make sure the version of the .NET Framework that is appropriate for your SharePoint version is installed on all Web front-end servers in your farm. It is typically installed on the first server as part of the ControlPoint installation. You can install it on additional servers (as well as on the first server if this step was skipped during the ControlPoint installation process) by following the procedure for Configuring ControlPoint for Additional Web Front-End Servers.

If You Cannot Resolve a Configuration Error

Contact Metalogix Technical Support. Have the contents of the ControlPoint web.config file readily available so that the Technical Support Specialist can better assist you.

Troubleshooting the ControlPoint Application Interface

Recent Change Does Not Show Up in the SharePoint Hierarchy

Issue

During your current ControlPoint session, an action you performed (such as a Delete Site, Set User Permissions, or Add User to Group) isn't reflected in the SharePoint Hierarchy.

Possible Resolution

- Try Refreshing the SharePoint Hierarchy.

OR

- If a site collection has been added or deleted and the ControlPoint Application Administrator has configured the application to load site collections from a server-side cache, you may try refreshing this cache.

"A Script on the Page is Causing Internet Explorer to Run Slowly..."

Message

A script on the page is causing Internet Explorer to run slowly. Stop running this script?

Possible Resolutions

If you encounter this message when trying to expand a node in the left navigation pane, click [**Yes**] then re-open the node.

Note that, once child items within a node are loaded, they are cached and are not reloaded:

- for the remainder of your ControlPoint session

OR

- until the SharePoint Hierarchy has been refreshed.

ControlPoint Application Administrators may also find that decreasing the number of child items that display within a subfolder improves performance, especially if it has been set higher than the default value. (The more items there are within a subfolder, the more time it will take for them to load.)

You may also be able to alleviate the issue by adjusting certain Internet Explorer configuration settings. Metalogix Technical Support can provide more detail.

When Launched from a Server That Has IE Enhanced Security Configuration Enabled, ControlPoint Fails to Launch Properly

