

ControlPoint

User Guide

VERSION 7.6

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Preface

This guide contains detailed information about Metalogix ControlPoint, a Web-based application that offers a proactive, integrated solution for managing your SharePoint environment.

Audience

The *Metalogix ControlPoint User's Guide* is intended for individuals who have responsibilities for administering an organization's SharePoint environment and assumes knowledge of SharePoint administrative concepts. Throughout this guide, the following terminology is used to differentiate between three segments of the intended audience:

Farm Administrator - As defined for native SharePoint, an administrator who has permissions and responsibilities for all servers within a SharePoint farm and can perform all administrative tasks in the SharePoint Central Administration Web site for the server or server farm.

ControlPoint Application Administrator - A SharePoint administrator who also has responsibilities for managing ControlPoint configuration and permissions. A separate guide, the *Metalogix ControlPoint Administration Guide* is intended specifically for use by ControlPoint Application Administrators when carrying out these tasks.

Administrator - A SharePoint administrator (generally an IT user) who has administrative responsibilities for site collections throughout the farm, but is not necessarily either a Farm Administrator or a ControlPoint Application Administrator.

Business Administrator (also known as a Site Administrator) - A business user responsible for administering his or her own SharePoint sites.

NOTE: Business Administrators have access to many, but not all ControlPoint features. For a complete list of ControlPoint menu options, including those that are not available to Business Administrators, see Default Menu Options for ControlPoint Users.

Getting Started with ControlPoint

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

Launching ControlPoint

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

From your workstation browser:

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

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

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

From the server on which ControlPoint is installed:

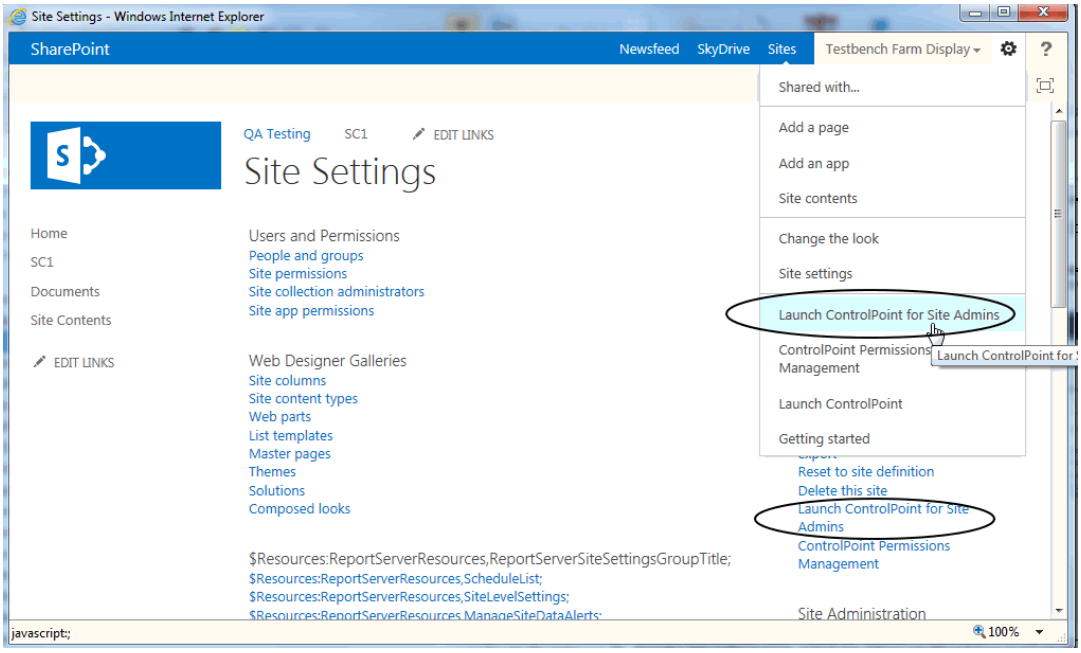
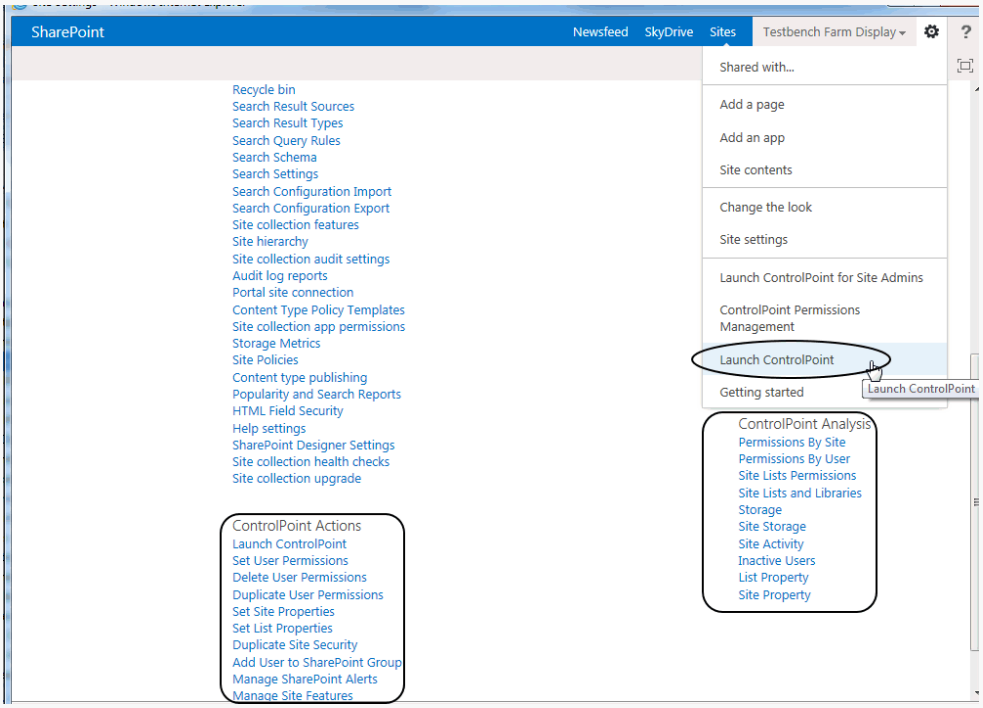
1 Log into the server using the account that was designated as the ControlPoint Service Account at the time the ControlPoint application was installed.

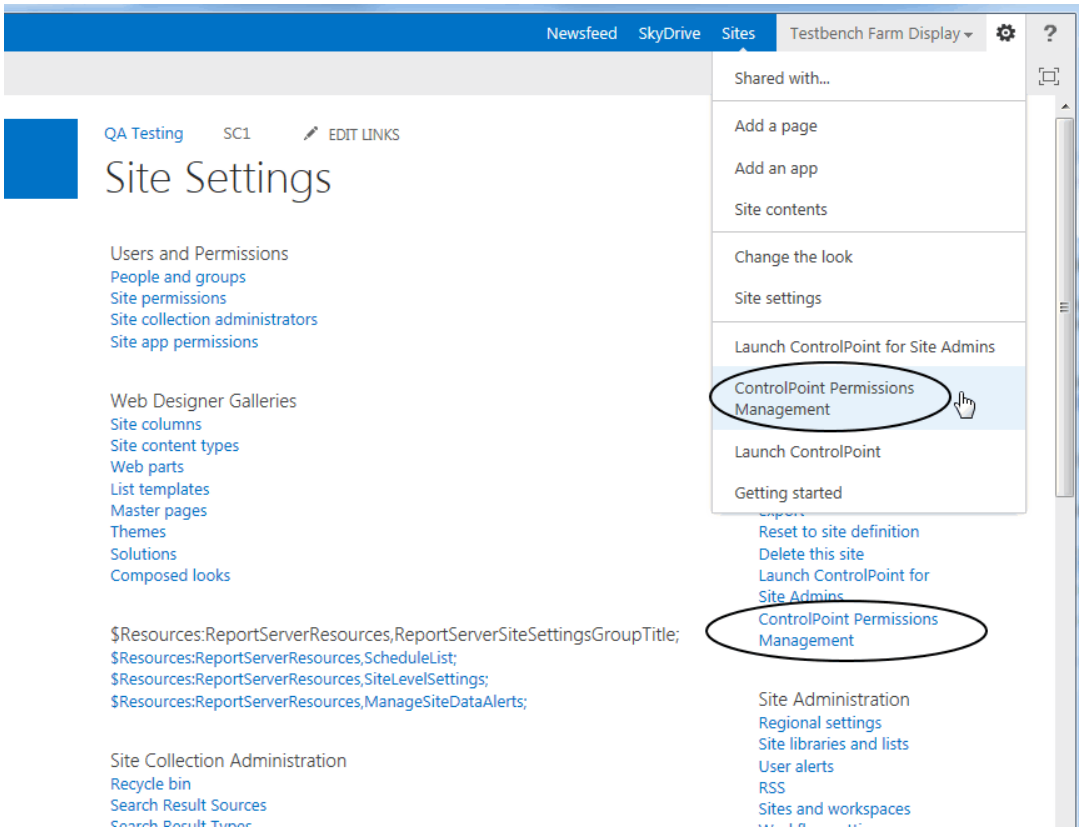
2 From the Windows Start menu, choose Programs > Metalogix > ControlPoint > Launch ControlPoint Application.

From within a SharePoint site:

NOTE: You can launch ControlPoint from within a SharePoint site only if the ControlPoint for Site Admins feature and/or the ControlPoint Menus for Site Settings feature has been activated for the site. More information can be found in the *ControlPoint Administration Guide*.

If ...	Then ...
ControlPoint for Site Admins has been activated	from the SharePoint Site Settings page or the Site Actions menu, choose Launch ControlPoint for Site Admins.

If ...	Then ...
	
ControlPoint Menus for Site Settings has been deployed and activated	• from the Site Settings page, select one of the **ControlPoint Actions** or a **ControlPoint Analysis** OR • from the Site Actions menu, choose Launch ControlPoint. 

If ...	Then ...
ControlPoint Permissions Management for Site Admins has been activated	from the SharePoint Site Settings page or the Site Actions menu, choose ControlPoint Permissions Management. 

The ControlPoint Configuration Site

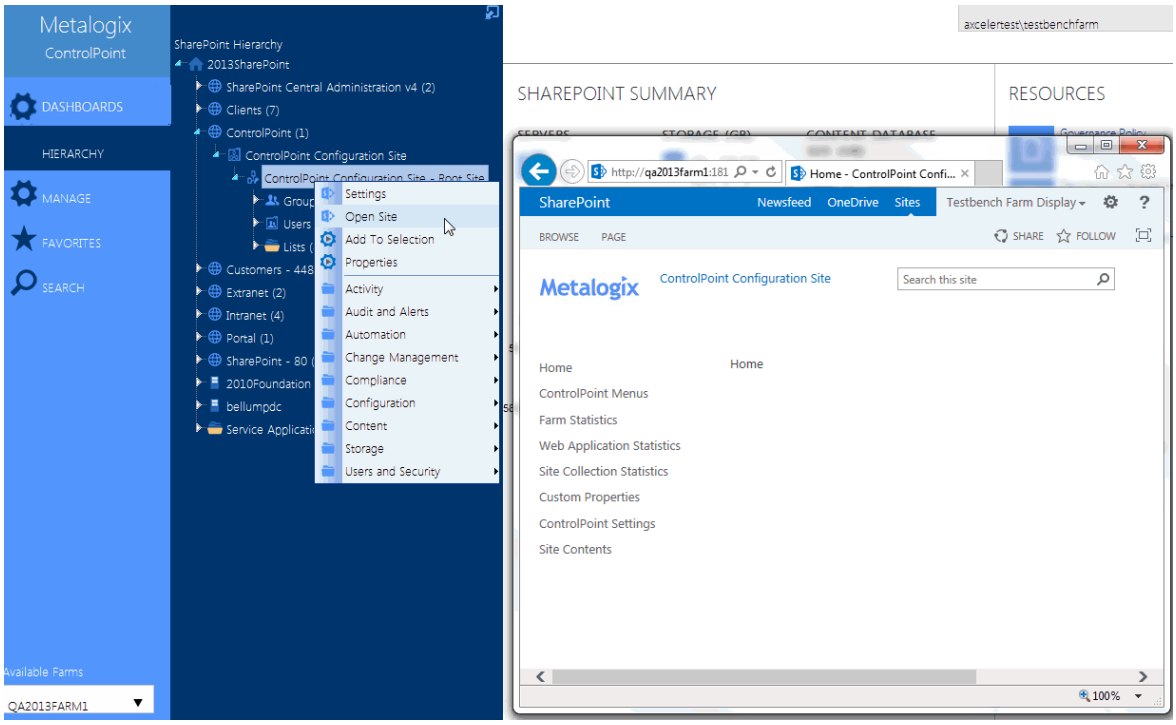
The ControlPoint Configuration site is a SharePoint site that is integral to your ControlPoint installation.

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.

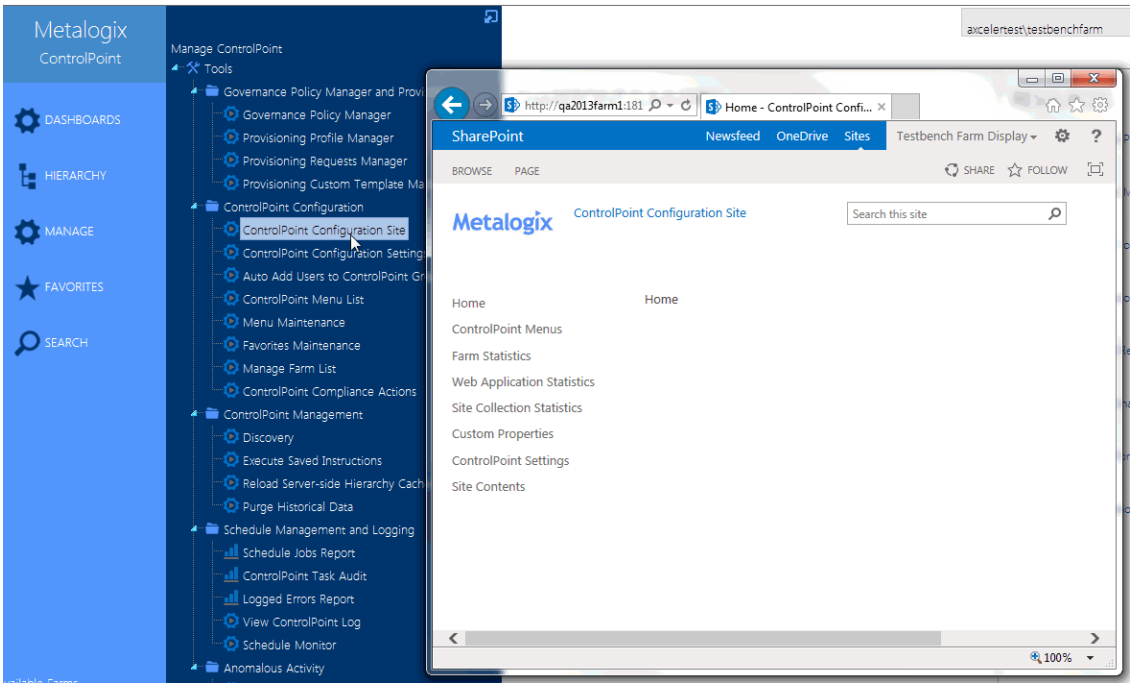
If you are a site collection administrator for the ControlPoint Configuration site collection, you can access the site's administration pages and ControlPoint value-added features from the Hierarchy panel. See ControlPoint Security for more detail.

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.



ControlPoint User Groups

When ControlPoint is installed for the first time:

- the six default user groups described in the table below are automatically created, and
- the ControlPoint Service Account is added to each group.

Group	Description	Default Site Permission(s)
ControlPoint Application Administrators	Individuals within IT responsible for the administration of the ControlPoint application, as well as most or all of the farm.	Full Control access NOTE: You should also place administrators in this group into the Site Collection Administrators group to enable them to manage other ControlPoint groups.
Administrators	Individuals (generally within IT) with administrative responsibilities for most or all of the farm.	Read access
Business Administrators It is imperative that the name assigned to this group match the parameter value for the BADMIN configuration setting. If you change this group name, you will also need to update the BADMIN parameter value. Refer to the *Metalogix ControlPoint Administration Guide* for instructions.	Business users responsible for managing specific sites, but not most of the farm. See also Making ControlPoint Available to Business Users (Site Administrators).	Read access
Remote Service Account Administrators It is imperative that the name assigned to this group match the parameter value for the RSAADMIN configuration setting. If you change this group name, you will also need to update the RSAADMIN parameter value. Refer to the	The Service Account of each farm involved in • multi-farm installations, and • cross-farm copy or move operations.	Read access

Group	Description	Default Site Permission(s)
Metalogix ControlPoint Administration Guide for instructions.		
ControlPoint Compliance Administrators	*If you are licensed for Compliance functionality*: Individuals permitted to access ControlPoint Compliance functionality.	Read access
ControlPoint Quarantine Administrators	*If you are licensed for Compliance functionality:* Individuals permitted to manage quarantined content.	Read Access

You can add users to ControlPoint groups using either of the following methods:

- Use standard SharePoint procedures. You can open the ControlPoint Configuration Site directly or access People and Groups pages through the ControlPoint application interface as follows:
  a) From the SharePoint Hierarchy, expand the Web Application that hosts the ControlPoint Configuration site, then **ControlPoint Configuration Root Site > Groups**
  b) Click on the group to which you want to add users.

OR

- Use the ControlPoint action Add Users to SharePoint Groups.

ControlPoint Application Administrators can create additional groups at any time, configure ControlPoint to automatically add users to a ControlPoint group based on security privileges, and even create custom ControlPoint menus for different groups of administrators. See also Managing ControlPoint Users and Permissions in the *ControlPoint Administration Guide*.

Making ControlPoint Available to Business Users (Site Administrators)

ControlPoint Application Administrators can grant access to ControlPoint to business users who administer their own sites. To do so:

- make sure they have Full Control access (or any other permission level that includes the Manage Web Site permission) to any site they will be administering, and
- add them to the ControlPoint Business Administrators group in the ControlPoint Configuration site. (See ControlPoint User Groups.)

Once the Full Discovery process has run, the SharePoint Hierarchy will show only Web applications and site collections that contain sites that the user has permissions to administer.

NOTE: For the sake of performance, ControlPoint uses cached data to determine SharePoint sites to which Business Administrators have management permissions. If you grant or deny permissions to a Business Administrator, the change will not be visible in the SharePoint Hierarchy until after the next Discovery is run.

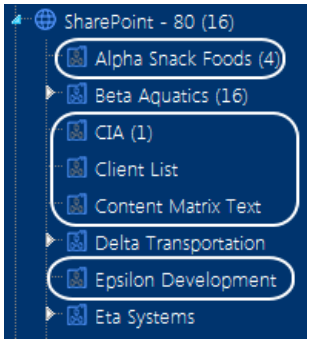
ControlPoint Security

By default, ControlPoint is security-trimmed to enforce SharePoint permissions. This means that administrators only have full access to site collections through ControlPoint if:

- they have been given site collection administrator privileges in SharePoint
- they have Full Control permissions granted to all zones in a Web application's policy.

EXCEPTION: The security model for business users (also referred to as Site Administrators) is somewhat different. See Making ControlPoint Available to Business Users (Site Administrators).

For users who are farm administrators, all of the site collections for which they are not the administrator may display in the SharePoint Hierarchy panel with a "disabled" icon. As farm administrators, they can give themselves permissions to those site collections via the ControlPoint Set Site Collection Properties action, which displays when the site collection icon is double-clicked.



For users who are *not* farm administrators (or are farm administrators but ControlPoint has been configured to suppress "super user" privileges), only site collections for which they are administrator display.

NOTE: The number that displays in parentheses represents the total number of site collections within the Web application, regardless of whether you have permissions for them.



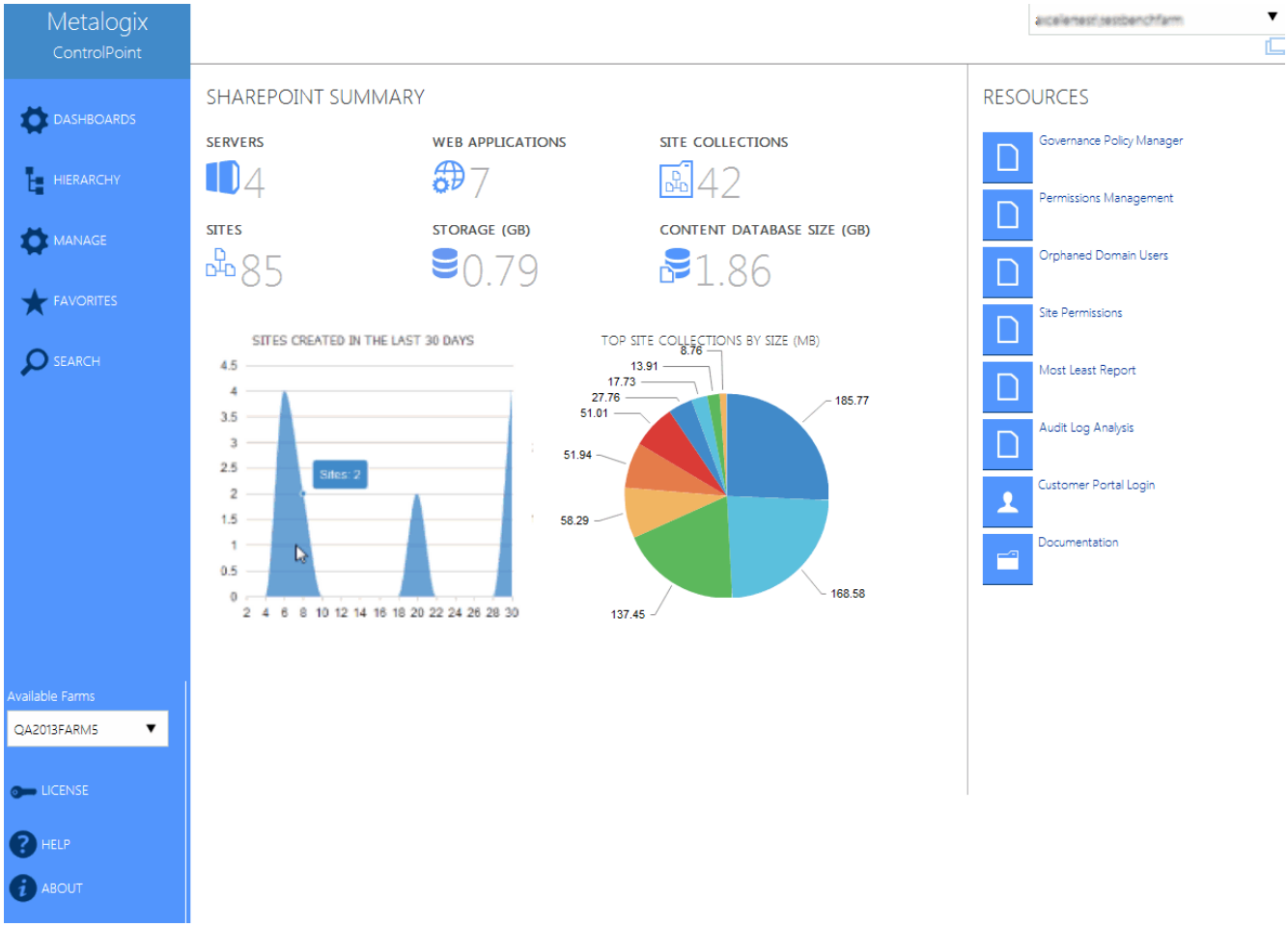
ControlPoint users can also manage sites for which they have a permission level that includes the fine-grained permission ManageWebSite (which is part of the SharePoint built-in permission level Full Control). Unless the user is a member of the Business Administrators group, these sites do not display in the SharePoint Hierarchy unless the user is also the administrator of the site collection. Such sites would, however, be included in a ControlPoint operation if they are within the selected scope and can be selected via a simple, advanced, or hierarchical search.

ControlPoint Application Administrators can, however, choose to override ControlPoint default security. Details can be found in the *ControlPoint Administration Guide*.

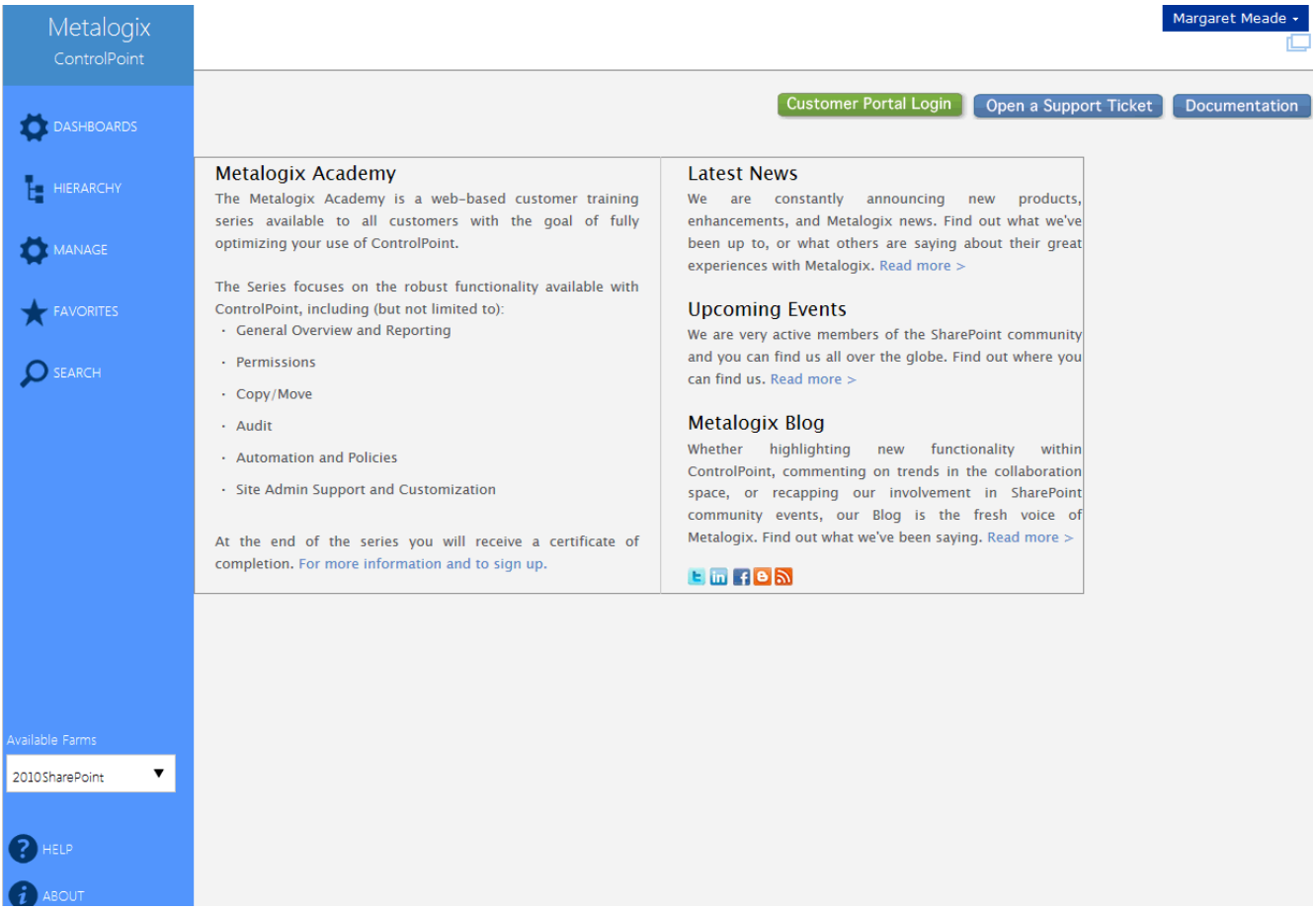
The ControlPoint Interface

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

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 the SharePoint Summary Dashboard.



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



Icons

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

Icon	Description
	The SharePoint **Farm**
	A ControlPoint **Search** feature See also Searching for SharePoint Sites.
	A SharePoint **Web application**

Icon	Description
	A SharePoint **Site collection** NOTE: If you are a farm administrator, icons for site collections to which you do not have access may appear grayed out. You can, grant yourself access to these site collections. If you are *not* a farm administrator (or if the ControlPoint Application Administrator has changed the default configuration to prohibit "super user" privileges for farm administrators), only site collections for which you are a site collection administrator (or site collections that *contain* sites for which you are an administrator) display. See also ControlPoint Security.
	A Site collection's **root site**
	A SharePoint **Site** or **Subsite** whose permissions are **inherited** from its parent
	A SharePoint **Site** or **Subsite** whose permissions are **unique** (or not inherited)
	A SharePoint **List** NOTE: Variations of this icon are used to represent different types of lists (Document Libraries, Calendars, Announcements, and so on).
	A **SharePoint page**
	SharePoint **Users**
	SharePoint **Groups**
	A **ControlPoint** value-added **action**
	A ControlPoint value-added (**Visual Analytics**) **analysis**.
	A **Server** on which SharePoint components are installed
	A SharePoint **Server Service**

ControlPoint Left Navigation Panels

The standard ControlPoint left navigation frame consists of the following four option sets:

- **SharePoint Hierarchy**
- **Manage ControlPoint**
- **Favorites**
- **Search**

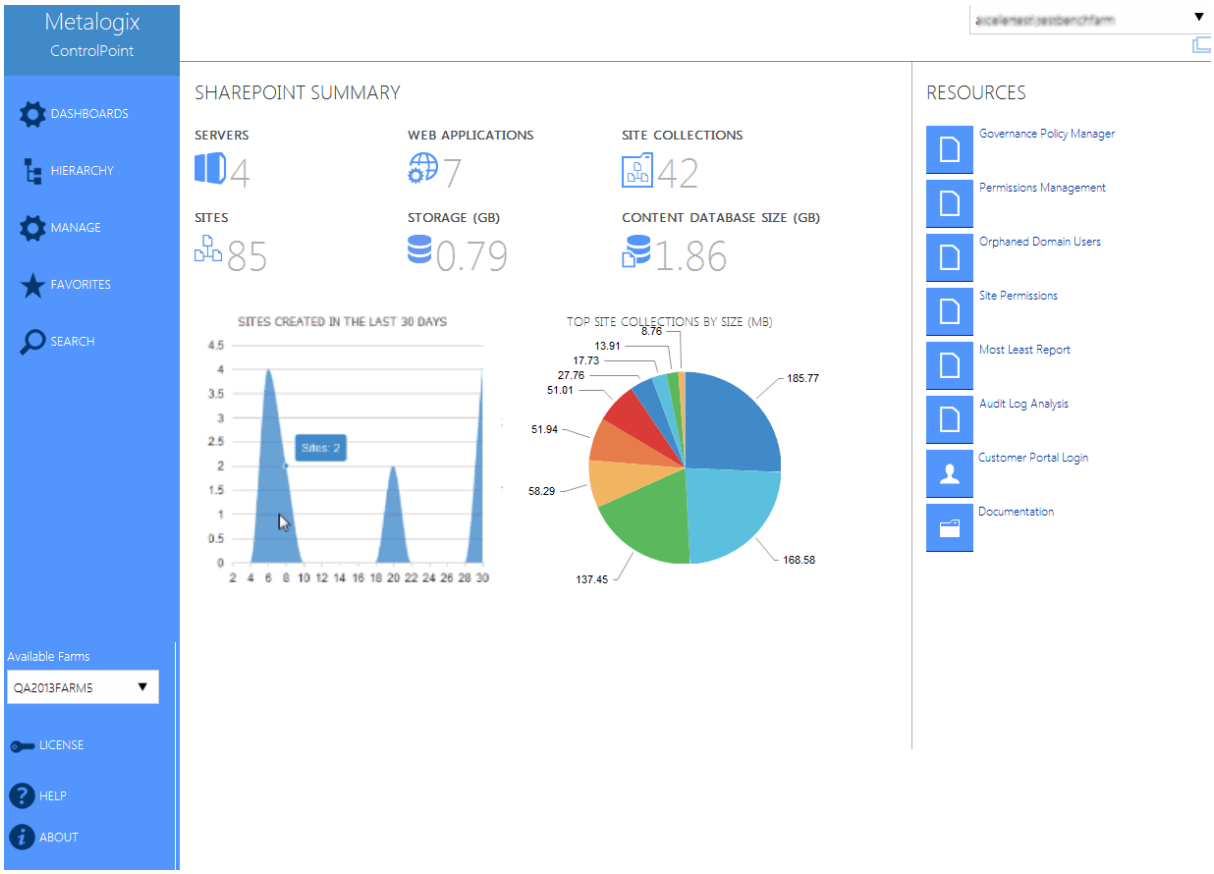
When a ControlPoint operation is initiated—or ControlPoint For Site Admins is launched—from within a SharePoint site, the left navigation frame provides access to a set of ControlPoint actions and analyses that can be customized for business administrators.

Dashboards

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

SharePoint Summary Dashboard

The SharePoint Summary dashboard, which is available—and displays as the home page—for ControlPoint 2013 and 2016 (non-Native) installations, contains the following information:



- statistical information about your SharePoint farm

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

  Statistical information comes from the following sources.

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

- quick links to some of ControlPoint's most powerful functionality:
  - the Governance Policy Manager, which allows you to define standard governance polices or best practices, then apply them to one or more site collections

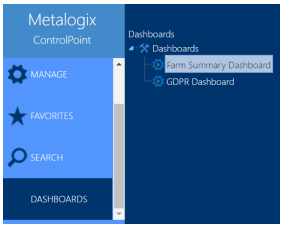
    NOTE: This feature is not available for SharePoint Foundation.

  - the Orphaned Domain User analysis, which identifies users who currently have permissions in SharePoint but are no longer valid in the Active Directory
  - The Most/Least report, which identifies SharePoint objects that have the most or least activity, use the most or least storage, or have the most or least amount of content.
  - the Permissions Management tool, which lets you perform a variety of ControlPoint permissions actions and analyses within a self-contained interface (details of which can be found in the *ControlPoint Permissions Management for Site Admins Guide*)
- links to the Metalogix Customer Portal as well as ControlPoint user documentation on the Metalogix website.

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

To access the SharePoint Summary dashboard:

From Dashboards panel, choose Dashboards > Farm Summary.



GDPR Dashboard

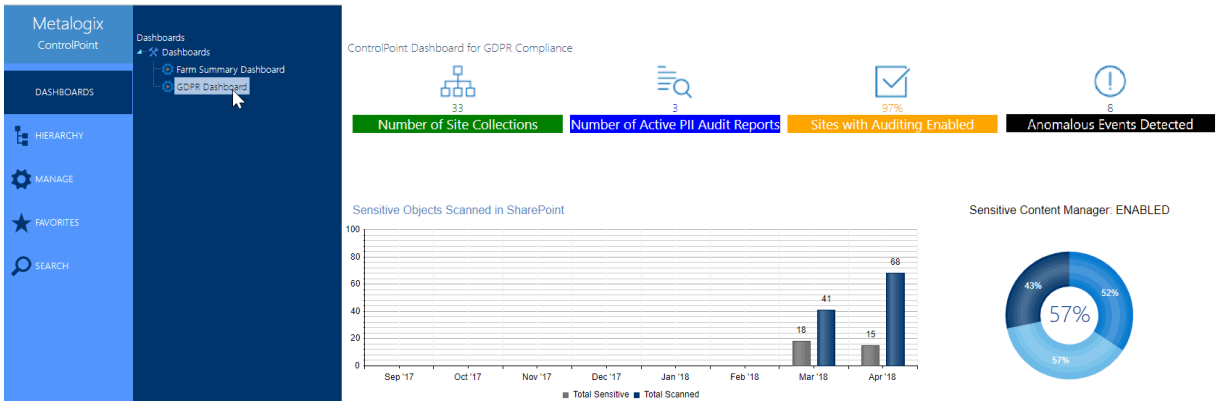
If your organization is subject to General Data Protection Regulation (GDPR) compliance, the GDPR dashboard provides an overview of how your organization is using ControlPoint to manage regulation-sensitive areas of your SharePoint environment.

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

- SharePoint Audit Settings
- Sensitive Content Manager
- ControlPoint Policies
- Governance Policy Manager
- ControlPoint Sentinel

To access the GDPR Dashboard:

From the Dashboards panel, choose Dashboards > GDPR Dashboard.



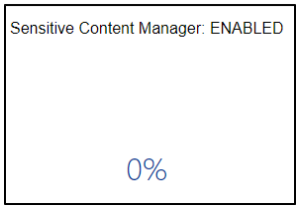
The GDPR Dashboard displays the following information:

- the **Number of Site Collections** in your farm (excluding Central Administration) as of the last Full Discovery run.

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

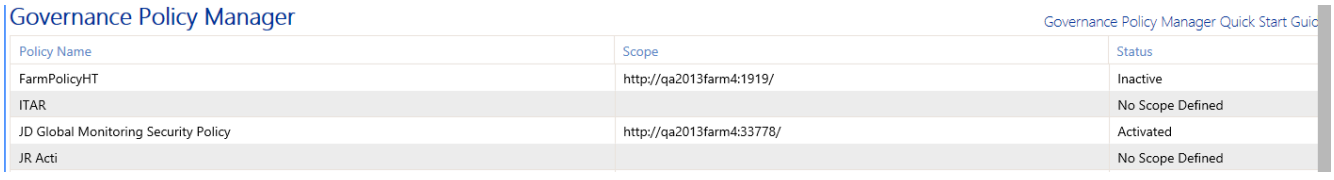
      NOTE: This percentage is also the number that displays inside the donut graph.
    - The **medium blue** section represents the percentage of site collections containing content for which at least one scan has been performed.
    - the **dark blue** section represents site collections that have had no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

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



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

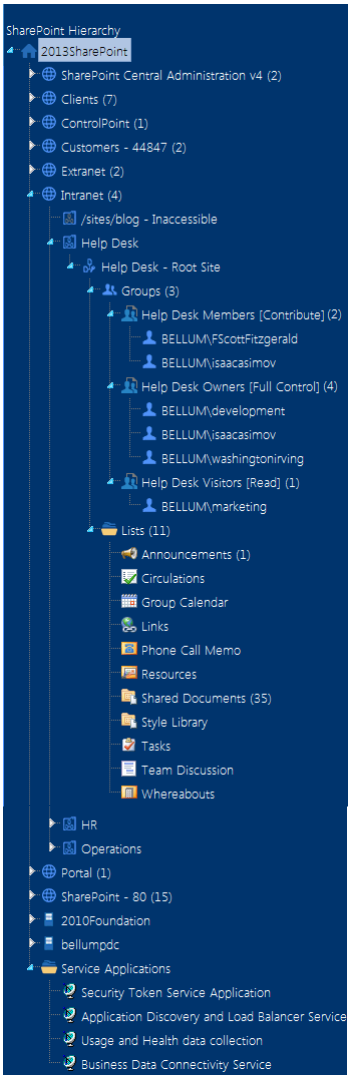
  NOTE: If *any* of the site collection audit settings are not enabled or if audit settings are enabled at the site level or below (which is possible if you are using ControlPoint Manage Audit Settings functionality), the site collection will not be counted in this percentage.
- If your organization uses ControlPoint Governance Policy Manager, the bottom section lists all of the Governance Policies that currently exist for the farm.



SharePoint Hierarchy

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

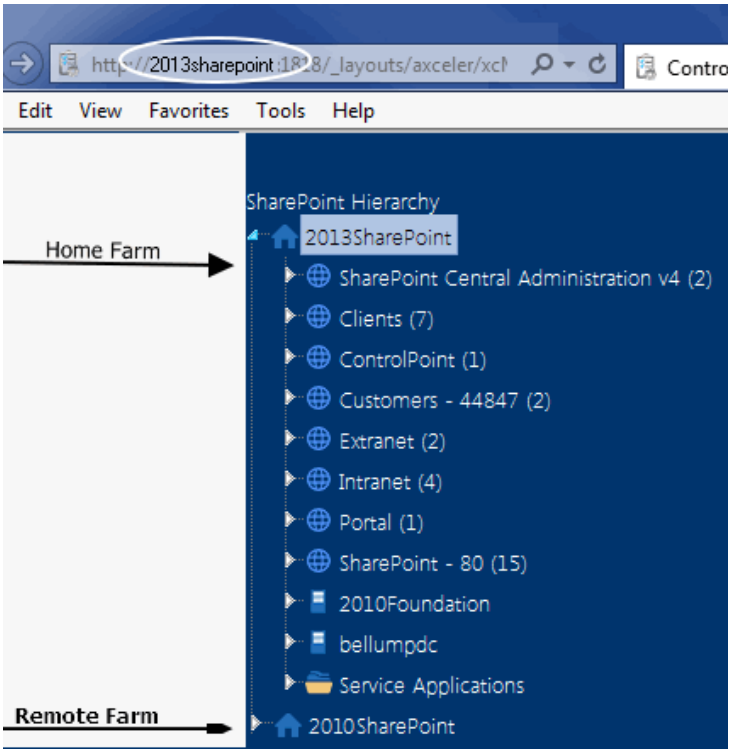
- Web applications and associated site collections, sites, and sub-sites
- within each site, its associated lists, groups, and individual users
- servers on which SharePoint components are installed, and
- if you are a farm administrator, Shared Service Providers (SharePoint 2007) or Service Applications (SharePoint 2010 and later).



NOTE: Unless you are a Farm Administrator and ControlPoint is configured to allow "super user" privileges—or if the ControlPoint Application Administrator has chosen to override default security—only site collections for which you have permissions are visible. (See ControlPoint Security.)

In a multi-farm environment, the following terminology is used to describe each farm in the SharePoint Hierarchy:

- The **home farm** is the farm from which ControlPoint was launched. Note that you can launch ControlPoint using the URL of any farm within the installation.
- A **remote farm** is any additional farm that is accessible from the home farm's application interface.

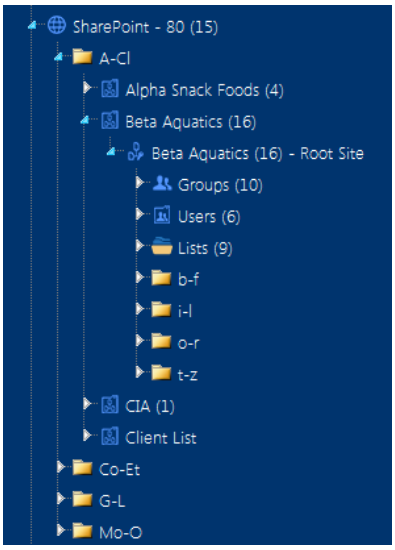


See also Selecting a Different Farm as Your Home Farm.

If a SharePoint component contains child items, a number displays in parentheses (). For example, for a Web application, the number identifies the number of *site collections* it contains, for a site collection, the number of *sites* (excluding the root site), and so on.

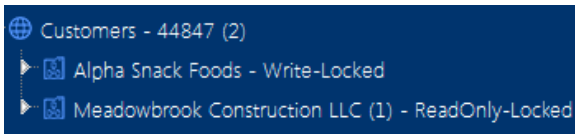
NOTE: The number in parentheses represents *all* immediate child items for that object, even those for which you may not have permissions.

Once the number of child objects at any level of the hierarchy exceeds a configurable size (45 by default), the objects are organized and displayed in folders, to improve performance and facilitate navigation. ControlPoint Application Administrators can, however, change this number. (See the *ControlPoint Administration Guide* for details.)



By default, ControlPoint displays site collection and site *titles*. ControlPoint Application Administrators can, however, change this setting so that the site collection and site *urls* display instead. (See the *ControlPoint Administration Guide* for details.)

If a site collection has been locked, text displays to the right of the site collection name which identifies the type of lock that has been imposed.



From most levels of the hierarchy you can access SharePoint pages and ControlPoint value-added features via:

- a right-click menu

AND/OR

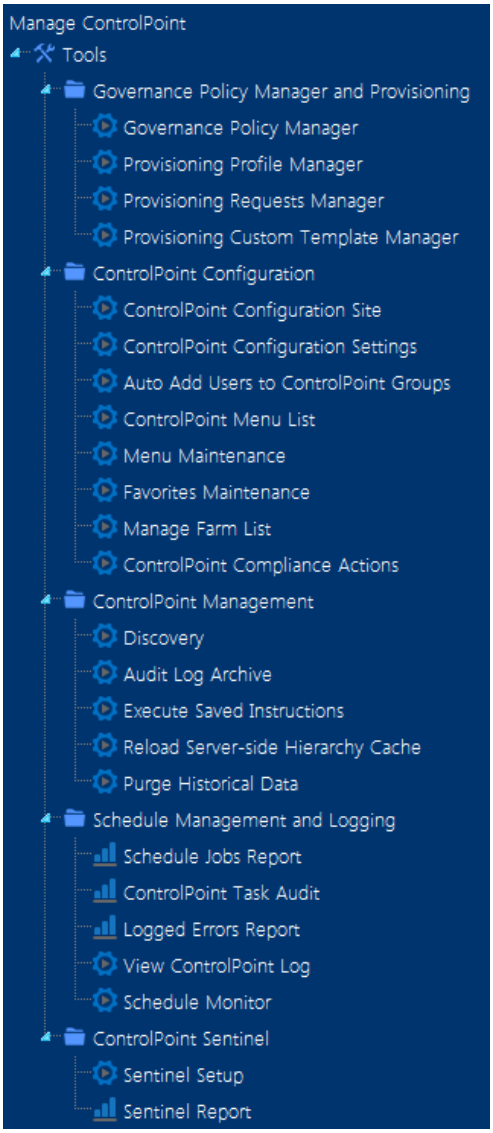
- a ribbon-style menu in the application header.

Manage ControlPoint

When the **Manage** tab is selected from the left navigation frame, the Manage ControlPoint tree displays, which contains:

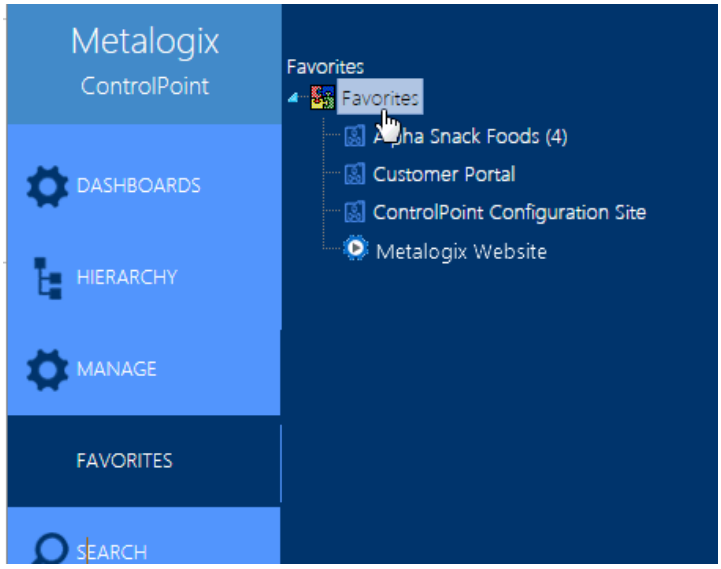
- tools for executing and reporting on farm-wide ControlPoint operations, and

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



Favorites

From the **Favorites** panel you can quickly access frequently-used ControlPoint features, SharePoint sites, or any website or Web-based application. Individual administrators can configure their own Favorites using the procedure for Customizing Your Favorites.

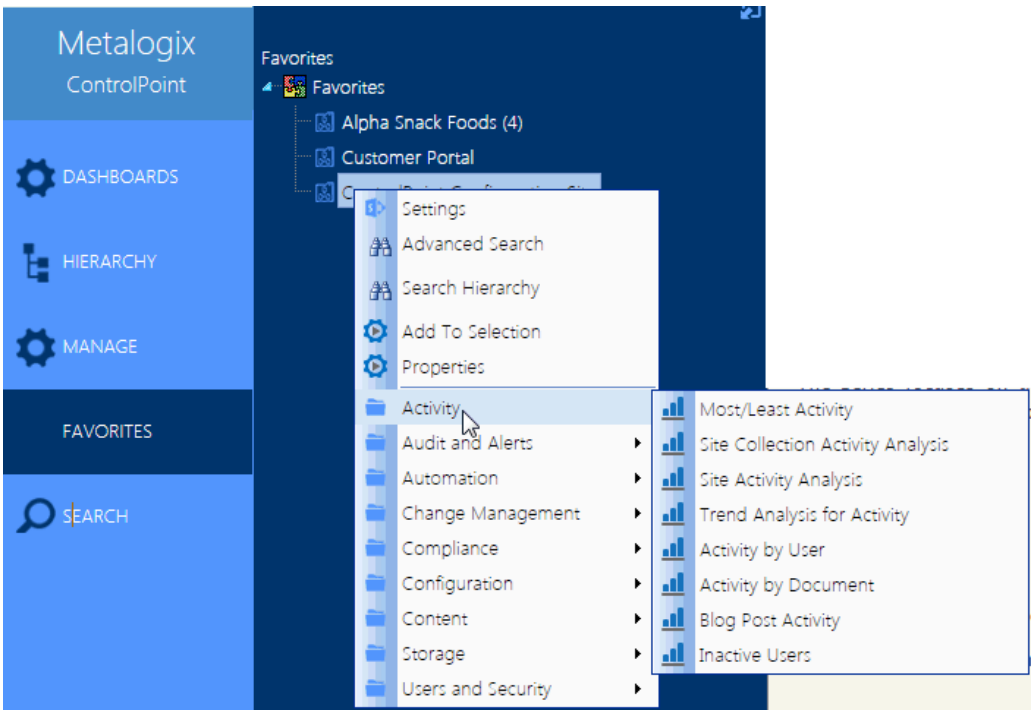


NOTE: In a multi-farm installation, your Favorites is persistent across all farms.

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.