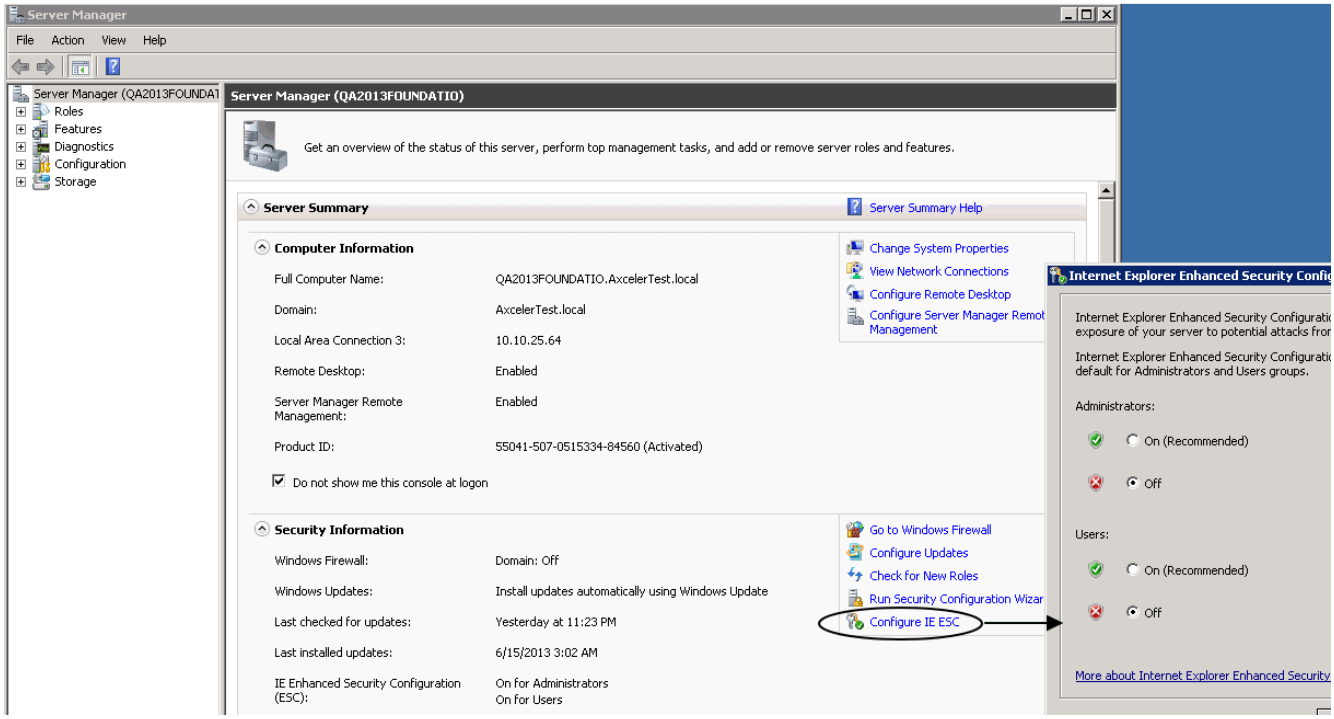
Issue

When you launch ControlPoint from a server for which IE Enhanced Security Configuration (IE ESC) is turned on and you are using Internet Explorer 10 or 11 as your browser, the application fails to launch properly .

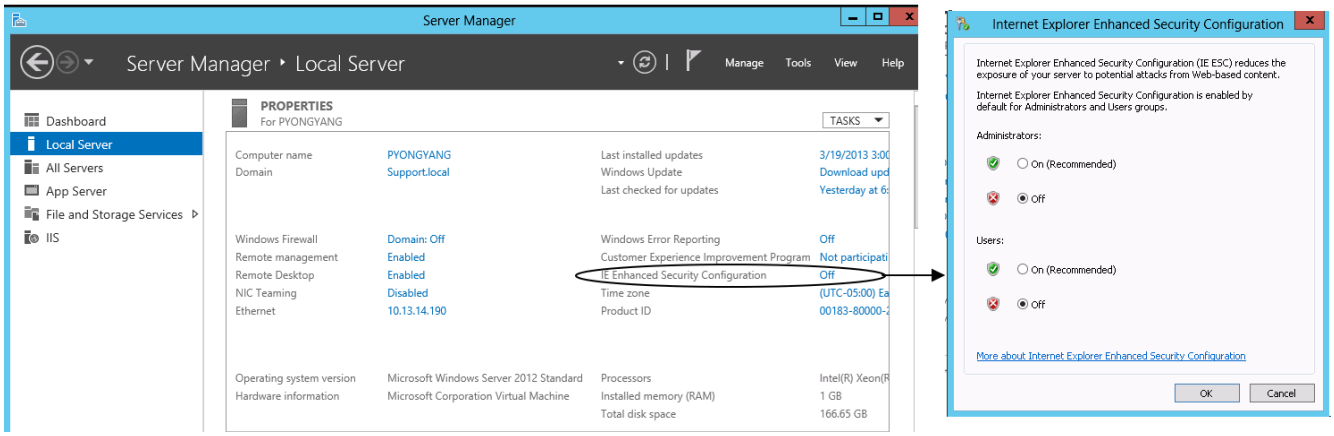
Resolution

In the Server Manager, make sure IE Enhanced Security Configuration (IE ESC) is *off*.

Server 2008 R2



Server 2012



Site Collections Grayed-Out and "Locked"

Issue

All of the sites beneath a Web application in the SharePoint Hierarchy are grayed-out and are labeled "Locked."

Possible Reason

You added one or more content database to an existing Web application, but the ControlPoint Service Account was not granted access to it.

Resolution

Grant the ControlPoint Service Account access to the content database(s) within the Web application(s).

Number of Child Objects Specified for an Object in the SharePoint Hierarchy Doesn't Match Number Displayed

Issue

When you expand a Web application or site collection in the SharePoint Hierarchy, the number of child objects you see is *fewer* than the number that appears in parentheses.

Reason

ControlPoint is security-trimmed to enforce SharePoint permissions. The number in parentheses beside an object represents *all* child objects. However, the objects that you actually sees depends on your SharePoint permissions. See ControlPoint Security in the *ControlPoint User's Guide*.

The Loading of Site Collections in the SharePoint Hierarchy is Extremely Slow

Issue

When a Web application in the SharePoint Hierarchy is expanded, it takes an exceptionally long time for site collections to load

Possible Reason

When a Web application is first expanded, ControlPoint must both load the site collections and build the folders into which they are grouped (based on the value specified for the ControlPoint Configuration Setting Maximum Number of Objects to Display Before Foldering (NAVCAP). If the Web application has an extremely large number of site collections (for example, thousands of MySites), this process can be time-consuming.

Resolution

The ControlPoint Application Administrator can increase the amount of time that foldered objects in the SharePoint Hierarchy remain in cache.

If the time that takes for site collections to load is *unacceptably* slow, ControlPoint Application Administrator can configure the application to pre-load site collections from a server-side cache .

Error Occurs When Attempting to Launch ControlPoint from a SharePoint Site

Issue

When an attempt was made to launch ControlPoint from within a SharePoint site, a dialog displays with a message that an unexpected error has occurred.

Possible Reason

The ControlPoint for Site Admins and/or ControlPoint Menus for Site Settings feature was activated for the site but was not configured properly for the farm.

Resolution

Follow the procedure for Configuring Site Administration Features for Your SharePoint Farm. After updating the file **webnew.config**, remember to save it as **web.config**.

A Business Administrator's SharePoint Sites Do Not Display in the SharePoint Hierarchy

Issue:

- When a member of the ControlPoint Business Administrator's group logs into ControlPoint, the SharePoint site collections/sites that the user manages do not display in the SharePoint Hierarchy.

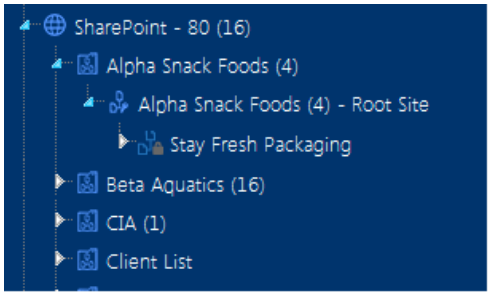
OR

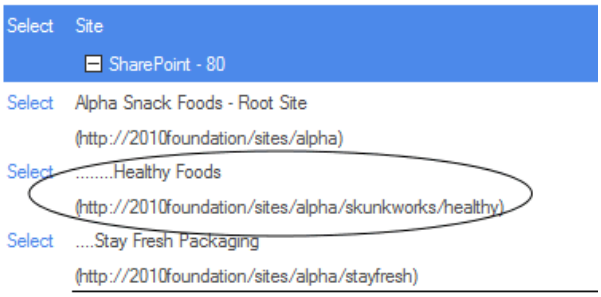
- A Business Administrator's permissions for SharePoint sites have changed, but those changes are not reflected in the SharePoint Hierarchy.

Possible Reason(s):

- The user does not have sufficient permissions for the SharePoint site(s) to be administered

- The user has management permissions for a subsite but *not* its parent site. (By default, if a member of the ControlPoint Business Administrators group has permissions to manage a subsite at any level below a site collection's root site but does *not* have permissions to manage its parent, the subsite does not display in the ControlPoint SharePoint Hierarchy or object pickers.)





- Since the last Discovery:
  - the user was added to the Business Administrator's group

  OR

  - the user's SharePoint permissions have changed.

Possible Resolution(s):

- Make sure the user has Full Control or equivalent permissions to the SharePoint sites to be administered in ControlPoint. See Making ControlPoint Available to Business Users (Site Administrators) in the *ControlPoint User's Guide*.
- If the user has management permissions for a subsite but not its parent site, the subsite will be included in a ControlPoint operation if it is within the scope of the selection, even if it does not *display* in the SharePoint Hierarchy. ControlPoint Application Administrators can also configure the application to display all Business Administrator sites in the SharePoint Hierarchy .
- Either run an interactive Discovery or wait for the nightly Full Discovery process to run.

Troubleshooting Discovery

"Discovery is Being Performed Now, Cannot Start"

Message

Discovery is being performed now, cannot start.

Possible Reason

You manually cancelled an interactive Discovery task, then tried to re-run it immediately.

When you cancel a Discovery task, as time is needed to roll back changes that the job was in the process of collecting for the cancelation to be fully processed.

Resolution

Wait several minutes before attempting to re-run Discovery.

If You Cannot Resolve a Discovery Issue

Contact Metalogix Technical Support. Have the contents of the ControlPoint Administration (xcAdmin) log and the Logged Errors Report readily available so that the Technical Support Specialist can better assist you.

Troubleshooting SharePoint Users and Permissions

Cannot Locate SharePoint Users Authenticated by Alternate (non-Active Directory) Methods

Issue

Attempting to select alternate authentication-based users on which to run a ControlPoint operation but unable to browse for or validate them.

Possible Reason(s)

- The ControlPoint application has not been configured to recognize the alternate authentication provider.
- The scope of your action or analysis encompasses more than one Web application.

Resolution(s)

- Make sure the ControlPoint application has been configured to recognize the alternate authentication provider(s) used in the farm. See Configuring ControlPoint to Recognize Alternate Authentication Providers.
- Either:
  - limit the scope of your operation to a single Web application

  OR

  - if the operation is one that can be run on unvalidated users, manually enter (rather than browsing for) the user's name and omit the validation.