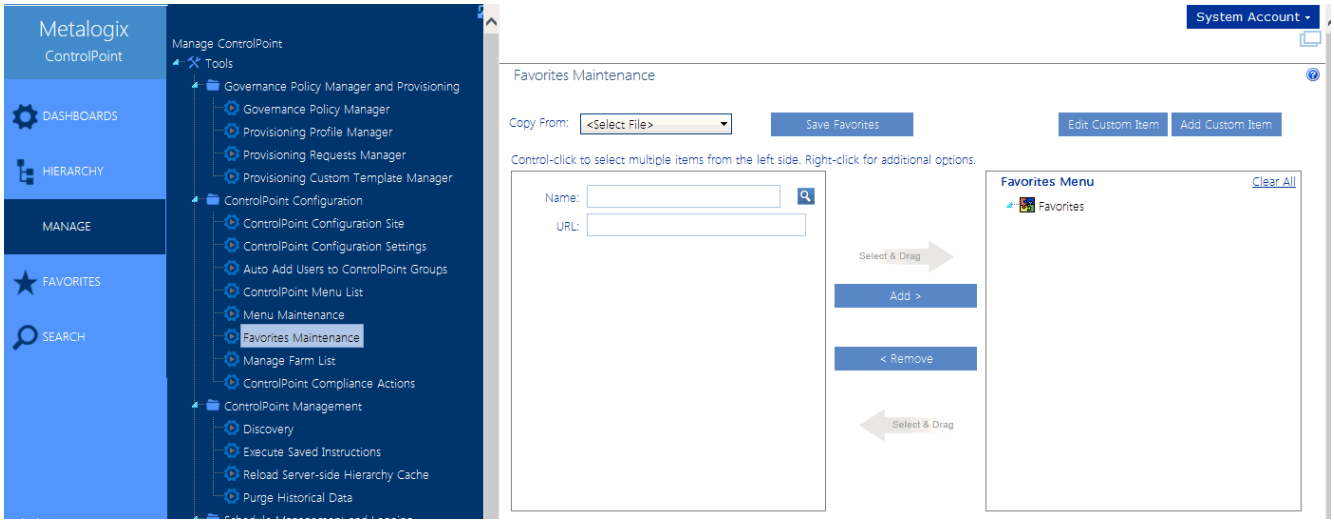


Custom items—such as links to SharePoint pages, internal or external web sites and web-based applications—can also be added.

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

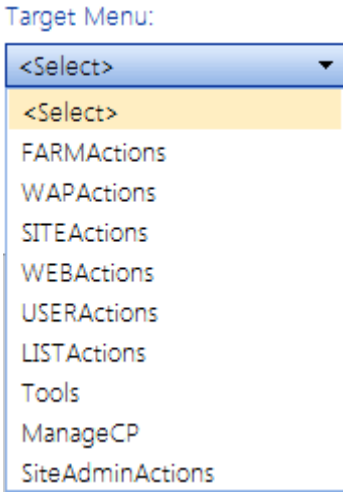
To access the Favorites Maintenance page:

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



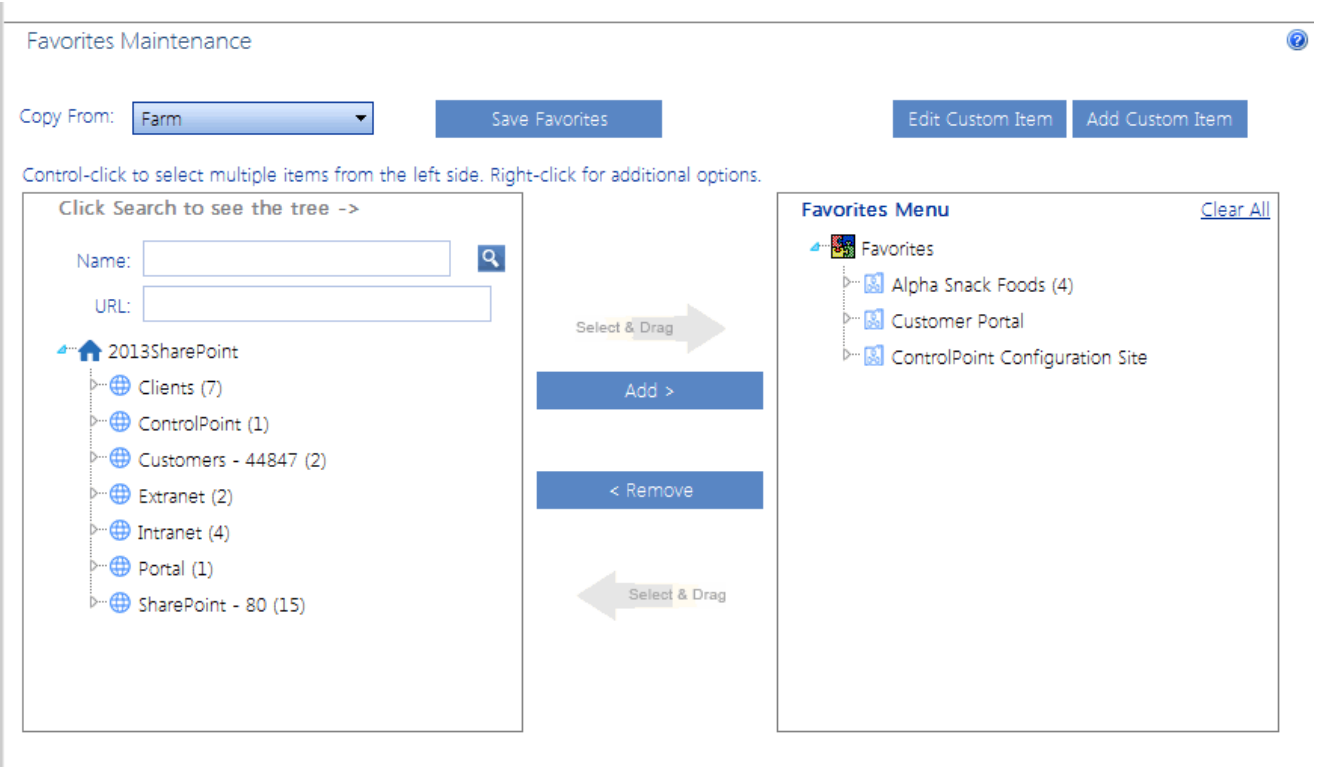
To add items to your Favorites:

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.

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.

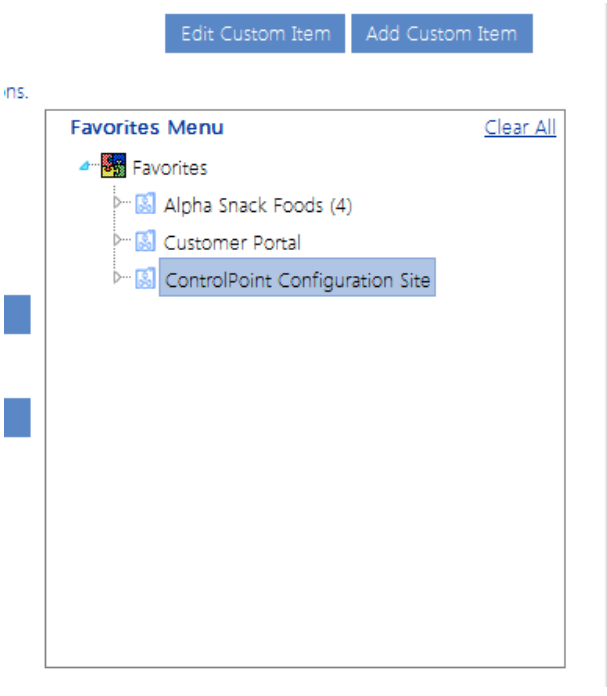
The procedure for adding an item to a ControlPoint menu is used by:

- 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:

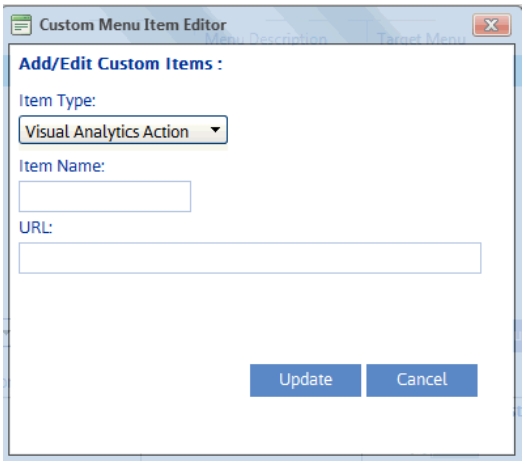
1 Highlight the item *below which* you want to place the new item.



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.

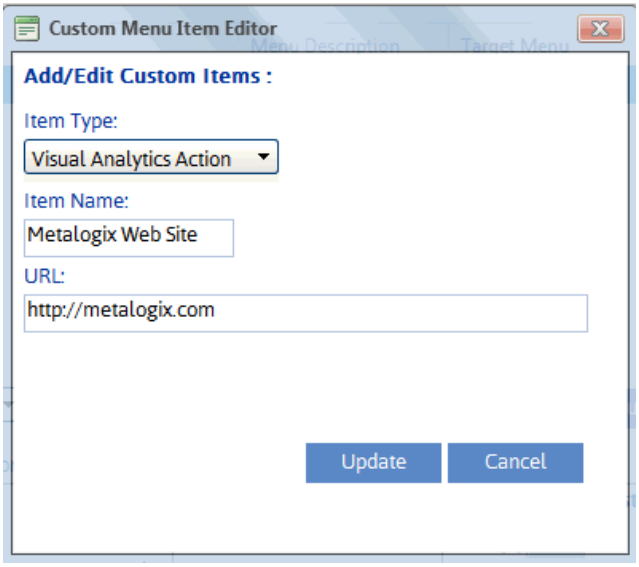
2 Click **[Add Custom Item]**..

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

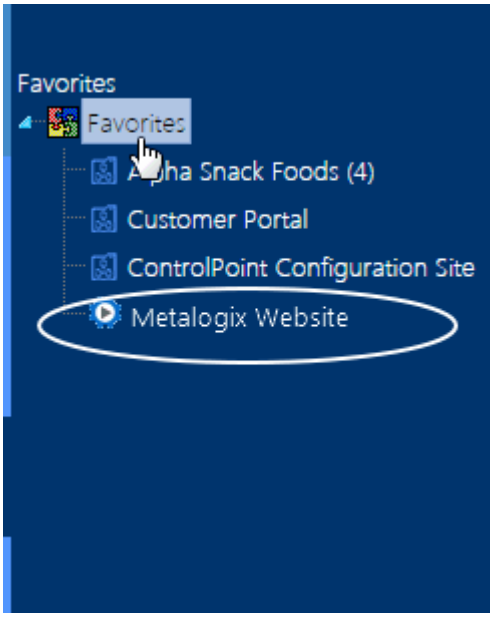


CAUTION: Once a custom item has been saved the Item Type cannot be changed.

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



5 Click **[Update]**.

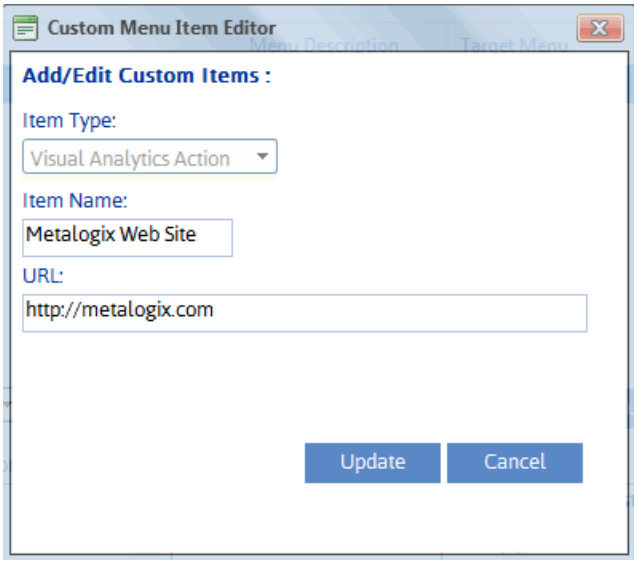


To edit an existing custom item:

1 Highlight the item you want to edit.

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

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

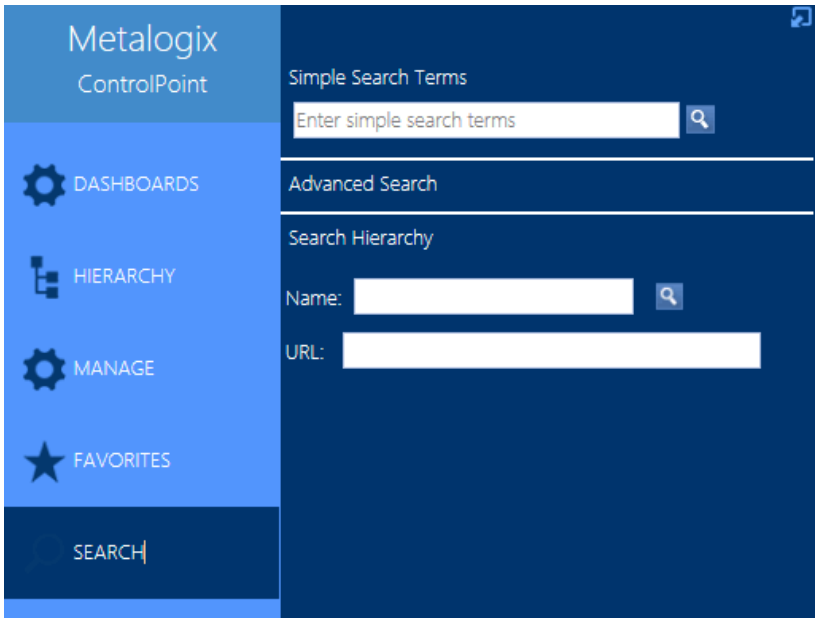


NOTE: For existing items, the Item Type drop-down is disabled.

4 Click [**Update**]

Search

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

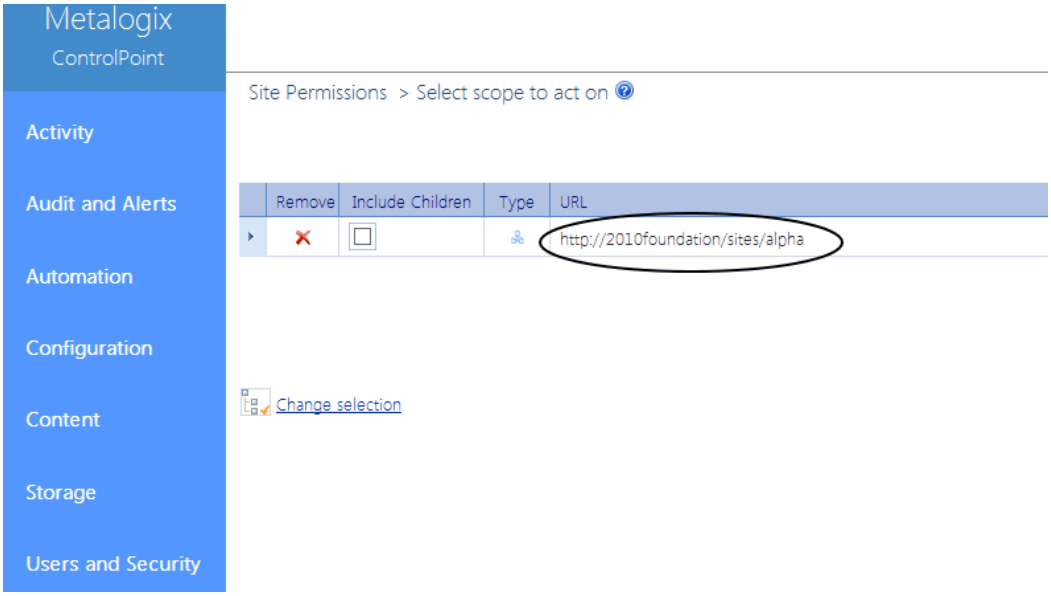


You can access this menu directly or from any of the Search Hierarchy links within the SharePoint Hierarchy panel. For more detail, see Searching for SharePoint Sites.

Menus for Site Admins

If you launch ControlPoint from within a SharePoint site, ControlPoint menus display in place of the "standard" navigation tree. The site from which ControlPoint was launched is used as the default scope. This approach is especially suited for use by Business Administrators.

Select a menu item to open the ControlPoint operation or SharePoint page in the workspace.

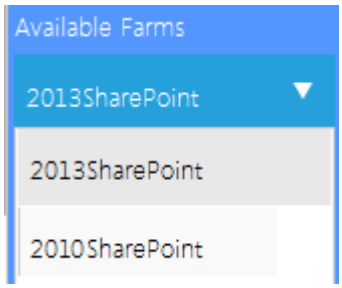


EXCEPTION: If ControlPoint Menus for Site Settings has been activated and you select Launch ControlPoint from the Sharepoint Site Actions menu, ControlPoint will open with the standard navigation panels.

Farm Selection, Product Information, and Online Help

The bottom of the left navigation frame contains:

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



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

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

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



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

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

Displaying ControlPoint Menus in a Ribbon

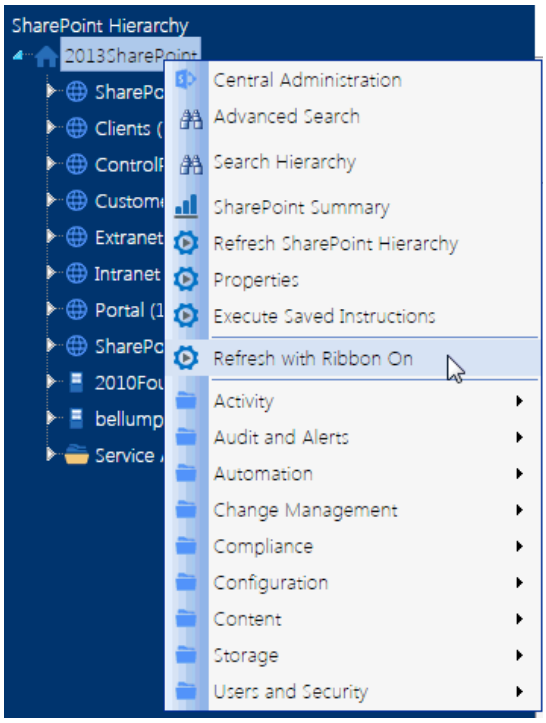
By default, ControlPoint is configured to allow menus to be displayed as right-click context menus in the left navigation frame and ribbon-style menus in the application header. (ControlPoint Application Administrators can, however, configure the application to allow only one or the other.)

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

To display (hide) the ribbon:

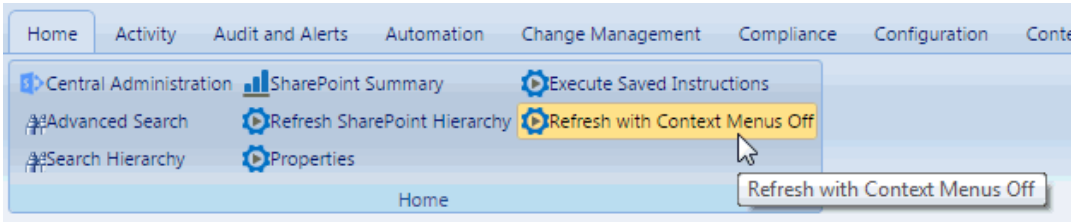
If you are using Internet Explorer 8 or 9, turn Compatibility View OFF to ensure the ribbon will render properly.

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



To display (hide) context menus:

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



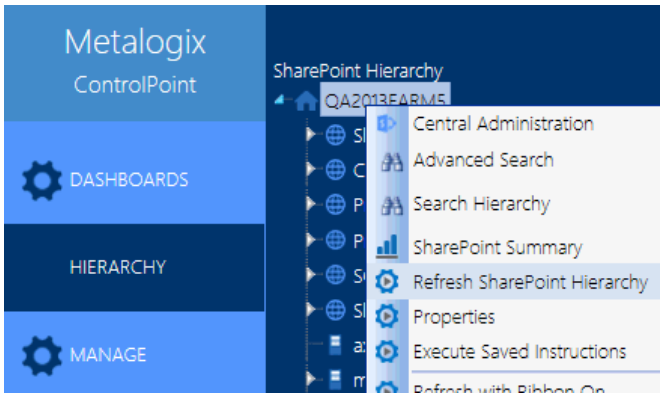
Refreshing the SharePoint Hierarchy

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

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

To refresh the SharePoint Hierarchy:

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



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

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

Reloading the Server-Side Hierarchy Cache

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

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

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

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

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

Opening a ControlPoint Workspace in a New Window or Tab

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

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

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

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

2 Choose the applicable menu option.

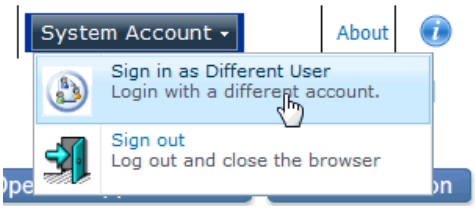
3 From the ControlPoint application header, click the Clone Work Area icon ( ).

Signing Into ControlPoint as Another User

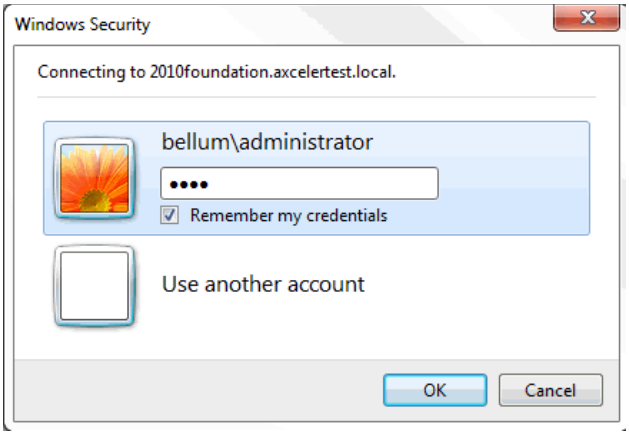
If you have sufficient permissions, you can sign into ControlPoint as a different user, with the access levels and menu permissions that have been set up for that user on the ControlPoint Configuration site. This feature is useful if you want to log into ControlPoint from a workstation other than your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

To sign into ControlPoint as a different user:

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



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



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.

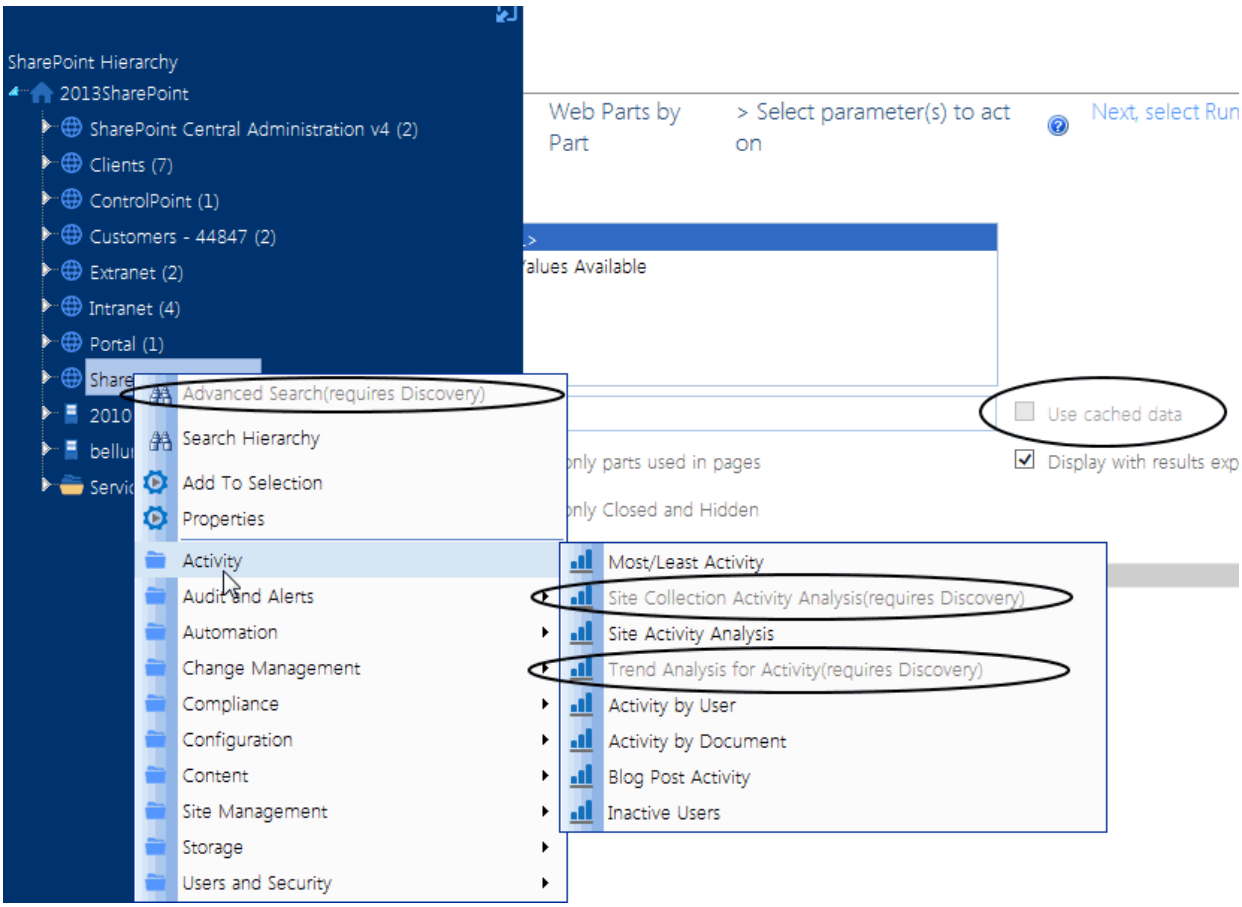
NOTE: Discovery can be a resource-intensive process, especially in a large SharePoint farm. If you regularly experience performance issues when the Discovery task is in progress, contact Metalogix Technical Support for help in fine-tuning the process to run more efficiently in your environment.

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. Details can be found in the *ControlPoint Administration Guide*.

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 and the operations and parameters that rely on it. Details can be found in the *ControlPoint Administration Guide*.

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.

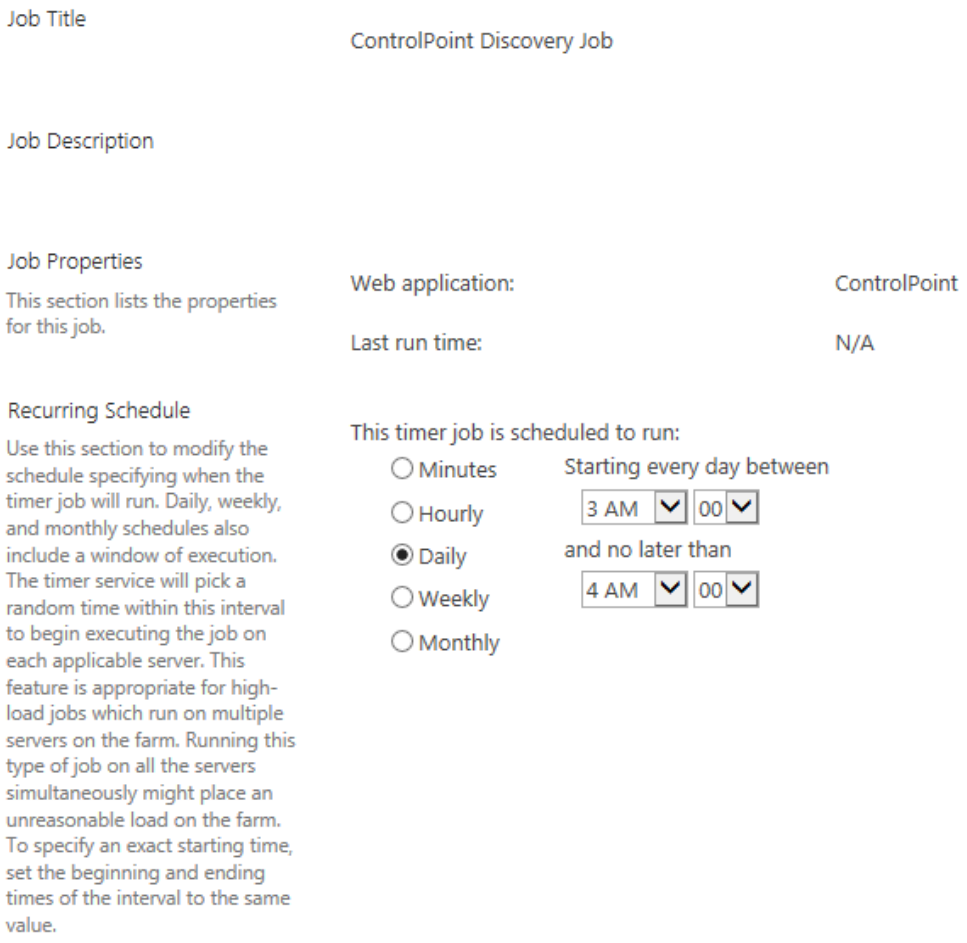
To update the Discovery schedule in SharePoint version 2010 and later:

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

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

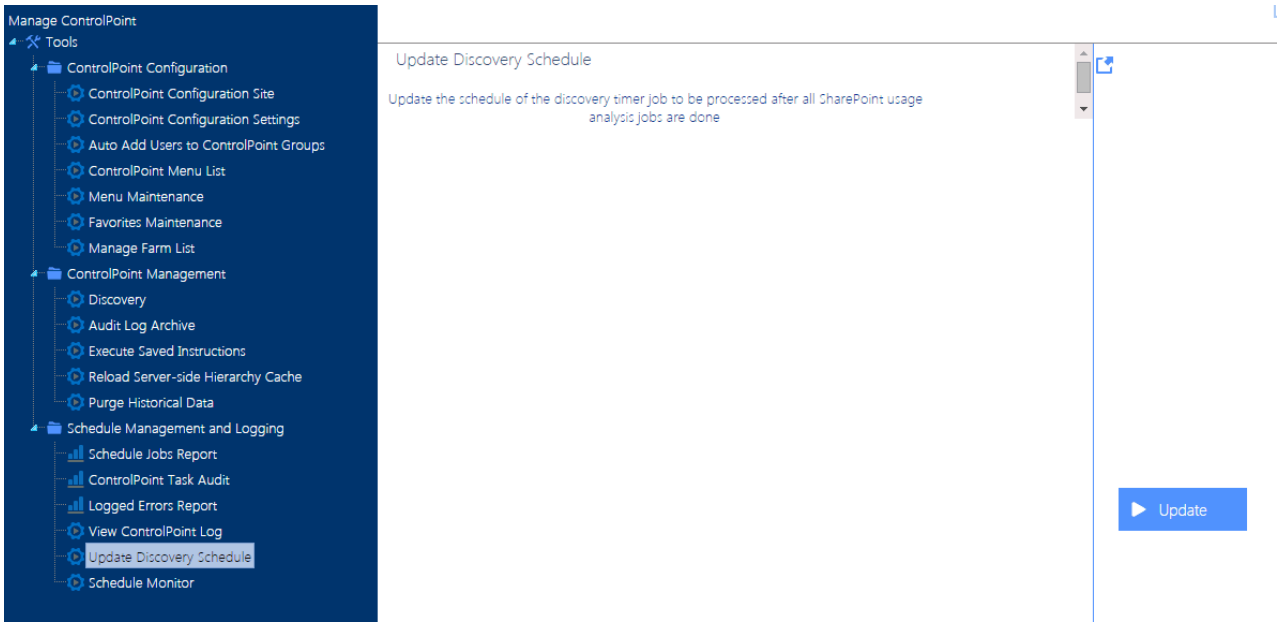
NOTE: During an upgrade from a version older than 6.0, the name 'Axceler' in the Discovery and Scheduled Job Review timer jobs is changed to 'ControlPoint'.

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:

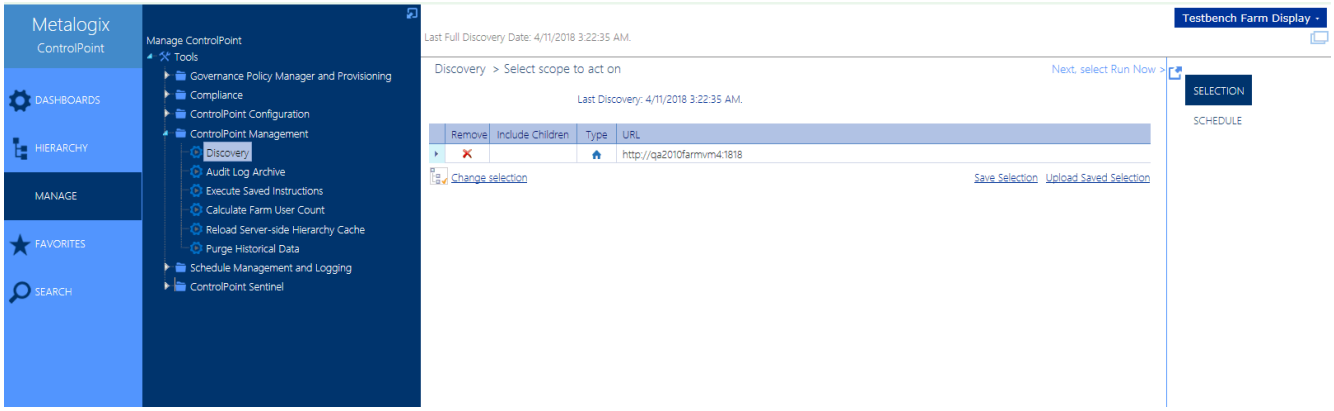
- the nightly Full Discovery job is disabled or has failed to run, or
- you want to perform an ad hoc update to the ControlPoint cache.

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.

Selecting Objects on Which to Perform a ControlPoint Operation

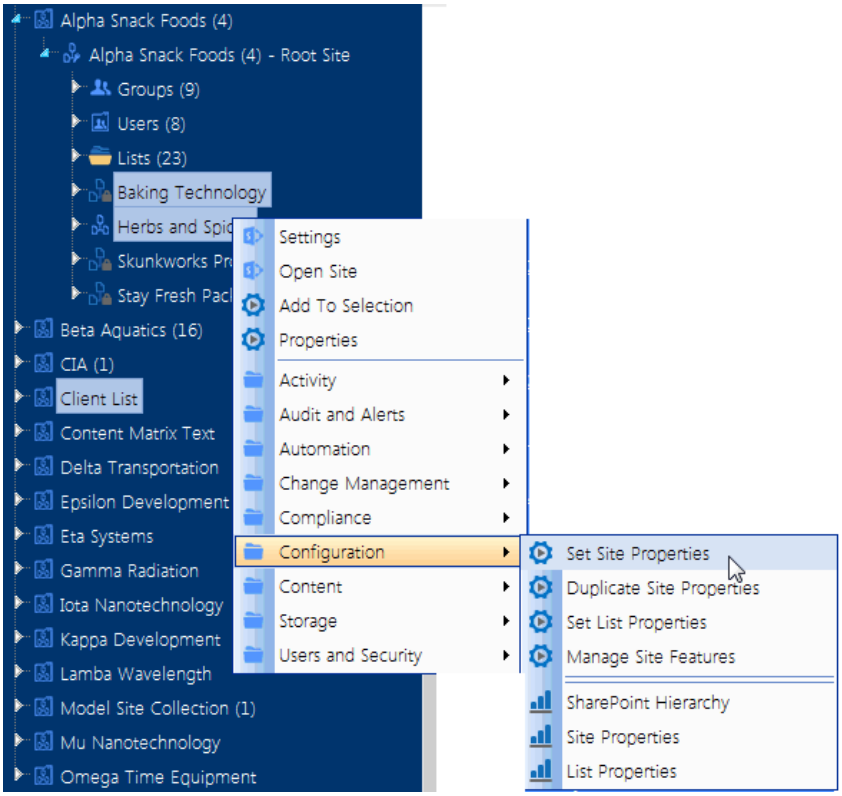
Selecting Objects from the SharePoint Hierarchy, Favorites, or Search Hierarchy Panel

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

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

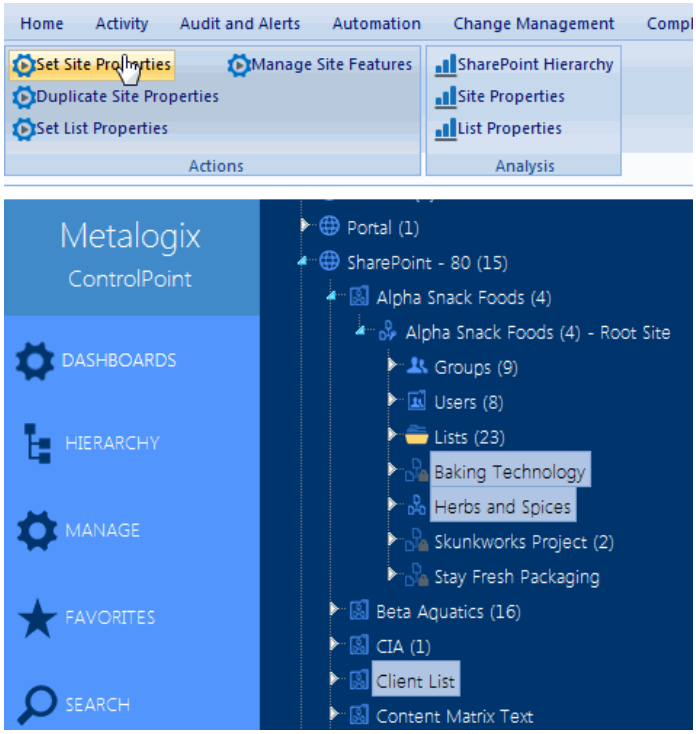
After selecting the object(s):

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



OR

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

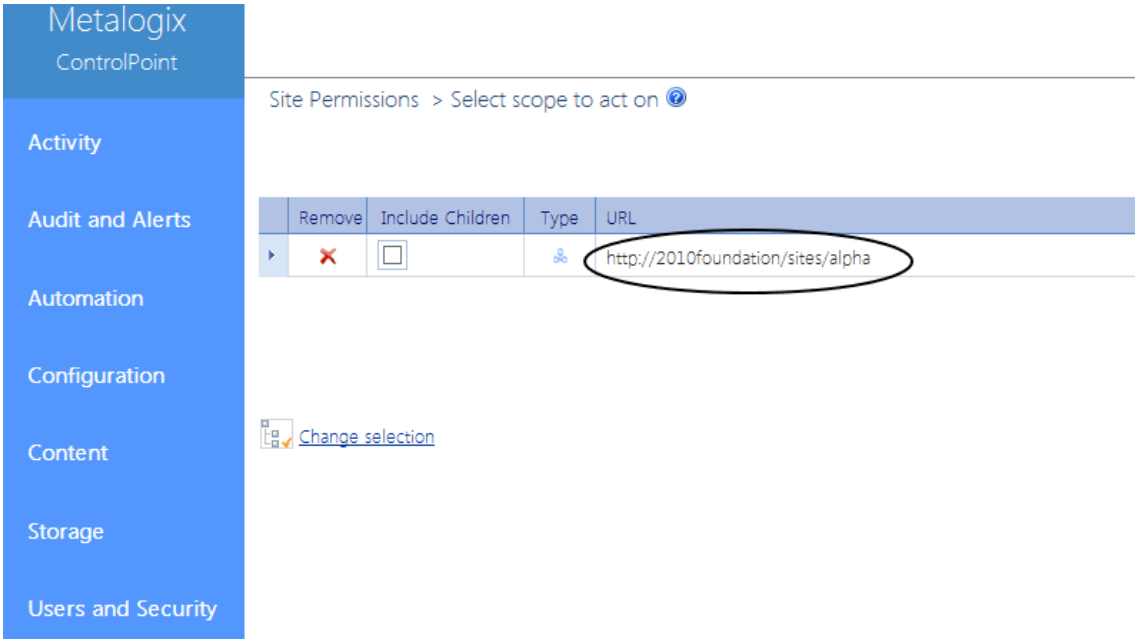


NOTE: The level of the hierarchy from which you select the object(s) determines the options available and the scope of the operation. For example, you can select objects at different levels of the hierarchy if the operation allows it. If you attempt to select objects from different levels when an operation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

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

Selecting Objects from within a SharePoint site

If you have launched ControlPoint from within a SharePoint Site, that site is pre-selected as the default scope.



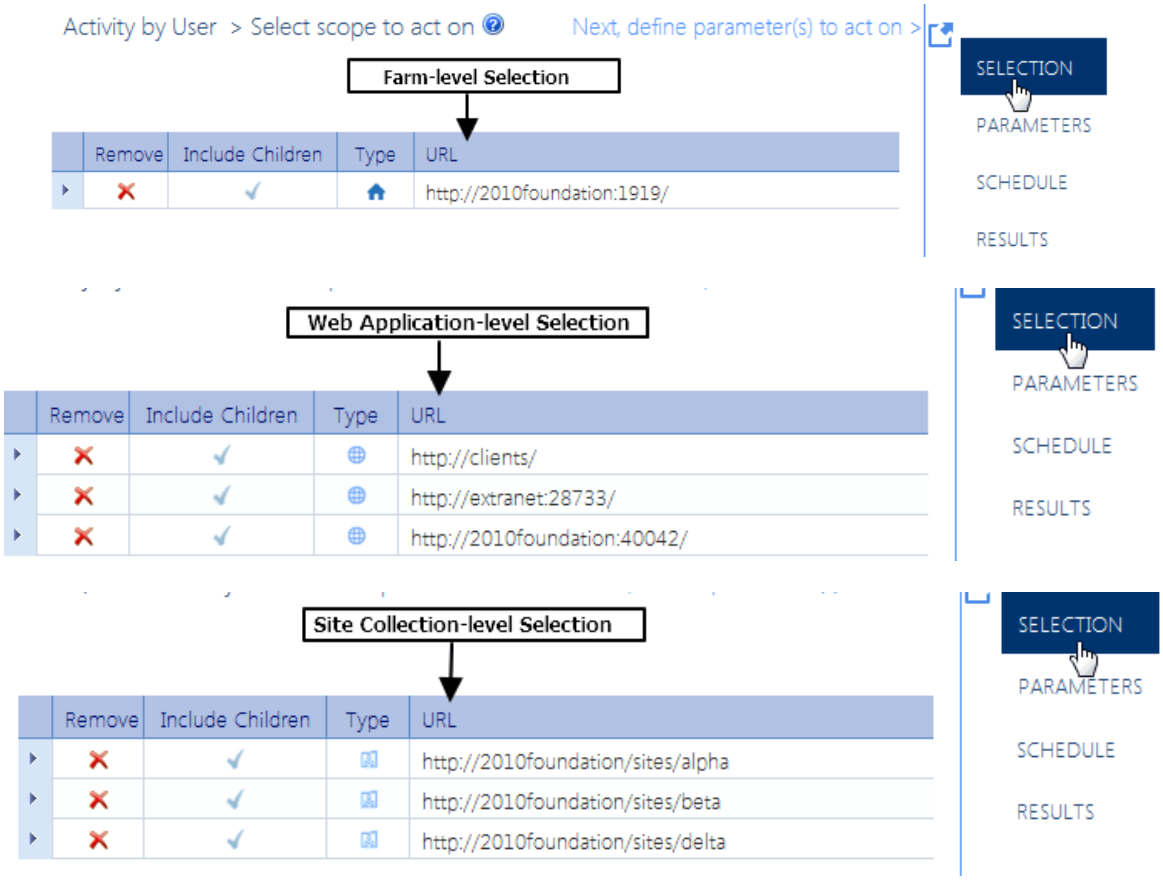
Selecting Items from Search or Data Analysis Results

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

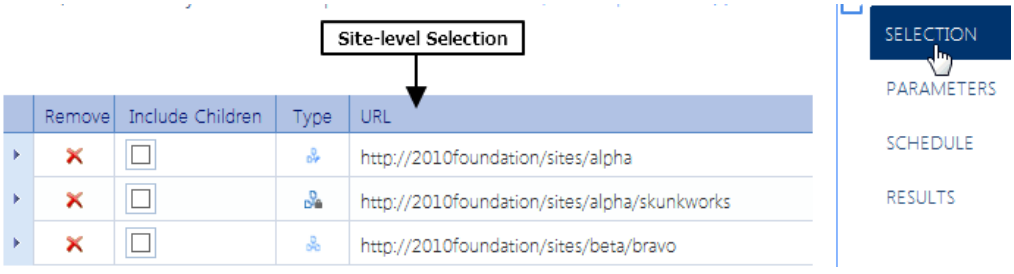
The Workspace Selection Section

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

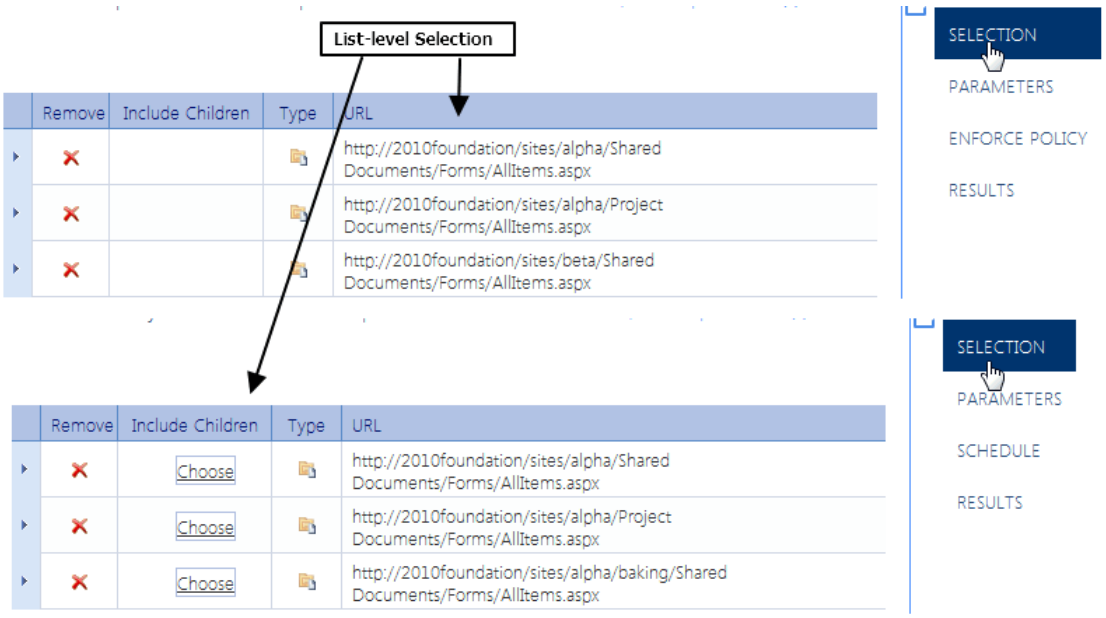
Generally, if you selected at the farm, Web application, or site collection level, all child items are included by default, as indicated by a check mark (✓) in the **Include Children** column. Because these items are simply "containers" for the actual sites and subsites on which you want to perform the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



If you selected at the site or subsite level the **Include Children** column is unchecked by default. The assumption is that you have explicitly selected only those sites and subsites on which you want to act. You can however, **Include Children** by checking this box.



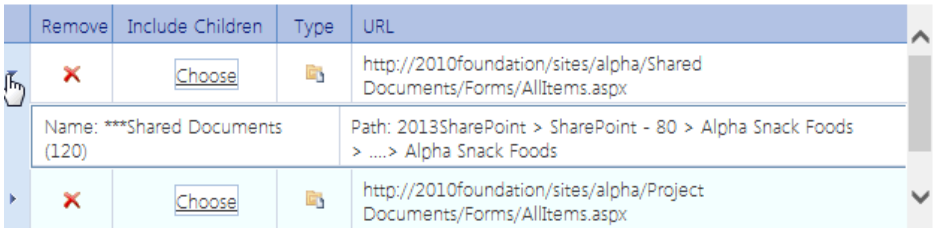
At the list level you may or may not be able to include children, depending on whether the operation can be performed on individual items. See also Selecting List Items on Which to Perform a ControlPoint Operation.



NOTE: 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.

After you have made your selection, you can:

- see more detail about an object (specifically, the **Name**, number of immediate child objects, and **Path**, by expanding the row.



- remove one or more items from the Selection pane, by clicking the Remove icon (✕)
- at the site level, explicitly select or de-select child objects, by checking/unchecking the **Include Children** box
- change the selected scope using the procedure for Changing Your Selection.

NOTE: If you originally selected one or more lists and the operation can be performed on individual items, the Selection section includes additional options. See Selecting List Items on Which to Perform a ControlPoint Operation.

Changing Your Selection

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

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

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

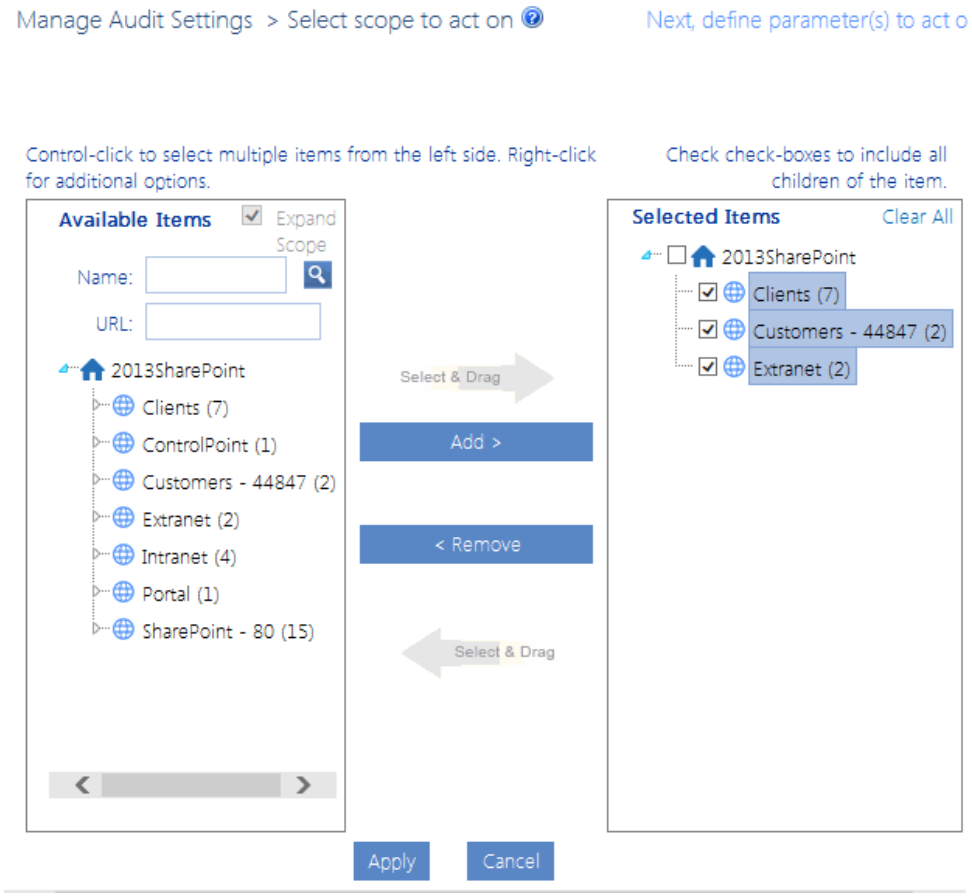
To access the Change Selection pane:

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

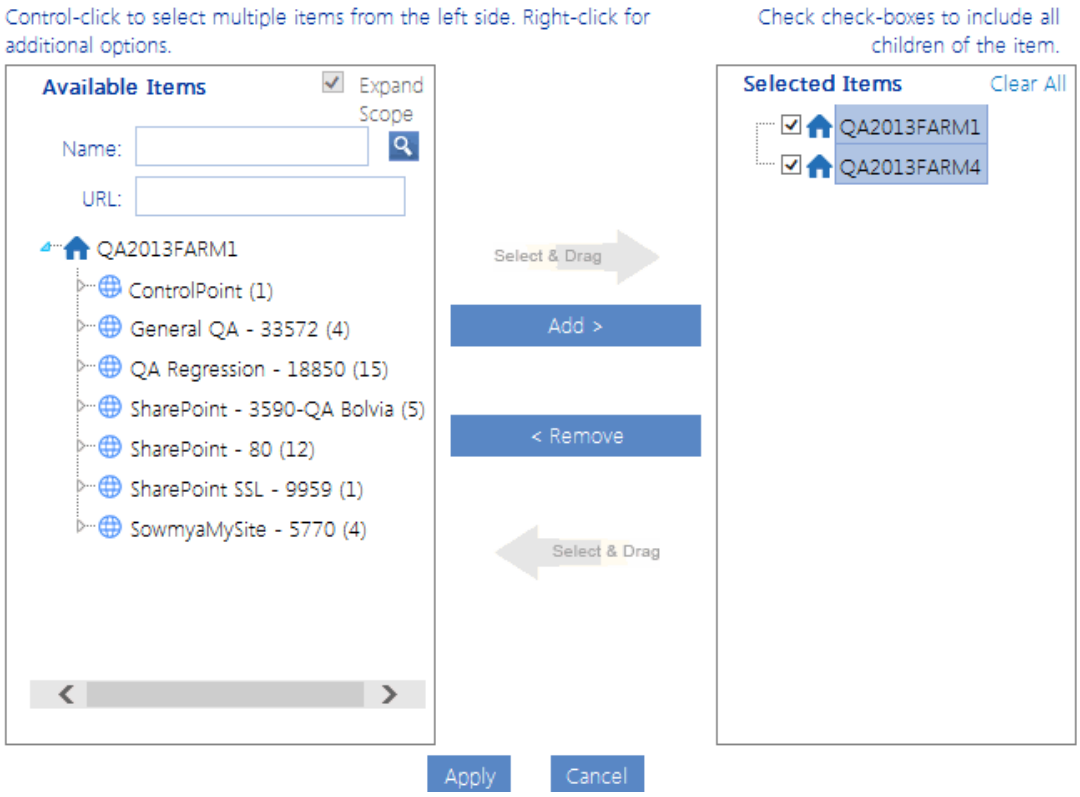
The Change Selection pane displays, which consists of two sections:

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

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



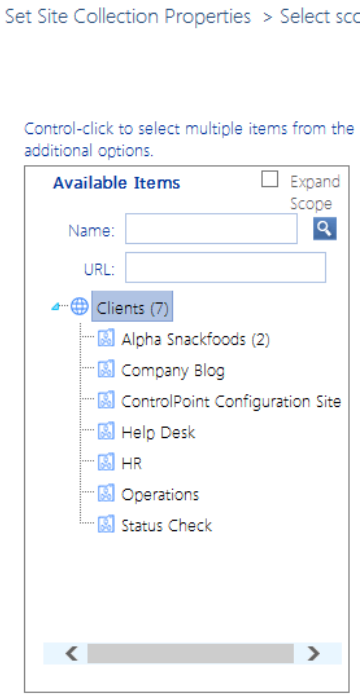
If your selection includes multiple farms, note that previously **Selected Items** from remote farms display, but only objects from the home farm are selectable from the **Available Items** list.



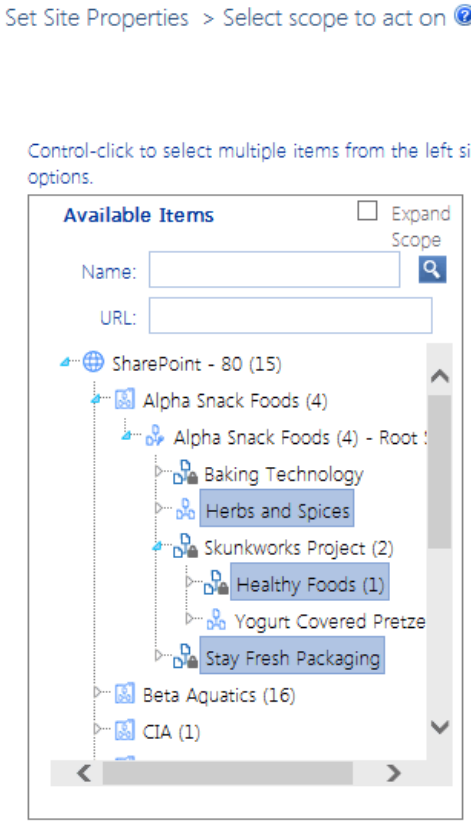
The level to which you can drill down in the Available Items list depends on the action that you want to perform.

EXAMPLES:

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



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



To modify the list of available items:

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

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

To modify the Selected Items list:

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

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

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

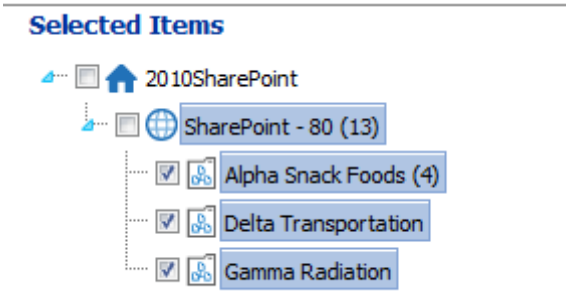
3 To add the highlighted item(s) to the selection list, do one of the following:

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

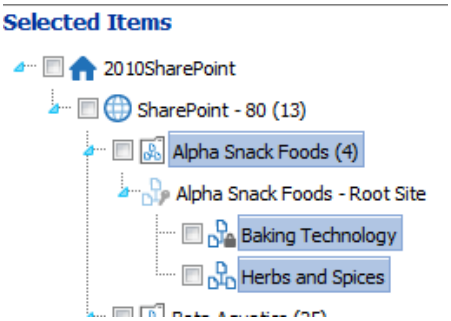
OR

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

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



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



To remove items from the Selected Items list:

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

2 Either:

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

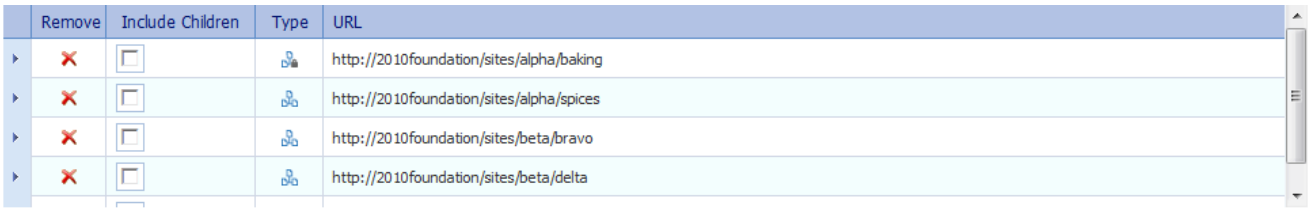
OR

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

Applying changes to the selection list:

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

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



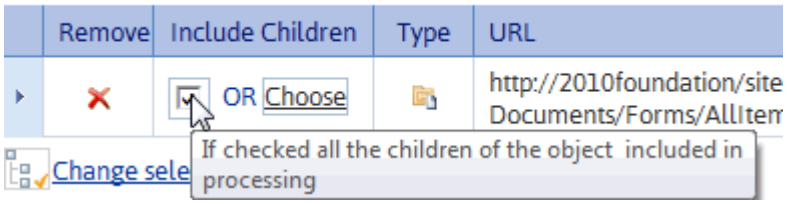
Selecting List Items on Which to Perform a ControlPoint Operation

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

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

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

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

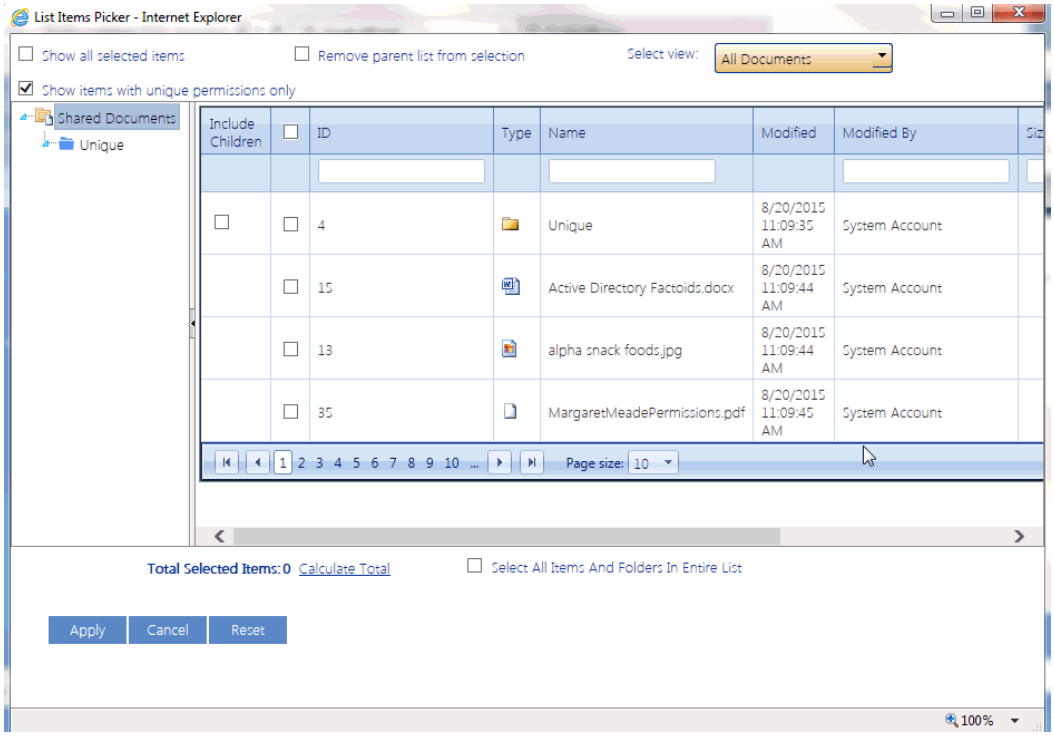


NOTE: The Include Children checkbox will not be visible if the operation requires that you select items explicitly. (Copy/Move List Items is a notable example).

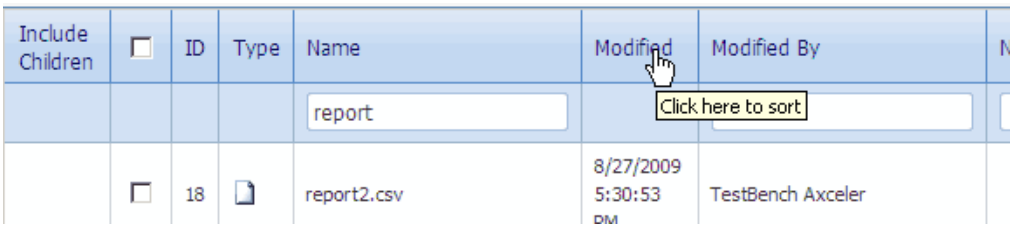
To specify folders and items to include (with or without the list itself):

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

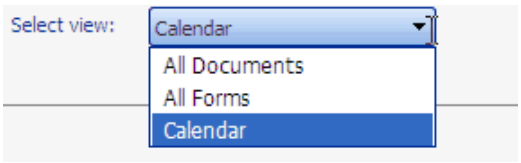
A pop-up window displays all of the items at the top level of the list hierarchy. If you want to display items within folders and subfolders, click the folder in the tree in the left pane. (You can drag the border between the left and right pane to resize, or click the arrow to open/close the left pane).



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



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



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

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

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

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

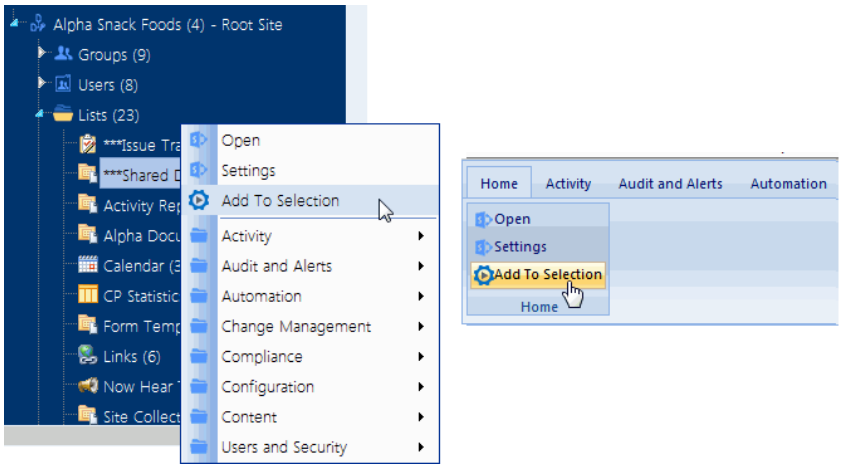
3 If, after you have finished selecting items you want to trim the list to display *only* selected items, check the **Show All Selected Items** box.

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

5 When you have finished, click [Apply].

Adding Objects from the SharePoint Hierarchy to Your Selection

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



EXCEPTIONS:

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

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

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

Saving and Re-Using a SharePoint Object Selection

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

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

- If your selection includes list items and you initiate an operation that is not valid for list items, those items will be excluded from scope.
- If you initiate an operation that can only be performed on a single object, the option to upload a selection from XML will not be available.

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

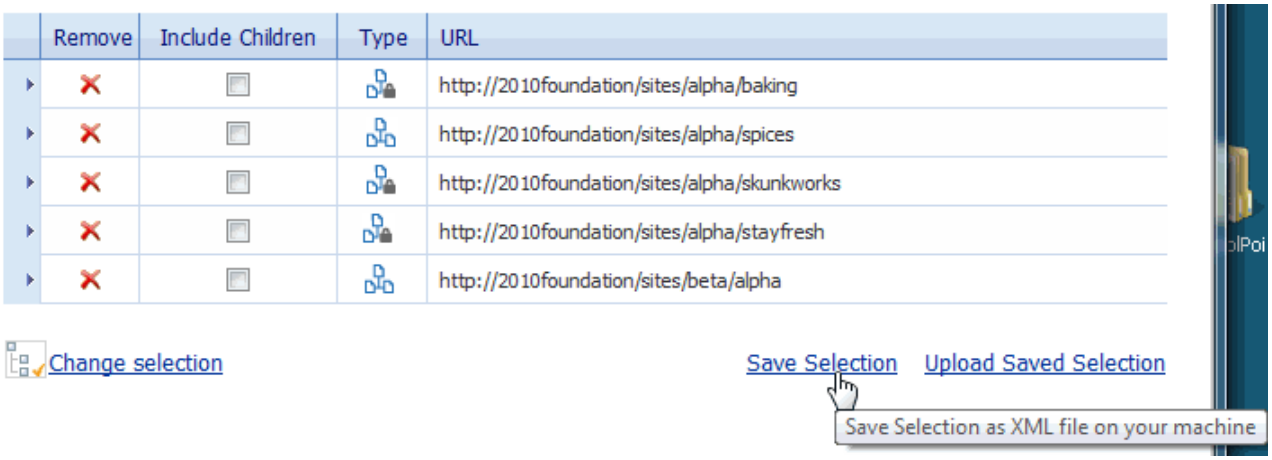
EXCEPTION: In a multi-farm environment, if a saved selection include items from more than one farm and you have initiated a ControlPoint operation that can act on multiple farms, it can be uploaded to any farm involved in the operation.

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

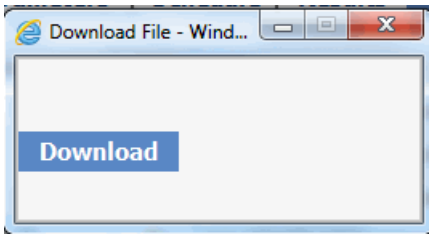
To save a selection to an XML file:

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

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



The Download File dialog displays.



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

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

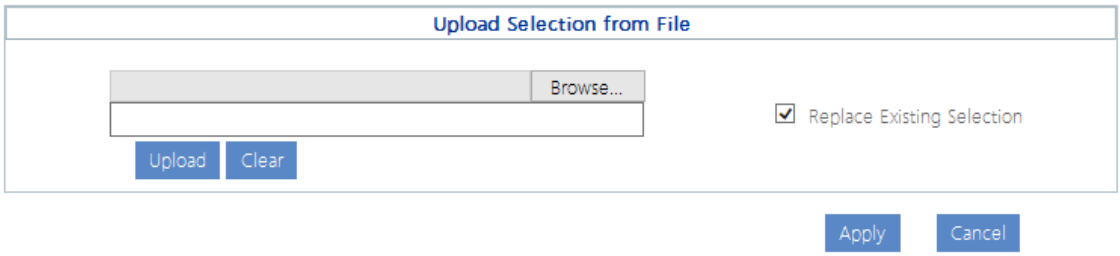
NOTE: It is recommended that you change the default file name, Selection.XML, to a name that is unique and descriptive.

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

To upload a selection from an XML file:

1 Initiate the ControlPoint operation you want to perform.

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



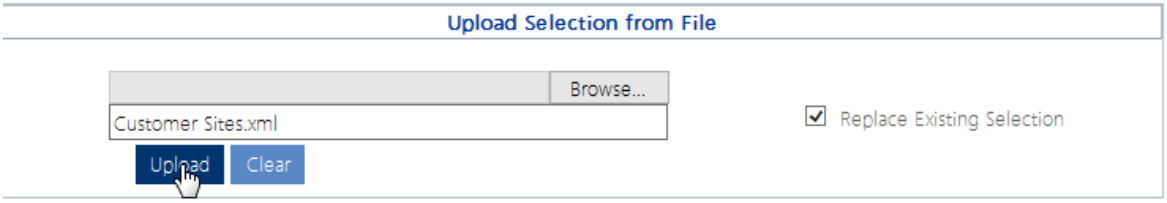
3 Click [**Browse]** and navigate to the file you want to upload.

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

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

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

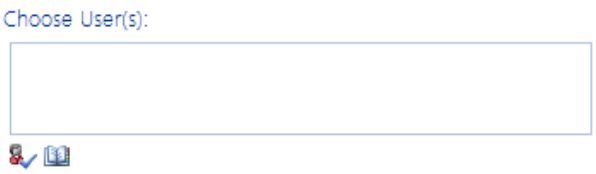
NOTE: If you leave this box unchecked, the uploaded selection will be *appended* to the current selection.



7 Click [**Apply**].

Selecting Users on Which to Perform a ControlPoint Action or Analysis

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



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



You can:

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

OR

- select one or more individual users.

Many ControlPoint operations also give you the option of selecting multiple users based on:

- a wildcard (*)

AND/OR

- a SharePoint user profile.

NOTE: There is a maximum number of users that can be included in a ControlPoint action. This limit is a "safety net" to prevent the operation from being carried out on more users than intended, which is especially useful when a wildcard is used. The ControlPoint Application Administrator can adjust this limit by changing the Value for the ControlPoint Configuration Setting Maximum Number of Users to Act on (MAXUSERSFORACTION), as described in the *ControlPoint Administration Guide*.

Selecting Individual Users

Enter the name of one or more users on which you want to perform the action or analysis. Separate each user name with a semicolon (;). You can either:

- enter a *full* user account name (for example, *domain\username* or *service provider:username*), then click the Check Names icon ( ) or press [Ctrl] k to validate the user name.

OR

- click the Browse icon ( ) and search for the user.

If your environment includes alternate authentication providers (that is, in addition to Active Directory), when you initiate an action or analysis for a single Web application you can validate or browse for individual users managed by any authentication provider supported by that Web application. Similarly, if you use

claims-based authentication and want to perform an operation on a claim, you can validate the claim if it is being performed on or within a single Web application. Because of limitations inherent in SharePoint, however, if you have selected the entire farm or *multiple* Web applications, you can type in alternate authentication-user account names or claims, but you can neither validate nor browse for them.

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

Selecting Users Based on a Wildcard

You can use a wildcard (*) to select users that you want to include in a ControlPoint operation. Only one wildcard can be used per entry and generally can be placed anywhere within the account name. ControlPoint will return all users (including Active Directory groups) whose account name matches the specified pattern. Built-in Active Directory Groups are always excluded.

For most actions and all analyses, users that match the pattern—along with their permissions—are collected from the ControlPoint data cache, which is current as of the date and time of the last Discovery run. For actions that *add* users (such as Set User Direct Permissions and Add User to SharePoint Group) ControlPoint queries Active Directory for users that match the specified pattern. Therefore, non-Active Directory users cannot be added using a wildcard.

EXAMPLES:

If you want to select ...	**Enter ...**
all users and groups within thebellum domain	bellum*.
all instances with the user name jamesjoyce, across all Active Directory domains	*\jamesjoyce. NOTE: This option cannot be used for actions that *add* users and require a query against Active Directory rather than the ControlPoint data cache. For these actions, the full domain name must be used. If you want to use a wildcard to select users in different Active Directory domains, a two-way trust relationship must exist.
all users with the last name Smith within the bellum domain	bellum*smith.

NOTE: Currently, wildcards cannot be used within the name of a claim.

Selecting Users Based on a SharePoint User Profile

If you are running MOSS or SharePoint Server, you can select users for most ControlPoint operations based on a common property defined in the SharePoint User Profile service(s) associated with the Web application.

NOTES: To use this feature, the User Profile Service Application must be enabled and associated with each of the Web applications within the scope of the action or analysis. If more than one instance of this service application is associated with a Web application, the default instance will be used.

Requirements

In order to act on or analyze users based on a SharePoint User Profile property:

- the ControlPoint Service account must have permissions to access the User Profile Service application, and
- the User Profile Service application must be associated with the Web application(s) within the scope of the operation.

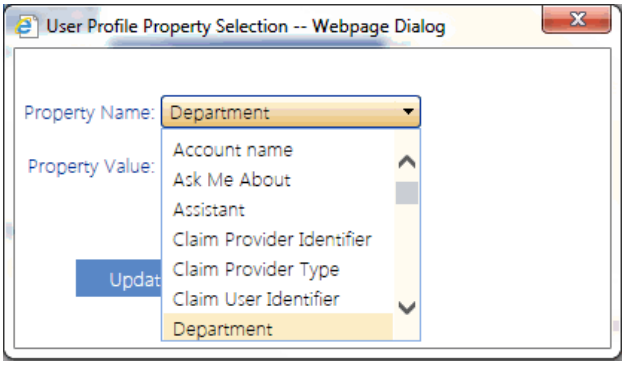
If the above requirements are not met for a particular Web application:

- In the case of an **action**:
  - profile-based users with permissions for sites within that Web application will not be acted upon, and
  - the name of each Web application that was not included in the action will be recorded in the ControlPoint Task Audit.
- in the case of an **analysis**:
  - the analysis will not continue processing, and
  - the following message will display in the analysis header: "*No User Profile Application available to service the request. Contact your farm administrator.*"

To select users based on a SharePoint User Profile property:

1 Click the profile icon () to display the Profile Property Selection dialog.

2 Select a **Property Name** from the drop-down.



NOTE: The Property Name drop-down includes properties whose Data Type is string, person, or boolean. If your selection has more than one associated User Profile service, the dialog will include properties from all associated profiles on the home farm.

3 Select or enter a **Property Value**.

NOTE: Depending on the nature of the property, the Property Value drop-down may or may not be populated. For properties of the Data Type person, enter a full account name (for example, domain\user_name). For properties of the Data Type boolean (identified in the SharePoint user profile by a check box), enter *true* (for checked) or *false* (for unchecked).

4 Click [**Upload**]

Using a Combination of User Selection Options

For most ControlPoint operations, you can specify a combination of individual users, wildcards, and/or profile properties. When a combination of selection options is used, *all* users specified through *any* of these criteria will be included in the operation.

Operations that Include Two People Pickers

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

Searching for SharePoint Sites

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

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

ControlPoint lets you:

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

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

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

Performing a Simple or Advanced Search

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

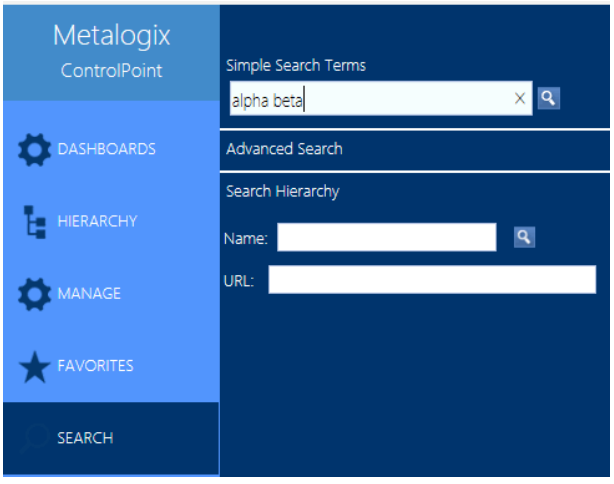
- a **simple search** (by entering a full or partial site name or url), or
- an **advanced search** (by selecting from a variety of criteria on which to base your search).

NOTE: Simple and advanced searches use cached data collected by the Discovery job. This means that it will take less time to process than a hierarchy search, which by default uses real-time data.

To perform a simple search:

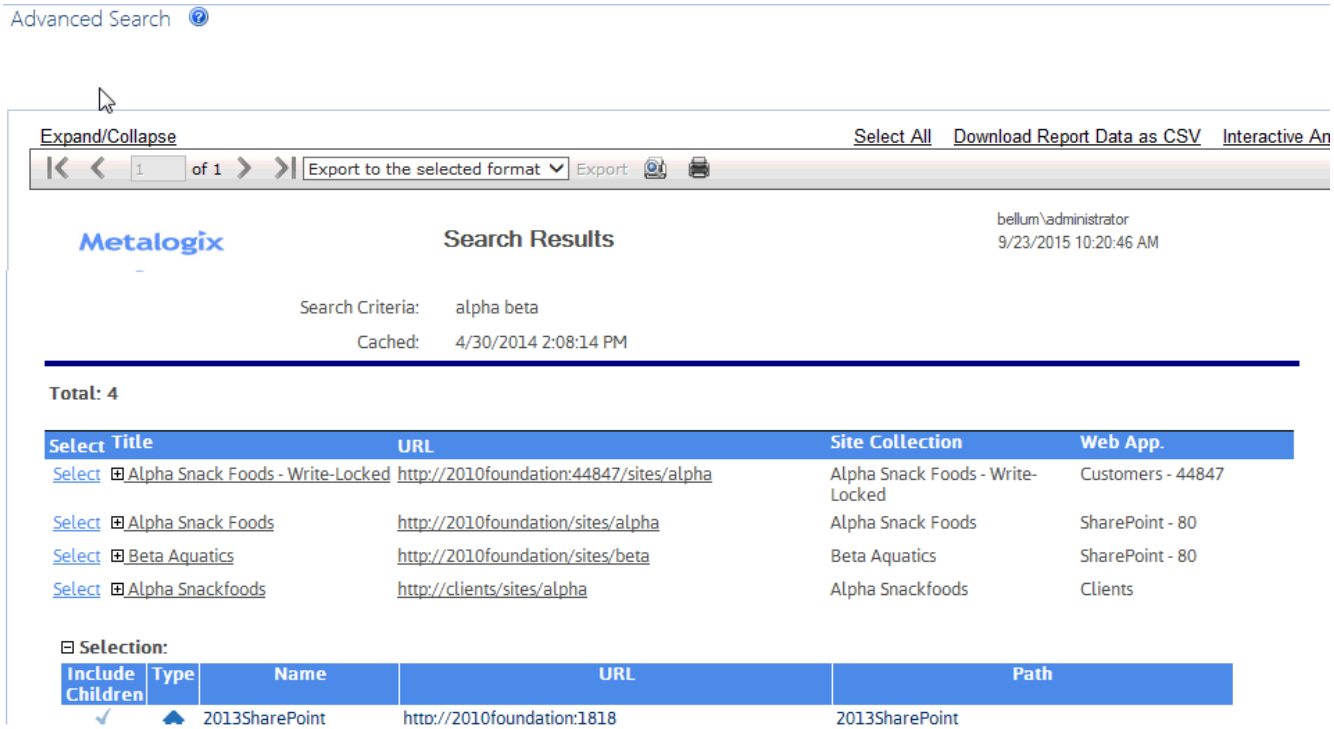
1 From the left navigation frame choose **Search**.

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



3 Click the magnifying glass icon ( ).

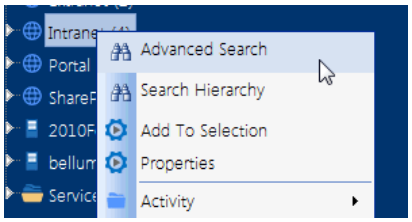
NOTE: Results will include sites that match *any* part of the text string that you entered.



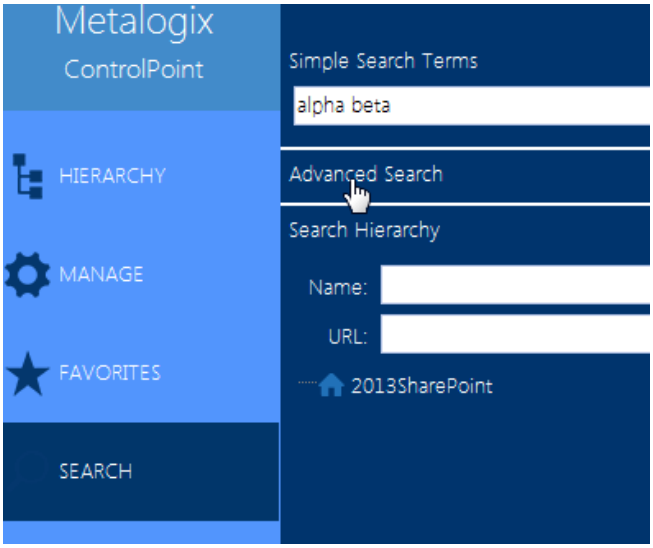
To perform an advanced search:

1 Use one of the following options:

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

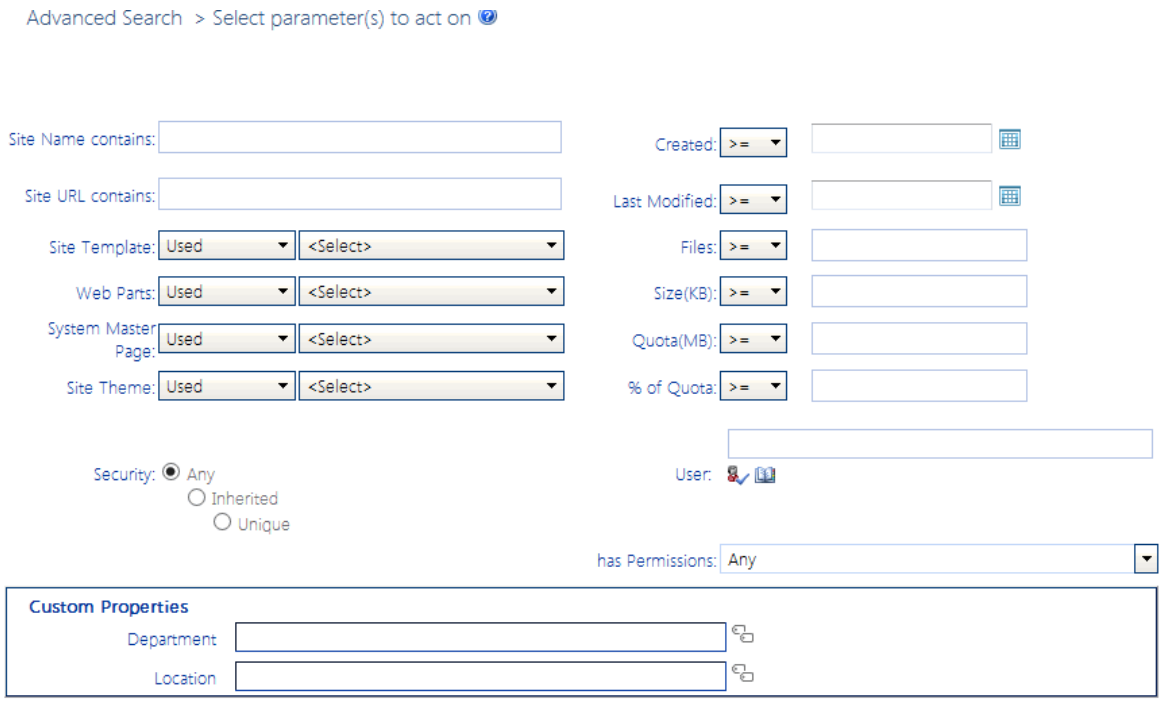


- From the left navigation frame Search tab, choose Advanced Search.



NOTE: When you initiate your search from anywhere within the SharePoint Hierarchy, the scope of the search will be limited to sites within that level of the hierarchy. When you initiate the search from the Search tab, the search will include all matching sites within the farm. The Central Administration site, however, is always *excluded* from search results.

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



You can:

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

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

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

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

- specify one or more site parameters, by selecting the appropriate operator (>=, <=, or =) and entering a value for:
  - number of Files
  - Size (KB)
  - Quota

- % of Quota
- Created date, and/or
- Last **Modified** date.

NOTE: If you enter a **Quota** <= a specified value, sites for which a quota has *not* been set will also be included in results.

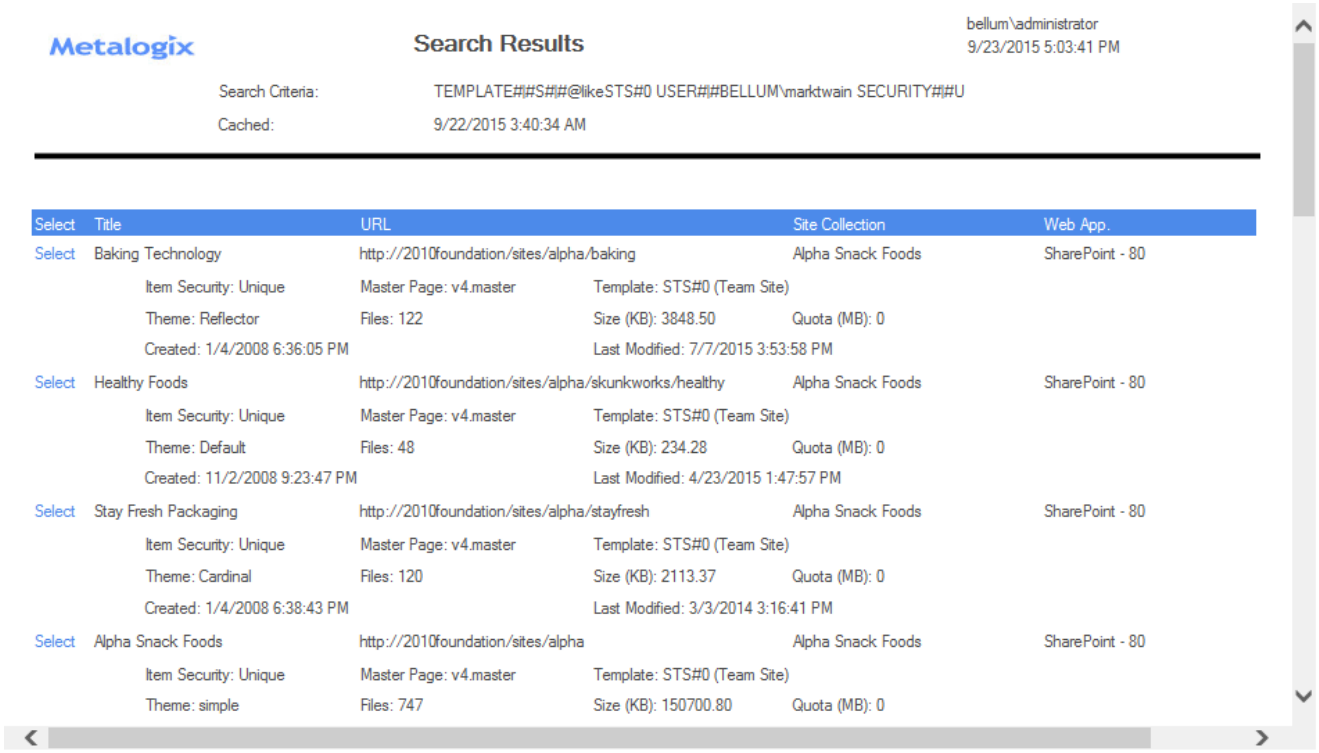
- select a **Security** level that is currently in use in the site's "has permissions" field.
- select whether you want to find sites which have permissions that are either **Inherited** or **Unique**.
- find sites for which a specific user has permissions; by selecting a user.

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

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

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

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



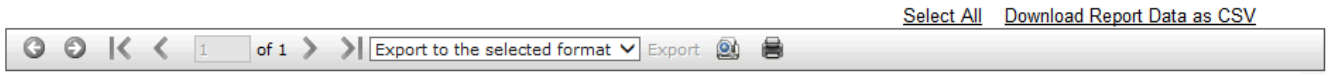
If you want to initiate a new search or change search criteria, first click [**Reset**] to clear the contents of the Advanced Search window.

Working with Simple or Advanced Search Results

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

Search Results Toolbar

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



Search Results Header

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

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



Search Results Footer Information

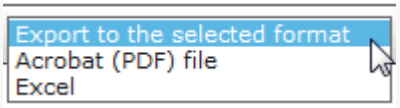
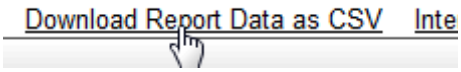
The search footer contains the following information:

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



Acting on Search Results

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

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

Searching within the SharePoint Hierarchy

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

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

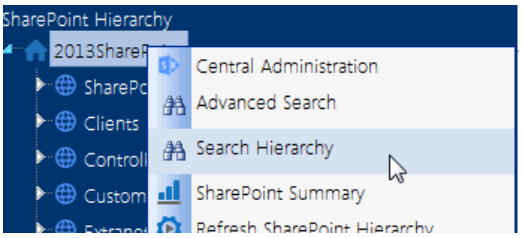
You can initiate a SharePoint Hierarchy search from various locations in the SharePoint Hierarchy panel, as well as from the Search Hierarchy panel. The scope of the search is determined by the location in the hierarchy from which it was initiated. That is, if you initiate the search at the farm level or directly from the Search Hierarchy menu, all matching sites within the farm will display. If you initiate the search at the Web

application level, results will be limited to matching sites within the Web application, and so on. In a multi-farm environment, you can only search the home farm.

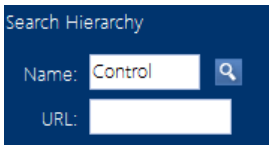
NOTE: By default, the Search Hierarchy feature uses real-time data. However, to enable faster searches in large environments, ControlPoint Application Administrators can change the default value of the ControlPoint Configuration Setting. If cache data is used, however, results will not return results for which your only permissions are Full Control in the Web Application Policy.

To perform a hierarchy search:

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

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

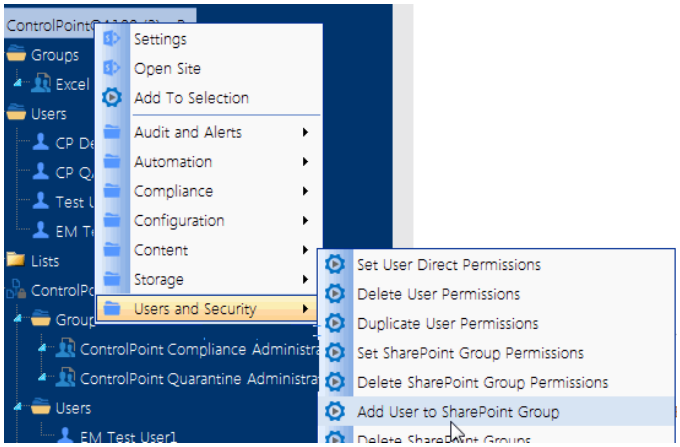
2 Enter a full or partial **Name** and/or **URL**.



3 Click the magnifying glass icon ( ).

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

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



Managing SharePoint Objects

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

Accessing SharePoint Pages

From the SharePoint Hierarchy panel, you can

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

EXCEPTION: By default, all Central Administration and site collection-level administration pages are absent from Business Administrators' menus.

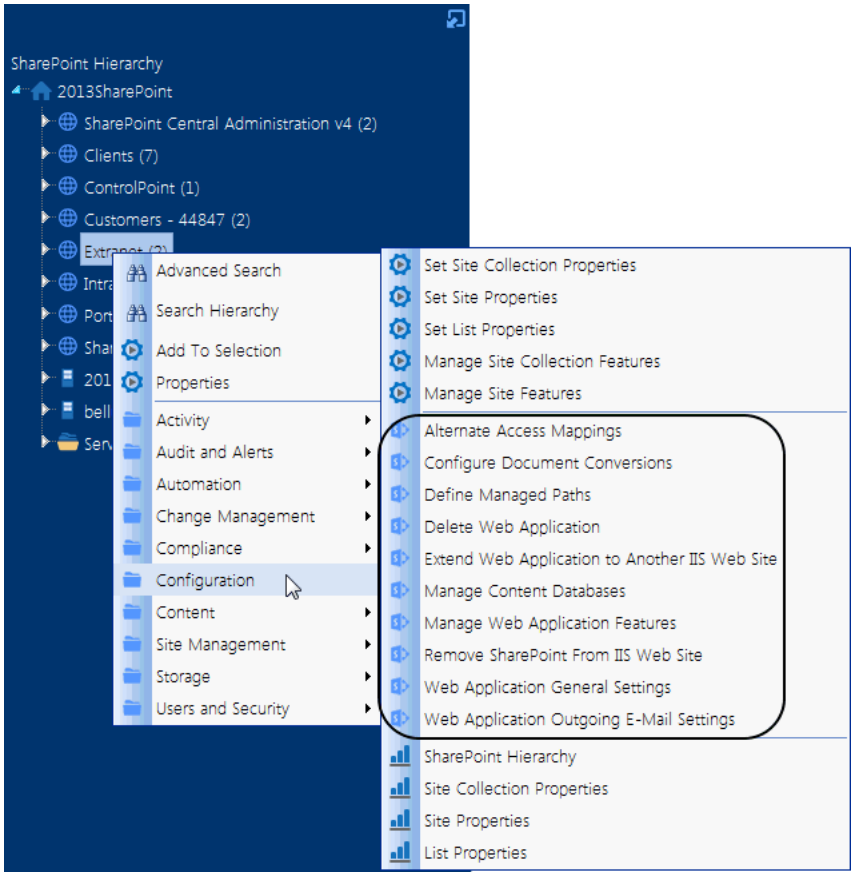
One of the advantages of using ControlPoint over native SharePoint to access these pages is that you can link *directly* to the appropriate page, within the relevant context, and without having to enter a url. In a multi-farm environment, you can access SharePoint pages for either the home farm or a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

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

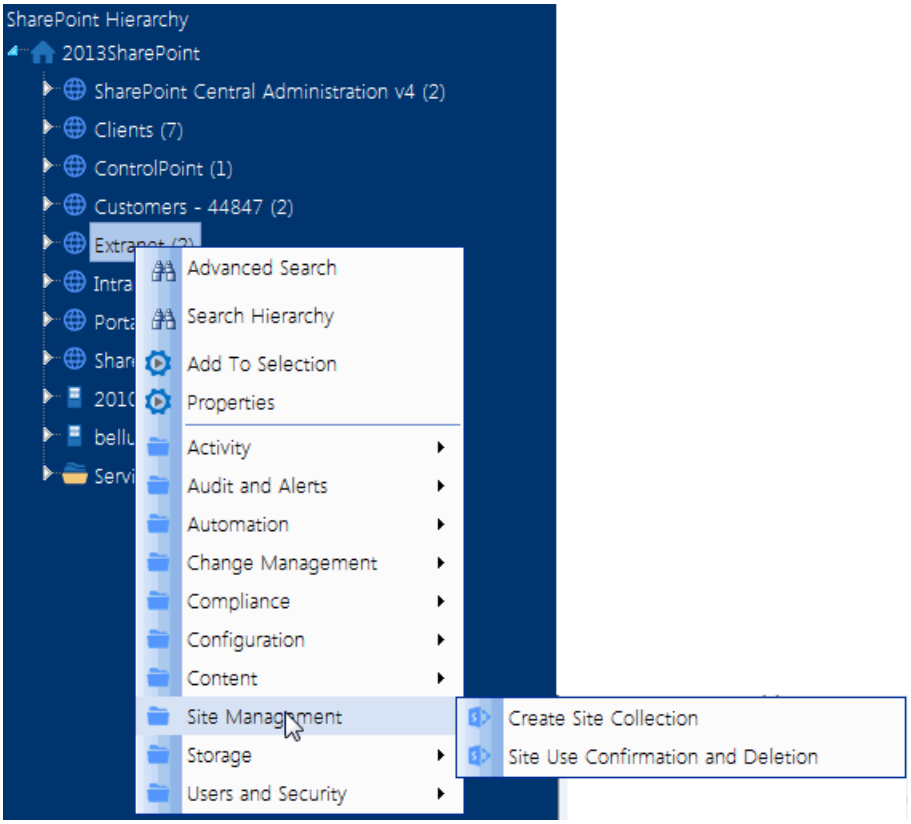
Accessing SharePoint Web Application Administrative Pages

A variety of SharePoint Central Administration pages can be accessed from a Web application's right-click menu for:

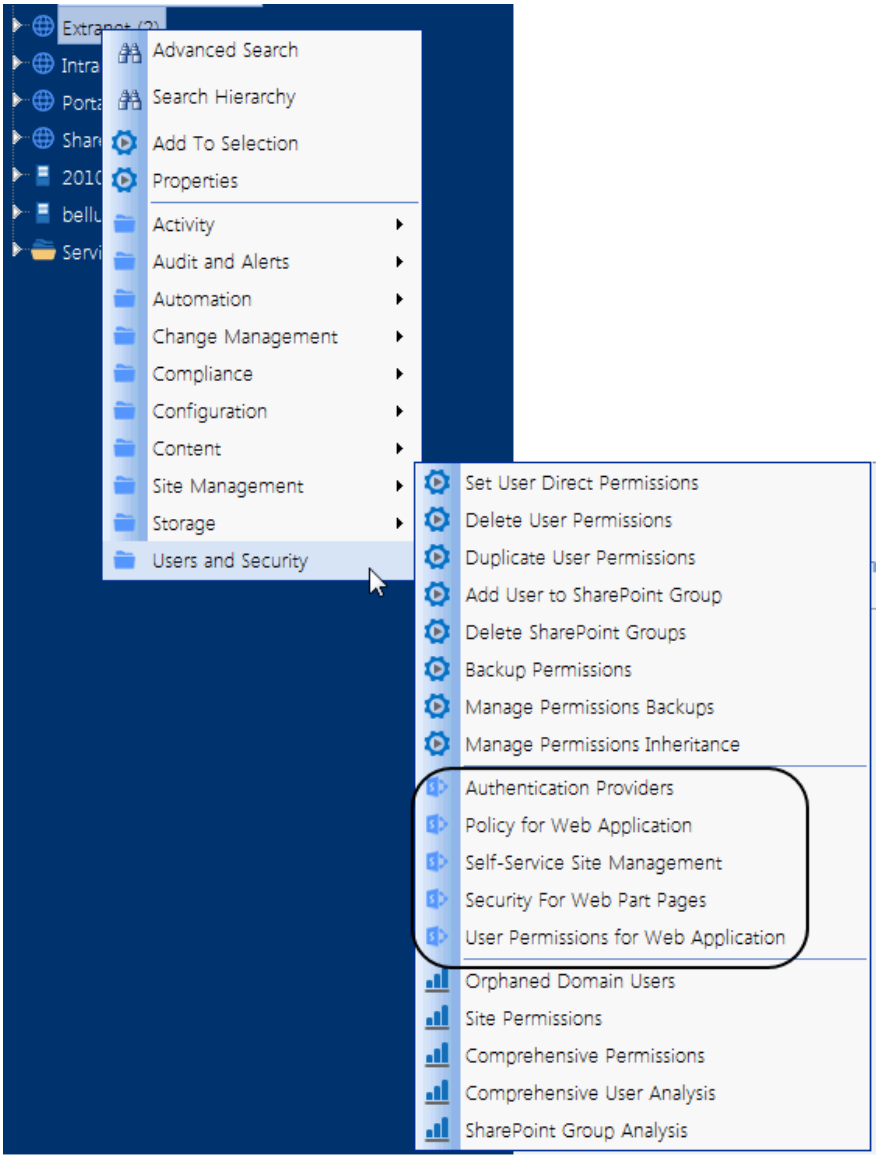
- Web application configuration



- site management



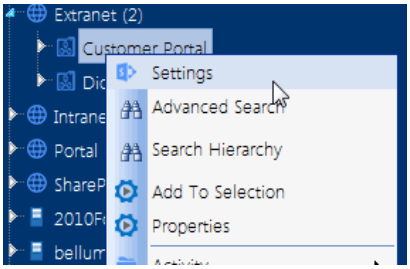
- managing Web application security policies and permissions.