  See "Special Considerations for Selecting Alternate Authentication-based Users" in the topic Selecting Users on Which to Perform a ControlPoint Action or Analysis in the *ControlPoint User's Guide*.

System Exception: "Cannot get the members of the group..."

Issue

When attempting to view members of an Active Directory group from permissions analysis results, an error window displays which includes the following message:

System.Exception: Cannot get the members of the group [domain\group] possibly because of network or permissions problems

Possible Reason

The ControlPoint Service Account does not have permissions to read all users within the Active Directory group.

Resolution

Make sure the ControlPoint Service Account has at least Read Permissions for the Active Directory record of every SharePoint user. Consult your Microsoft Active Directory documentation for details.

Active Directory Group Membership: "Cannot connect to the domain controller for domain"

Issue

When attempting to view membership in an Active Directory group from Permissions analysis results, the following message displays:

Group: [group-name] Cannot connect to the domain controller for domain

Possible Reason

A trust relationship between the domain or forest that hosts the Active Directory group and the domain or forest in which ControlPoint is installed

- does not exist

OR

- requires additional authentication.

Resolution

See ***Accessing Members of Active Directory Groups in Different Domains or Forests*** (on page 78).

Properties Dialog: Total Users with Permissions Displays as "Incomplete"

Issue

After clicking [**Calculate Totals**] On the ControlPoint Properties dialog, the number of **Total Users with Permissions** is followed by **(Incomplete)**.

Reason

An exception was encountered when Active Directory users were being counted. Possible reasons include:

- The ControlPoint Service Account does not have access to an entire Active Directory group or one or more accounts within an Active Directory group.
- Networking problems have been encountered.

Resolution

Review the ControlPoint Administration log (xcadmin) to determine the cause of the exception.

Users with Permissions Granted Through a Claim are not Showing Up in Permissions Analysis Results

Issue

One or more users who have permissions to SharePoint objects through a claim are not being included in permissions analysis results.

Possible Reason

If your SharePoint farm includes claims-based authentication, permissions granted through a claim may not be reliably reported because SharePoint only retains permissions information for an augmentation claims-based user for a limited time after the user logs in.

The same behavior can be observed in SharePoint. For example, the SharePoint Site Permissions > Check Permissions feature may or may not show permissions granted through an augmentation claim, depending on when the user last logged in.

Troubleshooting Site Provisioning

Site Provision Request Workflow Failed on Start

Issue

The SharePoint workflow associated with Site Provisioning is configured to start automatically but the **Workflow Status** column of the Site Provisioning Manager grid, shows a status of **Failed on Start**.

Possible Reason

Configuration information for the SharePoint workflow components that support automatic starting must be added to ControlPoint.

Solution/Workaround

For SharePoint 2010:

1 Open the ControlPoint web.config file, which is located in the following directory: `C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\TEMPLATE\LAYOUTS\Axceler.`

2 Locate and uncomment the following sections:

```
<System.Workflow.component>
<System.Workflow.CompoentModel.WorkflowCompiler>
```

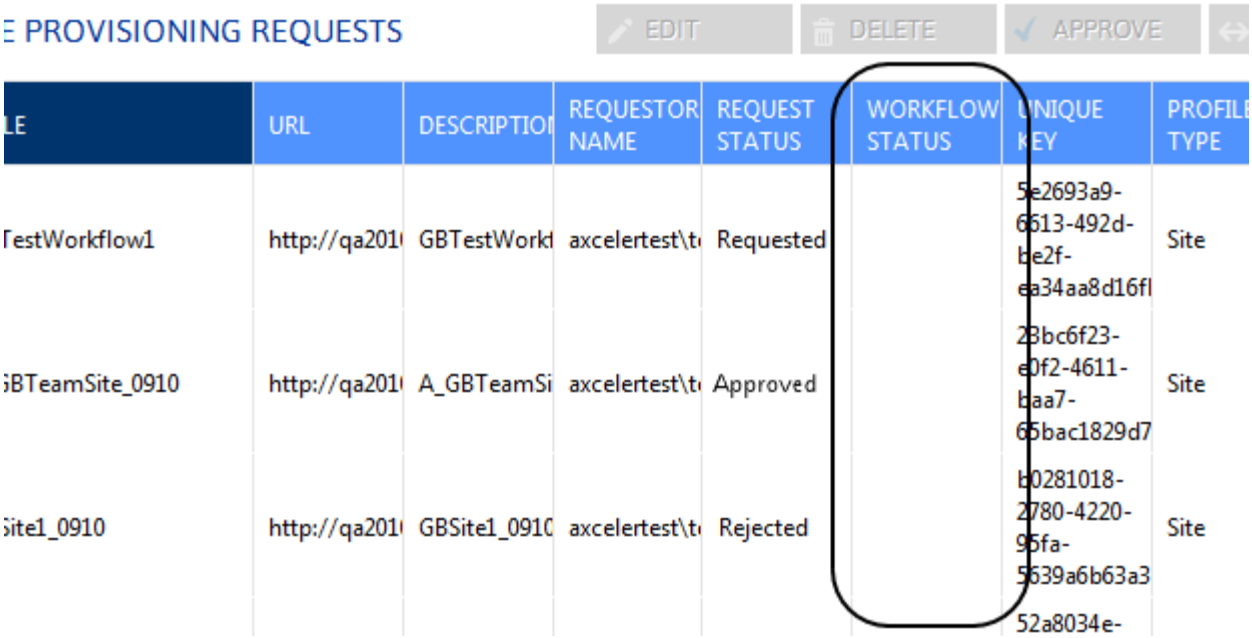
For SharePoint 2013 or later:

You may need to start the workflow manually. You can access the Workflow page for the Site Creation Requests list via the **[Workflow]** button on the Manage Provisioning Requests page.

Provisioning Requests Manager: Workflow Status Column is Blank

Issue

In the Site Provision Request Manager, the Workflow Status column is blank for all requests



Possible Reason

- The Value of the ControlPoint Setting does not match the name of the workflow used for Provisioning request processing.

OR

- WorkFlowName is correct, but the workflow has not been started.

Solution

Make sure the WorkFlowName is the same as the name of the workflow used to process Provisioning requests and that the workflow has been started.

Troubleshooting ControlPoint Operations

Not All ControlPoint Actions and Analyses Are Available to Me

Possible Reason(s):

- You have permissions for customized ControlPoint menus that do not include all features.
- You are running SharePoint Foundation and are missing features only available for SharePoint Server (for example, features that rely on the use of certain Service Applications)
- If Trend Analysis for Activity, Activity by User, Activity by Document, and Most/Least Usage analyses are missing, it is possible that:
  - You are running an WSS-only farm (which does not include usage reporting)

  OR

  - Since installing ControlPoint you have upgraded from WSS-only/Foundation to MOSS/Server but the appropriate parameter has not been updated in the ControlPoint application settings. See Enable SharePoint Server Functionality.
- If the Site Collection Activity Analysis, Trend analyses, and parameters that rely on information collected for the ControlPoint cache are grayed out, the nightly Discovery job may not be enabled.

Your Page has Expired

Issue

When attempting to complete a ControlPoint operation that was initiated at an earlier time, the following message displays in the workspace:

Your page has expired. Please call it again from the menu.

Reason

The time period during which ControlPoint holds the page information for the operation in the server's cache has expired.

Resolution

Re-initiate the operation from the left navigation pane.

NOTE: By default, ControlPoint holds page information in cache for 20 minutes. ControlPoint Application Administrators can, however, specify a different length of time.

Timeout Exception: The server has timed out.

Message:

[Method Name]Timeout Exception: The server has timed out.

Possible Reason:

ControlPoint has timed out while waiting for a SQL command to execute.

Possible Resolution:

The ControlPoint Application Administrator can increase the SQL Command Timeout Value.

Hyperlinks in Activity Analysis Results are broken

Issue:

When an attempt is made to link to a SharePoint Web Analytics page from a Site Collection or Site Activity analysis in a SharePoint 2010 farm, an error occurs.

Possible Reason:

- You are running SharePoint Foundation, for which the Web analytics is not available.

OR

- You are running SharePoint Server and the Web Analytics Service has not been configured for the farm, is not online, and/or has not been associated with the Web application(s).

Possible Resolution(s):

Make sure the Web Analytics Service:

- is properly configured for the farm,
- is online, and
- is associated with relevant Web application(s).

TIP: You can run a SharePoint Summary Report to view the status of Service applications and their associations with Web applications.

Number of Users Has Exceeded the Allowable Threshold

Issue

When ControlPoint action involving multiple SharePoint users is run, a message similar to the following displays in the Task Audit:

The number of users ([*num_users]*) has exceeded the allowable threshold of [*max_users].*

Reason

The number of users to be included in the action exceeds the maximum number allowed.

Resolution

Re-run the operation on a smaller set of users.

The ControlPoint Application Administrator can also change the maximum number of users that can be included in a ControlPoint action.

ASP.NET Session Has Expired

Issue

After drilling-down several times from the results of a ControlPoint analysis, the following text appears in the Results section of the original analysis:

ASP.NET session has expired

Reason

If you had checked the parameter **Open drill-downs in new window**, when you drill-down in analysis results ControlPoint limits the number of these windows that can be opened at one time.

Resolution

Keep the number of open windows to within the allowable limit. (Ten is the ControlPoint default, but ControlPoint Application Administrators can change this value.

Too Many Rows to Display

Message

This report has more rows than the current row limit of xxxxx. You can raise the limit. You can also narrow the scope or parameters of the analysis

Resolution

If you receive this message, try modifying the parameters to further narrow the scope of your search/analysis.

ControlPoint Application Administrators can increase the maximum number of rows returned by an analysis,

Download as .csv: No Cached Data for Download

Issue

Upon clicking the **Download as .csv** link from the results of a ControlPoint search or analysis, the following message displays:

Error: No cached data for download

Reason

The time period during which ControlPoint holds search or analysis results in the server's cache has expired.

Resolution

Re-run the search or analysis and complete the download to csv while the data is still in cache.

NOTE: By default, ControlPoint holds results data in cache for 20 minutes. ControlPoint Application Administrators can, however, specify a different length of time.

Export Results to Excel: "The file you are trying to open is in a different format..."

Issue

When an attempt is made to save search or analysis results to an Excel file via the results toolbar, the following message displays:

The file you are trying to open, '[file_name].xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source b efore opening the file. Do you want to open the file now?

Possible Reason

Security settings are insufficient for the ControlPoint Service account's Temp folder on the We b front-end server.

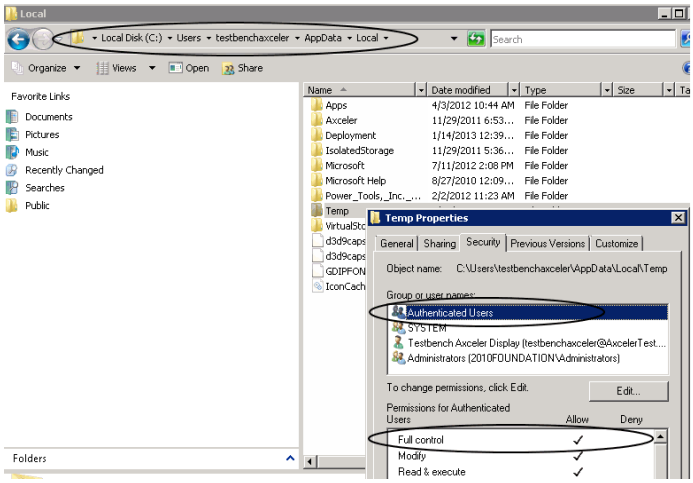
Resolution

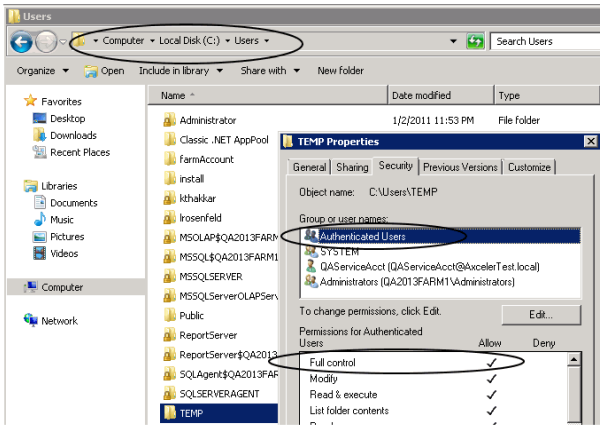
1 Log into the Web front-end server where ControlPoint is installed.

2 Navigate to the Temp folder.*

3 Make sure the group **Authenticated Users** has **Full Control** permissions

*Note that, as shown in the examples below, the precise location of the appropriate Temp folder depends on your server configuration.





Action or Analysis Taking Longer Than Expected

Message:

An action or analysis you requested is took longer than expected. If you requested an analysis, try changing the option to use data from the cache, or narrow the scope of the analysis. If Discovery was running at the time you made your request, try again after Discovery completes.