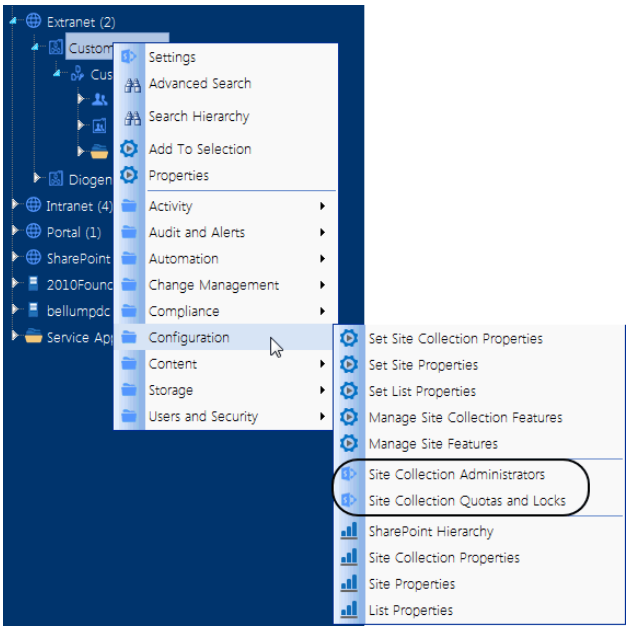
Accessing SharePoint Site Collection Administration Pages

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

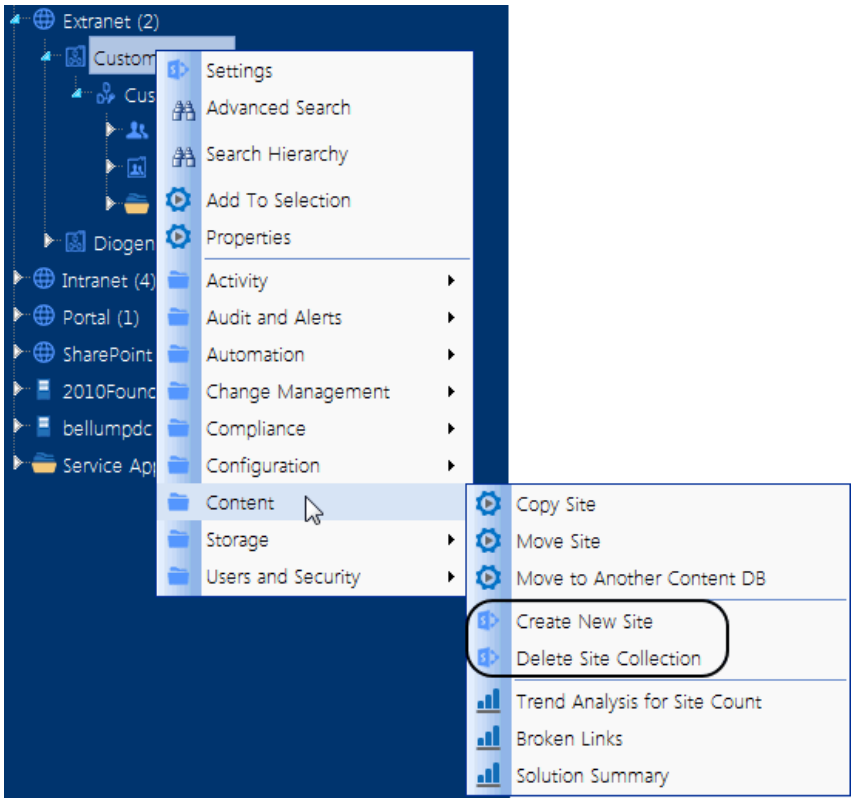
- Site Settings (for the root site)



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



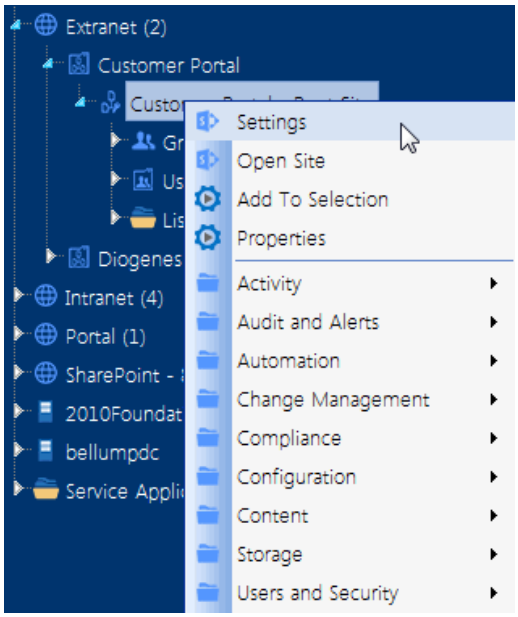
- Pages for managing a site collection's Content, including Content and Structure and site creation and site collection deletion.



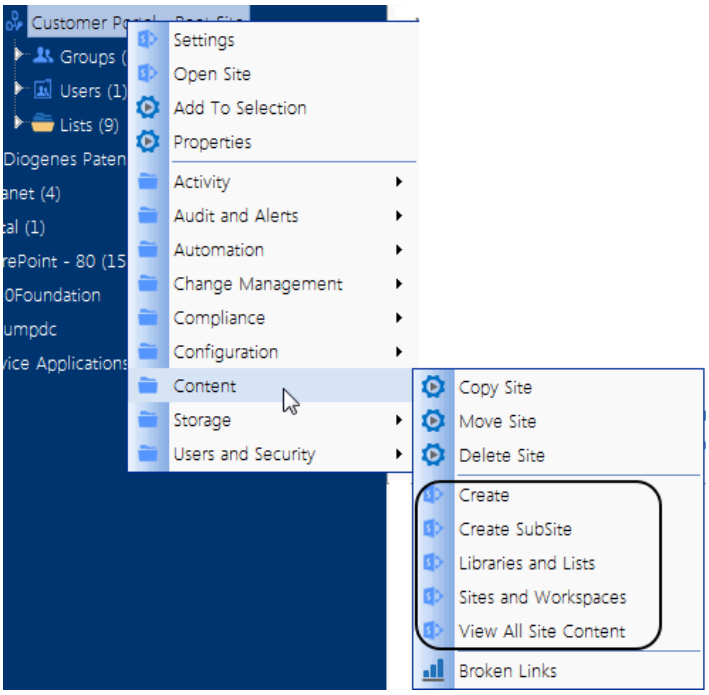
Accessing SharePoint Site Administration Pages

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

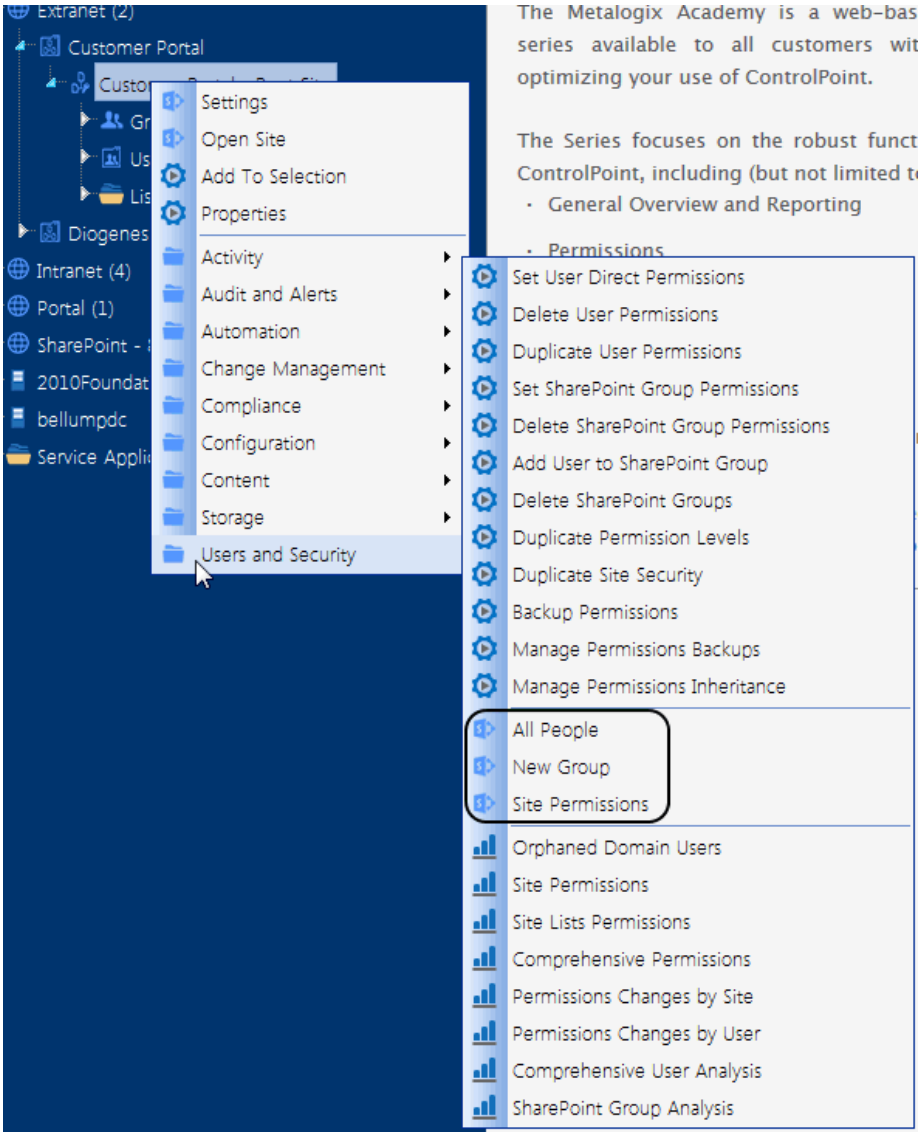
- Site Settings



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



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

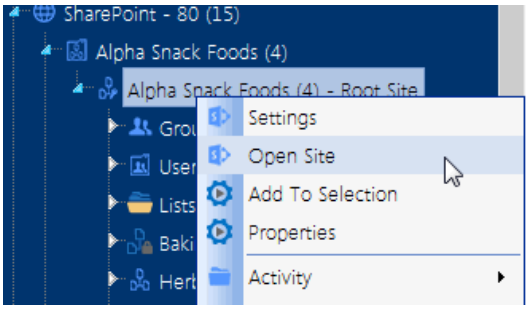


Opening a SharePoint Site in ControlPoint

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

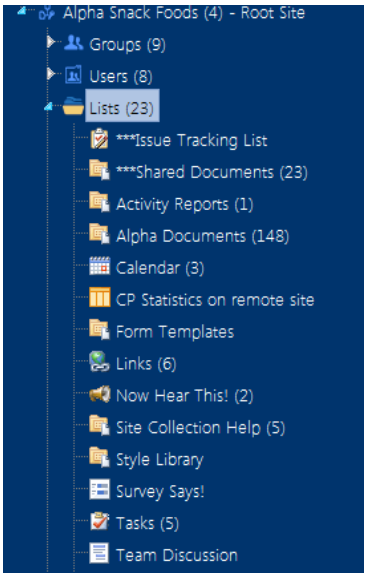
To open a SharePoint site in ControlPoint:

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



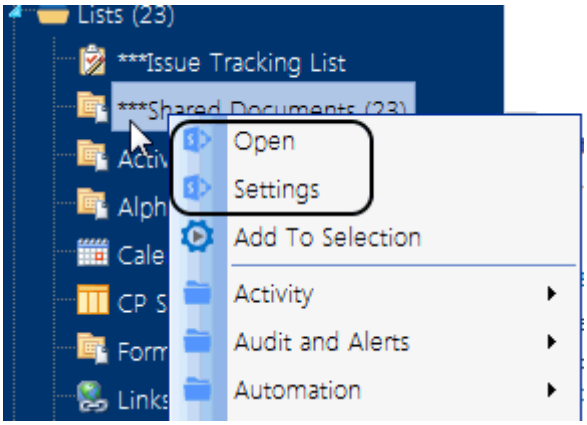
Accessing SharePoint Pages for Managing Libraries and Lists

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



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

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



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

Viewing Properties of an Object within the SharePoint Hierarchy

From the SharePoint Hierarchy, you can access an at-a-glance summary of key properties for the farm, a Web application, a site collection, or a site.

You can also retrieve the following statistics for an object at any level of the hierarchy:

- the total number of unique users who have permissions, and
- the total number of users with activity over the past 30 days.

  EXCEPTION: If your SharePoint environment is WSS only, (and therefore does not include usage reporting) the total number of users with activity cannot be calculated.

In a multi-farm environment, you can view properties for either the home farm or a remote farm.

To view an object's properties:

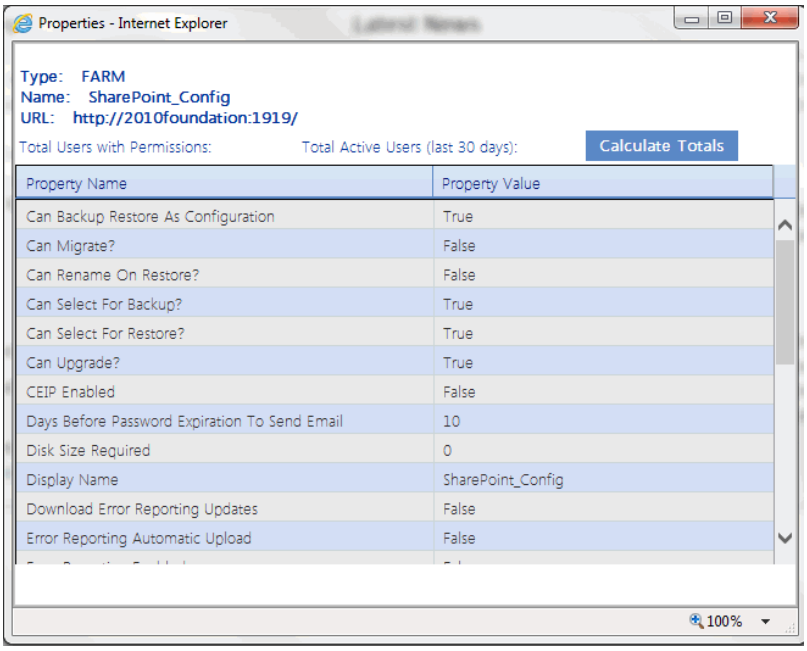
1 From the SharePoint Hierarchy panel, select the object whose properties you want to view.

  NOTE: You can only view properties for a single object at a time (that is, the multiple selection is unavailable).

2 Right-click and select **Properties**.

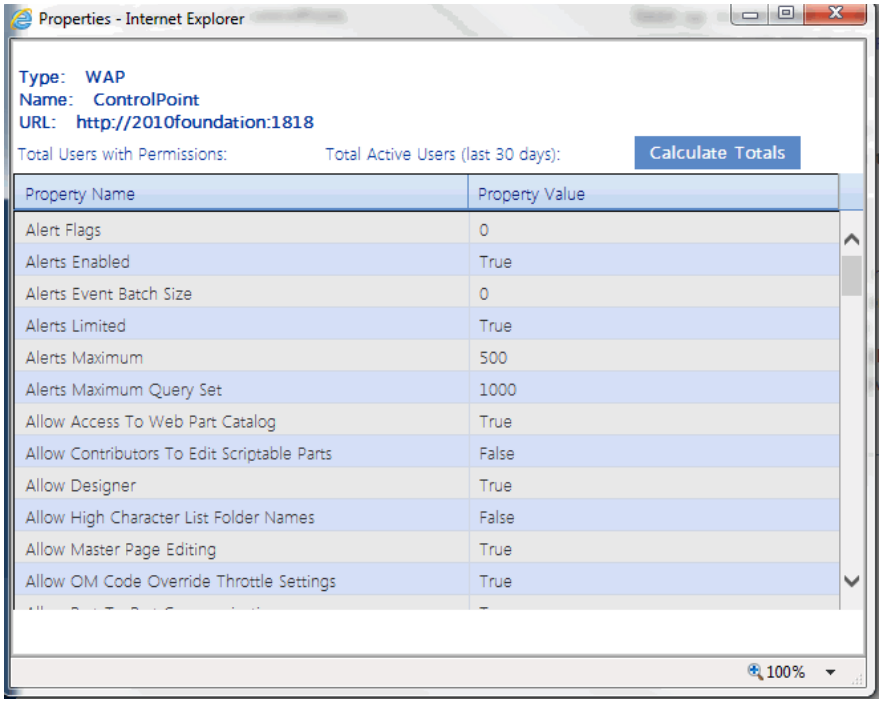
Farm Properties

Farm-level properties are maintained in Operations section of the SharePoint Central Administration site.



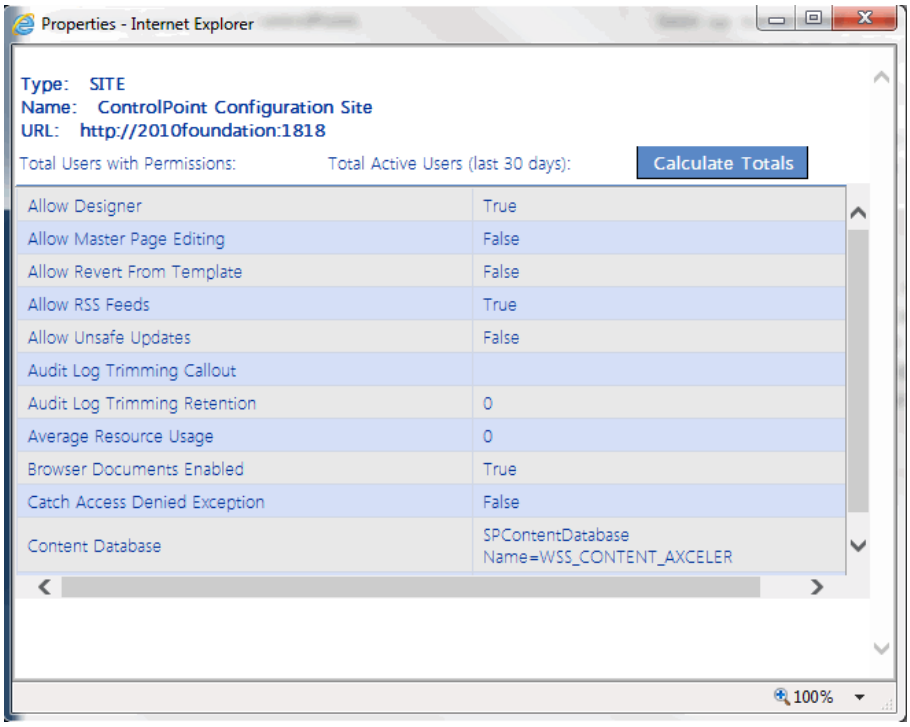
Web Application Properties

Web application-level properties are maintained in the Application Management section of the SharePoint Central Administration pages.



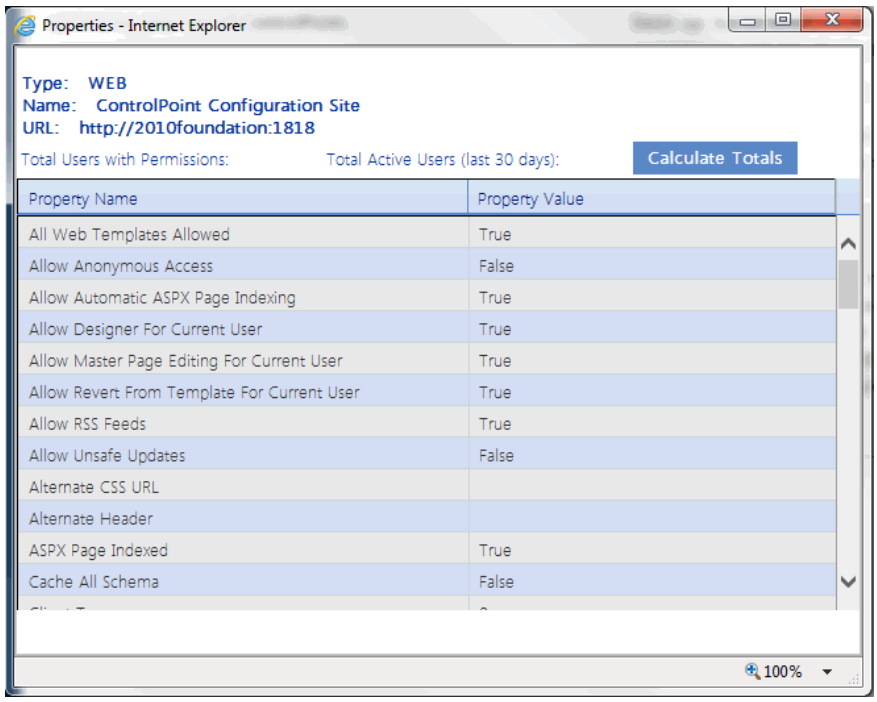
Site Collection Properties

Site Collection properties are maintained in the SharePoint Site Collection Administration area.



Site Properties

Site-level properties are maintained in SharePoint Site Settings pages.



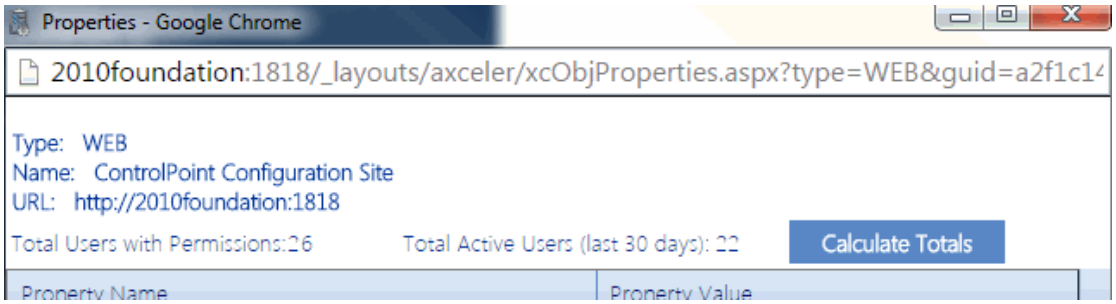
To view user permissions and activity totals (at any level of the SharePoint Hierarchy):

Click [**Calculate Totals**].

When the values have been calculated, the following information displays at the top of the Properties dialog:

- **Total Users with Permissions**
- **Total Active Users** (last 30 days)

NOTE: These totals reflect *unique* users. (That is, any user who has more than one set of permissions to a site is only counted once).



- **Total Users with Permissions** includes:
  - Web application Service Accounts
  - Users granted permissions through Web application policies
  - Site Collection Administrators
  - Users within Active Directory groups to which the ControlPoint Service Account has access (that is, within the same domain or forest, in a different domain/forest for which with a two-way trust exists, or in a different domain/forest with a one-way outgoing trust that ControlPoint can authenticate via the ControlPoint Manage Forest Access feature. Disabled Active Directory accounts are included in this total. If an Active Directory user has been renamed but still has permissions in SharePoint under the old name, each name will be counted as a separate user.
- Excluded from this total are built-in groups and special accounts, such as nt authority\authenticated users (or any account that begins with "nt authority") and sharepoint\system, and users granted permissions via augmented Claims or alternate authentication providers.

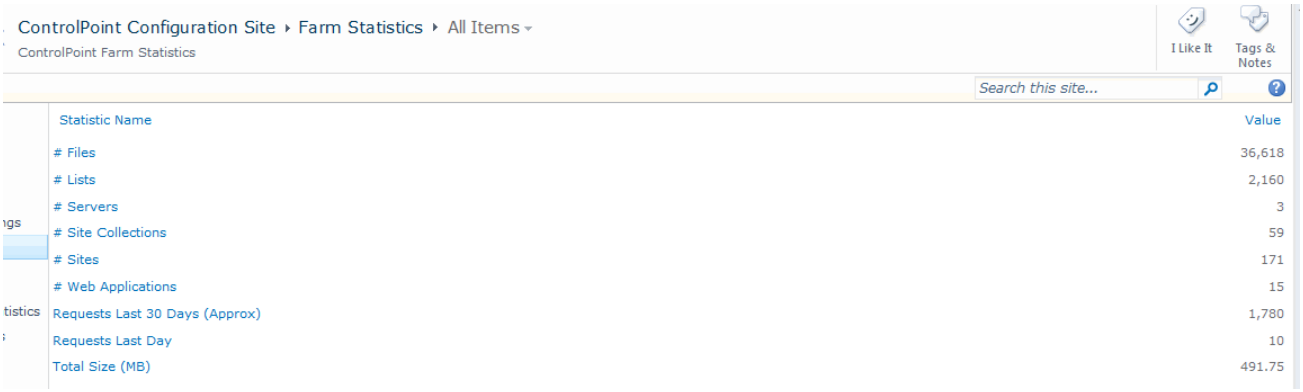
  NOTE: Total Users with Permissions uses data recorded in the ControlPoint Service Database (xcAdmin), and is current as of the last Discovery run. (The actual number of users *within Active Directory groups* is counted in real-time, however.)

  Total Active Users uses 30 days worth of activity data that is collected by the SharePoint usage job(s), and is as current as the last time the job(s) ran.

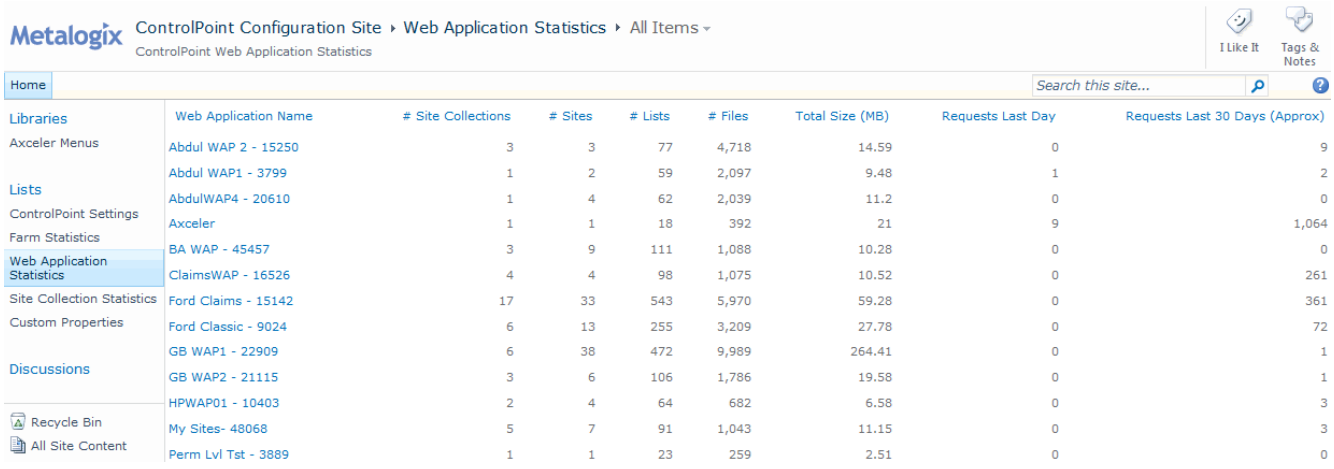
Creating Dashboards for Monitoring Statistics within Your SharePoint Farm

The ControlPoint Configuration site contains the following custom lists that ControlPoint Application Administrators can use to create "dashboards" of Web Parts for monitoring statistics within a SharePoint farm:

- **Farm Statistics -** Individual farm-wide metrics that are typically presented individually.



- **Web Application Statistics** - Rows of data about each Web application. Depending on your needs, you can present aggregate data (column sums, maximums, standard deviation, and so on).



- **Site Collection Statistics** - Rows of data about each site collection which, like Web Application Statistics, can be customized to present aggregate data as well as key performance indicators (KPIs).



NOTE: by default, the Site Collections Statistics list includes all site collections in the farm. ControlPoint Application Administrators can, however, eliminate from the list groups of site collections that they do *not* want to monitor by excluding the Web applications that host them as described in the *ControlPoint Administration Guide*. This may be useful, for example, if the number of site collections in your farm exceeds the SharePoint recommended maximum number of list items.

You can configure an additional list, the Web Statistics KPI/Status List, to track key performance indicators for selected statistics if:

- **for SharePoint 2010**:
  - you have a SharePoint Server Enterprise-based environment, and
  - the feature "SharePoint Server Enterprise Site Features" has been activated on the ControlPoint Configuration root site.
- **for SharePoint 2007**:
  - you have a MOSS Enterprise-based environment, and
  - the feature "Office Services Enterprise Site Features" has been activated on the ControlPoint Configuration root site.

NOTE: This list type has been deprecated as of SharePoint 2013.

How Statistics Lists are Populated

Statistics lists are populated as part of the *nightly* Full Discovery timer job. When this job runs, the lists are cleared and re-populated with current data.

NOTE: Because of the way in which they are populated, if any of these lists are copied or moved, statistics data will become static (that is, it will not be updated) in the new location.

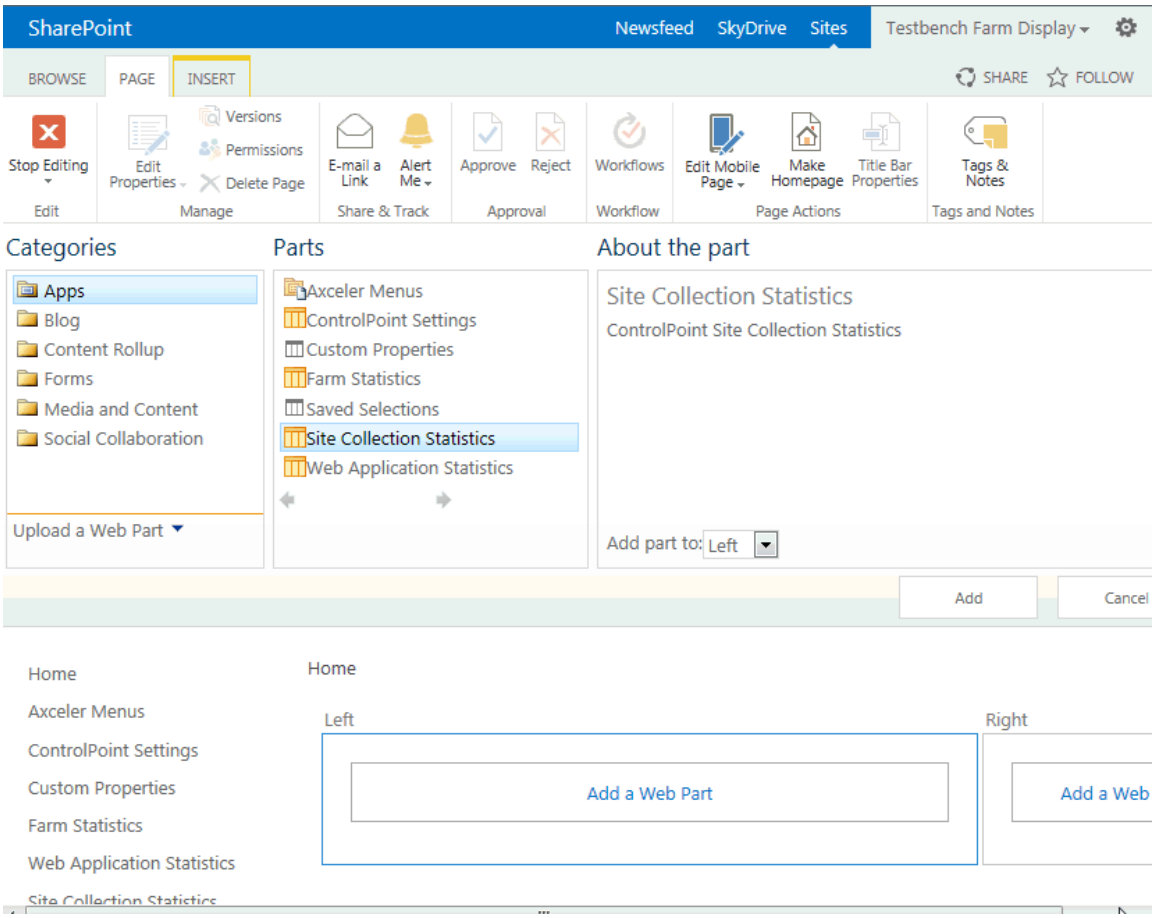
To create a statistics dashboard on the ControlPoint Configuration root site main page:

NOTE: The steps below are intended to provide introductory guidelines for creating dashboards on the ControlPoint Configuration root site main page. Consult your SharePoint documentation and other available resources for more detailed instructions and/or guidance in using alternate tools and techniques.

1 From the ControlPoint Configuration site main page, choose Site Actions > Edit Page.

2 Click **Add a Web Part**, then choose the list(s) that you want to add as Web Parts to that area of the page.

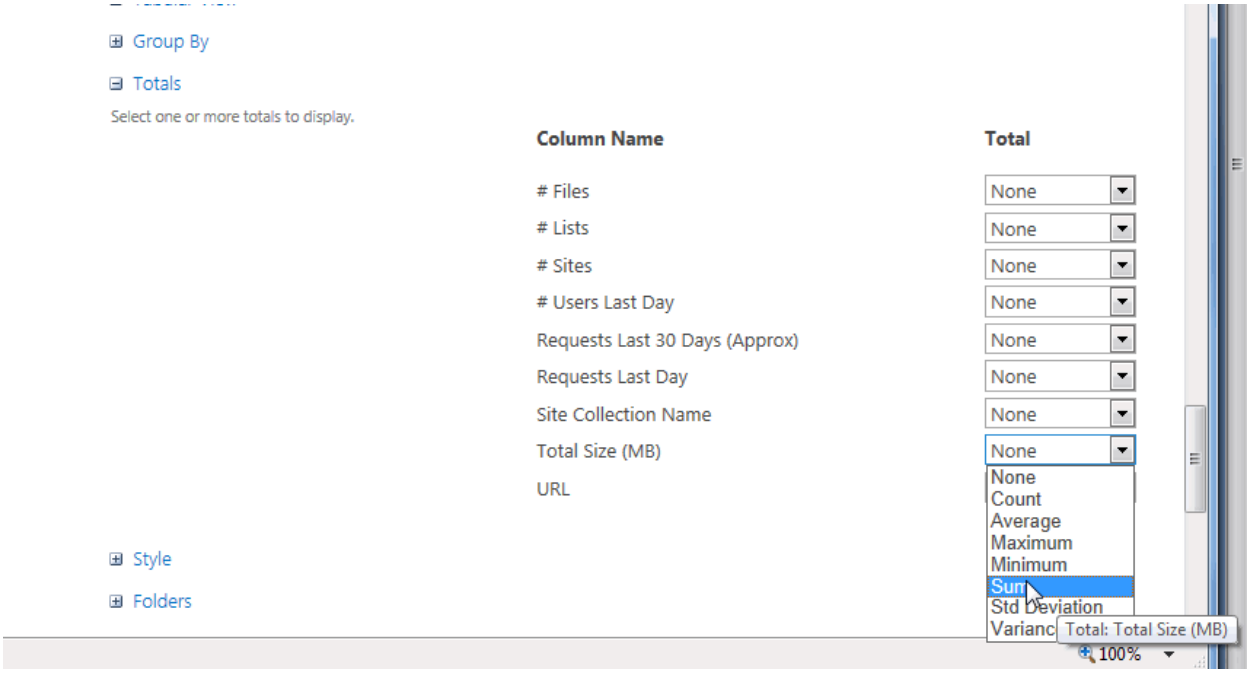
EXCEPTION: The Web Statistics KPI List is configured and added to the page using a different method. See "To configure the Web Statistics KPI, " following.

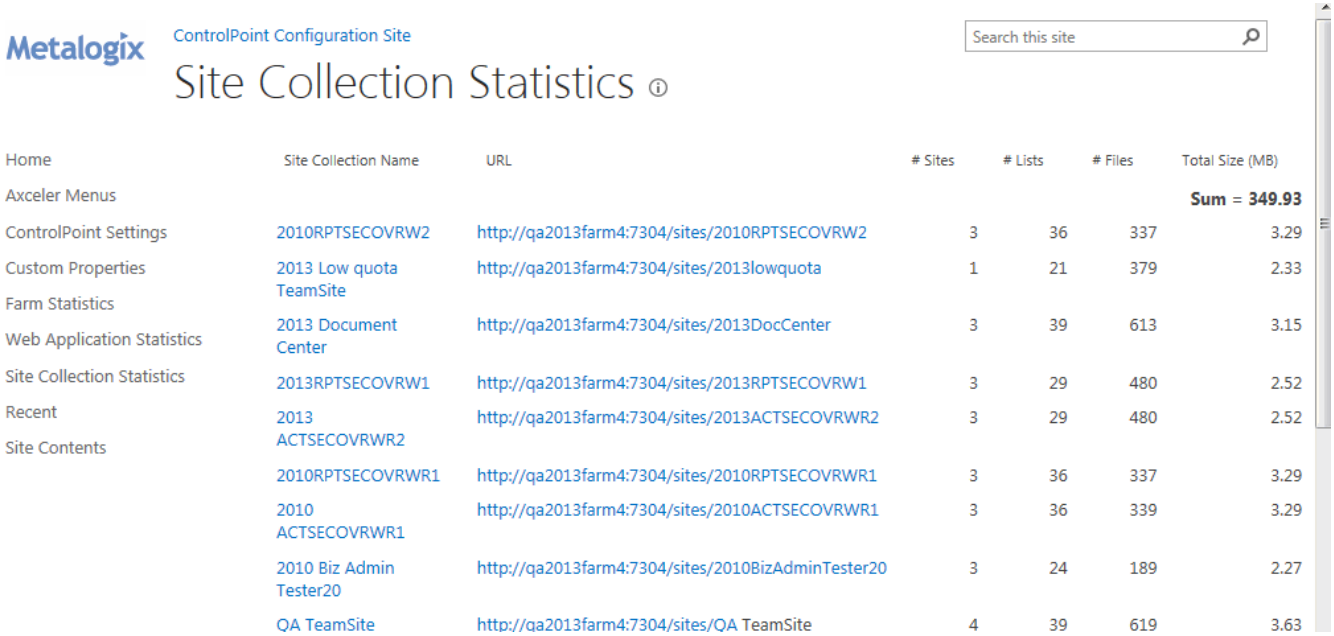


You can either use the default view that has been defined for the list or create a custom view.

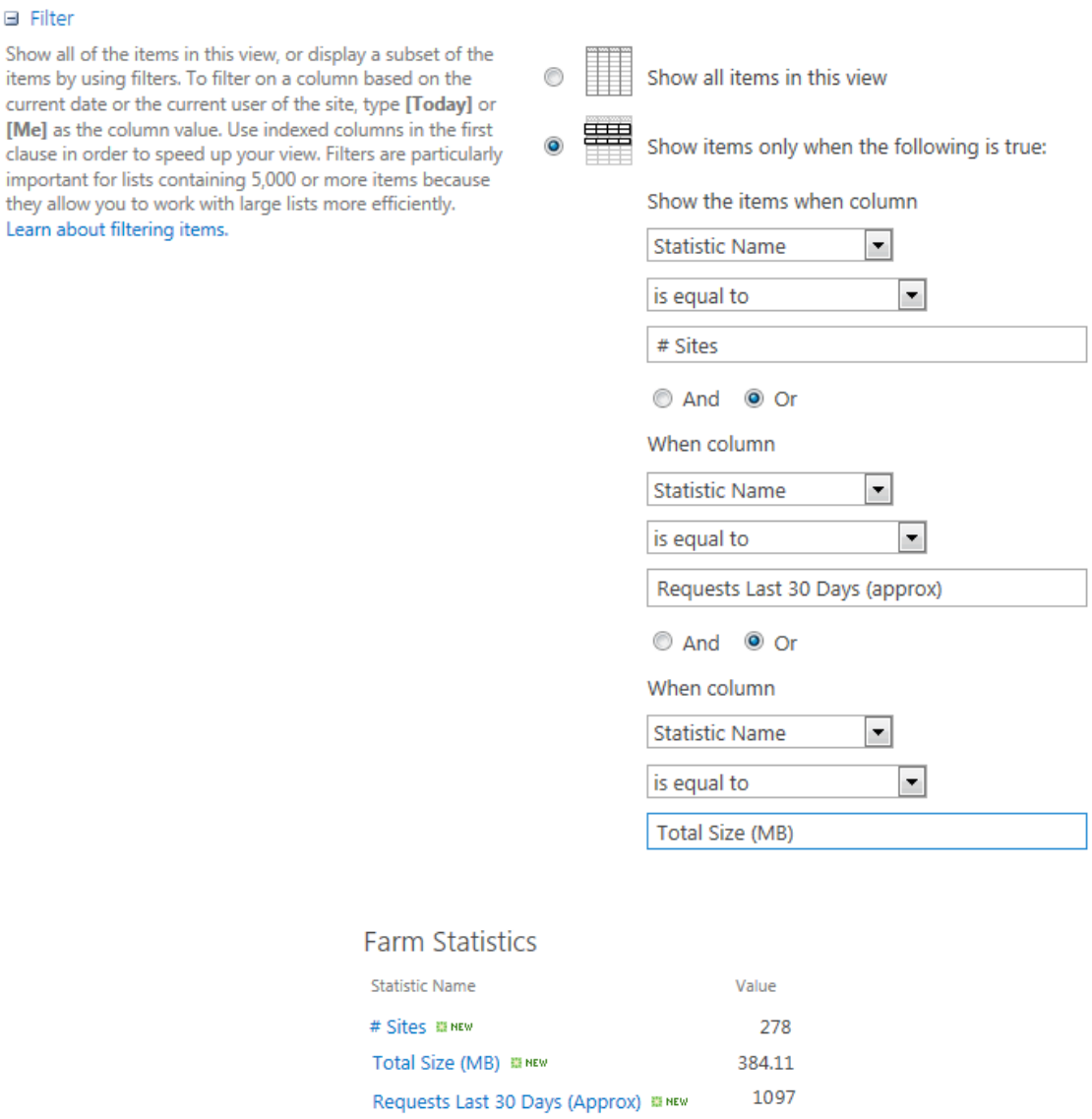
You can, for example, change the display order of columns; display a subset of columns; display columns that are not included in the default view; add a calculated column; display column totals.

- Example: Site Collection Statistics with calculated columns to track size and storage utilization.





- Example: Farm Statistics filtered to show only "high priority" metrics.



Farm Statistics

Statistic Name	Value
# Sites NEW	278
Total Size (MB) NEW	384.11
Requests Last 30 Days (Approx) NEW	1097

To configure the Web Statistics KPI/Status List (SharePoint 2007 and 2010):

REMINDER: To use KPI lists and Web Parts, you must have an Enterprise-based environment with Enterprise Site Features activated on the ControlPoint Configuration root site. This list type has been deprecated as of SharePoint 2013.

1 Create a new Status list (or KPI list as it is known in SharePoint 2007) entitled "Web Statistics KPI" (or another name of your choosing).

2 Create indicators for the Web Statistics KPI List as follows:

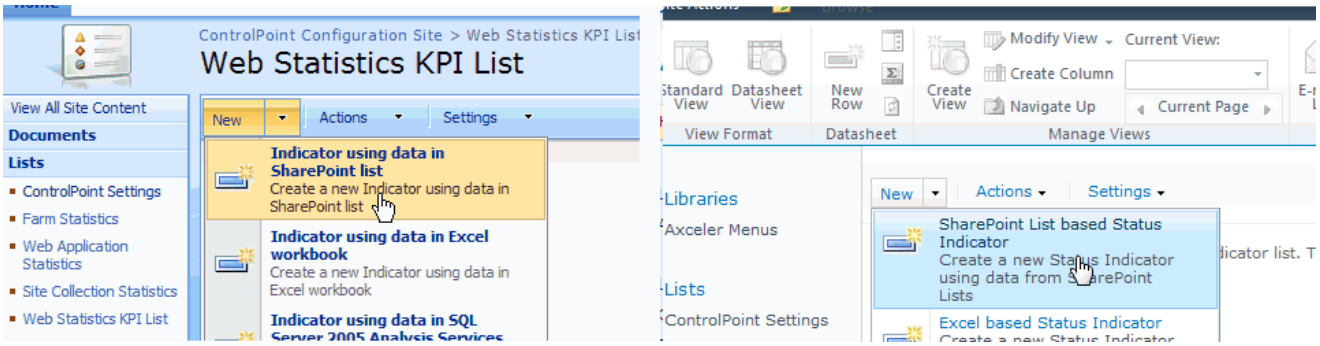
a) In the ControlPoint Configuration root site, open the Web Statistics KPI List.

b) Choose:

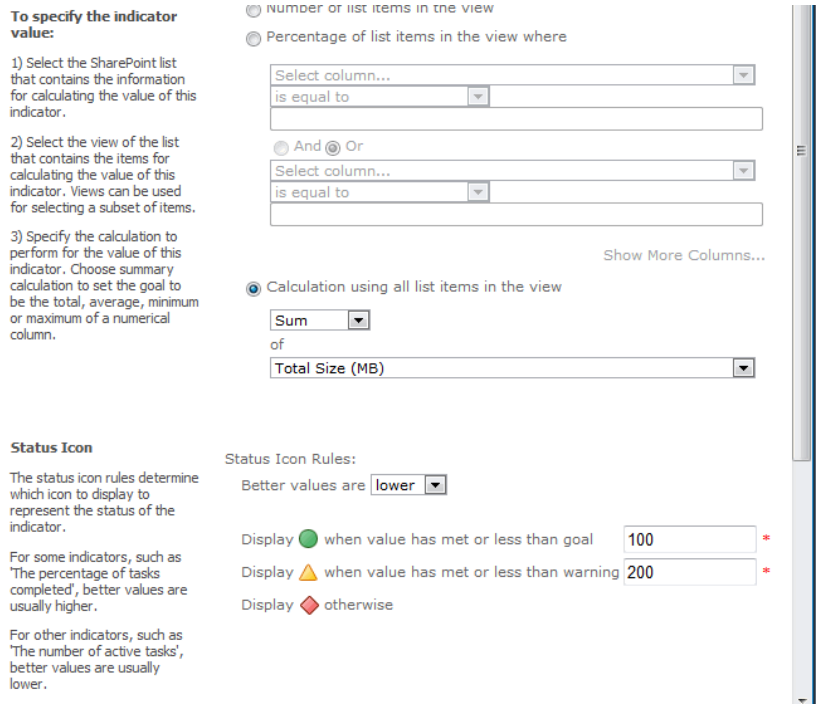
- New > Indicator using data in SharePoint list (SharePoint 2007)

OR

- New > SharePoint List based Status Indicator (SharePoint 2010)

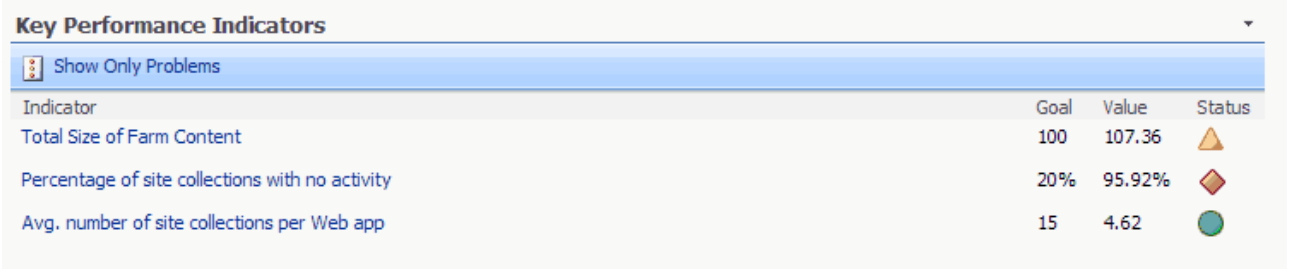


c) Complete the appropriate fields on the New Item page (including the List URL of the list containing the statistic for which you want to create an indicator). Consult your SharePoint documentation for complete instructions.



d) Complete substeps b and c for each indicator you want to create.

Once the list has been set up, add a KPI Web Part to the dashboard, specifying the Web Statistics KPI List as the **Indicator List**.



Setting Object Properties

You can use ControlPoint to set properties for site collections, sites, and lists.

In a multi-farm environment, properties can be set across multiple farms; the user interface for the home farm is always used. Therefore, if your multi-farm installation includes different SharePoint versions (for example, both 2007 and 2010) or variations (for example, WSS-only and MOSS), which necessitates differences in the user interface, some options may be missing—or not valid—for the remote farm. For example, in a SharePoint 2010 farm you have the option of performing a Visual Upgrade, a setting that is not available in—and therefore would be skipped for— a SharePoint 2007 farm. Note that if a SharePoint 2007 farm were your home farm, the option to perform a Visual Upgrade would not be available.

Setting Site Collection Properties

Set Site Collection Properties is a ControlPoint action that lets you set the following properties for one or more site collections within a SharePoint farm:

- Site Collection Administrators
- Quota
- Portal Site Connections
- Site Collection Audit Settings
- Site Collection Search Settings.

If you have a SharePoint 2010 Server farm, you can also modify SharePoint Designer settings.