Resolution:

- If you have chosen to run an analysis on real-time data, consider using cached data instead.
  OR
- Narrow the scope of the operation. For example, re-initiate the operation from a different (lower) level of the SharePoint Hierarchy or modify your current parameters.
  OR
- If an interactive Discovery is currently running (as indicated by the message *Discovery is being performed now, started at [date] [time]* in the application header) wait for it to complete before re-running the action or analysis.

The ControlPoint Application Administrator can also increase the SERVERTIMEOUT value.

Cannot Perform Operations on Central Administration

Issue

- Message: *Action is not Valid for Central Administration*

OR

- Central Administration was included within the scope of the selection but is missing from search or analysis results

OR

- Central Administration is missing from the Customize Selection list of available items

Reason

Because the Central Administration Web application, site collection and site serve a special purpose, many ControlPoint operations cannot be performed on Central Administration. If Central Administration is within the scope of a selection (for example, you selected the entire farm), ControlPoint will automatically exclude it from the operation.

Copy/Move Insufficient Permissions Message

Issue

When attempting to perform a copy/move operation, one of the following messages displays:

Access Denied.User must be in Site Collection administrators permission group or Web Application Policy with Full Control!

OR

Only farm administrator can create new Site Collection.

Reason

When ControlPoint default security is in effect, you must be either be a member of the Site Collection Administrator's group or have Full Control permissions in the Web application policy at both the source and destination location. This applies to *all* copy/move operations, including Copy/Move Lists and List Items. (ControlPoint Application Administrators can, however, override ControlPoint default security.

If the copy/move operation involves the creation of a new site collection, you must be a farm administrator at the destination location.

Newly-Created Site Does Not Show Up in Manage SharePoint Groups Picker/Cannot be Scheduled

Issue

For the Manage SharePoint Groups action, a newly-created SharePoint site does not show up :

- in the model or dependent group picker

OR

- after making an association, in the dependent grid.

Possible Reason

After a site is created, SharePoint typically requires several minutes to "catch up" with the operation, so it may not display in the ControlPoint group picker immediately.

Once the site is visible in the group picker, an association can be made; however, the group will not display in the dependent grid—and cannot be scheduled—until Discovery is run.

Resolution

- If the site does not display in the group picker, wait several minutes then refresh the page.
- If, after an association is made, the group does not display in the dependent grid, you can:
  - wait for the next nightly Full Discovery to be run

  OR

  - run an interactive partial Discovery on the Web application containing the newly-created site.

Cannot Run Activity Analysis Using Real-time Data

Issue

I would like to run an activity analysis using real-time data, but the option is not available.

Reason

The Discovery task accumulates and caches activity data that is collected by the nightly SharePoint Usage Analysis tasks. Therefore, activity data is as current as the last time Discovery was run.

Activity Data in Analysis Results is Out of Date

Issue

Results of an analysis run on cached data includes activity data that is not current.

Possible Reasons

- You are requesting data for a date or time period that is older than the ControlPoint cache.
- The Discovery task has not been run on one or more Web application(s) within the scope of your analysis since the last date reflected in activity data.
- The nightly Discovery job ran before one or more of the SharePoint usage analysis jobs from which it collects data for the cache.

Note that, if the nightly Full Discovery process has not run, a message displays in the ControlPoint application header. You can compare the date of the last Full Discovery with the date displayed in the analysis results header. (By default, activity data for site collections is reported for a time period that ends on the date of the last Discovery).

If you determine that nightly Discovery *has* run and the out-of-date activity data is confined to one or more specific Web applications, it may be that the ControlPoint Application Administrator has excluded the Web application(s) from the nightly Discovery process

Resolution

If you have determined that the Discovery task has *not* run on one or more Web applications, run either a full or partial interactive Discovery (depending on the situation) then regenerate the analysis.

NOTE: You can determine whether Web applications have been excluded from the nightly Discovery process by examining the ControlPoint Configuration Setting Web Applications to Exclude from Full Discovery (WAPEXCLUDE).

If you have determined that Discovery has run on all Web applications, check the Central Administration Timer Job Status report to determine when the nightly jobs actually ran. If one or more of the usage analysis jobs ran *after* nightly Discovery, it may be necessary to update the nightly Discovery schedule.

Cumulative Hits Only Available Option When Running Activity Analyses

Issue

For a Farm Summary Report or activity analysis:

- In the Parameters section, the only available option in the **View Activity for** drop-down is Cumulative Hits.

AND/OR

- In analysis results, the Requests column displays cumulative hits instead of number of requests or page views for the specified time period.