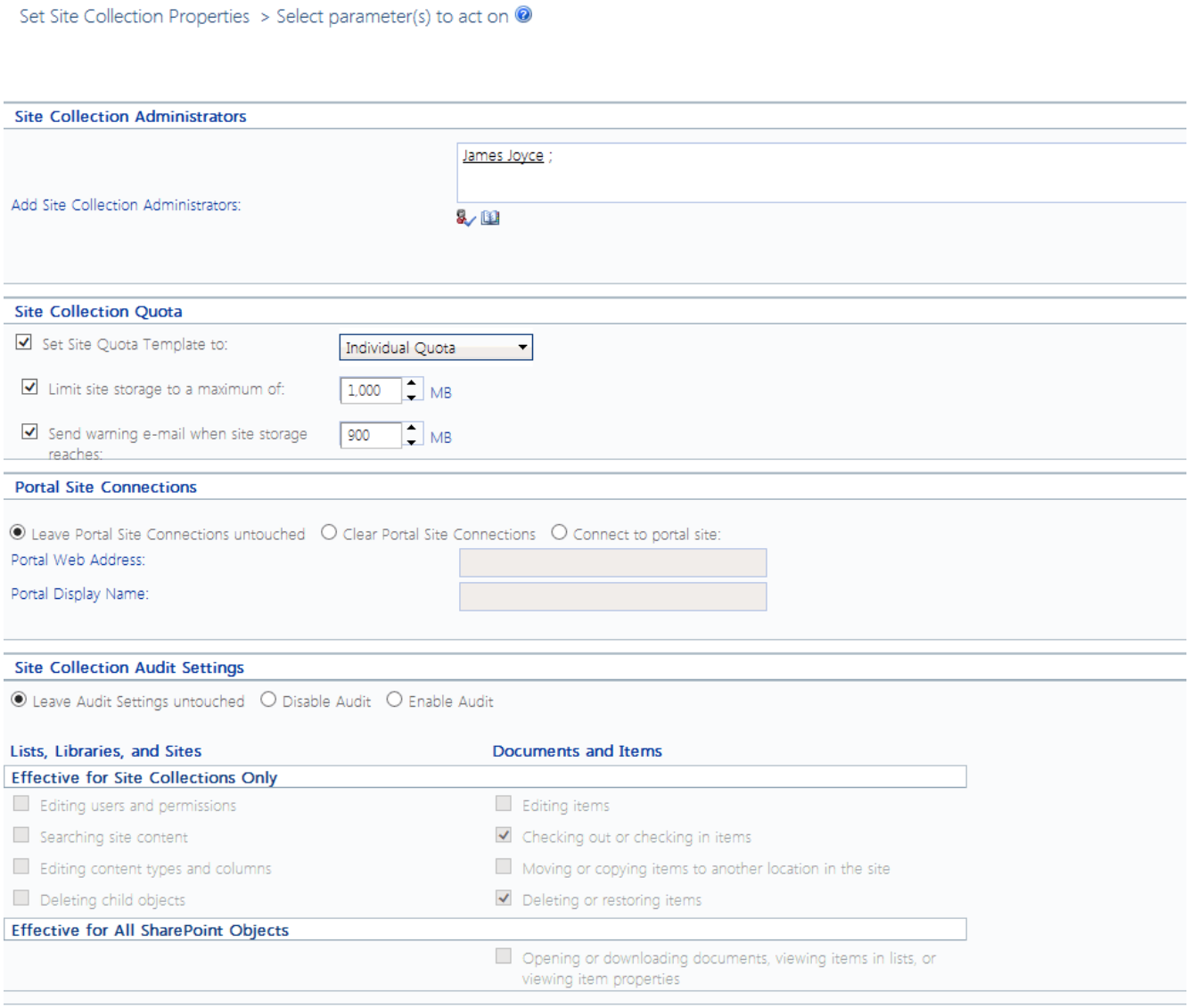
NOTE: Set Site Collection Properties is available at the farm, Web application, and site collection level of the hierarchy.

To set site collection properties:

1 Select the site collection(s) for which you want to set properties.

2 Choose Configuration > Set Site Collection Properties.

3 In the **Parameters** section, specify each property you want to set as you would if you were performing Site Collection Administration via SharePoint Site Settings. Consult your SharePoint documentation for detailed instructions.



NOTE: Changes to SharePoint Designer Settings will impact only users who are **not** Site Collection Administrators. SharePoint maintains SharePoint Designer Settings for Site Collection Administrators at the Web application (not Site Collection) level.

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

Setting Site Properties

You can use the ControlPoint Set Site Properties action to set the following properties of one or more sites within a SharePoint farm:

- theme (only if you are using the SharePoint 2007 user interface; for SharePoint 2010, this means that a Visual Upgrade has not been performed*)
- icon (that is, the logo used for the site)
- navigation settings
- the left navigation panel (tree view)
- regional settings
- whether or not to include the site(s) in SharePoint search results
- whether or not to enable RSS feeds for the site(s).

*NOTE: If you are running SharePoint 2010, you can use this action to run a Visual Upgrade on sites across your farm.

For SharePoint Server farms running the Managed Metadata Service Application, you can also "tag" sites with Custom Properties that have been defined by the ControlPoint Application Administrator, for use as parameters in ControlPoint Advanced Searches. The procedure for defining Custom Properties is covered in the *ControlPoint Administration Guide*.

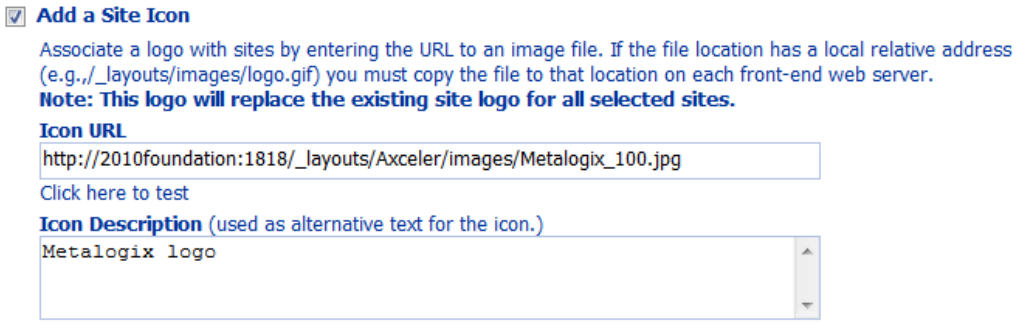
To set site properties:

1 Select the object(s) for which you want to set site properties.

2 Choose Configuration > Set Site Properties.

3 In the **Parameters** section, expand the node for the category of properties you want to set.

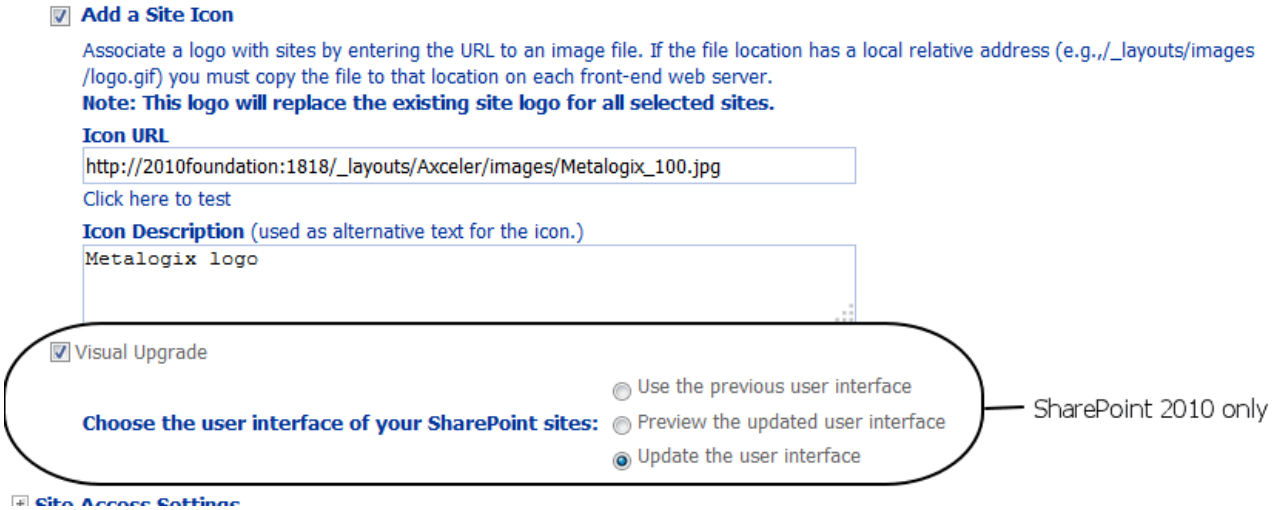
4 Check the box that describes the property you want to set.



NOTE: If you do not check the applicable property box, ControlPoint will not carry out that action.

5 Specify the parameter(s) for the selected property as you would if you were setting it via SharePoint Site Settings. Consult your SharePoint documentation for detailed instructions.

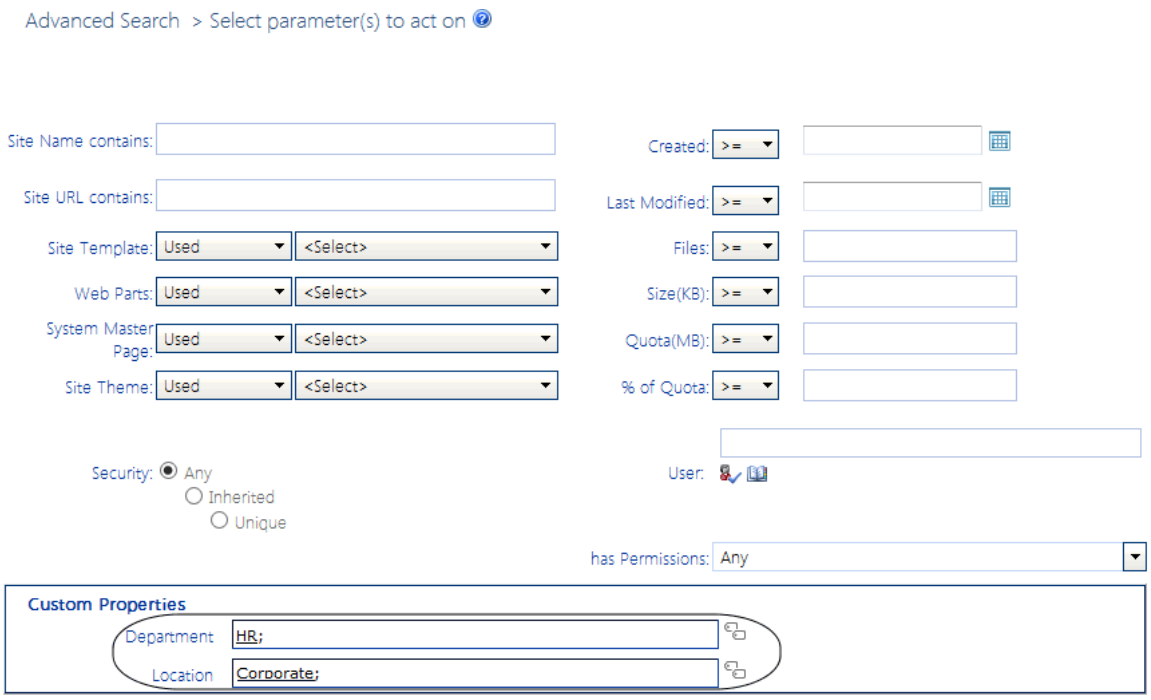
Note that if you are running SharePoint 2010, in addition to adding a Site Icon (as shown in the example above) you can perform a Visual Upgrade.



If you have a SharePoint Server 2010 farm running the Managed Metadata Service Application and the ControlPoint Application Administrator has defined Custom Properties, they are selectable from within the **Custom Properties** section. (This section is not included for SharePoint 2007 or 2010 Foundation farms.)



Custom Properties can be used as ControlPoint Advanced Search parameters to locate sites with which they have been associated via this action.



6 Complete Steps 2-5 for each category of properties you want to set.

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

Duplicating Site Properties

The Duplicate Site Properties action lets you copy selected properties from a SharePoint site to one or more other sites.

You can, for example, set up and configure a single model site, then copy its settings to any number of other sites for which you want to use the same settings.

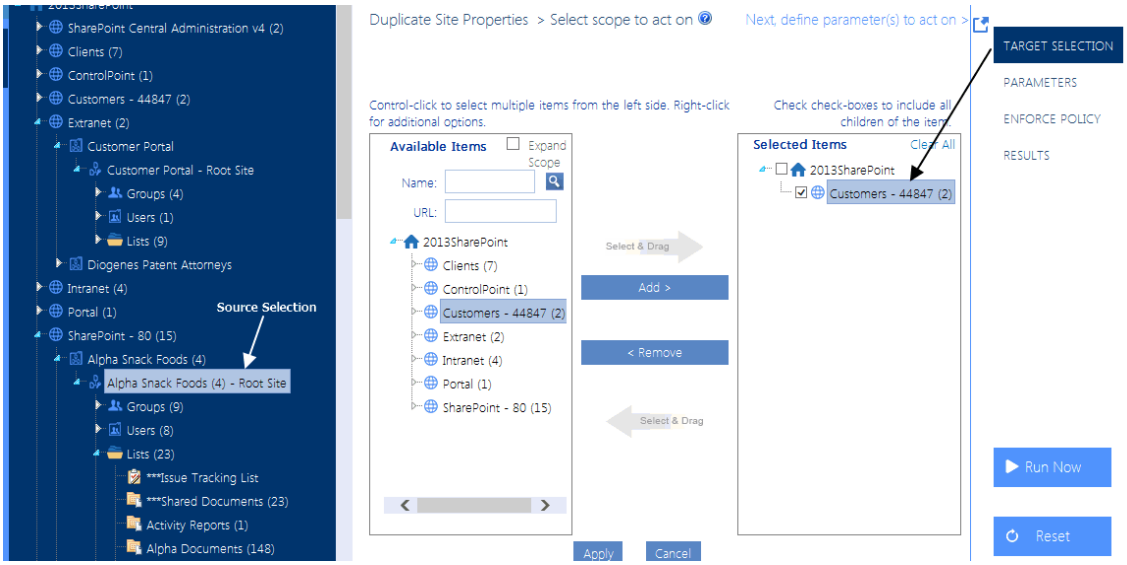
To duplicate site properties:

1 Select the site whose properties you want to duplicate.

NOTE: Unlike many other ControlPoint operations—which are initiated for *target* objects (that is, objects that you want to act *on*)—you initiate the Duplicate Site Properties operation by selecting the *source* site (that is, the site you want to copy *from*).

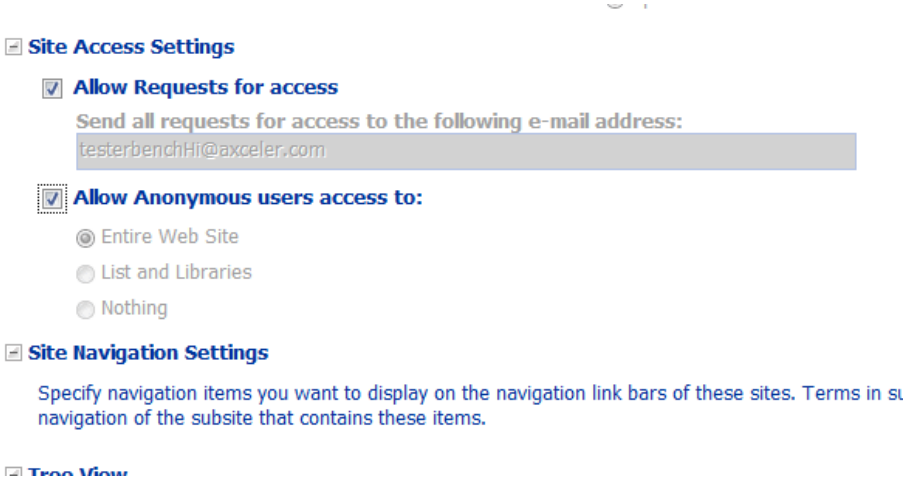
2 Choose Configuration > Duplicate Site Properties.

3 In the Target Selection picker, select the object(s) containing the site(s) that you want to copy properties *to*.



4 Click [Apply].

5 In the Parameters section, check each box that corresponds to the property you want to copy to the target site(s).



Note that, with the exception of Site Theme, each field pre-populates with the value currently assigned to the source site (that is, the value that will be applied to the target sites). These fields are not editable.

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

If you schedule the action, ControlPoint will use the settings that exist for the source object *at the time the job is executed* (not at the time the job was created).

Setting List Properties

Use the ControlPoint Set List Properties action to set the following properties of one or more lists within a SharePoint farm:

- name, description, and navigation
- version settings
- audience targeting
- for SharePoint 2010 and higher, validation settings and default column values
- advanced settings, such as
  - whether to allow users to create folders and attachments, and
  - item-level permissions

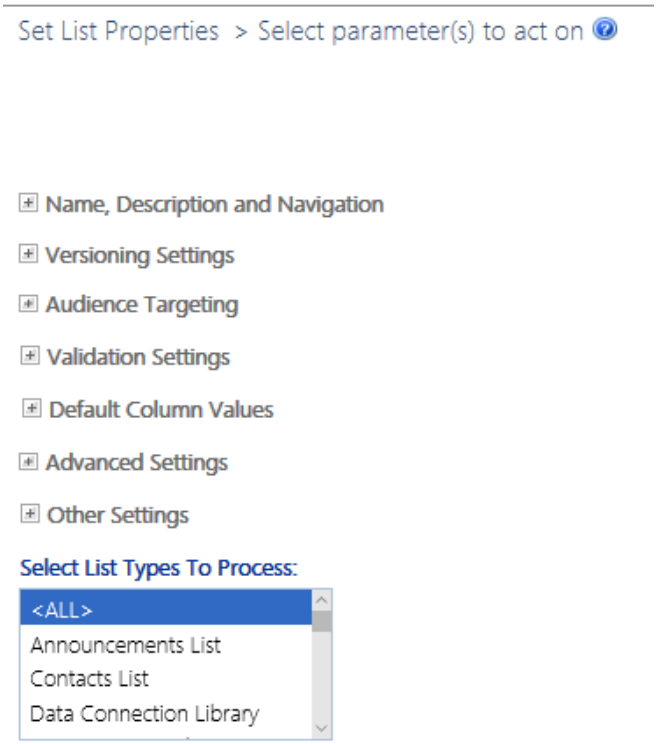
You can also specify the list type(s) whose properties you want to set.

To set list properties:

1 Select the object(s) for which you want to set list properties.

2 Choose Configuration > Set List Properties.

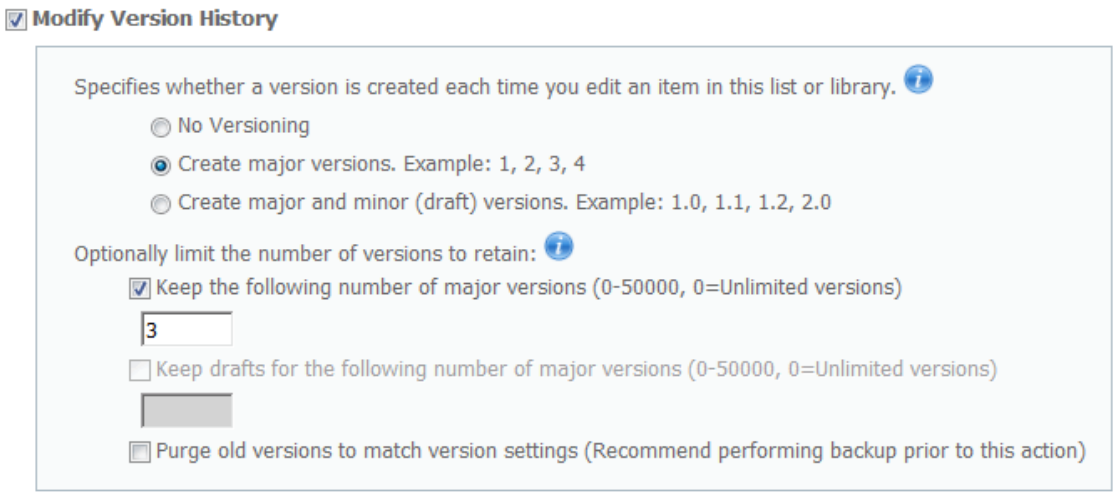
3 In the **Parameters** section, expand the node for the category of properties you want to set.



4 Check the box that describes the property you want to set.

NOTE: If you do not check the applicable property box, ControlPoint will not carry out that action.

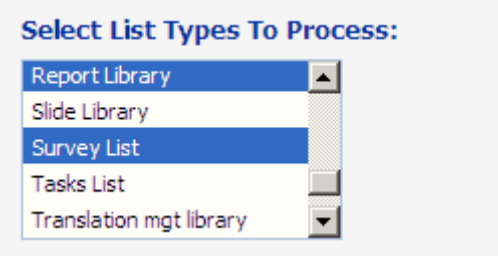
5 Specify the parameter(s) for the selected property as you would if you were setting it via SharePoint List Settings. Consult your SharePoint documentation for detailed information.



NOTE: The icon displays beside any property that does not apply to all list types. Click this icon for a summary of exceptions for which the property either will or will not be set.

6 Complete Steps 3-5 for each category of properties you want to set.

7 If you want to limit the operation to one or more specific list types, **Select List Types to Process**.



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.

Duplicating List Properties

The Duplicate List Properties action lets you copy selected properties from a SharePoint list to one or more other lists.

You can, for example, set up and configure a single model list, then copy its settings to any number of other lists for which you want to use the same settings.

To duplicate list properties:

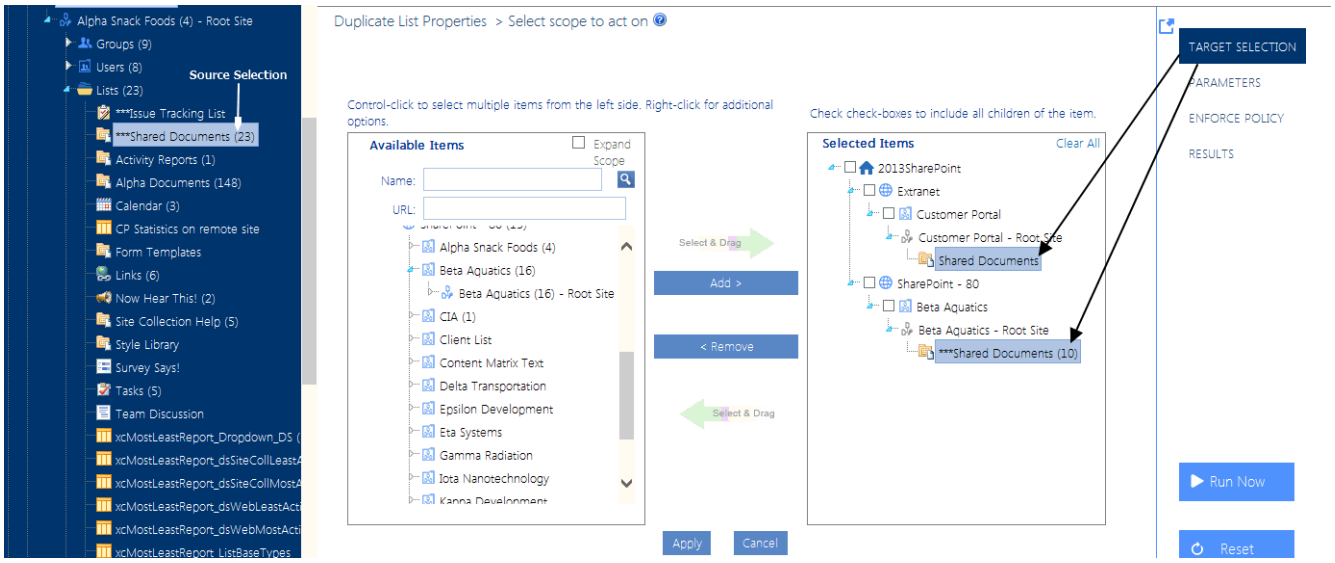
1 Select the list whose properties you want to duplicate.

NOTE: Unlike many other ControlPoint operations—which are initiated for *target* objects (that is, objects that you want to act *on*)—you initiate the Duplicate List Properties operation by selecting the *source* list (that is, the list you want to copy *from*).

2 Choose Configuration > Duplicate List Properties.

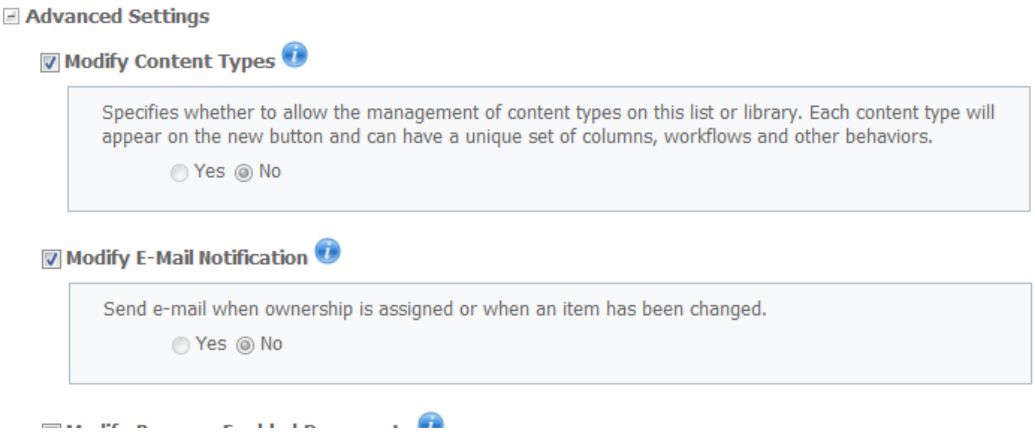
3 In the Target Selection picker, select the object(s) that you want to copy list properties *to*.

NOTE: If you select an object above the list level, you will have the option of limiting the operation to one or more specific *types* of list within that scope.



4 Click [Apply].

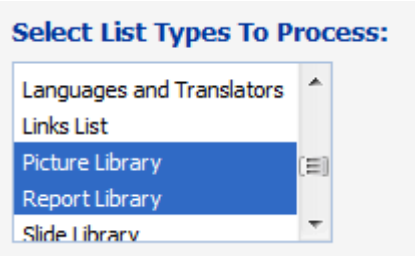
5 In the Parameters section, check each box that corresponds to the property you want to copy to the target list(s).



Note that:

- The Parameters section displays properties that are valid for the selected source list type.
- With the exception of Modify Retention Policy, each field pre-populate with the value currently assigned to the source list (that is, the value that will be applied to the target lists). These fields are not editable.

6 If you want to limit the operation to specific types of lists, **Select List Types to Process**.



Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

If you schedule the action, ControlPoint will use the settings that exist for the source object *at the time the job is executed* (not at the time the job was created).

Managing Site Collection and Site Features

Manage Site Collection Features and **Manage Site Features** are ControlPoint actions that enable you to activate or deactivate features across one or more SharePoint site collections or sites. In addition to managing features that can be activated/deactivated via the SharePoint user interface, you can also activate/deactivate *hidden* features. (In native SharePoint, hidden features must be activated/deactivated using a command line, custom code, or through dependency of another feature.)

You can use these actions in conjunction with the Site Collection Property Report and Site Property Report to manage the configuration of SharePoint features throughout your farm.

In a multi-farm environment, features can be managed across multiple farms; the user interface is populated with features that have been deployed on the home farm. Therefore, if your multi-farm installation includes different SharePoint versions (for example, both 2010 and 2013) or variations (for example, Foundation and Server), which necessitates differences in the user interface, some options may be missing—or not valid—for

the remote farm. For example, if a feature is selected that has not been deployed on a remote farm, the activation or deactivation of the feature will be skipped for that farm.

To manage site collection or site features:

1 Select the object(s) for which you want to manage features.

2 Choose the appropriate option:

- Configuration > Manage Site Collection Features.

OR

- Configuration > Manage Site Features.

All of the available site collection or site-level features (depending on your selection) that can be activated/deactivated via the SharePoint user interface display.

NOTE: If you also want to manage *hidden* features (that is, features that cannot be activated/deactivated via the SharePoint user interface), check the **Show Hidden** box. Each hidden features will be identified by a check mark in the Hidden column.

3 Select the action you want to carry out: **Activate** or **Deactivate**.

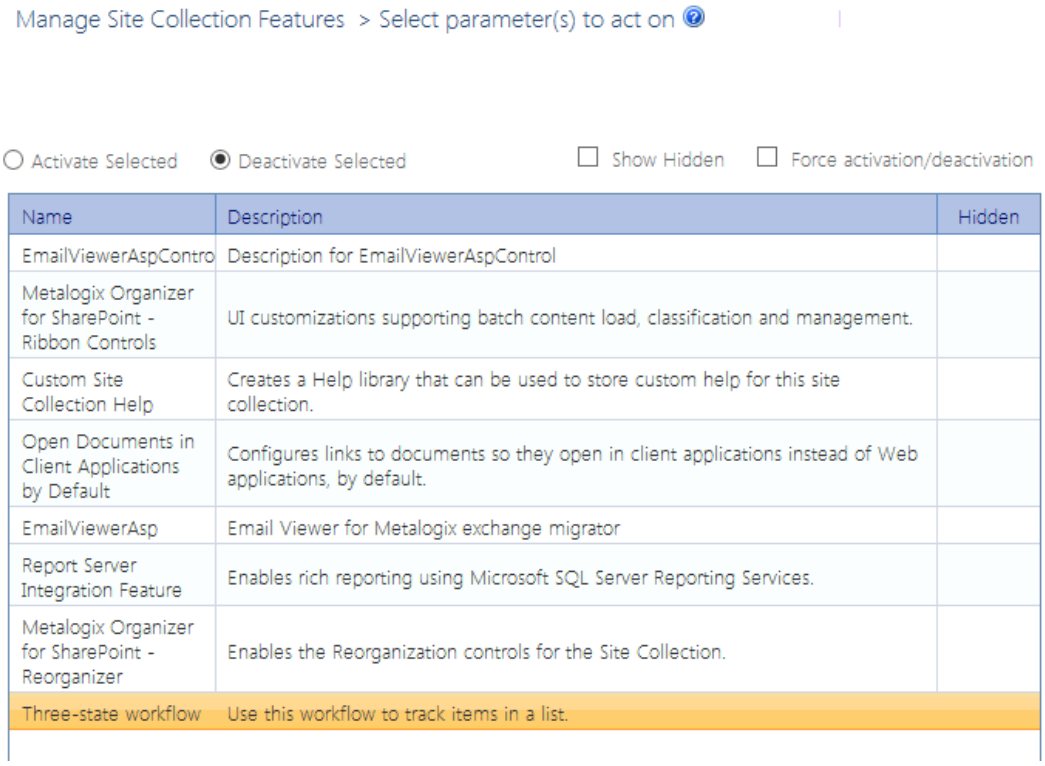
4 If you want to override certain errors that could occur while attempting to activate a feature, check the **Force activation/deactivation** box.

NOTE: An error might occur, for example, if a feature becomes corrupted and you cannot uninstall it. The force option allows you to overwrite the existing feature.

5 Highlight each feature you want to act on. (You can select multiple line items in the conventional manner by using the [**SHIFT**] or [**CTRL**] key .)

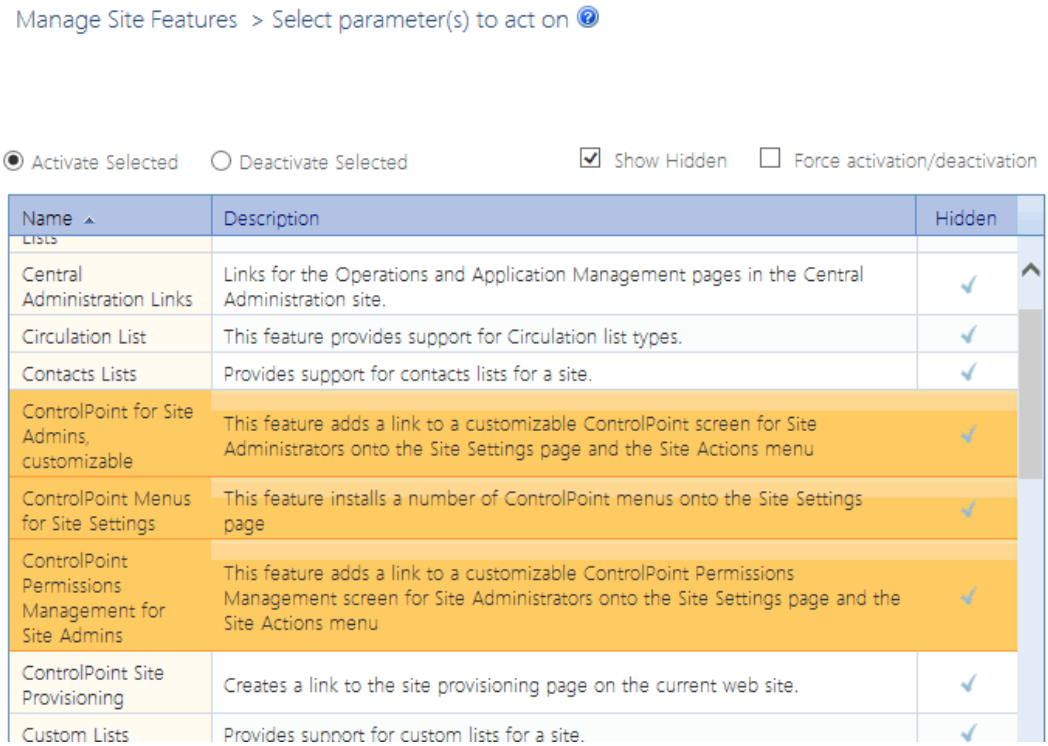
NOTE: Any site collections or sites that are already in the selected state will be skipped.

Example: Deactivate Site Collection Workflows



Example: Activate ControlPoint Site Features

(Note that these are hidden features)



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.

Managing Audit Settings

The **Manage Audit Settings** action lets you to manage (enable and disable) SharePoint audit settings from within the ControlPoint application interface.

NOTE: Using "Manage Audit Settings" to disable or enable Audit flags will *not* affect auditing enabled through a SharePoint Information Management Policy for a list or library. These Audit flags are enabled at the Content Type level, and disabling auditing at the Site Collection level will not disable Content Type auditing.

In a multi-farm environment, audit settings can be managed across multiple farms.

To access the Manage Audit Settings workspace:

1 Select the object(s) whose audit settings you want to manage.

NOTE: If you select the entire farm or one or more Web applications or site collections, the audit settings will be applied to the site collection(s) and inherited by child objects (sites, libraries, and lists). If you want a site collection to be included in the GDPR Dashboard **Sites with Auditing Enabled** calculation, you must enable audit settings at the site collection level or above.

2 Choose Audits and Alerts > Manage Audit Settings.

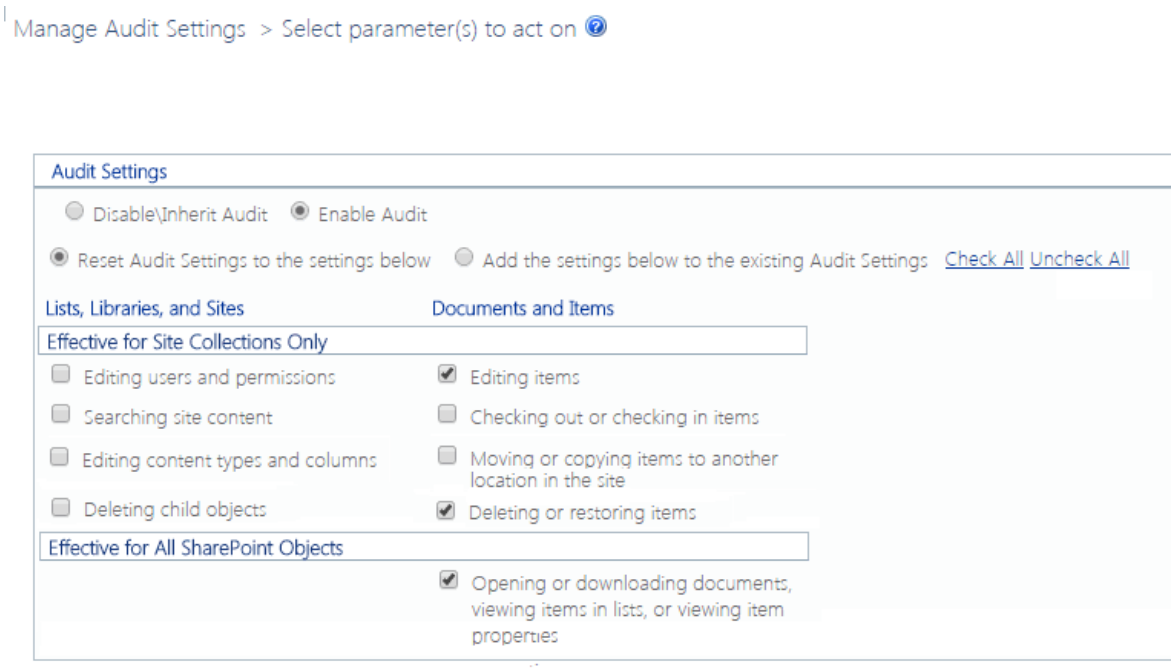
It is important to note that if your selection includes a single object, audit settings currently enabled for that object will be checked. (Enabled settings will not be checked if your scope includes multiple objects.)

To enable or change audit settings:

1 Select **Enable Audit**.

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

If you want to ...	Then ...
reset all audit settings for the selected objects*	• select **Reset Audit Settings to the settings below** • check/uncheck each setting you want to enable/disable.
add to existing audit settings for the selected objects*	• select **Add the settings below to the existing Audit Settings** • check each setting you want to add. NOTE: Remember that existing audit settings will appear checked only if they were set explicitly for all objects within the scope of your selection.



* For most audit settings, SharePoint will only recognize and report on those that have been set at the site collection level (in the Effective for Site Collections Only section). The only setting that can be set explicitly at the site or list/library level that SharePoint will recognize is **Opening or downloading documents, viewing items in lists, or viewing item properties** (in the Effective for all SharePoint Objects section).

If you are enabling audit settings at the site collection level or above, all settings (except for **Deleting child objects**) *must* be enabled if you want the affected site collections to be included in the GDPR Dashboard **Sites with Auditing Enabled** calculation.

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

To disable audit settings:

Select **Disable\Inherit Audit**.

If you select this option for site collections, auditing for individual sites and lists/libraries within the site collection depends on whether auditing has been enabled for the site or list/library. If you select it for sites, libraries, or lists, whether SharePoint captures audit events depends on whether auditing has been enabled for the site collection. (By design, sites, lists, and libraries inherit most audit behavior from the site collection.)

NOTE: If you disable the auditing of any event type(s) for which ControlPoint alerts have been scheduled, you will no longer receive alerts for those events. See also Setting ControlPoint Alerts.

Creating and Managing SharePoint Alerts

The ControlPoint Create SharePoint Alerts action lets you create alerts for users in your SharePoint farm. You can create SharePoint alerts for sites, lists, and individual list items.

You can also change and/or delete SharePoint alerts using the Manage SharePoint Alerts action.

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

Creating SharePoint Alerts

You can set alerts for SharePoint users from the ControlPoint application interface using the **Create SharePoint Alerts** action.

To create SharePoint alerts:

1 Select the object(s) for which you want to set alerts).

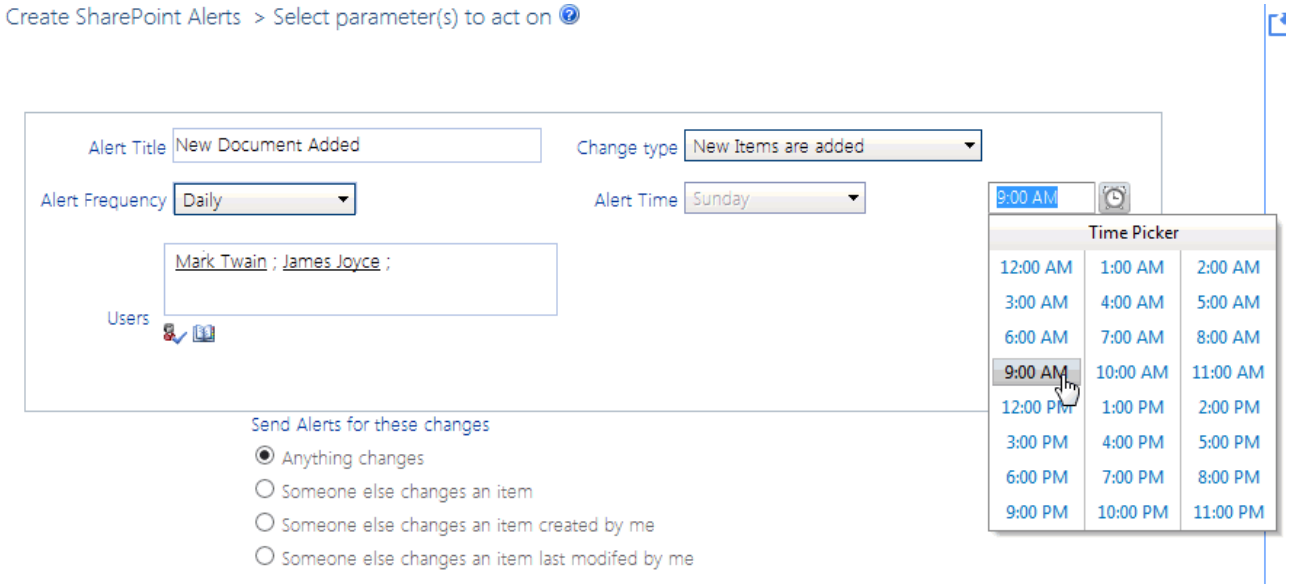
2 Choose Audits and Alerts > Create SharePoint Alerts.

NOTE: If you want to set alerts for individual items within the list(s), follow the procedure for Selecting List Items on Which to Perform a ControlPoint Operation.

3 Select the user(s) for whom you want to create the alert.

4 Complete the remaining parameters as you would if you were creating the alert in SharePoint.

Users will receive alert emails only if they have a minimum of **Read** permissions for the selected object(s). For additional SharePoint alert troubleshooting tips, refer to the following article: http://sharepointalert.info/troubleshooting-sharepoint-alerts/



NOTE: If your selection includes lists of different types, **Send Alerts for these changes** will include options that are common to both. (For example, if your selection includes both Announcements and Tasks, the options that are unique to each type (such as "An announcement with an expiration date is added or changed" and "A task is assigned to me") will not be available for selection.

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

Managing SharePoint Alerts

Use the **Manage SharePoint Alerts** action to delete or update alerts on lists and libraries that have been set for users in your SharePoint environment. Deletions are always performed in real time. Updates can either be performed in real time or scheduled.

To access the Manage SharePoint Alerts workspace:

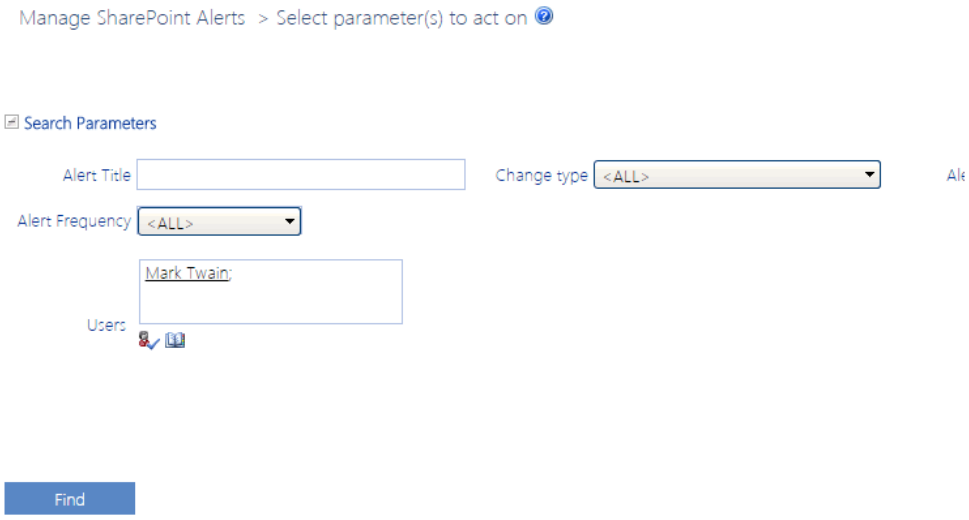
1 Select the object(s) containing the alerts that you want to manage.

2 Choose Audit and Alerts > Manage SharePoint Alerts.

A table displays with information about all of the alerts within the scope of your selection. (Note that, if the alert was set on the list itself, **Item** and **Item ID** will be blank).

3 If you want to narrow the list to only alerts that meet specific criteria:

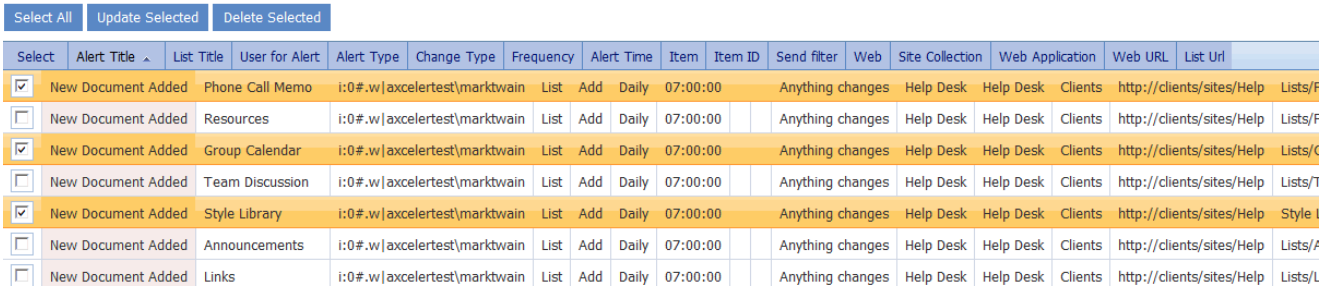
a) in the **Search Parameters** section, specify the criteria you want to use.



b) Click [**Find**].

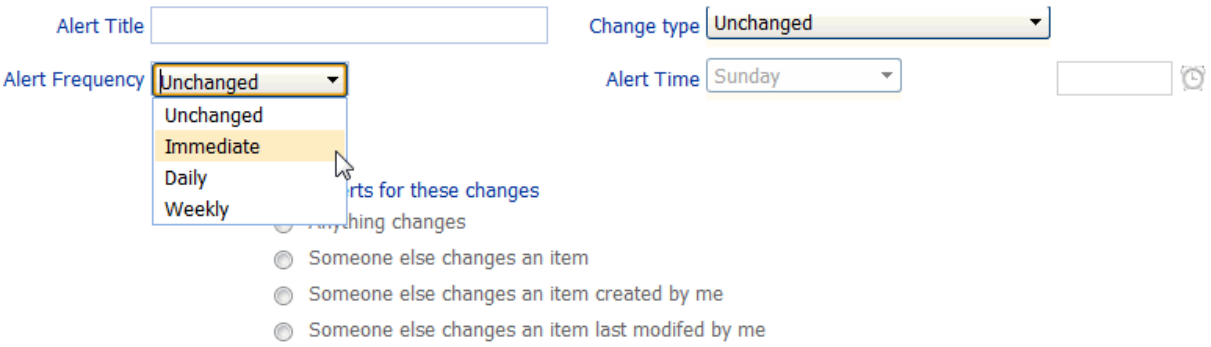
4 The **Search Parameters** section collapses and the **Update/Delete** section expands automatically.

5 Check the **Select** box to the left of the row(s) containing the alerts that you want to update or delete.



Select	Alert Title	List Title	User for Alert	Alert Type	Change Type	Frequency	Alert Time	Item	Item ID	Send filter	Web	Site Collection	Web Application	Web URL	List Url
☑	New Document Added	Phone Call Memo	i:0#.w|axcelertest\marktwain	List	Add	Daily	07:00:00			Anything changes	Help Desk	Help Desk	Clients	http://clients/sites/Help	Lists/F
☐	New Document Added	Resources	i:0#.w|axcelertest\marktwain	List	Add	Daily	07:00:00			Anything changes	Help Desk	Help Desk	Clients	http://clients/sites/Help	Lists/F
☑	New Document Added	Group Calendar	i:0#.w|axcelertest\marktwain	List	Add	Daily	07:00:00			Anything changes	Help Desk	Help Desk	Clients	http://clients/sites/Help	Lists/C
☐	New Document Added	Team Discussion	i:0#.w|axcelertest\marktwain	List	Add	Daily	07:00:00			Anything changes	Help Desk	Help Desk	Clients	http://clients/sites/Help	Lists/T
☑	New Document Added	Style Library	i:0#.w|axcelertest\marktwain	List	Add	Daily	07:00:00			Anything changes	Help Desk	Help Desk	Clients	http://clients/sites/Help	Style L
☐	New Document Added	Announcements	i:0#.w|axcelertest\marktwain	List	Add	Daily	07:00:00			Anything changes	Help Desk	Help Desk	Clients	http://clients/sites/Help	Lists/A
☐	New Document Added	Links	i:0#.w|axcelertest\marktwain	List	Add	Daily	07:00:00			Anything changes	Help Desk	Help Desk	Clients	http://clients/sites/Help	Lists/L

NOTE: If you want to select all alerts in the table, click [**Select All**].



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

If you want to ...	Then ...
update one or more alert criteria	select the criteria you want to change. Now you can either: • update the alert(s) immediately (by clicking the [**Update selected**] button OR • complete the Enforce Policy section and ***schedule*** the update to run on a one-time or recurring basis.
delete the selected alert(s)	click [**Delete selected**].

Setting ControlPoint Alerts

Use ControlPoint alerts if you want to be notified when specific events occur within site collections in your SharePoint farm.

Unlike SharePoint alerts, which notify a *user* to changes that occur within libraries and lists within sites, ControlPoint alerts notify *an administrator* of changes made to the SharePoint environment, including:

the creation of site collections

- the creation or deletion of sites, and
- events captured in SharePoint audit logs and change logs.

In a multi-farm environment, you can set ControlPoint alerts for the home farm only.

Scheduled vs. Real-time Alerts

- If you run ControlPoint Alerts on a scheduled basis:
  - Any events that occurred after the Start Date specified in the Scheduler section will display immediately in the Results section.