Possible Reason(s)/Resolution

- You are running a WSS-only farm (See Variations in Activity Data in the *ControlPoint User's Guide*.
- Since installing ControlPoint you have upgraded from SharePoint Foundation to SharePoint Server but Enable SharePoint Server functionality (MOSS) has not been changed in the ControlPoint application settings.
- Usage Reporting has not been enabled (See System Requirements in the *ControlPoint Installation and Upgrade Guide*.)

Activity Analysis Requests Column Only Shows 0's for Users and Requests

Issue

Activity Analysis results *always* show only 0's in the **Avg. Users per Day** and **Requests** columns.

Possible Reason

If analysis results show 0's for all sites within a Web application which you know has had activity, it may be that the Web application uses cross-farm Service Applications that has been created on a different farm that the one on which ControlPoint is installed (which, by default, means that activity data is inaccessible to ControlPoint).

Contact Metalogix Technical Support for instructions on configuring ControlPoint to access activity data from cross-farm Service Applications.

Number of Lists in Storage Analysis Results Does not Match Number Displayed in SharePoint Hierarchy

Issue

The number of lists reported in a Content Database Storage or Site Lists and Libraries Storage analysis is greater than the number that appear in the SharePoint Hierarchy.

Reason

Storage analysis results include *hidden* lists (such as Master Page Gallery, Reporting Metadata, and User Information), which are not shown in the SharePoint Hierarchy.

Storage Information Reported by ControlPoint is Different than What's Reported by SharePoint

Issue

ControlPoint Storage analysis results show different values for content size and % of quota than those shown on the SharePoint Site Collection Usage Summary and Storage Space Allocation pages.

Reason

In calculating results for storage analyses (including the Farm Summary Report), ControlPoint determines the size of a site by including:

- size of documents, including all versions
- document metadata, including metadata for all versions
- list content
- recycle bin size
- Web Part size, including any personalization to the web parts on the page.

SharePoint uses a proprietary algorithm to calculate size and determine % of quota, which may differ from the algorithm used by ControlPoint.

Most/Least and ControlPoint Policies Analysis Never Progress Beyond "Loading" Using IE 11 with SharePoint 2010

Issue

When running a Most/Least or ControlPoint Policies analysis using Internet Explorer 11 with a SharePoint 2010 farm, results perpetually display as "Loading" but are never returned.

Resolution

Make sure your browser's Compatibility View is turned *on*.

HRESULT:0x80040E09

Issue

When attempting to run a ControlPoint operation, the following warning message displays in the results header:

Warnings: [site url]: Exception from HRESULT: 0x80040E09

Reason

The ControlPoint Service Account does not have sufficient permissions to complete the operation.

Resolution

In accordance with System Requirements, make sure the ControlPoint Service Account has been added to the security server role `sysadmin` in:

- the SQL server(s) used for SharePoint content databases, and
- the SQL server used for the ControlPoint Service database.

NOTE: If `sysadmin` privileges cannot be granted, you will need to use an account that has the SQL server roles `securityadmin` and `dbcreator`, such as the server farm account (that is, the account under which Central Administration runs).

No User Profile Application available to service the request

Issue

An attempt was made to run a ControlPoint analysis based on a SharePoint User Profile property, and the following message displayed in the header before the analysis finished processing:

No User Profile Application available to service the request. Contact your farm administrator.

Possible reason

- A SharePoint User Profile Service Application is not associated with one or more Web applications within the scope of the analysis

OR

- The ControlPoint Service account does not have permissions to access the User Profile Service application.

NOTE: The ControlPoint administration (xcadmin) log identifies the Web application(s) for which the User Profile Service application was unavailable.

Interactive Analyses: Unhandled Error in Silverlight Application Code

Issue

ControlPoint is installed on a Windows 2003 server, and the following error is displayed when an interactive analysis is initiated:

Unhandled Error in Silverlight Application Code 2104 category:initialize

Reason

On Windows 2003 servers, IIS is not configured to support some data types used by Silverlight.

Resolution

To register the necessary data types, on each Web-front end server where ControlPoint is installed run the Metalogix-provided script **AddSLMimeTypes.vbs**, which is located in the **Support Tools** folder in the ControlPoint installation kit.

If you Cannot Resolve an Issue with a ControlPoint Operation

Contact Metalogix Technical Support. Have the contents of the ControlPoint Administration (xcAdmin) log and the Logged Errors Report readily available so that the Technical Support Specialist can better assist you.