- The first time the scheduled job runs, a notification email will be sent with a list of all events that have occurred since the Start Date specified in the Scheduler section*.

  EXCEPTION: If the action is scheduled to run on a recurring basis and the interval is in *minutes*, the amount of historical data that is included the first time the job runs is determined by the ControlPoint Setting MaxAlertProcessingPeriod.

- (in the case of a recurring schedule), every subsequent time the job runs the notification email will include all events that occurred since the last successfully-completed job run.*

  *NOTE: Unlike other scheduled jobs, for which a notification email is sent whenever the job runs, an email is sent for ControlPoint alerts *only* if there are events to report.

If you choose to run alerts in real-time (using the [**Run Now**] option), all of the events that occurred since the Start Date specified in the Scheduler section display in the Results section (a notification email will not be sent).

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

To set ControlPoint Alerts:

1 Select the object(s) for which you want to set ControlPoint alerts.

2 Choose Audits and Alerts > ControlPoint Alerts.

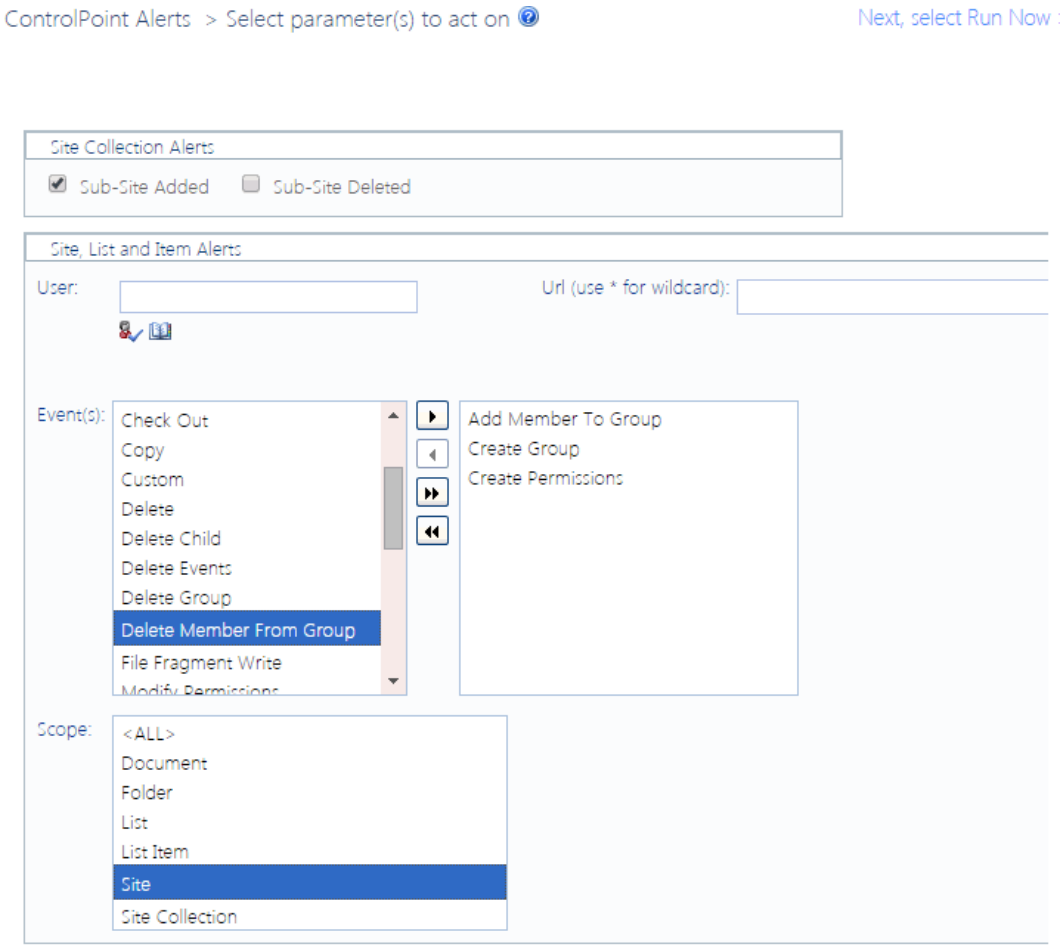
3 In the Parameters section, select each alert you want to set:

- **Site Collection Alerts** - Check the appropriate box to receive an alert of sites added or sites deleted.
- **Site, List, and Item Alerts:**
  - select the **User**(s) whose actions you want to audit (or leave blank for all users)
  - enter a *relative* **URL** (note that you can enter a url down to the item level; you can also use an asterisk (*) at the beginning and end of a url as wildcards)

  EXAMPLES

  - sites/al*
  - sites/alpha/shared documents/xcrSummaryReport.pdf
  - select one or more **Event** types from the list box. Use the arrows to move the events to the "selected" list on the right. Refer to the topic Events Captured in SharePoint Logs for guidance in selecting the appropriate event type(s).

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



NOTE: When you set an alert for any event *other than* Site Added, SharePoint auditing will be enabled on the site collection(s) as part of the operation.

4 In the Schedule section, enter a **Start Date** (that is, the first date that events for which you want to be alerted occurred).

5 You can either:

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

OR

- schedule the alerts to be evaluated and sent either one time or on a recurring basis.

NOTE: You have the option of scheduling ControlPoint alerts to recur at intervals in the *minutes*. Be aware, however, that by default the ControlPoint Scheduled Job Review 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."

Managing Metadata

For SharePoint Server farms running the Managed Metadata Service Application, ControlPoint offers two actions for managing metadata :

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

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

NOTE: In order to work with Managed Metadata in ControlPoint, the Web application that hosts the ControlPoint Configuration Site Collection must be associated with every Managed Metadata Service Application used within the farm.

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

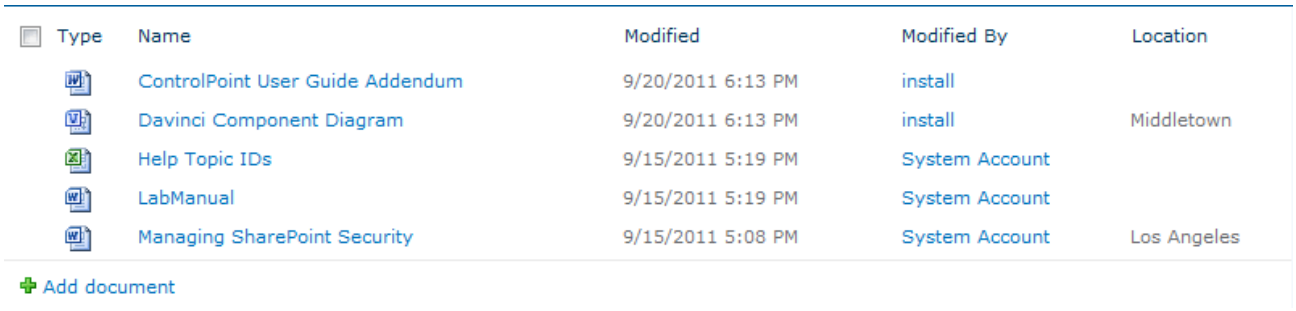
Setting Metadata Values

For a SharePoint Server 2010 or 2013 farm running the Managed Metadata Service Application, ContolPoint lets you populate or change Managed Metadata, a single line of text, or numeric values within a list column for a selected Content Type.

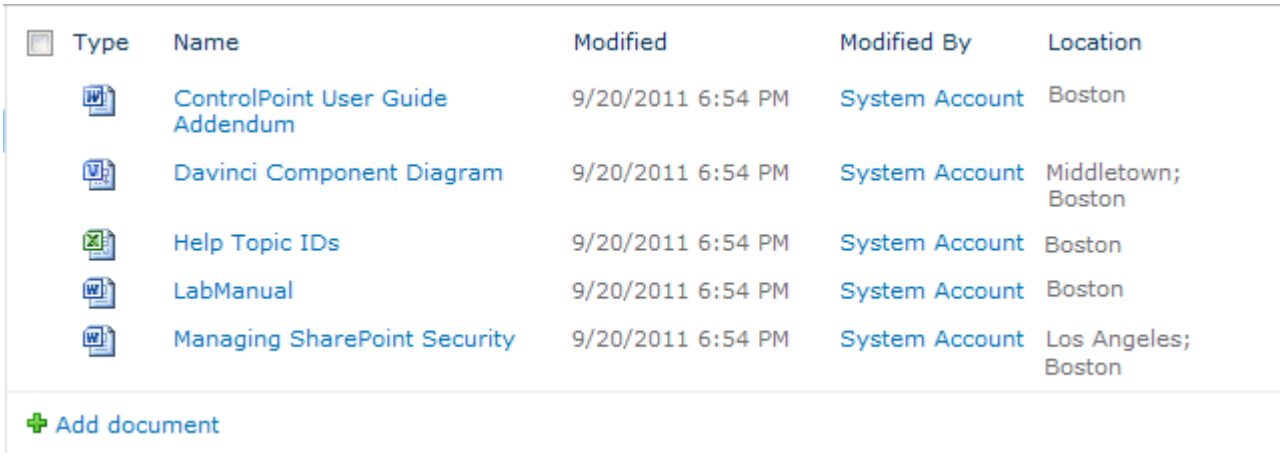
You can also run a simulation of how the operation will be carried out before committing to the action. This can be valuable, for example, to identify exactly which items would be changed.

EXAMPLE:

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



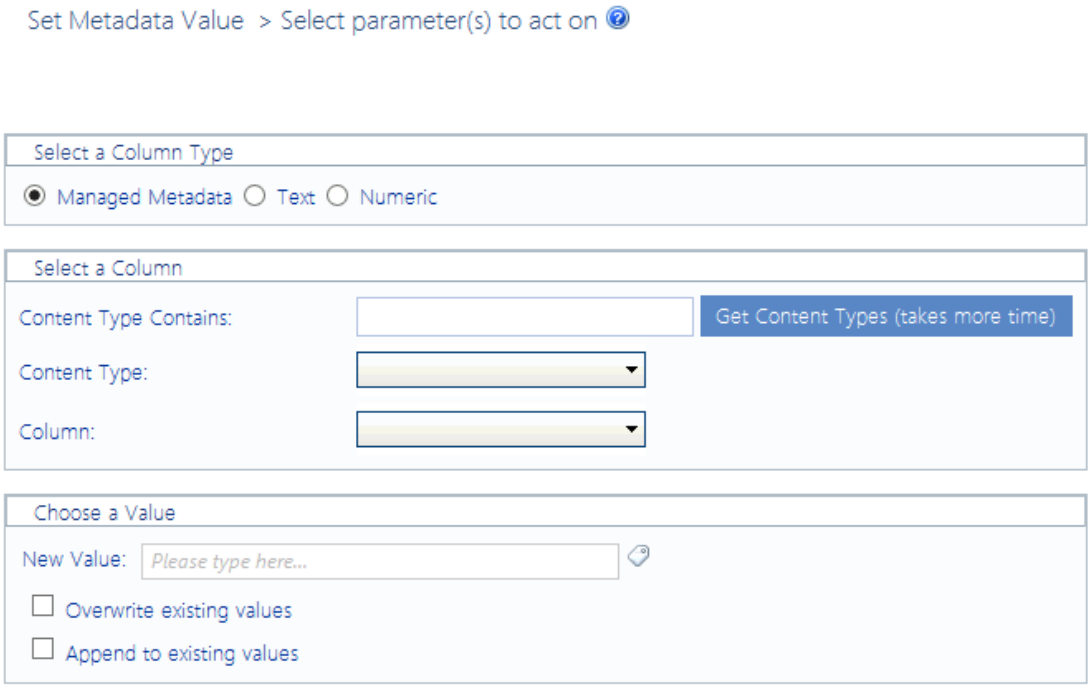
I want to make sure that the value Woburn is added to the Location column for all documents in that library.



To set a metatdata value:

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

2 Choose Automation > Set Metadata Value.



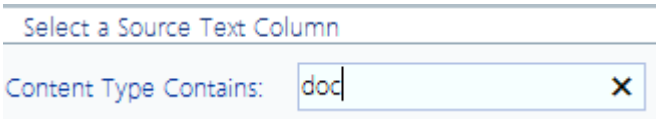
3 Select the type of metadata you want to set:

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

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

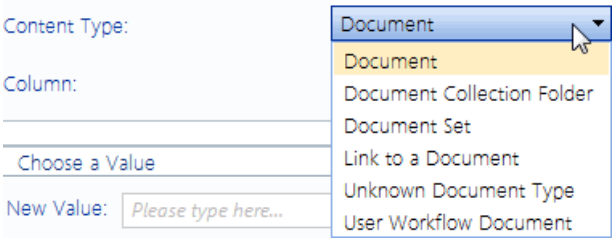
If the scope of your selection ...	Then ...
• is at the site level or above and/or • includes more than one list	go to the next step. NOTE: Before you can select a list column, you must first choose from available Content Types.
consists of only one list	you may want to go to Step 8. NOTE: It is not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

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



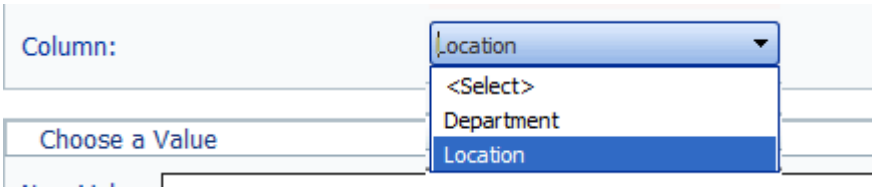
6 To populate the **Content Type** drop-down with relevant Content Types, click **[Get Content Types]**.

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



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

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



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

list (or to a Content Type on the list), it will appear in the drop-down if your selection consists of *only* that list.

9 For **Choose a Value**:

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

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

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



Now you can either:

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

OR

- schedule the action to run at a later time .

OR

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

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

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

The Create Managed Metadata action lets you map an existing text column in a SharePoint Server 2010 or 2013 list or library to a Managed Metadata term. You can:

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

OR

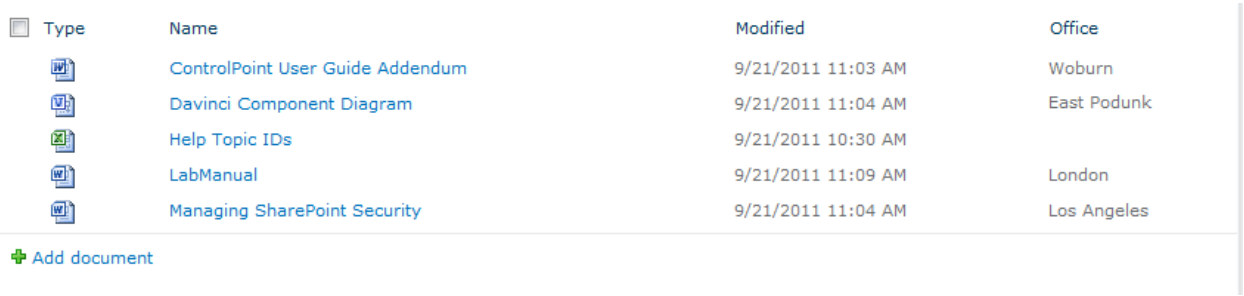
- create a new Managed Metadata column using a term set that has been defined either within the current site collection or in the Managed Metadata Service Application.

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

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

EXAMPLE:

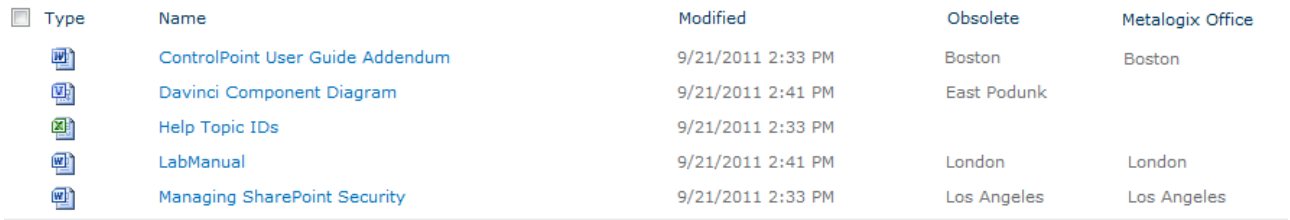
A SharePoint document library has a text field called Office, which identifies the Metalogix regional office that has ownership of a document.



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

Add document

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

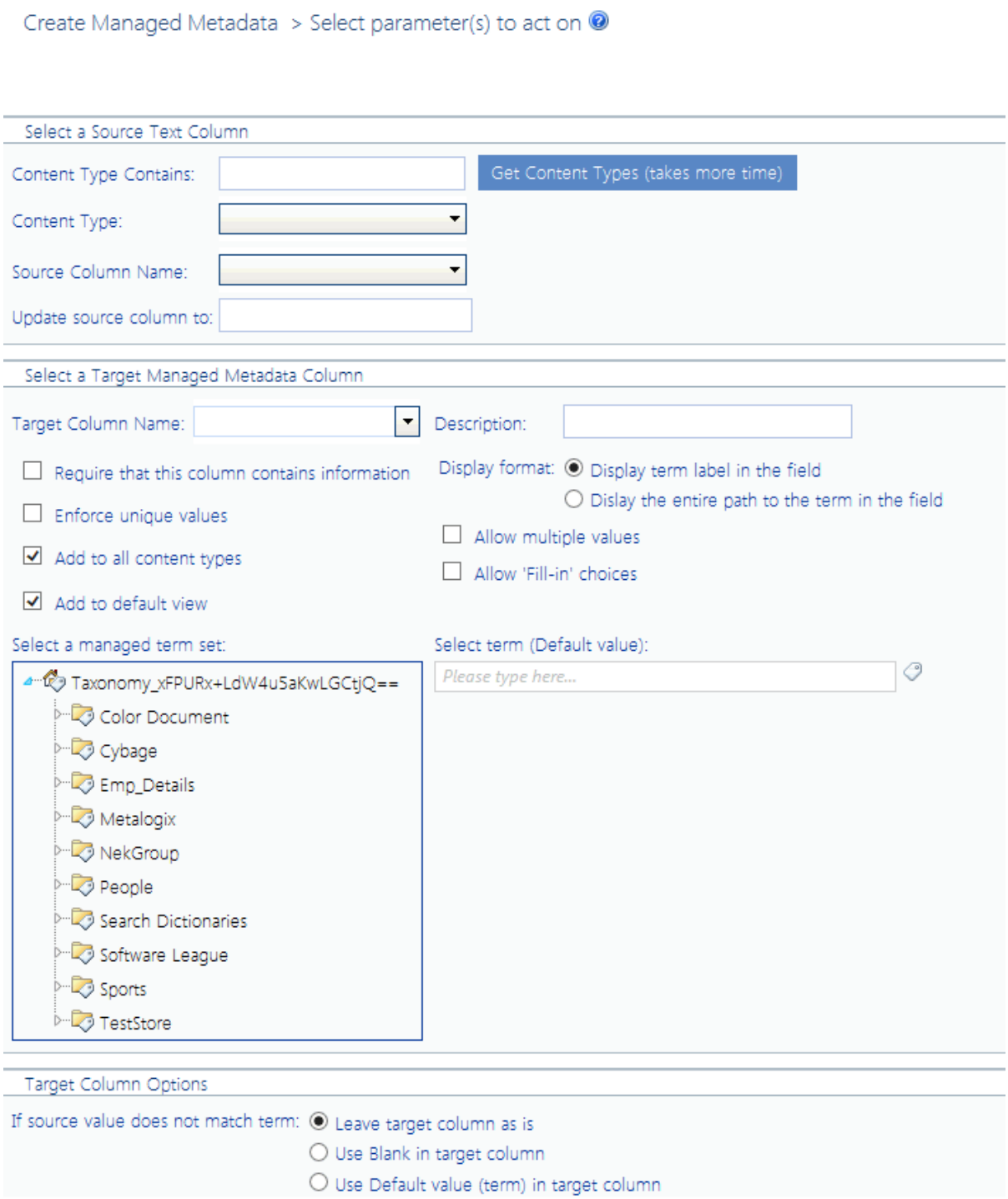


Type	Name	Modified	Obsolete	Metalogix Office
	ControlPoint User Guide Addendum	9/21/2011 2:33 PM	Boston	Boston
	Davinci Component Diagram	9/21/2011 2:41 PM	East Podunk	
	Help Topic IDs	9/21/2011 2:33 PM		
	LabManual	9/21/2011 2:41 PM	London	London
	Managing SharePoint Security	9/21/2011 2:33 PM	Los Angeles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

To create Managed Metadata from a text column:

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

2 Choose Automation > Create Managed Metadata.

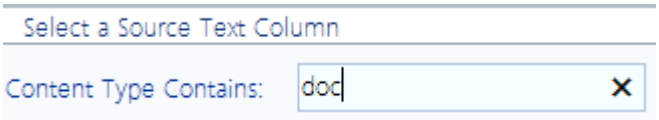


3 Use the information in the following table to determine the appropriate action to take.

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

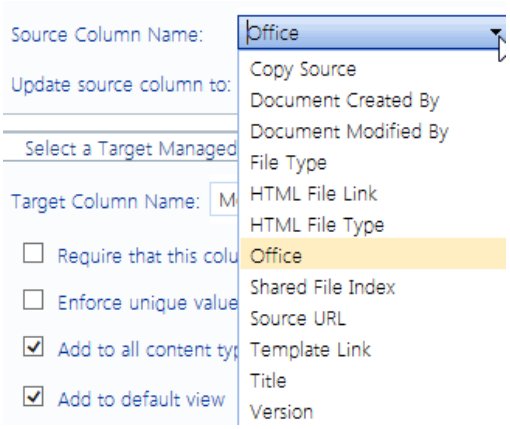
• includes more than one list	NOTE: Before you can select a list column, you must first choose from available Content Types.
consists of only one list	you may go to Step 7. NOTE: It is not necessary to choose a Content Type for a single list. The **Column** drop-down will automatically populate with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

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



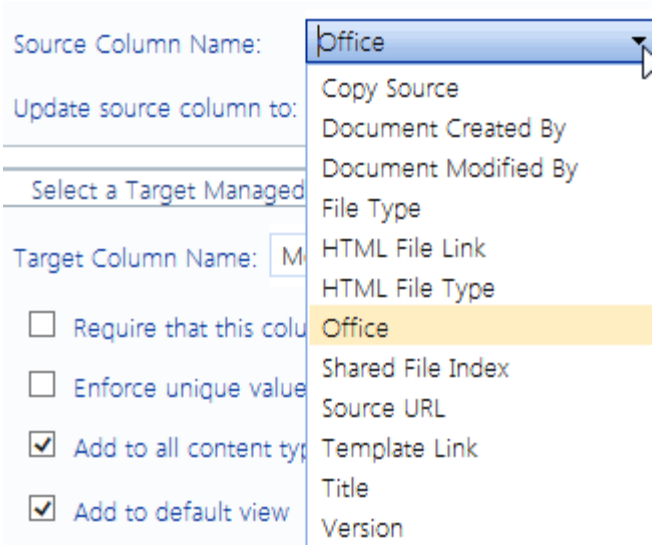
5 To populate the Content Type drop-down with relevant content types, click **[Get Content Types]**.

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



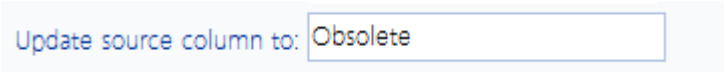
NOTE: If you have selected objects above the list level (for example, Web applications, site collections, and/or sites), the drop-down will be populated with all Content Types that are available for use by lists and libraries within the scope of your selection. If you have selected multiple lists, only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

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



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

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



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

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

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

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

OR

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



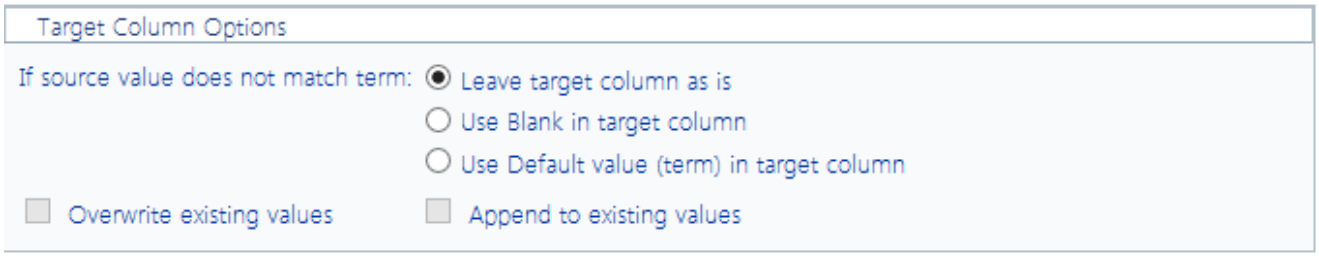
NOTE: If you are creating a new Managed Metadata column, complete the remaining fields as you would if you were creating it in SharePoint.

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



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

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



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

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

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

Now you can either:

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

- run the action immediately (by clicking [**Run Now**]),

OR

- schedule the action to run at a later time

OR

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

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

Copying and Moving SharePoint Objects

ControlPoint Copy and Move actions are designed to be one-time, self-contained operations for copying or moving a single SharePoint object, either within the same farm or to a different farm. You can choose whether or not to copy/move:

- descendants (site only, site with lists and libraries, entire site—including subsites)
- permissions
- if you are copying subsites, navigation and navigation inheritance.

In addition, you can

- "promote" a site so that it become a site collection in the destination location
- "demote" a site collection so that it becomes a site in the destination location
- in the case of a move, create a backup (.CAB file) of the object before it is deleted from the source location
- overwrite an object at the destination (and optionally, create a backup .CAB file of the destination site collection/site before it is overwritten).

You can also *copy* an object to multiple locations within the same destination farm. (You can only *move* an object to a single destination).

A separate action, Move Site Collection to a Different Content Database, lets you move a site collection to another content database associated with the Web application, while preserving the url of the site collection.

In a multi-farm environment, you can initiate a copy/move action for a site collection or site in the home farm only . (You can, however, specify a different farm as the destination as part of the operation).

You cannot use these actions to copy/move objects between farms using different versions of SharePoint . If your goal is to migrate from one version of SharePoint to another, Metalogix offers a tool that can help you migrate between SharePoint versions. Contact Metalogix for more information.

Copy/Move Process Overview

ControlPoint Copy/Move vs. stsadm

ControlPoint Copy and Move actions are based on the same underlying API that supports the stsadm command line tool's export and import operations. However, ControlPoint copy and move offers several advantages over stsadm:

- the interactive GUI allows you to:
  - select source and destination urls without having to look them up and re-type them
  - promote a site to a site collection or demote a site collection to a site more easily
  - copy or move across farms without manually performing multiple steps
- you have the option of overwriting a destination site or list and backing up the site being overwritten
- for a move operation you can have the source site automatically deleted, either immediately or after a specified number of days, and have source backed up before deletion
- other ControlPoint value-added features include:
  - the ability to run the copy or move operation on a schedule basis
  - having a record of the copy/move operation in the ControlPoint Task Audit

Summary of the Copy/Move Process

ControlPoint performs the following copy/move operations:

a Exports the selected object (site collection, site, list, or library) to one or more .CAB files using the API that underlies the stsadm -o export command.

b Optionally, uses the export to .CAB file operation to make a backup copy of:

- objects being copied/moved at the source location

and/or

- if applicable, objects being overwritten at the destination location.

c If you requested that the destination site be overwritten, deletes that site and all of its children.

d Creates the destination object (in the case of a site collection, a destination root site) using either a blank template or the same template and creation language as the source site). Default lists, content, groups, and permissions consistent with the template are created.

e Imports content from the Temporary Location to the destination using the API that underlies the stsadm -o import command.

NOTE: ControlPoint carries out some steps associated with the creation of a new site (such as granting permissions to the account taking the action, and recording an event "announcing" the new site).

f If the operation is a move, deletes the object from the source location either immediately or after a specified number of days.

Factors to Consider Before Performing a Copy or Move

Please review the following information about what to expect *before* performing a copy or move.

For further detail, refer to the document *CopyMoveDetails* in the ControlPoint install directory documentation folder (typically, **C:\Program Files\Metalogix\ControlPoint\Support\Documents**.

What a Copy or Move Does Not Do

ControlPoint copy and move site actions:

- are not backup and restore tools
- do not support ongoing synchronization or replication between two active sites
- do not perform a bit-for-bit copy of a site collection or site
- do not allow you to copy/move an entire farm or Web application or more than one site collection, site, or list
- do not copy application elements, including alerts, features, solutions, custom event handlers, recycle bin state, or any of the code necessary to support Web Parts. Workflows can be copied only if your ControlPoint license includes Content Matrix functionality.
- at the site collection and site level, do not allow you to select which items within a list or library you want copy/move (that is, when you copy or move a list or library, *all* items are carried over).

NOTE: You can use a separate ControlPoint action for copying/moving individual items or folders from one list another. See Copying and Moving List Items.

- do not copy site definitions (which are often referred to as site templates). Site definitions must be installed on the destination system.

TIP: The site definition is a combination of the fields Web Template and Web Template ID (often written as Template#ID, as in STS#1). This information can be found in the ControlPoint Properties window for a site.

Permissions Required to Perform a Copy/Move

When ControlPoint default security trimming is in effect, you must either be a site collection administrator or have Full Control permissions in the Web application policy at both the source and destination location to perform a copy/move operation.

If the operation will result in the *creation* of a new site collection, you must be a farm administrator at the destination.

How Content is Handled When Copied or Moved

Different site templates can cause different behaviors when a new site is created. The descriptions below provide some general guidelines for what you may expect.

Lists and Libraries -

- When copying or moving a site collection or site, default lists and libraries are always created on the destination site, regardless of whether you choose to carry over content.
- If you do choose to carry over site content:
  - lists and libraries are carried over to the destination, including *all* documents, list items, and folders.
  - the contents of default lists and libraries at the destination are replaced by the contents of default lists and libraries on the source
  - all versions of documents stored in the site are carried over.

Web Parts - A Web Part itself (that is, the installed code) is not copied. Web Parts placed onto pages are normally copied if they are installed on the destination system, although this behavior may vary with the specific implementation of the Web Part.

Features - As with Web Parts, installed code is not copied. If a site has a feature activated and the feature has not been installed on the destination farm, the copy will fail. As a preventative measure, you may deactivate the feature on the source site collection/site or install it on the destination farm before performing the copy/move.

Content Types (which may include document templates and custom event handler definitions) -

- If a list within a site references a content type defined at that site, the document template aspects of the site-level content will be copied with the site as a site-level content type.
- If a list within a site references a content type from a parent site or site collection, the document template aspects of the parent-level content type will be copied as a list-level content type. This means that the field-level design of the list (and items in the list) will not change but any sharing/inheritance of a common content type definition will be lost.
- Event handlers are not carried over.

Columns -

- List-level columns are copied without complication.
- If a site-level column was defined in the site being copied/moved, it will become a site column in the destination location.

NOTE: If the site being copied/moved is to become a child site at the destination location and the destination parent site has a site-level column definition with the same name, an error will occur during the import to the destination site.

- If a site-level column was defined in the parent of the site being copied/moved, it will become a list-level column in the destination location. The behavior of the column will be the same but any inheritance will be lost.

Urls - Urls that are internal to the site collection or site and *which are managed by SharePoint* will be "fixed up." These include

- top link bar tabs
- Quick Launch, and
- in general, links that were placed in a Link List.

Links that are not fixed up include:

- those placed directly onto any custom page or custom list, and
- any inbound links from outside the site or list being copied or moved.

Workflows

You can choose whether or not to copy/move workflows from the source to the destination. If you choose this option:

- The operation will include *definitions* of SharePoint "out-of-the-box" workflows and workflows created in SharePoint Designer.
- The operation will *not* include:
  - running instances of workflows
  - workflow history
  - workflows created using a third party product

Miscellaneous - (Navigation Settings, Object IDs, and Version History)

- You can choose whether to include navigation settings at the ControlPoint interface.
- The copy/move operation creates an entirely new copy of the source, with new Item IDs for all SharePoint objects.

NOTE: If you are running SharePoint Server 2010 or later and the Document ID Service is enabled, Document IDs will be retained as long as you are *moving* within the same site collection and the source objects are deleted immediately. (A Document ID cannot be used for more than one item within a site collection.) A Document ID can be used to find the document in the new location after the Search Service has indexed it.

How Security Settings are Handled at the Copy/Move Destination

The following guidelines apply only if you are copying/moving between Web applications that use the same authentication method (Windows *or* Claims). If you are copying/moving between Claims-enabled and non-Claims-enabled Web applications, you cannot carry over security settings.

General Guidelines

The following table describes how security settings are handled at the copy/move destination depending on the option you choose.

If you choose to ...	Then ...	And, the account used to perform the copy/move ...
carry security settings from the source to the destination NOTE: This option is not available for sites that have inherited permissions.	• the security in the destination will be the same as that of the source AND • groups and group members in the source site collection will be copied and any default groups specified by the template will be created, regardless of whether the sites and subsites where the groups were defined are copied (since groups are actually maintained at the site collection level) NOTE: If you are copying or moving a *library or list* which has (or whose items have) unique permissions, a user group and its members will be carried over only if the group does not already exist on the destination site.	• for most site types, will be granted Full Control permission to the site in the destination location, and • depending on the template, will be added to some SharePoint user groups. If the destination is a site collection, the account will also be added to the Site Collection Administrators list.
not carry security settings from the source to the destination	• all child sites, lists, libraries, and folders will inherit permissions from their parent in the destination location, even if they had unique permissions in the source location	• if the destination is a site collection: ▪ will be added to all groups except Visitors. Members, and Owners for Publishing sites ▪ will be added to all groups except Visitors and Members for other site types • will be added to the Site Collection Administrator's list, and

If you choose to ...	Then ...	And, the account used to perform the copy/move ...
	AND • groups defined for the template are created and assigned default permissions defined by the template Be aware that there may be significant security implications involved in this change.	• will be given Full Control permissions to the root site.

Additional Security Considerations for Sites that are Promoted/Demoted

If you want to ...	Then ...
"demote" a site collection so it becomes a site in the destination location	if security is carried over: • groups from the source site collection will be added to the destination site collection, and • if duplicate names exist, membership will be merged.
"promote" a site so that it becomes a site collection in the destination location	• most (but not all) groups and lists that are defined on the template of the source site will be created on the destination site, and • if security is carried over, members of the group will come from the source site.

How Orphan Users are Handled

If a user who has been granted permissions in the source site is no longer in Active Directory (that is, is an "orphan"), those permissions will be copied to the destination location, so that they can be reassigned.

EXCEPTION: If an orphaned user is a member of the Site Administrator's group in the source location, that permission will *not* be carried over to the destination.

Special Consideration for Copying or Moving Across Farms

General Requirements

- In order to perform a cross-farm copy or move, both farms must:
  - normally, be in Active Directory domains that have a two-way trust relationship
  - NOTE: If you are performing a cross-farm copy/move operation and a two-way trust does not exist, the operation can be performed if the domains have a one-way trust relationship See

"Copying/Moving Between Farms with a One-Way Trust Relationship," following, for account requirements

- use a domain account as the Service Account
- either:
  - use the same Service Account for the Web application that hosts the ControlPoint Configuration Site collection

OR

  - if using different Service Accounts, each account must be in the ControlPoint RSAADMIN group in the other farm. See ControlPoint User Groups.

- You can copy/move objects from a WSS-only farm to a MOSS farm; however, the operation will fail if you attempt to copy/move objects from a MOSS farm to a WSS-only farm.
- As covered in "How Content is Handled," above:
  - the operation *may* fail if Web Parts used in pages in the source have not been installed on the destination farm

AND

  - the operation *will* fail if any active features used in the source have not also been installed and activated on the destination farm. (You may circumvent the issue by deactivating features on the source site before performing the copy/move.)
- The operation may fail if the source farm has a later Service Pack version than the destination farm. For example, it is usually not possible to copy/move a site from a system with Service Pack 1 to a system with Service Pack 2.
- You cannot copy/move between farms running different versions of SharePoint. Copying/moving sites from an earlier version of SharePoint to a later version should be treated as a migration. (Metalogix offers tools to facilitate the migration process.)

Copying/Moving Between Farms with a One-Way Trust Relationship

If you are performing copy/move operation between domains that have a one-way trust relationship:

- the accounts used by the administrator(s) requesting the copy and the service accounts being used by the Web application that hosts the ControlPoint Configuration Site collection on both farms are in the domain that is *trusted* (often referred to as the "user" domain)
- the temporary location specified in copy operation can be accessed by the ControlPoint application pool process on both the source and destination server. Ideally, this should be in the in the *trusting* domain (often referred to as the "resource" domain)
- on the appropriate ControlPoint page you will need to provide credentials (domain, account and password) for an account that can be authenticated within the *trusting* domain (either source or destination).

NOTE: If the *source* is the trusting domain, the account must be in the ControlPoint Remote Service Account Administrators (RSAAdmin) group..

Copy/Move Backup and Temporary Locations

\\One of the parameters that must be specified for a copy or move operation is a **Temporary Location**. The Temporary Location is the location to which the site containing the object(s) being copied/moved are exported from the source location, then subsequently imported to the destination location to complete the operation. This location must be accessible to both the source and destination Web front-end servers, but it does not necessarily have to be accessible to the ControlPoint user's workstation.

If you are *moving* SharePoint objects, you also have the option of specifying a **Backup Location** from which you can restore an object, if necessary.

NOTE: It is a best practice to already have current backups of objects to be moved initiating the copy or move operation.

Both the Temporary Location and Backup Location(s) must meet the following requirements:

- The location must be a folder (not file) path, normally a UNC specification of a network shared folder (for example, *server_name**share*). You may use a local path (such as c:\temp) for the Backup Location (and, if both source and destination are within a farm, for the Temporary Location; if source and destination are in different farms, you must use a UNC specification). ControlPoint Application Administrator may have also specified a *default* temporary location to use.
- The account you are using to perform the operation (and in the case of cross-farm operations, the Service Account(s) of both the source and destination farm) must have Full Control access to each location, both to the folder itself and to the share. If are performing a cross-farm operation between farms in domains with a one-way trust relationship, it is generally best to place the share in the resource (i.e., trusting) domain. Exported files are automatically deleted from the Temporary Location (but log files are retained) once the operation has been carried out.

The available disk space on both the source and destination web front ends and the destination SQL server must be several times larger than the size of the site containing the objects being copied/moved. This is necessary in order to accommodate the way in which the SharePoint API performs the export operation.

TIP: For ease of management, it is recommended that you specify different locations for the Temporary and Backup files.

Copying a Site Collection or Site

The ControlPoint Copy Site action lets you copy the configuration, content, and/or permissions of a site collection or site from one location to another, either within the same farm or across farms.

Before you copy a site collection or site:

Be sure to review Factors to Consider Before Performing a Copy or Move.

To copy a site collection or site:

1 In the SharePoint Hierarchy, select the site collection or site you want to copy. (Note that you can only copy one site collection or site at a time.)

2 Right-click and choose Content > Copy Site.

3 Use the information in the following table to determine the appropriate **Source Site Content Settings** option to select.

If you want to copy the site collection or site's ...	Select ...
• configuration (that is, properties that have been defined for the site, such as theme, templates, and default lists) • site content (lists and libraries, documents and list items), and • child sites	**All Content**.
configuration and site content (not child sites)	**Limited Content**.
configuration only	**No Content**.

4 Specify the following **Destination Settings**:

a) For Temporary Location, specify the folder path to which you want to export source files. (ControlPoint Application Administrator may have also specified a *default* temporary location to use.)

b) REMINDER: The account you are using to perform the operation (and in the case of cross-farm operations, the Service Account(s) of both the source and destination farm) must have Full Control access to the Temporary Location, both to the folder itself and to the share.

c) If you are performing a cross-farm operation:

- select a **Destination Farm** from the drop-down

OR

- enter the location of the destination farm in the format http://*server_name:port_number*

where *port_number* is the port number used for the ControlPoint Web application. 1818 is the ControlPoint default.

NOTE: You can perform cross-farm operations *only* if both farms are managed in ControlPoint. For additional requirements and considerations, see Special Consideration for Copying or Moving Across Farms.

d) Click the **Destination Url:** [**Select**] button to open the Destination Selection page.

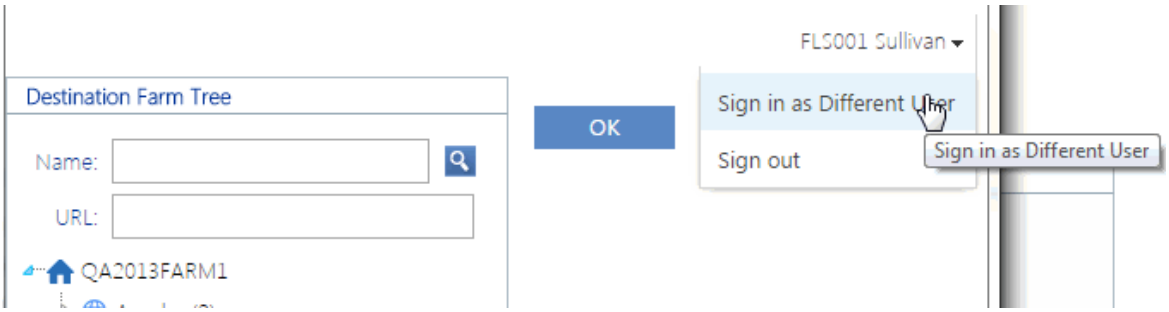
5 Select a location in the **Destination Farm Tree**. Use the information in the following table for guidance.

NOTE: Remember that you can promote a subsite (that is, make it a site collection in the destination location) or demote a site collection (that is, make it a subsite in the destination location). You can also select multiple destination sites and/or subsites.

If you want to ...	Then in the Destination Farm Tree ...	And ..
create a site collection in the destination location	select the **Web application** under which you want to add the site collection	accept the default selection **Copy under [***Web_App_Name***]**. Note that if you choose this option: • the Overwrite option is disabled, and • you can only select one Web application.
overwrite the site collection in the destination location(s)	select the **site collection(s)** you want to overwrite*	select **Overwrite selection and its children**.
create a subsite in the destination location(s)	select the **site collection(s)** and/or **subsite(s)** under which you want the site collection to be added*	select **Copy under selection.**
overwrite a subsite in the destination location(s)	select the **subsite(s)** that you want to overwrite*	select **Overwrite selection and its children**.

* To multi-select, hold down the [Ctrl] key

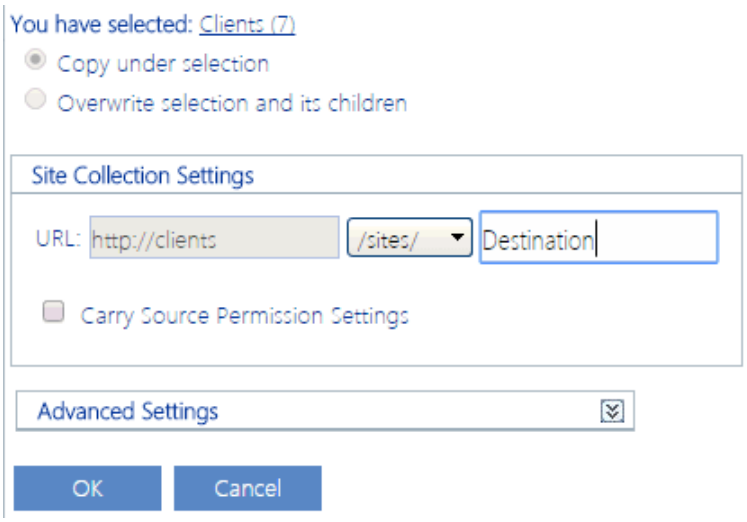
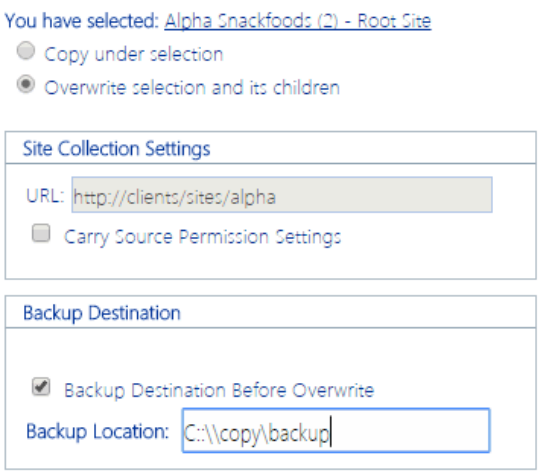
6 If you selected a Destination Farm that is different than the source farm and you want to select a different user account to carry out the portion of the operation that occurs in the destination location, use the **Sign in as Different User** option in the upper-right corner of the Destination Selection page. (Note that this option will not be visible if the source and destination are within the same farm.)

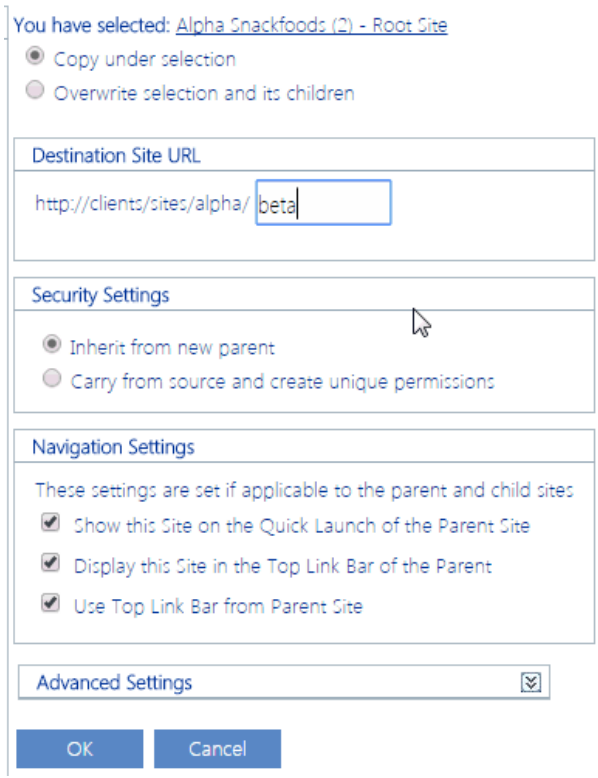


7 Use the information in the following table to determine the appropriate actions to take.

REMINDER: Make sure you are familiar with How Security Settings are Handled at the Copy/Move Destination.

If you chose to ...	Then ...
create a site collection	• Enter the URL path for the new site collection.

If you chose to ...	Then ...
	• If you want to carry security settings over from the source site, check the **Carry Source Permission Settings** box. 
overwrite a site collection or site	• If you want to carry security settings over from the source site, check the **Carry Source Permission Settings** box. • If you want to back up the destination site collection or site to a CAB file before overwriting it: ▪ check the **Backup Destination Before Overwrite** box, and ▪ enter the UNC path to the folder to which you want to export the destination site collection/site before it is overwritten. It is strongly recommended that you *always* back up destination site collections/sites that are to be overwritten. If an error occurs during the operation, the import of the source site will be rolled back, but the deleted/overwritten site will have to be restored manually. 

If you chose to ...	Then ...
	The Backup Location you specify becomes the default backup location for future copy and move operations that *you* perform (that is, it is a user-specific location). You can restore sites from the backup location using standard stsadm import procedures.
create a subsite	• Enter the **Destination Site URL** path • Select the appropriate option for Security Settings; either: ▪ **Inherit from [***site_name***]** (if you select this option, all child sites, lists, and libraries will inherit permissions from the destination parent, even if they had unique permissions on the source site), OR ▪ **Carry from source and create unique permissions** (if you select this option, all permissions from the source site (both inherited and unique) will be carried over and set as unique permissions on the destination site.) • Check each of the **Navigation Settings** you want to carry over to parent and child sites. 

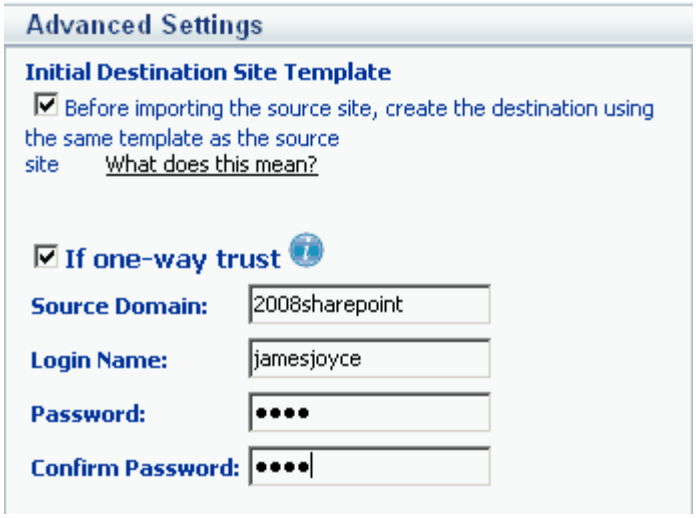
8 If the source and destination are in different domains with a one-way trust relationship and the source domain does not trust the destination:

a) Expand the **Advanced Settings** section.

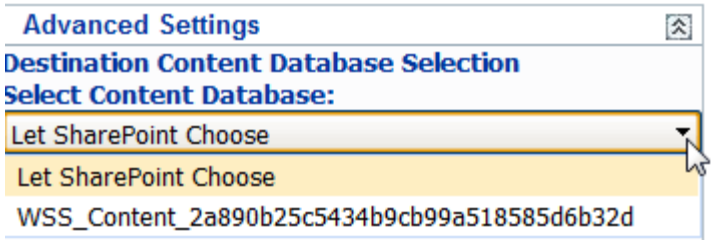
b) Check the **If one-way trust** box.

c) Enter the **Source Domain** name, **Login Name**, and **Password**.

NOTE: If the destination domain does not trust the source, you will need to complete corresponding fields on the main page.



9 If you are creating or overwriting a site collection and more than one content database is attached to the Web application, select the content database that you want to use from the **Select Content Database** drop-down.



NOTE: The drop-down displays content databases that are currently online and for which the Maximum Number of Sites has not been reached. If you do not want to specify a database, accept the default value **Let SharePoint Choose**.

10 Click [**OK**] to return to the Copy Site main page, with the Other Settings section populated with the options you selected.

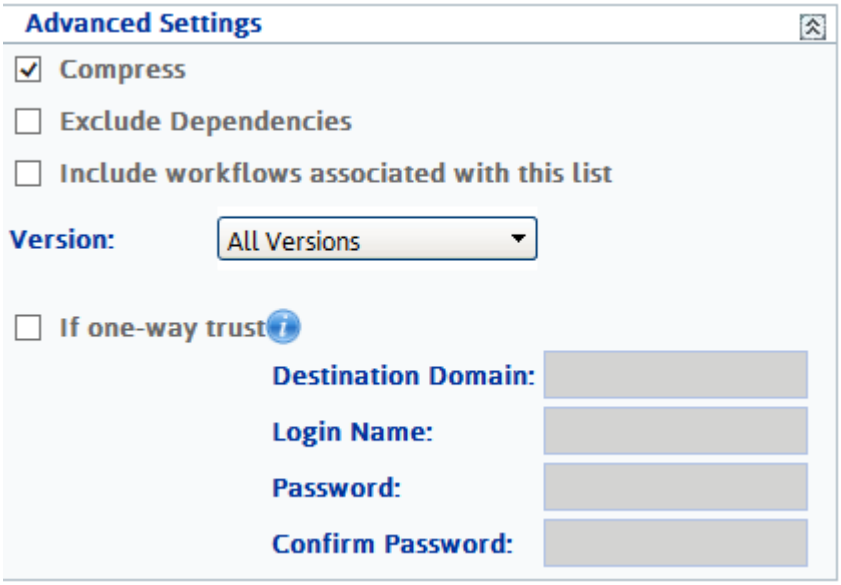
11 If the source and destination are in different domains with a one-way trust relationship and the destination domain does not trust the source:

a) Expand the Advanced Settings section.

b) Check the I**f one-way trust** box.

c) Enter the **Destination Domain** name, **Login Name**, and **Password**. (Remember that the account you use must be in the ControlPoint Remote Service Account Administrators (RSAA) group.)

NOTE: If the source domain does not trust the destination, you will need to complete corresponding fields on the Destination Selection page.



Additional options in the Advanced Settings section may be used in special circumstances. For example:

- If you want to **Compress** content during export, check this box.

  NOTE: If your selection includes one or more exceptionally large documents or list items an attempt to perform a copy/move operation may result in Out of Memory exception as files are being exported. (Compression of exceptionally large list items may consume a lot of memory.) This is why the **Compress** option is unchecked by default.

- If the site contains certain kinds of dependencies (such as a reference to another site), and you want those dependencies to be included at the destination, uncheck the **Exclude Dependencies** box.

  NOTE: If you choose *not* to Exclude Dependencies, you may encounter an error when the export process attempts to capture the content being referenced. This is why **Exclude Dependencies** is checked by default.

- By default, ControlPoint does not copy workflows. If you want to **Include workflows associated with selected content**, check this box.

  NOTE: For information on workflow components that ControlPoint will and will not copy or move, see How Content is Handled When Copied or Moved.

- By default, ControlPoint copies all versions of lists or libraries. However, compatibility issues may exist with old versions. For example, if an old version of a Web Part page contains a Web Part that no longer exists on the system, you may encounter an error. You can choose, instead, to copy only the **Current version**, **Last Major**, or **Last Major and its Minor**.

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 choose to run the action immediately, an Action Verification dialog displays with a summary of the options you chose. Review these options, then click [**OK**] to continue.

When the process has completed, one of the following messages displays on the Action Verification dialog:

- **Process Completed** -

  ControlPoint completed the operation without errors.

- **Process Completed with Some Errors** -

  ControlPoint completed the operation, but with some errors; for example, an orphaned user was found in a group that was copied.

- [**error_message_text**]

  An error occurred that prevented ControlPoint from completing the operation.

NOTE: If you chose to overwrite an object and an error occurs during the backup (export) of the destination site, ControlPoint will stop processing the operation regardless of the nature of the error, to prevent the destination site from being deleted before the problem can be corrected.

Click [**OK**] to generate a ControlPoint Task Audit, which provides detail about the progress of the operation, including any errors that have occurred.

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.

Moving a Site Collection or Site

The ControlPoint Move Site action lets you move the configuration, content, and/or permissions of a site collection or site from one location to another, either within the same farm or across farms.

Once a site collection is deleted from the source content database, any activity and audit log data associated with it remains but becomes "orphaned." If ControlPoint audit log archiving has been set up for the farm, audit log data can be archived—and purged from the database— before the site collection is deleted. See Archiving Audit Log Data Before Moving or Deleting a Site Collection . The site collection in the source content database will display as a deleted site collection in Site Collection Activity results only if it was active during the period covered by the analysis.

Before you move a site collection or site:

Be sure to review Factors to Consider Before Performing a Copy or Move.

To move a site collection or site:

1 In the SharePoint Hierarchy, select the site collection or site you want to move. (Note that you can only move one site collection or site at a time.)

2 Right-click and choose Content > Move Site.

3 Use the information in the following table to determine the appropriate **Source Site Content Settings** option to select.

If you want to copy the site collection or site's ...	Select ...
• configuration (that is, properties that have been defined for the site, such as theme, templates, and default lists) • site content (lists and libraries, documents and list items), and • child sites	**All Content**.
configuration and site content (not child sites)	**Limited Content**.
configuration only	**No Content**.

4 Specify the following **Destination Settings**:

a) For **Temporary Location**, specify the folder path to which you want to export source files. (ControlPoint Application Administrator may have also specified a *default* temporary location to use.)

REMINDER: The account you are using to perform the operation (and in the case of cross-farm operations, the Service Account(s) of both the source and destination farm) must have Full Control access to the Temporary Location, both to the folder itself and to the share.

b) If you are performing a cross-farm operation:

- select a **Destination Farm** from the drop-down

OR

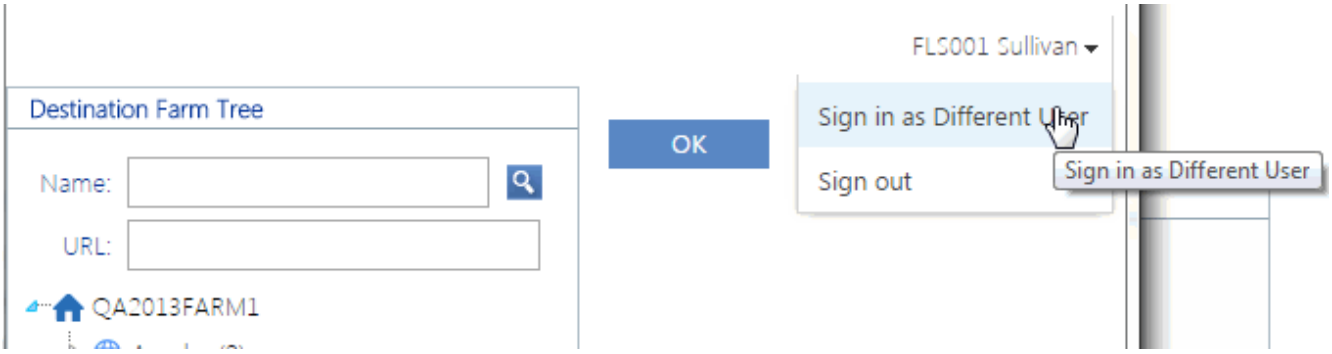
- enter the location of the destination farm in the format http://*server_name:port_number*

where *port_number* is the port number used for the ControlPoint Web application. 1818 is the ControlPoint default.

NOTE: You can perform cross-farm operations *only* if both farms are managed in ControlPoint. For additional requirements and considerations, see Special Consideration for Copying or Moving Across Farms.

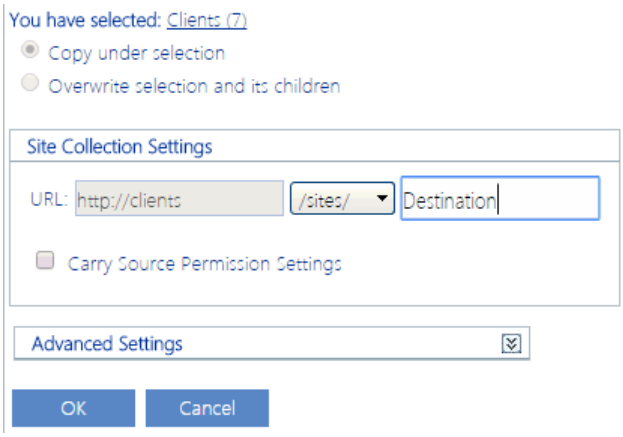
c) Click the **Destination Url:** [**Select**] button to open the Destination Selection page.

5 If you selected a Destination Farm that is different than the source farm and you want to select a different user account to carry out the portion of the operation that occurs in the destination location, use the **Sign in as Different User** option in the upper-right corner of the Destination Selection page. (Note that this option will not be visible if the source and destination are within the same farm.)

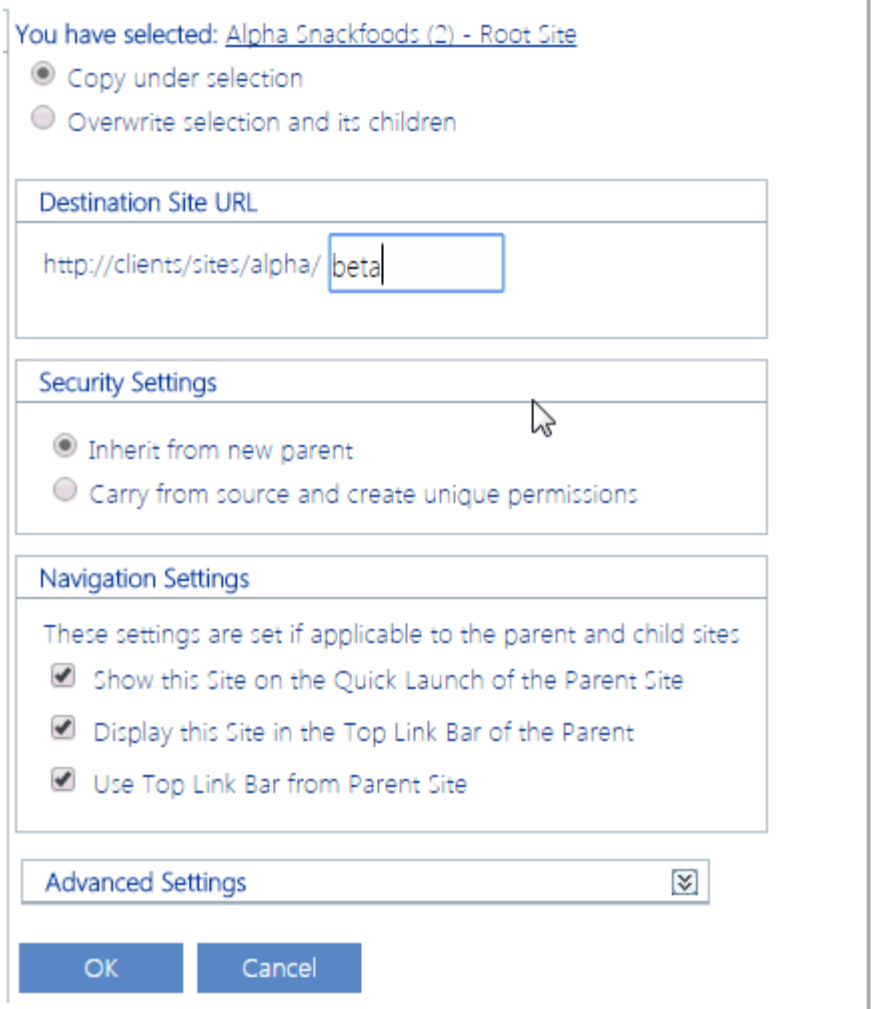


6 Use the information in the following table to determine the appropriate actions to take.

REMINDER: Make sure you are familiar with How Security Settings are Handled at the Copy/Move Destination.

If you chose to ...	Then ...
create a site collection	• Enter the URL path for the new site collection. • If you want to carry security settings over from the source site, check the **Carry Source Permission Settings** box. 
overwrite a site collection or site	• If you want to carry security settings over from the source site, check the **Carry Source Permission Settings** box. • If you want to back up the destination site collection or site to a CAB file before overwriting it: ▪ check the **Backup Destination Before Overwrite** box, and ▪ enter the UNC path to the folder to which you want to export the destination site collection/site before it is overwritten. It is strongly recommended that you *always* back up destination site collections/sites that are to be overwritten. If an error occurs during the

If you chose to ...	Then ...
	operation, the import of the source site will be rolled back, but the deleted/overwritten site will have to be restored manually. The Backup Location you specify becomes the default backup location for future copy and move operations that *you* perform (that is, it is a user-specific location). You can restore sites from the backup location using standard stsadm import procedures.
create a subsite	• Enter the **Destination Site URL** path • Select the appropriate option for Security Settings; either: ▪ **Inherit from [***site_name***]** (if you select this option, all child sites, lists, and libraries will inherit permissions from the destination parent, even if they had unique permissions on the source site), OR ▪ **Carry from source and create unique permissions** (if you select this option, all permissions from the source site (both inherited and unique) will be carried over and set as unique permissions on the destination site.) • Check each of the **Navigation Settings** you want to carry over to parent and child sites.

If you chose to ...	Then ...
	

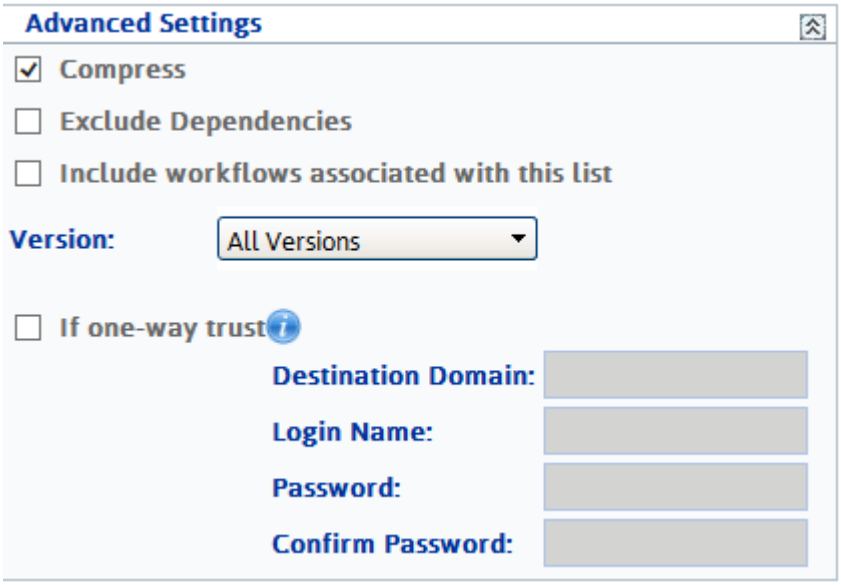
7 If the source and destination are in different domains with a one-way trust relationship and the source domain does not trust the destination:

a) Expand the **Advanced Settings** section.

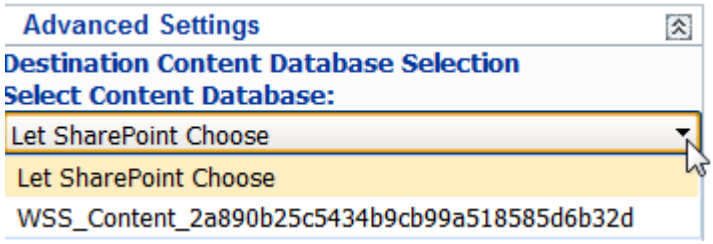
b) Check the **If one-way trust** box.

c) Enter the **Source Domain** name, **Login Name**, and **Password**.

NOTE: If the destination domain does not trust the source, you will need to complete corresponding fields on the main page.



8 If you are creating or overwriting a site collection and more than one content database is attached to the Web application, select the content database that you want to use from the **Select Content Database** drop-down.



NOTE: The drop-down displays content databases that are currently online and for which the Maximum Number of Sites has not been reached. If you do not want to specify a database, accept the default value **Let SharePoint Choose**.

9 Click [**OK**] to return to the Move Site main page, with the Other Settings section populated with the options you selected.

10 Complete the Delete Source Settings section as follows:

a) If different from the default (10 days), enter the number of days after the move that you want the site collection/site deleted from the source location.

NOTE: If you are moving an active site collection or site, it is recommended that you either lock the site collection to prevent changes or delete it within a day of a successful move because any changes to the source after the move is carried out will not be replicated to the destination.

b) If you want to back up the source site collection or site to a .CAB file before it is deleted:

- make sure the **Backup Before Delete** box is checked, and
- specify a network folder path to which you want to export the backup file.

It is strongly recommended that you make a backup of the source, especially if security settings will be changed and/or content will be overwritten. You must have Full Control permissions to the Backup Location you specify, and it becomes the default location for future move operations that you perform (that is, it is a user-specific location). You can restore sites from the backup location using standard stsadm import procedures.

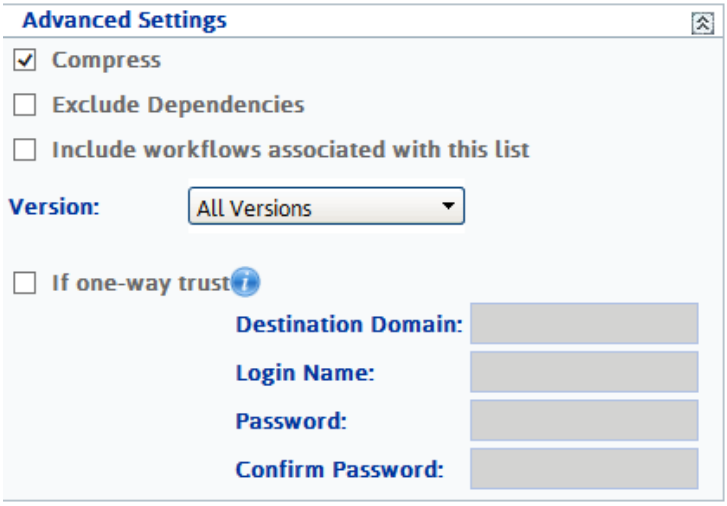
11 If the source and destination are in different domains with a one-way trust relationship and the destination domain does not trust the source:

a) Expand the Advanced Settings section.

b) Check the I**f one-way trust** box.

c) Enter the **Destination Domain** name, **Login Name**, and **Password**. (Remember that the account you use must be in the ControlPoint Remote Service Account Administrators (RSAA) group.)

NOTE: If the source domain does not trust the destination, you will need to complete corresponding fields on the Destination Selection page.



Additional options in the Advanced Settings section may be used in special circumstances. For example:

- If you want to **Compress** content during export, check this box.

  NOTE: If your selection includes one or more exceptionally large documents or list items an attempt to perform a copy/move operation may result in Out of Memory exception as files are being exported. (Compression of exceptionally large list items may consume a lot of memory.) This is why the **Compress** option is unchecked by default.

- If the site contains certain kinds of dependencies (such as a reference to another site), and you want those dependencies to be included at the destination, uncheck the **Exclude Dependencies** box.

  NOTE: If you choose *not* to Exclude Dependencies, you may encounter an error when the export process attempts to capture the content being referenced. This is why **Exclude Dependencies** is checked by default.

- By default, ControlPoint does not copy workflows (and only provides the option to copy workflows if the ControlPoint license includes Content Matrix functionality). If your ControlPoint license includes

Content Matrix functionality and you want to **Include workflows associated with selected content**, check this box.

NOTE: For information on workflow components that ControlPoint will and will not copy or move, see How Content is Handled When Copied or Moved.

By default, ControlPoint copies all versions of lists or libraries. However, compatibility issues may exist with old versions. For example, if an old version of a Web Part page contains a Web Part that no longer exists on the system, you may encounter an error. You can choose, instead, to copy only the **Current version**, **Last Major**, or **Last Major and its Minor**.

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 choose to run the action immediately, an Action Verification dialog displays with a summary of the options you chose. Review these options, then click [**OK**] to continue.

When the process has completed, one of the following messages displays on the Action Verification dialog:

- **Process Completed** -

  ControlPoint completed the operation without errors.

- **Process Completed with Some Errors** -

  ControlPoint completed the operation, but with some errors; for example, an orphaned user was found in a group that was copied.

- [**error_message_text**]

  An error occurred that prevented ControlPoint from completing the operation.

NOTE: If you chose to overwrite an object and an error occurs during the backup (export) of the destination site, ControlPoint will stop processing the operation regardless of the nature of the error, to prevent the destination site from being deleted before the problem can be corrected.

Click [**OK**] to generate a ControlPoint Task Audit, which provides detail about the progress of the operation, including any errors that have occurred.

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.

Moving a Site Collection to Another Content Database

The Move Site Collection to Another Content Database action enables you to move a site collection to a different content database within the same Web application while preserving the site collection's url.

You can use this action in conjunction with the Content Database Storage analysis to help you effectively monitor and manage content storage among databases.

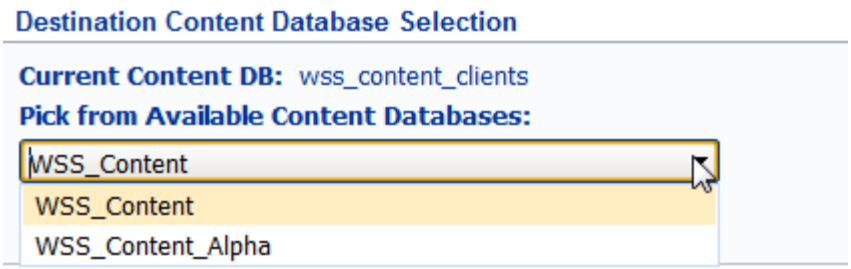
Once a site collection is deleted from the source content database, any activity and audit log data associated with it remains but becomes "orphaned." If ControlPoint audit log archiving has been set up for the farm, audit log data can be archived—and purged from the database— before the site collection is deleted. See Archiving Audit Log Data Before Moving or Deleting a Site Collection. The site collection in the source content database will display as a deleted site collection in Site Collection Activity results only if it was active during the period covered by the analysis.

To move a site collection to another content database:

1 From the SharePoint Hierarchy, select the site collection that you want to move to another content database. (Note that you can only move one site collection at a time.)

2 Right-click and choose Content > Move to Another Content DB.

3 From the **Pick from Available Content Databases** drop-down, select the database to which you want to move the site collection.



NOTE: The drop-down lists all other content databases associated with the Web application that are currently online and for which the Maximum Number of Sites has not been reached.

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 choose to run the action immediately, an Action Verification dialog displays with a summary of the options you chose. Review these options, then click [**OK**] to continue.

When the process has completed, one of the following messages displays on the Action Verification dialog:

- **Process Completed** -

  ControlPoint completed the operation without errors.

- **Process Completed with Some Errors** -

  ControlPoint completed the operation, but with some errors; for example, an orphaned user was found in a group that was copied.

- [**error_message_text**]

  An error occurred that prevented ControlPoint from completing the operation.

NOTE: If you chose to overwrite an object and an error occurs during the backup (export) of the destination site, ControlPoint will stop processing the operation regardless of the nature of the error, to prevent the destination site from being deleted before the problem can be corrected.

Click [**OK**] to generate a ControlPoint Task Audit, which provides detail about the progress of the operation, including any errors that have occurred.

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

NOTE: Only one copy/move operation can run at a time. Any additional copy/move operations either submitted via the Run Now option or scheduled to run within the same timeframe will begin processing after the previous operation has completed.

See also Auditing ControlPoint Administrator Tasks.

Copying a List or Library

The ControlPoint Copy List action lets you copy the configuration and contents (and optionally, security settings) of a SharePoint list or library from one site to another, either within the same farm or across farms.

NOTE: You can only copy one list or library at a time, and the operation includes *all* items. If you want to copy selected items or folders within a list or library, use the procedure for Copying List Items.

Before you copy a list or library:

Be sure to review Factors to Consider Before Performing a Copy or Move.

To copy a list or library:

1 In the SharePoint Hierarchy, select the list or library you want to copy. (Note that you can only copy one list or library at a time, and the operation includes *all* items.)

2 Choose Content > Copy List.

3 Specify the following **Destination Settings**:

a) For **Temporary Location**, specify the folder path to which you want to export source files. (ControlPoint Application Administrator may have also specified a *default* temporary location to use.)

REMINDER: The account you are using to perform the operation (and in the case of cross-farm operations, the Service Account(s) of both the source and destination farm) must have Full Control access to the Temporary Location, both to the folder itself and to the share.

b) If you are performing a cross-farm operation:

- select a **Destination Farm** from the drop-down

OR

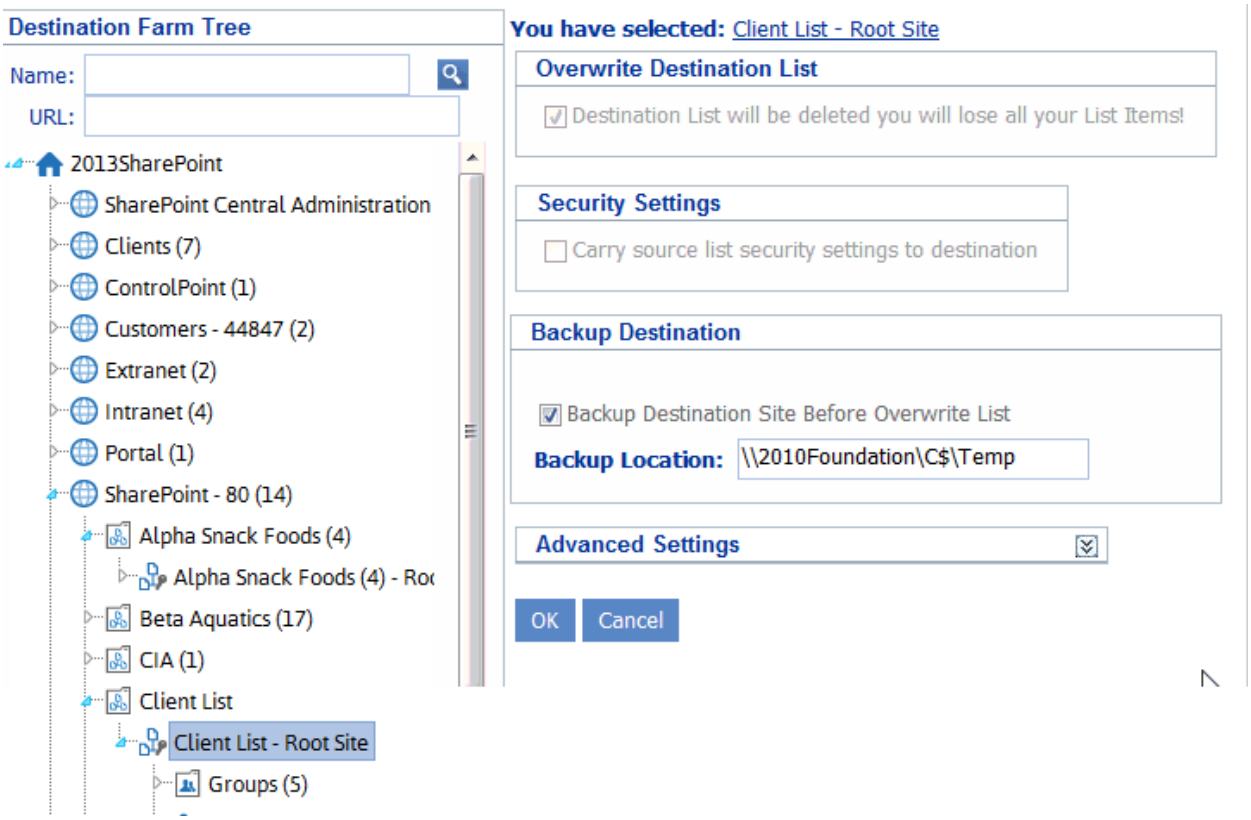
- enter the location of the destination farm in the format http://*server_name:port_number*

where *port_number* is the port number used for the ControlPoint Web application. 1818 is the ControlPoint default.

NOTE: You can perform cross-farm operations *only* if both farms are managed in ControlPoint. For additional requirements and considerations, see Special Consideration for Copying or Moving Across Farms.

4 Click the **Destination Url:** [**Select**] button to open the Destination Selection page.

5 Select a site in the **Destination Farm Tree**. (If you select a site collection, the list will be copied to the root site.)



If the site you selected contains a list with the same name as the source, the list (and all of its item) will be overwritten with the list from the source site.

6 If you selected a Destination Farm that is different than the source farm and you want to select a different user account to carry out the portion of the operation that occurs in the destination location, use the **Sign in as Different User** option in the upper-right corner of the Destination Selection page. (Note that this option will not be visible if the source and destination are within the same farm.)



7 Use the information in the following table to determine the appropriate **Security Settings** option to select.

If ...	Then ...
• you are copying a list with unique permissions, and • you want to carry permission settings of the source list over to the list on the destination site	check the **Carry source list security settings to the destination**. NOTE: If you check this box, a user group and its members will be carried over only if the group does not already exist on the destination site. This option is not available if you are moving between claims-enabled and non-claims-enabled Web application.
you want the list to inherit permissions from the destination site	leave the **Carry source list security settings to the destination** box unchecked. NOTE: If you are copying a list with inherited permissions, this is the only available option.

8 If you want to back up the destination list before overwriting it:

- check the **Backup Destination Before Overwrite**, and
- enter the relative path to the folder or url to which you want to export the destination list before it is overwritten.

It is strongly recommended that you *always* back up destination lists that are to be overwritten. If an error occurs during the operation, the import of the source site will be rolled back and the list can be restored using standard stsadm import procedures.

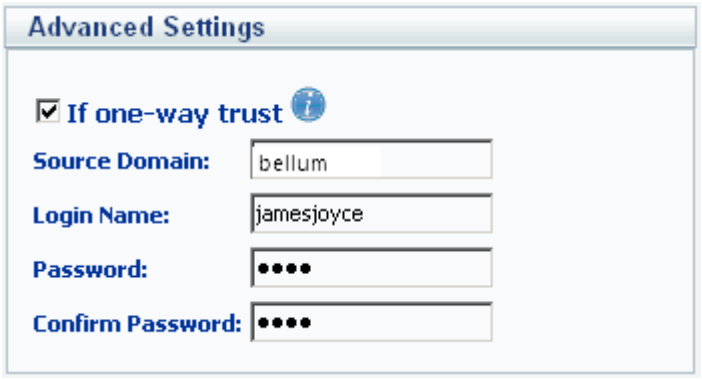
9 If the source and destination are in different domains with a one-way trust relationship and the source domain does not trust the destination:

a) Expand the **Advanced Settings** section.

b) Check the **If one-way trust** box.

c) Enter the **Source Domain** name, **Login Name**, and **Password**.

NOTE: If the destination domain does not trust the source, you will need to complete corresponding fields on the main page.



10 Click [**OK**] to return to the Copy List main page, with the Other Settings section populated with the options you selected.

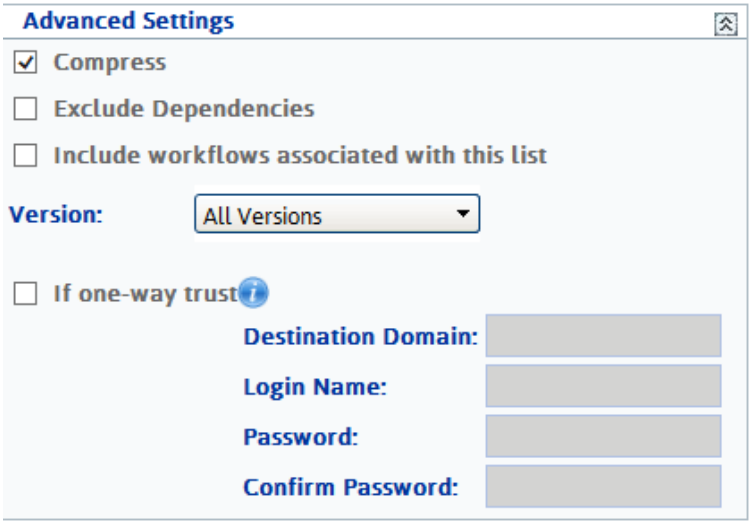
11 If the source and destination are in different domains with a one-way trust relationship and the destination domain does not trust the source:

a) Expand the Advanced Settings section.

b) Check the I**f one-way trust** box.

c) Enter the **Destination Domain** name, **Login Name**, and **Password**. (Remember that the account you use must be in the ControlPoint Remote Service Account Administrators (RSAA) group.)

NOTE: If the source domain does not trust the destination, you will need to complete corresponding fields on the Destination Selection page.



Additional options in the Advanced Settings section may be used in special circumstances. For example:

- If you want to **Compress** content during export, check this box.

NOTE: If your selection includes one or more exceptionally large documents or list items an attempt to perform a copy/move operation may result in Out of Memory exception as files are being exported. (Compression of exceptionally large list items may consume a lot of memory.) This is why the **Compress** option is unchecked by default.

- If the site contains certain kinds of dependencies (such as a reference to another site), and you want those dependencies to be included at the destination, uncheck the **Exclude Dependencies** box.

  NOTE: If you choose *not* to Exclude Dependencies, you may encounter an error when the export process attempts to capture the content being referenced. This is why **Exclude Dependencies** is checked by default.

- By default, ControlPoint does not copy workflows. If you want to **Include workflows associated with selected content**, check this box.

  NOTE: For information on workflow components that ControlPoint will and will not copy or move, see How Content is Handled When Copied or Moved.

- By default, ControlPoint copies all versions of lists or libraries. However, compatibility issues may exist with old versions. For example, if an old version of a Web Part page contains a Web Part that no longer exists on the system, you may encounter an error. You can choose, instead, to copy only the **Current version**, **Last Major**, or **Last Major and its Minor**.

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 choose to run the action immediately, an Action Verification dialog displays with a summary of the options you chose. Review these options, then click [**OK**] to continue.

When the process has completed, one of the following messages displays on the Action Verification dialog:

- **Process Completed** -

  ControlPoint completed the operation without errors.

- **Process Completed with Some Errors** -

  ControlPoint completed the operation, but with some errors; for example, an orphaned user was found in a group that was copied.

- [**error_message_text**]

  An error occurred that prevented ControlPoint from completing the operation.

NOTE: If you chose to overwrite an object and an error occurs during the backup (export) of the destination site, ControlPoint will stop processing the operation regardless of the nature of the error, to prevent the destination site from being deleted before the problem can be corrected.

Click [**OK**] to generate a ControlPoint Task Audit, which provides detail about the progress of the operation, including any errors that have occurred.

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.

Moving a List or Library

The ControlPoint Move List feature lets you move the configuration and content (and optionally, security settings) of a SharePoint list or library from one location to another, either within the same farm or across farms.

NOTE: You can only move one list or library at a time, and the operation includes *all* items. If you want to move selected items within a list or library, use the procedure for Moving List Items.

Before you move a list or library:

Be sure to review Factors to Consider Before Performing a Copy or Move.

NOTE: When a list or list items are moved, the entire site is exported to the Backup Location. The SharePoint user interface does not provide a mechanism for exporting/importing selected lists/list items. If you need to restore objects that have been overwritten as part of a copy/move operation, you can import the site to an interim location using standard stsadm import procedures, then copy the object(s) back to the original site using the ControlPoint action for copying lists or list items.

To move a list or library:

1 In the SharePoint Hierarchy, select the list or library you want to move.

2 Choose Content > Move List.

3 Specify the following **Destination Settings**:

a) For **Temporary Location**, specify either a network folder (not file) path or a url to which you want to export the source files that will be copied. (ControlPoint Application Administrator may have also specified a *default* temporary location to use.)

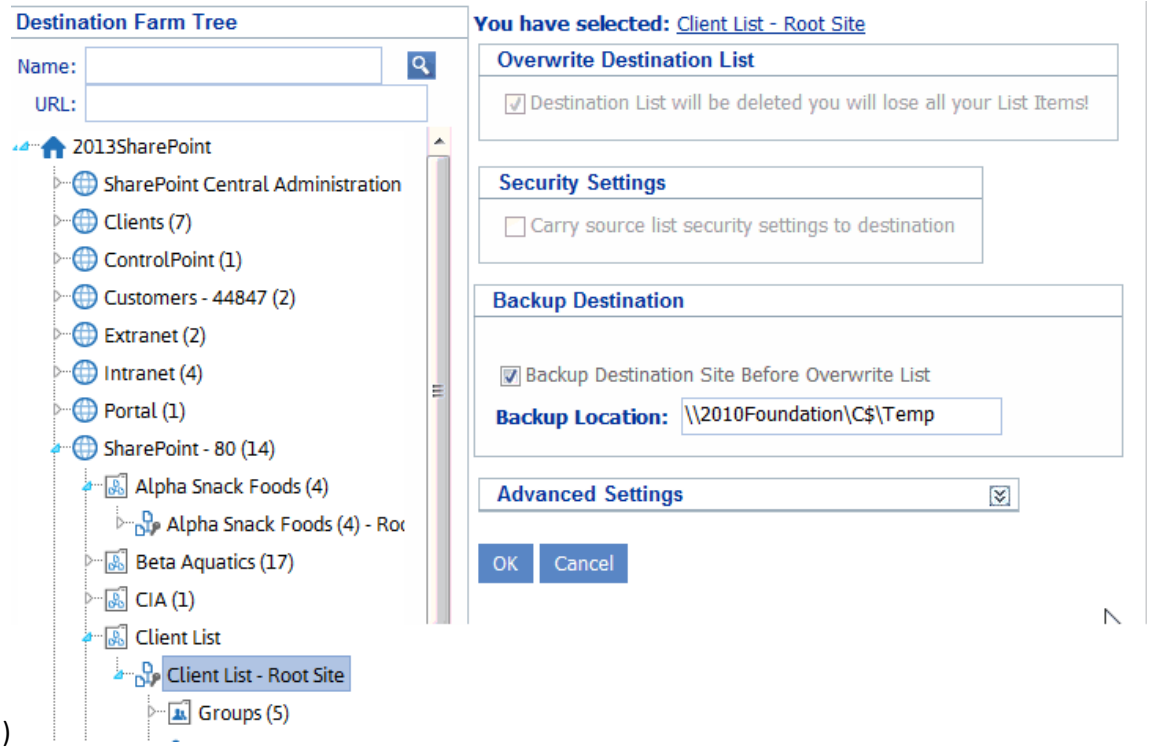
NOTE: The account you are using to perform the operation (and in the case of cross-farm operations, the Service Account(s) of both the source and destination farm) must have Full Control access to the Temporary Location. Exported files are automatically deleted from this location once the operation has been carried out.

b) If you are performing a cross-farm move, select a **Destination Farm** from the drop-down.

NOTE: You can perform cross-farm moves *only* if both farms are managed in ControlPoint.

4 For **Destination URL**, click [**Select**] to display the Destination Selection Page.

5 Select a site in the **Destination Farm Tree**. (If you select a site collection, the list will be copied to the root site.)



If a list with the same name exists on the destination site, that list and all of its items will be overwritten with the list from the source site.

6 If you selected a Destination Farm that is different than the source farm and you want to select a different user account to carry out the portion of the operation that occurs in the destination location, use the **Sign in as Different User** option in the upper-right corner of the Destination Selection page. (Note that this option will not be visible if the source and destination are within the same farm.)



7 Use the information in the following table to determine the appropriate Security Settings option to select.

If ..	Then ...
• you are moving a list with unique permissions, and	check the **Carry source list security settings to the destination**.

If ..	Then ...
• you want to carry permission settings of the source list over to the list on the destination site	NOTE: If you check this box, a user group and its members will be carried over only if the group does not already exist on the destination site. This option is not available if you are moving between claims-enabled and non-claims-enabled Web application.
you want the list to inherit permissions from the destination site	leave the Carry source list security settings to the destination box unchecked. NOTE: If you are moving a list with inherited permissions, this is the only available option.

8 If you want to back up the destination list to a .CAB file before overwriting it:

- check the **Backup Destination Before Overwrite**, and
- enter the relative path to the folder or url to which you want to export the destination list or library before it is overwritten.

It is strongly recommended that you *always* back up destination lists that are to be overwritten. If an error occurs during the operation, the import of the source site will be rolled back, and you can restore the list using standard stsadm import procedures.

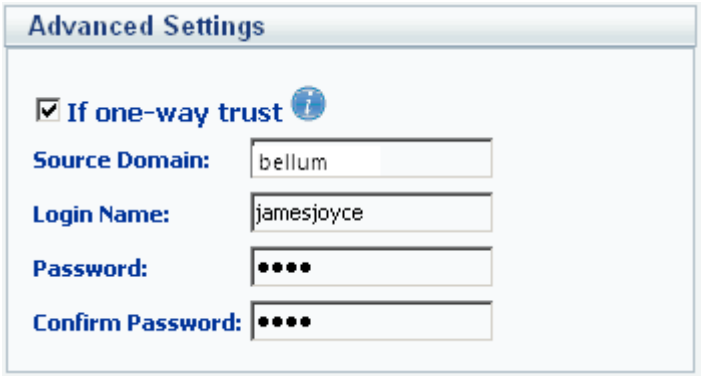
9 If the source and destination are in different domains with a one-way trust relationship and the source domain does not trust the destination:

a) Expand the **Advanced Settings** section.

b) Check the **If one-way trust** box.

c) Enter the **Source Domain** name, **Login Name**, and **Password**.

NOTE: If the destination domain does not trust the source, you will need to complete corresponding fields on the main page.



10 Click [**OK**] to return to the Move List main page, with the Other Settings section populated with the options you selected.

11 Complete the **Delete Source Settings** section as follows:

a) If different from the default (10 days), enter the number of days after the move that you want the object deleted from the source location.

NOTE: If you are moving an active object, it is recommended that you delete it within a day of a successful move because any changes to the source after the move is carried out will not be replicated to the destination.

b) If you want to back up the source site to a .CAB file before it is deleted:

- make sure the **Backup Before Delete** box is checked, and
- specify either a network folder (not file) path or url to which you want to export the backup file.

It is strongly recommended that you make a backup of the source site, especially if security settings will be changed and/or content will be overwritten. You must have Full Control permissions to the Backup Location you specify, and it becomes the default location for future move operations that you perform (that is, it is a user-specific location). Remember, you can restore sites from the backup location to an interim location using standard stsadm import procedures, then restore the object(s) to the source site using the ControlPoint Copy List or Copy List Item(s) action.

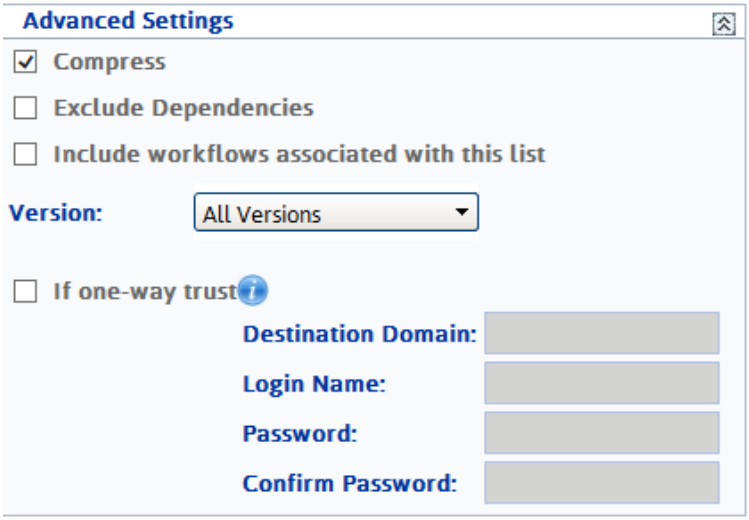
12 If the source and destination are in different domains with a one-way trust relationship and the destination domain does not trust the source:

a) Expand the Advanced Settings section.

b) Check the I**f one-way trust** box.

c) Enter the **Destination Domain** name, **Login Name**, and **Password**. (Remember that the account you use must be in the ControlPoint Remote Service Account Administrators (RSAA) group.)

NOTE: If the source domain does not trust the destination, you will need to complete corresponding fields on the Destination Selection page.



Additional options in the Advanced Settings section may be used in special circumstances. For example:

- If you want to **Compress** content during export, check this box.

NOTE: If your selection includes one or more exceptionally large documents or list items an attempt to perform a copy/move operation may result in Out of Memory exception as files are being exported. (Compression of exceptionally large list items may consume a lot of memory.) This is why the **Compress** option is unchecked by default.

- If the site contains certain kinds of dependencies (such as a reference to another site), and you want those dependencies to be included at the destination, uncheck the **Exclude Dependencies** box.

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- By default, ControlPoint does not copy workflows (and only provides the option to copy workflows if the ControlPoint license includes Content Matrix functionality). If you want to **Include workflows associated with selected content**, check this box.

NOTE: For information on workflow components that ControlPoint will and will not copy or move, see How Content is Handled When Copied or Moved.

- By default, ControlPoint copies all versions of lists or libraries. However, compatibility issues may exist with old versions. For example, if an old version of a Web Part page contains a Web Part that no longer exists on the system, you may encounter an error. You can choose, instead, to copy only the **Current version**, **Last Major**, or **Last Major and its Minor**.

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 choose to run the action immediately, an Action Verification dialog displays with a summary of the options you chose. Review these options, then click [**OK**] to continue.

When the process has completed, one of the following messages displays on the Action Verification dialog:

- **Process Completed** -

  ControlPoint completed the operation without errors.

- **Process Completed with Some Errors** -

  ControlPoint completed the operation, but with some errors; for example, an orphaned user was found in a group that was copied.

- [**error_message_text**]

  An error occurred that prevented ControlPoint from completing the operation.

NOTE: If you chose to overwrite an object and an error occurs during the backup (export) of the destination site, ControlPoint will stop processing the operation regardless of the nature of the error, to prevent the destination site from being deleted before the problem can be corrected.

Click [**OK**] to generate a ControlPoint Task Audit, which provides detail about the progress of the operation, including any errors that have occurred.

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.

Copying and Moving List Items

ControlPoint Copy and Move List Items actions are designed to be one-time, self-contained operations for copying or moving selected items and/or folders from one list or library to another, either within a site, across sites, or across farms.

Factors to Consider Before Copying/Moving List Items

Items and folders can only be copied/moved between lists that use the same template. For example, you cannot copy/move files from a document library to a task list or discussion board.

Folders

When you copy or move a folder, the operation will copy all content, including subfolders and their contents. You can also choose to copy individual items within a folder or subfolder.

Security Settings

For items with unique permissions, you can choose to carry over security settings or have them inherited from the list/library on the destination site.

Mapping Columns

You can map user-defined columns in the source list to user-defined columns in the destination list as long as they are of the same data type. The operation will not *create* custom columns in the destination list.

You must also map any column for which the internal name is different in the destination list. Columns of the same data type, internal name, *and* display name do not need to be mapped.

Overwrite and Versioning Options

If versioning is enabled for the source list, you can choose to copy/move:

- the latest version of the item(s)
- all versions of the item(s)
- the last major version of the item(s)

- the last major and minor version of the item(s).

You can choose how you want ControlPoint to handle an item in the destination list that is the same as an item being copied/moved from the source list:

- save the item as a new version of the existing item
- skip the item
- overwrite the item.

An item is considered the "same" if:

- within a library, it has the same file name
- within another list type, it has the same object ID. (Items from the source list that have unique object IDs will always be carried over as new, even if they *appear* to be duplicates.)

NOTE: Object IDs may be retained if, for example, Central Administration - Content Deployment was used to copy content from one farm to another. Object IDs are *not* retained as the result of a ControlPoint copy/move action.

Copying List Items

The ControlPoint Copy List Item(s) action lets you copy items and folders (and optionally, security settings) from one SharePoint list or library to another, either within a site, across sites, or across farms.

Before you copy list items:

Be sure to review Factors to Consider Before Copying/Moving List Items.

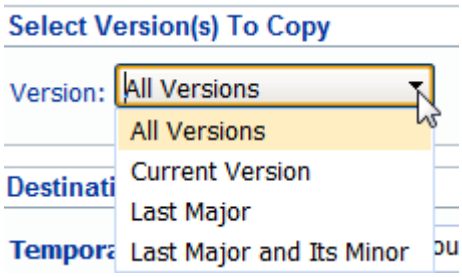
To copy list items:

1 In the SharePoint Hierarchy, select the list whose item(s) you want to copy.

2 Choose Content > Copy List Item(s).

3 In the Selection section, select the list items that you want to include in the operation.

4 If versioning is enabled for the source list or library, **Select Version(s) to Copy** from the drop-down. (This option will not be visible if versioning is disabled.)



NOTE: The most recent version copied from the source will become the current version at the destination. If you choose to copy multiple versions, all will be copied if versioning is enabled at the destination.

5 Specify the following **Destination Settings**:

a) For **Temporary Location**, specify the folder path to which you want to export source files. (ControlPoint Application Administrator may have also specified a *default* temporary location to use.)

REMINDER: The account you are using to perform the operation (and in the case of cross-farm operations, the Service Account(s) of both the source and destination farm) must have Full Control access to the Temporary Location, both to the folder itself and to the share.

b) If you are performing a cross-farm operation:

- select a **Destination Farm** from the drop-down

OR

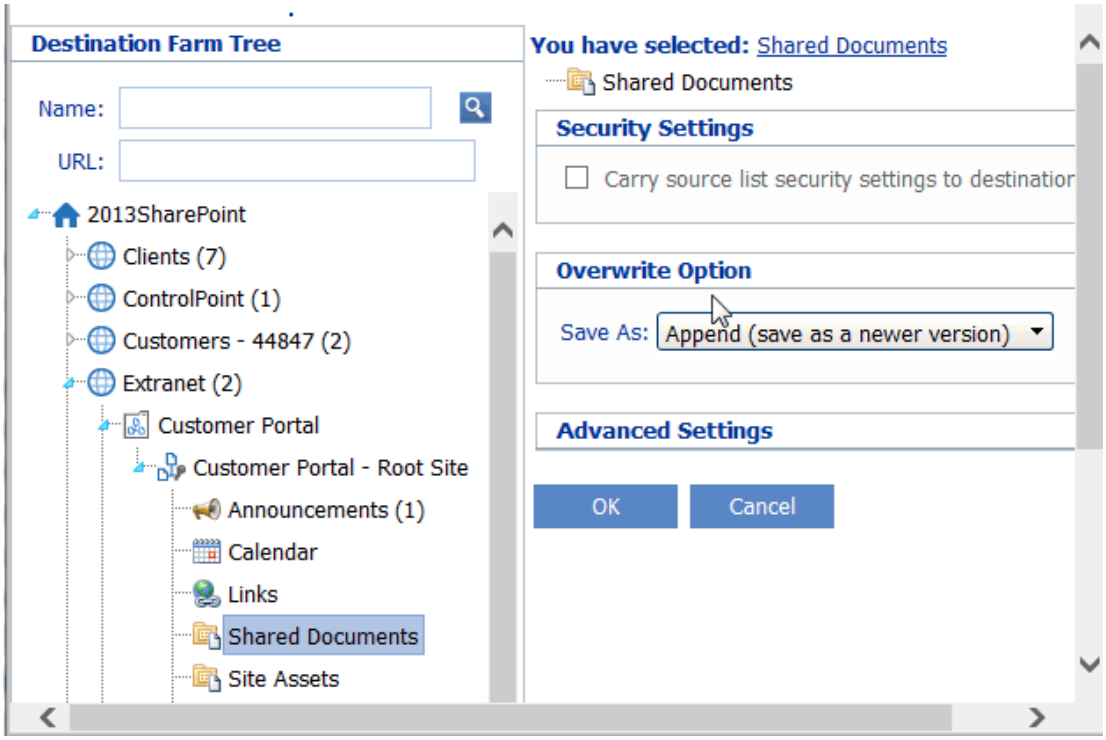
- enter the location of the destination farm in the format http://*server_name:port_number*

where *port_number* is the port number used for the ControlPoint Web application. 1818 is the ControlPoint default.

NOTE: You can perform cross-farm operations *only* if both farms are managed in ControlPoint. For additional requirements and considerations, see Special Consideration for Copying or Moving Across Farms.

6 Click the **Destination Url:** [**Select**] button to open the Destination Selection page.

7 From the **Destination Farm Tree**, select the list to which you want to copy items.



REMINDER: You can only copy items to a list that uses the same template as the source.

8 If you selected a Destination Farm that is different than the source farm and you want to select a different user account to carry out the portion of the operation that occurs in the destination location, use the **Sign in as Different User** option in the upper-right corner of the Destination Selection page. (Note that this option will not be visible if the source and destination are within the same farm.)



9 Use the information in the following table to determine the appropriate **Security Settings** option to select.

If ...	Then ...
you want to carry the permission settings of the source item(s) to the item(s) in the destination list (which will give the item(s) unique permissions within the destination list)	check the **Carry source list security settings to destination** box. NOTE: If you check this box, a user group and its members will be carried over only if the group does not already exist in the destination site collection. This option is not available if you are copying/moving between claims-enabled and non-claims-enabled Web applications.
you do *not* want to carry permissions settings of the source item(s) to the destination list	leave the Carry source list settings to the destination box unchecked. NOTE: If you leave this box unchecked and an item of the same name already exists in the destination list and has unique permissions, security settings will depend on the **Overwrite Option** option you select in the next step.

10 If applicable, select the appropriate **Overwrite Option** from the drop-down. Use the information in the following table for guidance.

NOTE: This option is available *only* for document library items (which can be uniquely identified by file name) or lists whose items have the same IDs (for example, if a list was copied from one farm to another and IDs were retained).

If you want the operation to ...	Select ...
create a new version of any items that are the same in the destination	**Append (save as a newer version)**. NOTES:

If you want the operation to ...	Select ...
list	• The most recent version that is copied will become the current version at the destination. If you choose to copy multiple versions, all will be copied, if versioning is enabled at the destination. • If the item on the destination site had unique permissions, those permissions will be retained.
skip any items that are the same in the destination list	**Ignore (if same item exists, don't copy)**.
overwrite any items that are the same in the destination list	**Overwrite**. NOTE: Any item that had unique permissions will be overwritten with an item that inherits permissions from the parent list or folder.

11 If the source and destination are in different domains with a one-way trust relationship and the source domain does not trust the destination:

a) Expand the **Advanced Settings** section.

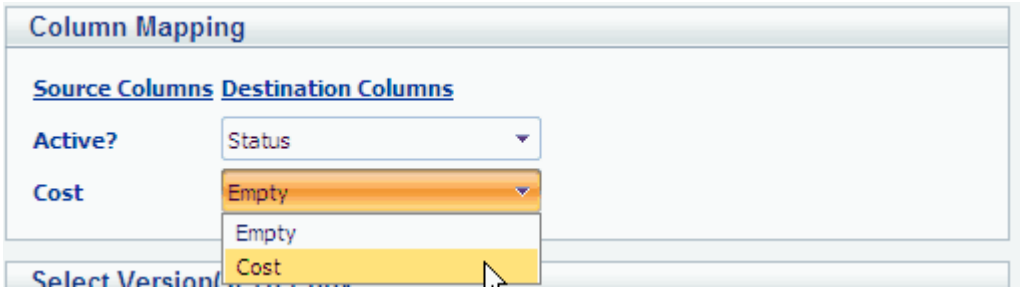
b) Check the **If one-way trust** box.

c) Enter the **Source Domain** name, **Login Name**, and **Password**.

NOTE: If the destination domain does not trust the source, you will need to complete corresponding fields on the main page.

12 Click [**OK**] to return to the Copy List Item page, with the Other Settings section populated with the options you selected.

13 If both the source and destination list contain columns of the same data types but different internal and/or display names, use the **Column Mapping** drop-down(s) to map columns in the source list to those in the destination list.



NOTE: Only columns of the same data type that exist on both the source and destination list can be mapped to each other. The operation will not *create* a column in the destination list. If you do not

specifically map a column for which display and/or internal names are different, it will not be carried over to the destination.

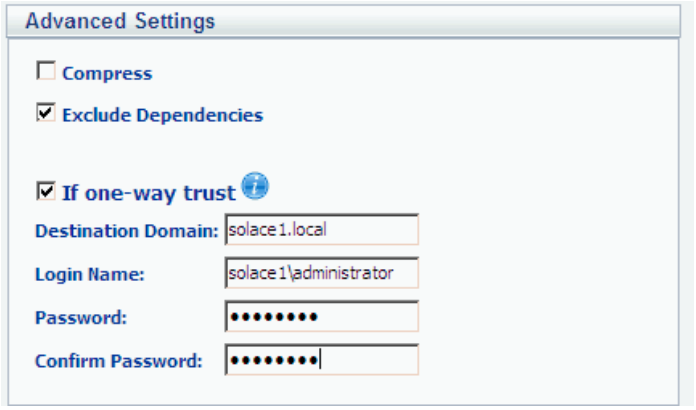
14 If the source and destination are in different domains with a one-way trust relationship and the destination domain does not trust the source:

a) Expand the Advanced Settings section.

b) Check the I**f one-way trust** box.

c) Enter the **Destination Domain** name, **Login Name**, and **Password**. (Remember that the account you use must be in the ControlPoint Remote Service Account Administrators (RSAA) group.)

NOTE: If the source domain does not trust the destination, you will need to complete corresponding fields on the Destination Selection page.



Additional options in the Advanced Settings section may be used in special circumstances. For example:

- If you want to **Compress** content during export, check this box.

  NOTE: If your selection includes one or more exceptionally large documents or list items an attempt to perform a copy/move operation may result in Out of Memory exception as files are being exported. (Compression of exceptionally large list items may consume a lot of memory.) This is why the **Compress** option is unchecked by default.

- If the site contains certain kinds of dependencies (such as a reference to another site), and you want those dependencies to be included at the destination, uncheck the **Exclude Dependencies** box.

  NOTE: If you choose *not* to Exclude Dependencies, you may encounter an error when the export process attempts to capture the content being referenced. This is why **Exclude Dependencies** is checked by default.

- By default, ControlPoint copies all versions of lists or libraries. However, compatibility issues may exist with old versions. For example, if an old version of a Web Part page contains a Web Part that no longer exists on the system, you may encounter an error. You can choose, instead, to copy only the **Current version**, **Last Major**, or **Last Major and its Minor**.

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 choose to run the action immediately, an Action Verification dialog displays with a summary of the options you chose. Review these options, then click [**OK**] to continue.

When the process has completed, one of the following messages displays on the Action Verification dialog:

- **Process Completed** -

  ControlPoint completed the operation without errors.

- **Process Completed with Some Errors** -

  ControlPoint completed the operation, but with some errors; for example, an orphaned user was found in a group that was copied.

- [**error_message_text**]

  An error occurred that prevented ControlPoint from completing the operation.

NOTE: If you chose to overwrite an object and an error occurs during the backup (export) of the destination site, ControlPoint will stop processing the operation regardless of the nature of the error, to prevent the destination site from being deleted before the problem can be corrected.

Click [**OK**] to generate a ControlPoint Task Audit, which provides detail about the progress of the operation, including any errors that have occurred.

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.

Moving List Items

The ControlPoint Move List Item(s) action lets you move items and folders (and optionally, security settings) from one SharePoint list or library to another, either within a site, across sites, or across farms.

Before you move list items:

Be sure to review Factors to Consider Before Copying/Moving List Items.

NOTE: When a list or list items are moved, the entire site is exported to the Backup Location. The SharePoint user interface does not provide a mechanism for exporting/importing selected lists/list items. If you need to restore objects that have been overwritten as part of a copy/move operation, you can import the site to an interim location using standard stsadm import procedures, then copy the object(s) back to the original site using the ControlPoint action for copying lists or list items.

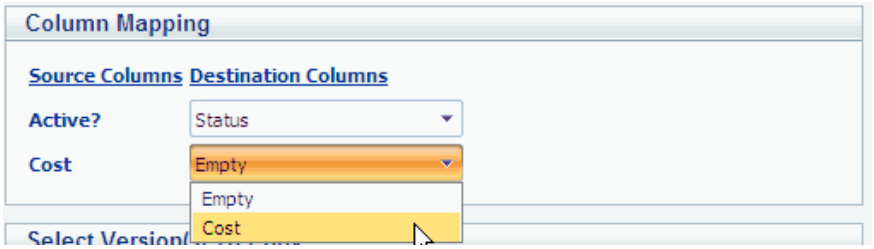
To move list items:

1 In the SharePoint Hierarchy, select the list whose item(s) you want to move.

2 Choose Content > Move List Item(s).

3 In the Selection section, select the list items that you want to include in the operation.

4 If versioning is enabled for the source list or library, **Select Version(s) to Copy** from the drop-down. (This option will not be visible if versioning is disabled.)



NOTE: The most recent version copied from the source will become the current version at the destination. If you choose to copy multiple versions, all will be copied if versioning is enabled at the destination.

5 Specify the following **Destination Settings**:

a) For **Temporary Location**, specify the folder path to which you want to export source files. (ControlPoint Application Administrator may have also specified a *default* temporary location to use.)

REMINDER: The account you are using to perform the operation (and in the case of cross-farm operations, the Service Account(s) of both the source and destination farm) must have Full Control access to the Temporary Location, both to the folder itself and to the share.

b) If you are performing a cross-farm operation:

- select a **Destination Farm** from the drop-down

OR

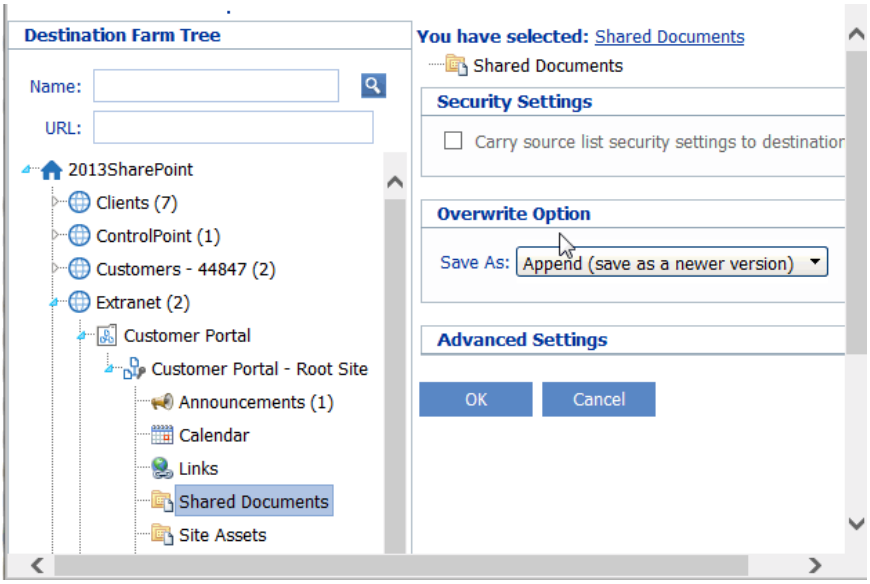
- enter the location of the destination farm in the format http://*server_name:port_number*

where *port_number* is the port number used for the ControlPoint Web application. 1818 is the ControlPoint default.

NOTE: You can perform cross-farm operations *only* if both farms are managed in ControlPoint. For additional requirements and considerations, see Special Consideration for Copying or Moving Across Farms.

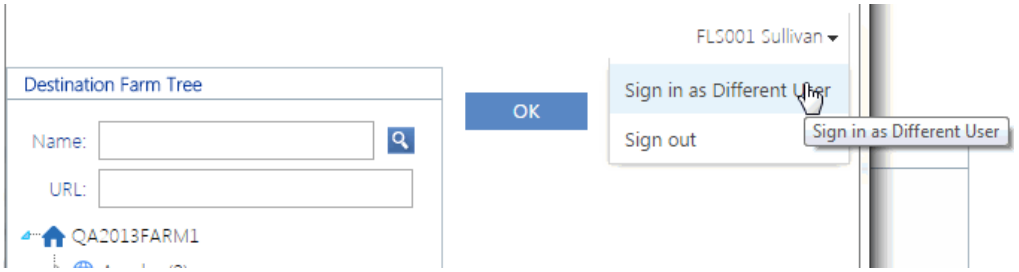
c) Click the **Destination Url:** [**Select**] button to open the Destination Selection page.

6 From the **Destination Farm Tree**, select the list to which you want to move items.



REMINDER: You can only move items to a list that uses the same template as the source.

7 If you selected a Destination Farm that is different than the source farm and you want to select a different user account to carry out the portion of the operation that occurs in the destination location, use the **Sign in as Different User** option in the upper-right corner of the Destination Selection page. (Note that this option will not be visible if the source and destination are within the same farm.)



8 Use the information in the following table to determine the appropriate **Security Settings** option to select.

If ...	Then ...
you want to carry the permission settings of the source item(s) to the item(s) in the destination list (which will give the item(s) unique permissions within the destination list)	check the **Carry source list security settings to destination** box. NOTE: If you check this box, a user group and its members will be carried over only if the group does not already exist in the destination site collection. This option is not available if you are copying/moving between claims-enabled and non-claims-enabled Web applications.

If ...	Then ...
you do *not* want to carry permissions settings of the source item(s) to the destination list	leave the Carry source list settings to the destination box unchecked.
	NOTE: If you leave this box unchecked and an item of the same name already exists in the destination list and has unique permissions, security settings will depend on the **Overwrite Option** option you select in the next step.

9 If applicable, select the appropriate **Overwrite Option** from the drop-down. Use the information in the following table for guidance.

NOTE: This option is available *only* for document library items (which can be uniquely identified by file name) or lists whose items have the same IDs (for example, if a list was copied from one farm to another and IDs were retained).

If you want the operation to ...	Select ...
create a new version of any items that are the same in the destination list	**Append (save as a newer version)**. NOTES: • The most recent version that is copied will become the current version at the destination. If you choose to copy multiple versions, all will be copied, if versioning is enabled at the destination. • If the item on the destination site had unique permissions, those permissions will be retained.
skip any items that are the same in the destination list	**Ignore (if same item exists, don't copy)**.
overwrite any items that are the same in the destination list	**Overwrite**.
	NOTE: Any item that had unique permissions will be overwritten with an item that inherits permissions from the parent list or folder.

10 If the source and destination are in different domains with a one-way trust relationship and the source domain does not trust the destination:

a) Expand the **Advanced Settings** section.

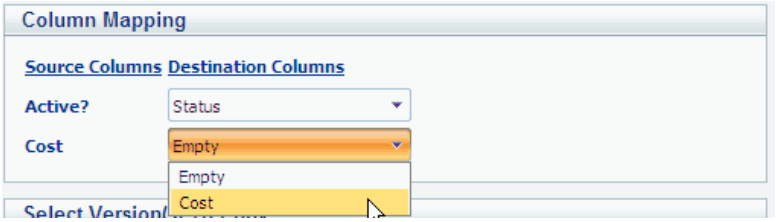
b) Check the **If one-way trust** box.

c) Enter the **Source Domain** name, **Login Name**, and **Password**.

NOTE: If the destination domain does not trust the source, you will need to complete corresponding fields on the main page.

11 Click [**OK**] to return to the Move List Items main page, with the Other Settings section populated with the options you selected.

12 If both the source and destination list contain columns of the same data types but different internal and/or display names, use the **Column Mapping** drop-down(s) to map columns in the source list to those in the destination list.



NOTE: Only columns of the same data type that exist on both the source and destination list can be mapped to each other. The operation will not *create* a column in the destination list. If you do not specifically map a column for which display and/or internal names are different, it will not be carried over to the destination.

13 Complete the **Delete Source Settings** section as follows:

a) If different from the default (10 days), enter the number of days after the move that you want the object deleted from the source location.

NOTE: If you are moving an active object, it is recommended that you delete it within a day of a successful move because any changes to the source after the move is carried out will not be replicated to the destination.

b) If you want to back up the source site to a .CAB file before it is deleted:

- make sure the **Backup Before Delete** box is checked, and
- specify either a network folder (not file) path or url to which you want to export the backup file.

It is strongly recommended that you make a backup of the source site, especially if security settings will be changed and/or content will be overwritten. You must have Full Control permissions to the Backup Location you specify, and it becomes the default location for future move operations that you perform (that is, it is a user-specific location). Remember, you can restore sites from the backup location to an interim location using standard stsadm import procedures, then restore the object(s) to the source site using the ControlPoint Copy List or Copy List Item(s) action.

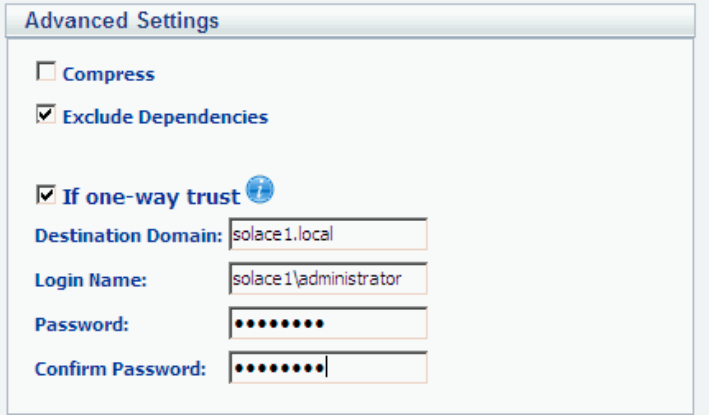
14 If the source and destination are in different domains with a one-way trust relationship and the destination domain does not trust the source:

a) Expand the Advanced Settings section.

b) Check the I**f one-way trust** box.

c) Enter the **Destination Domain** name, **Login Name**, and **Password**.

NOTE: If the source domain does not trust the destination, you will need to complete corresponding fields on the Destination Selection page.



Additional options in the Advanced Settings section may be used in special circumstances. For example:

- If you want to **Compress** content during export, check this box.

  NOTE: If your selection includes one or more exceptionally large documents or list items an attempt to perform a copy/move operation may result in Out of Memory exception as files are being exported. (Compression of exceptionally large list items may consume a lot of memory.) This is why the **Compress** option is unchecked by default.

- If the site contains certain kinds of dependencies (such as a reference to another site), and you want those dependencies to be included at the destination, uncheck the E**xclude Dependencies** box.

NOTE: If you choose *not* to Exclude Dependencies, you may encounter an error when the export process attempts to capture the content being referenced. This is why **Exclude Dependencies** is checked by default.

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 choose to run the action immediately, an Action Verification dialog displays with a summary of the options you chose. Review these options, then click [**OK**] to continue.

When the process has completed, one of the following messages displays on the Action Verification dialog:

- **Process Completed** -

  ControlPoint completed the operation without errors.

- **Process Completed with Some Errors** -

ControlPoint completed the operation, but with some errors; for example, an orphaned user was found in a group that was copied.

- [**error_message_text**]

  An error occurred that prevented ControlPoint from completing the operation.

NOTE: If you chose to overwrite an object and an error occurs during the backup (export) of the destination site, ControlPoint will stop processing the operation regardless of the nature of the error, to prevent the destination site from being deleted before the problem can be corrected.

Click [**OK**] to generate a ControlPoint Task Audit, which provides detail about the progress of the operation, including any errors that have occurred.

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

See also Auditing ControlPoint Administrator Tasks.

Deleting Sites

The ControlPoint Delete Sites action lets you delete one or more sites from your SharePoint farm. You also have the option of "backing up" the sites by exporting them to an external directory.

If you delete an entire site collection (by deleting its root site) from the source content database, any activity and audit log data associated with it remains but becomes "orphaned." If ControlPoint audit log archiving has been set up for the farm, audit log data can be archived—and purged from the database— before the site collection is deleted. See Archiving Audit Log Data Before Moving or Deleting a Site Collection. The site collection in the source content database will display as a deleted site collection in Site Collection Activity results only if it was active during the period covered by the analysis. A deleted site will continue to be included in activity and storage analysis results if it was active during the period covered by the analysis.

About Exporting Site(s) Before Deletion:

The ControlPoint Export Before Delete option uses the same options and export format as the stsadm command for exporting site collections and sites.

ControlPoint allows you to specify:

- whether to include security
- whether to compress content into a CAB file

ControlPoint uses the following stsadm default options:

- includes all versions (current, last, major, last major, and minor)
- exports all content (not just changes)

Instead of auto-generating file names using stsadm parameters, ControlPoint generates a file name that consists of:

site_name (first 25 characters) *site_guid time_stamp* (dd_mm_yy_mm_ss format)

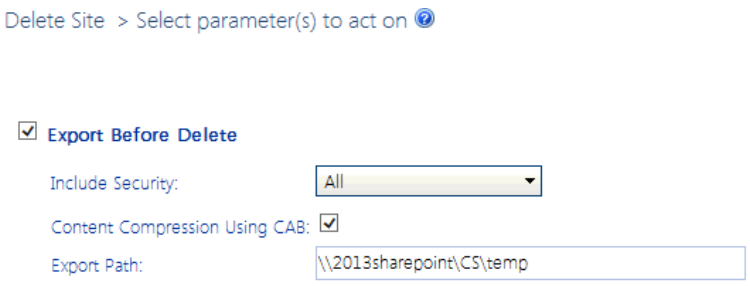
NOTE: If you are planning to export the site(s) before deleting them, make sure the directory to which you want to export has been created and that you know the path to it.

To delete one or more sites from your SharePoint farm:

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

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

2 Choose Content > Delete Site.



3 If you want to export the site(s) before deletion, complete the Parameters section as follows:

a) Make sure the **Export Before Delete** box is checked. (If you do not want to export the site(s), uncheck this box and continue with Step 4.)

NOTE: If you choose to **Export Before Delete**, the delete action will not be carried out unless the export is successful.

b) Specify whether you want to **Include Security** by selecting the appropriate option (**All** or **None**) from the drop-down.

NOTE: Security data includes time stamps, security information, and user data.

c) If you do *not* want the entire site to be compressed into a CAB file (with a .cmp extension), uncheck the **Content Compression Using CAB** box.

d) Enter the **Export Path** to the directory to which you want the content to be exported.

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

Deleting Lists

The ControlPoint Delete Lists action lets you delete one or more sites from your SharePoint farm *in real time*. You can also choose to:

- "back up" lists by exporting them to an external directory

  NOTE: For lists that have versioning enabled, you can also choose which version(s) of list items to export
- send deleted lists to the site collection's Recycle Bin or delete them permanently.

About Exporting Lists Before Deletion:

The ControlPoint Export Before Delete option uses the same options and export format as the stsadm command for exporting lists.

ControlPoint allows you to specify:

- whether to include security
- whether to compress content into a CAB file

ControlPoint uses the following stsadm default options:

- includes all versions (current, last, major, last major, and minor)
- exports all content (not just changes)

Instead of auto-generating file names using stsadm parameters, ControlPoint generates a file name that consists of:

site_name (first 25 characters) *site_guid time_stamp* (dd_mm_yy_mm_ss format)

NOTE: If you are planning to export the site(s) before deleting them, make sure the directory to which you want to export has been created and that you know the path to it.

To delete one or more lists from your SharePoint farm:

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

2 Choose Content > Delete List.



3 If you want to export the list(s) before deletion, complete the section as follows:

a) Make sure the **Export Before Delete** box is checked. (If you do not want to export the site(s), uncheck this box and continue with Step 4.)

NOTE: If you choose to **Export Before Delete**, the delete action will not be carried out unless the export is successful.

b) If you want the entire site to be compressed into a CAB file (with a .cmp extension), check the **Content Compression Using CAB** box.

c) Enter the **Export Path** to the directory to which you want the lists to be exported.

d) Select the version(s) that you want to export:

- **Last Major**
- **Current Version**
- **Last Major and its Minor**
- **All Versions**

4 For **Delete Settings**, specify whether you want to **Send to recycle bin** or **Permanently delete**.

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

Archiving Audit Log Data Before Moving or Deleting a Site Collection

Any audit log data associated with a site collection remains in the content database but becomes “orphaned” when one of the following operations is performed:

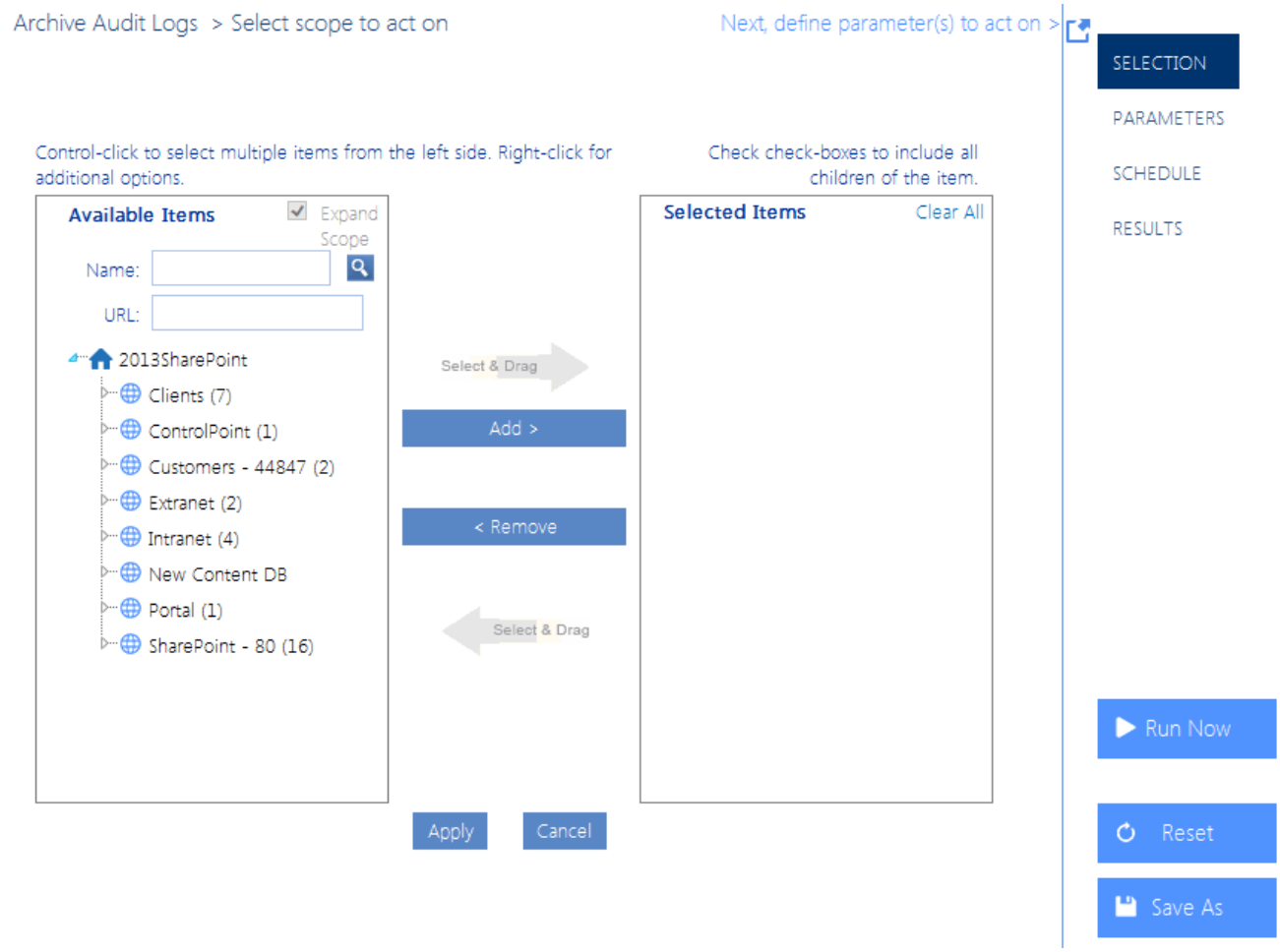
- move site collection
- move site collection to a different content database
- delete site collection.

If ControlPoint audit log archiving has been set up for the farm, you can archive the site collection's audit log data—and purge it from the source content database—before performing one of the actions listed above.

NOTE: For detailed information on setting up an audit log data archive, refer to the *ControlPoint Administration Guide*.

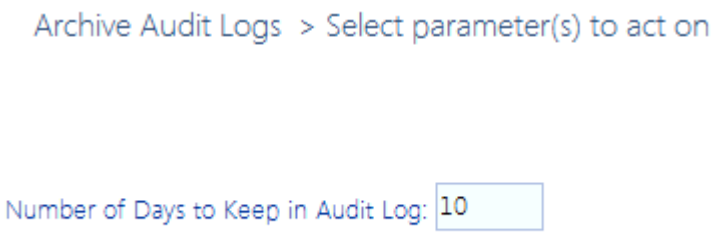
To archive a site collection's audit log data:

1 From the Manage ControlPoint tree, chose ControlPoint Management > Audit Log Archive.



2 Select the site collection(s) whose audit log data you want to archive.

3 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.

Duplicating a Workflow Definition from one List or Site to Others

If your ControlPoint license includes Content Matrix functionality, the **Duplicate a (List or Site) Workflow** action lets you copy a workflow that has been defined for one list or site to one or more other lists or sites.

NOTES:

- This action is only valid for workflows that have been defined within SharePoint or SharePoint Designer. Workflows created by other methods (for example, using Visual Studio Designer or third-party tools) cannot be copied using this action.
- This action is used to copy workflow definitions; not individual instances.
- Site-level workflows apply only for SharePoint Server 2010 farms.
- The workflow whose definition will be duplicated must already be activated on the target site.

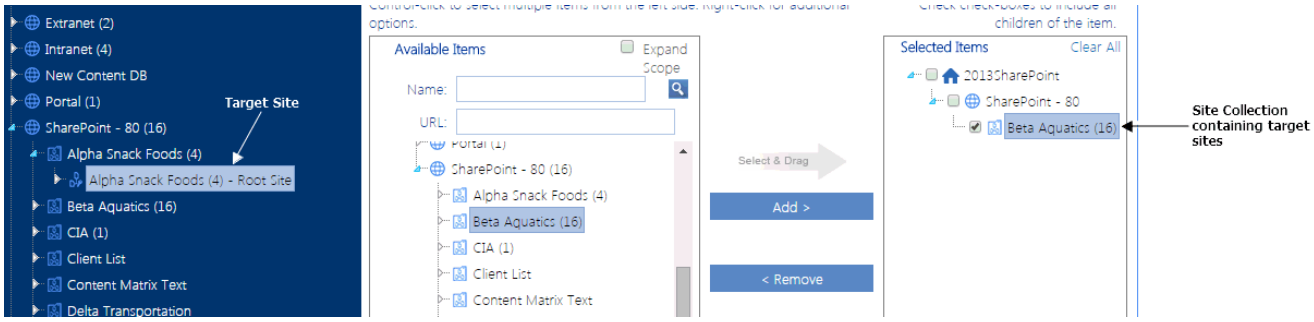
To copy a workflow definition:

1 Select the list (or site, if appropriate) that you want to copy the workflow definition from.

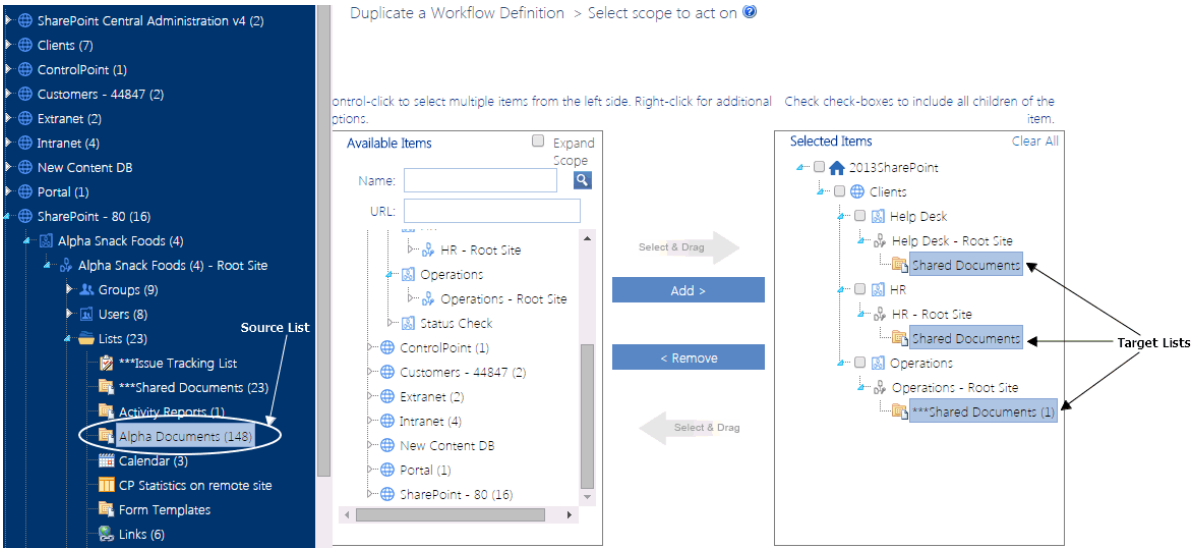
2 Choose Change Management > Duplicate a Workflow Definition.

3 From the **Available Items** list, select the objects to which you want the workflow duplicated and move them to the **Selected Items** list.

- In the case of a site workflow, all of the child sites within the selection will be included.



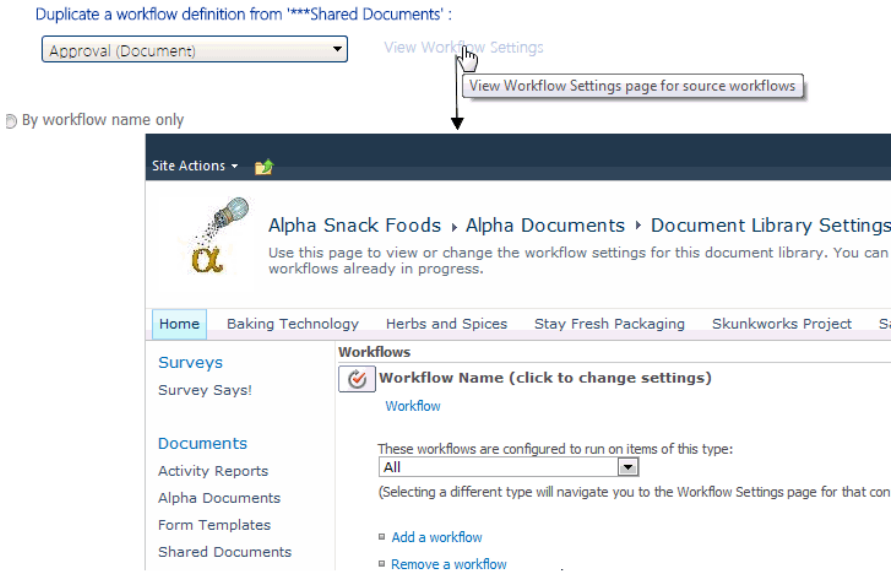
- In the case of a list workflow, you will have the opportunity to further define which lists within the selection will be included.



4 When you have finished selecting target objects, click **[Apply]**.

5 Select the Parameters tab then select the workflow that you want to duplicate from the drop-down.

Note that the drop-down displays only workflows that have been added to source object. If you want to examine workflow properties, click the **View Workflow** Settings link to open the SharePoint Workflow Settings page for the object.



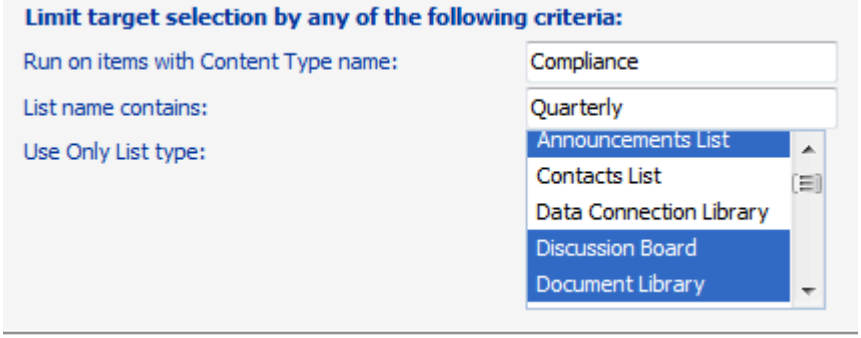
6 *For list-level workflows only*, you can choose to **Limit target selection by any of the following criteria**

- For **Run on items with Content Type name:** you can choose to have the workflow added only to items within the list(s) of the specified content type.

NOTE: You can only specify a single content type using its *full* name.

- If the scope of your target selection includes more than one list, you can limit to lists:

- whose **List name contains** a specified text string
- One or more **List type(s)**



When a combination of selection options is used, all lists specified through *any* of these criteria (though not necessarily *all* criteria) will be included in the operation.

EXCEPTION: The ControlPoint Application Administrator may choose to exclude all lists with a specific name from the target selection of *all* Duplicate Workflow operations, regardless of the scope. Details can be found in the *ControlPoint Administration Guide*.

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.

Removing a Workflow from One or More Lists (or Sites)

If your ControlPoint license includes Change Management functionality, the **Remove a Workflow** action lets you remove workflows from multiple lists or sites in a single operation. The operation "matches" a workflow selected as the "source," to workflows within your "target" selection. Workflows can be matched by name only, template only, or both.

TIP: You can generate a ControlPoint Workflow Analysis.

NOTES:

- This action will delete both the workflow definitions *and* all instances (including running instances).
- Site-level workflows apply only for SharePoint Server 2010 farms.

To remove a workflow:

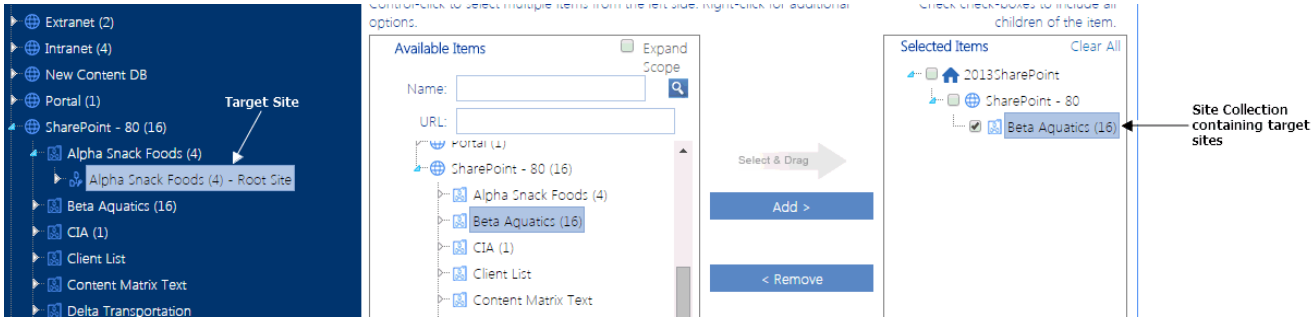
1 Select the list (or site, if appropriate) containing the workflow you want to use as the "source" (that is, a workflow that "matches" the workflow(s) you want to remove from target lists or sites).

2 Choose Change Management > Remove a Workflow.

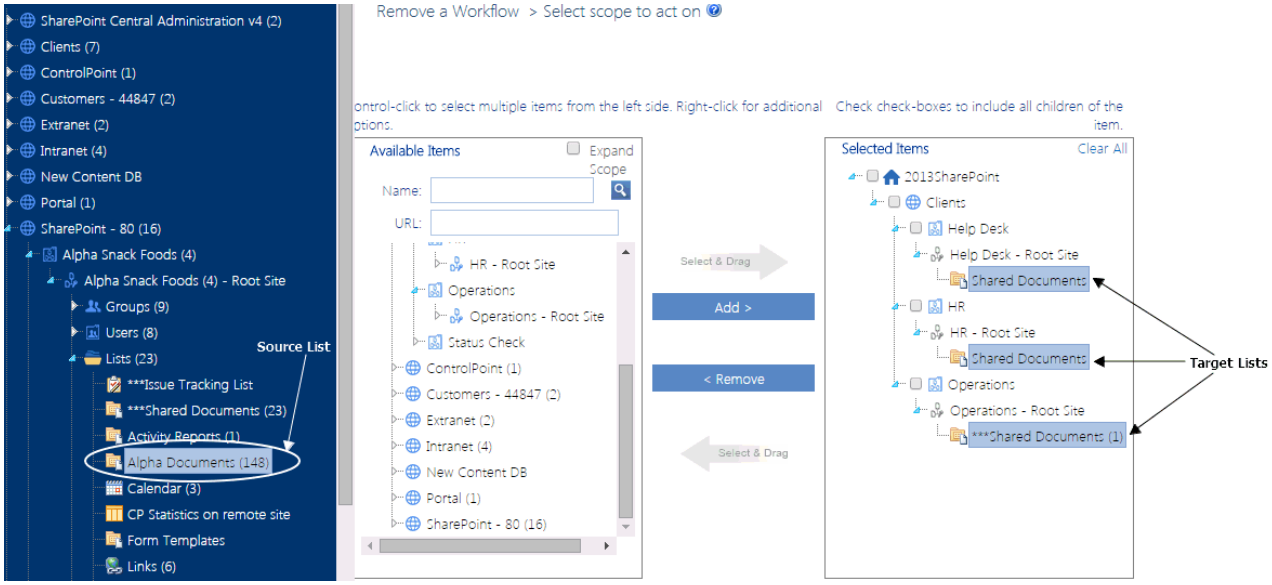
3 From the **Available Items** list, select the objects from which you want workflows removed and move them to the **Selected Items** list.

NOTE: The workflow will *not* be removed from the source object by default. If you also want to remove the workflow from the source object, you must also include it in your Target Selection.

- In the case of a site workflow, all of the child sites within the selection will be included.

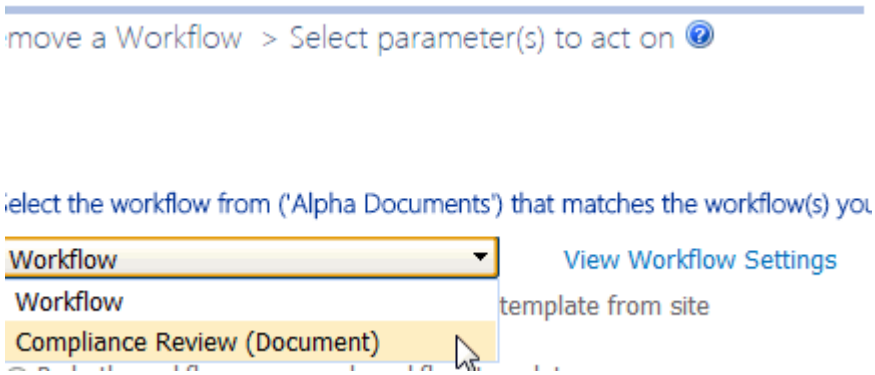


- In the case of a list workflow, you will have the opportunity to further define which lists within the selection will be included.

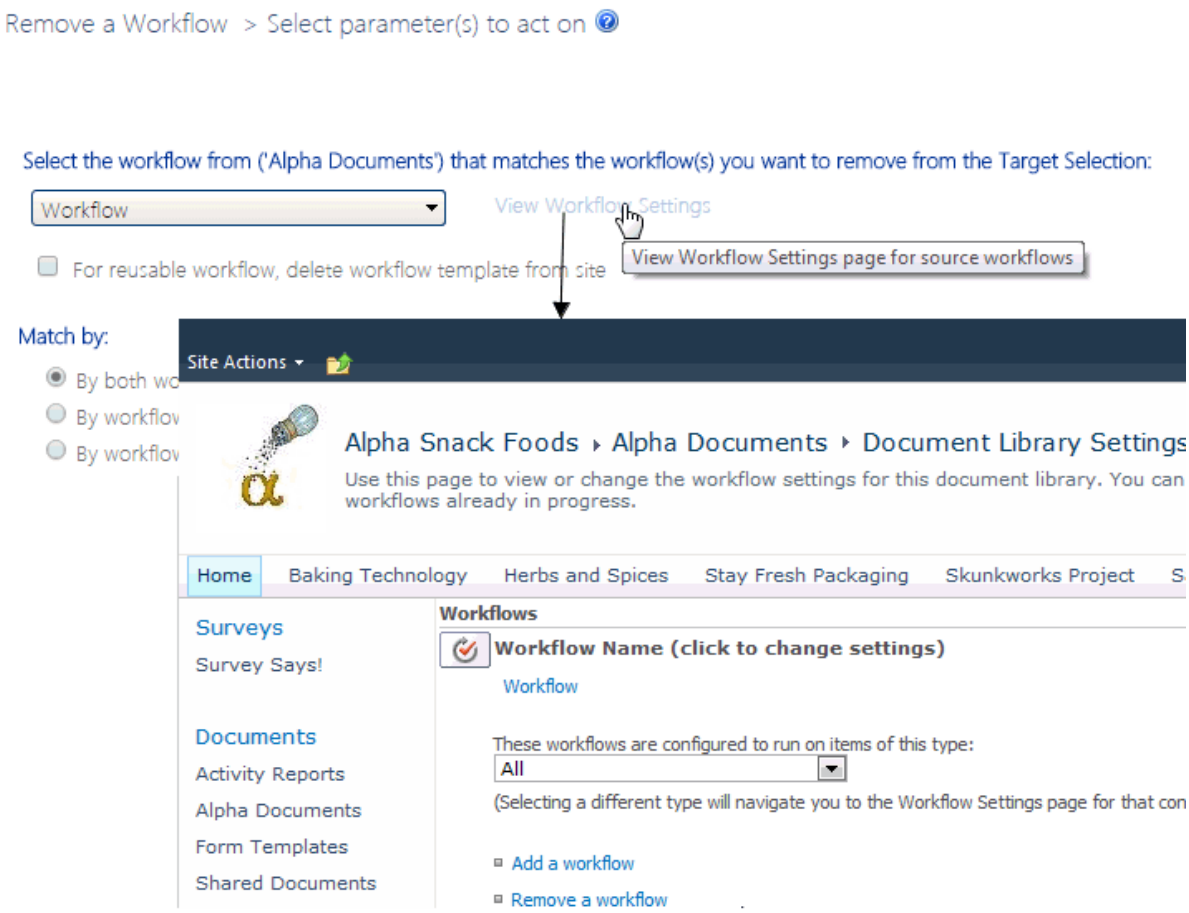


4 When you have finished selecting target objects, click **[Apply]**.

5 Select the Parameters tab then select the workflow that you want to remove from the Target Selection from the drop-down.



If you want to examine workflow properties, click the **View Workflow** Settings link to open the SharePoint Workflow Settings page for the object.



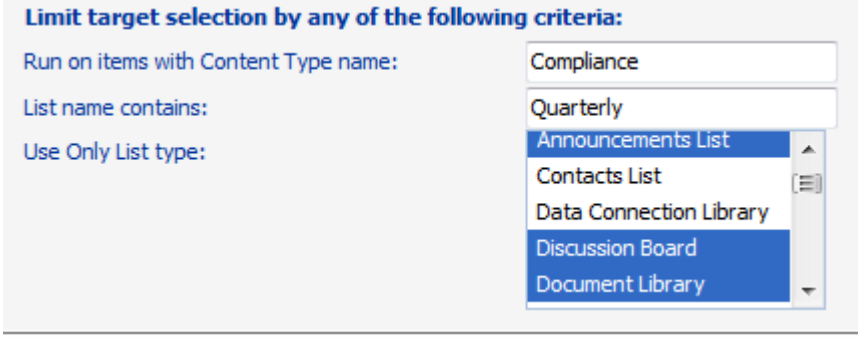
6 *For list-level workflows only*, you can choose to **Limit target selection by any of the following criteria:**

- For **Run on items with Content Type name:** you can choose to have the workflow removed only from items within the list(s) of the specified content type.

  NOTE: You can only specify a single content type using its *full* name.

- If the scope of your target selection includes more than one list, you can limit to lists:

- whose **List name contains** a specified text string
- One or more **List type(s)**



When a combination of selection options is used, all lists specified through *any* of these criteria (though not necessarily *all* criteria) will be included in the operation.

Now you can either:

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

OR

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

OR

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

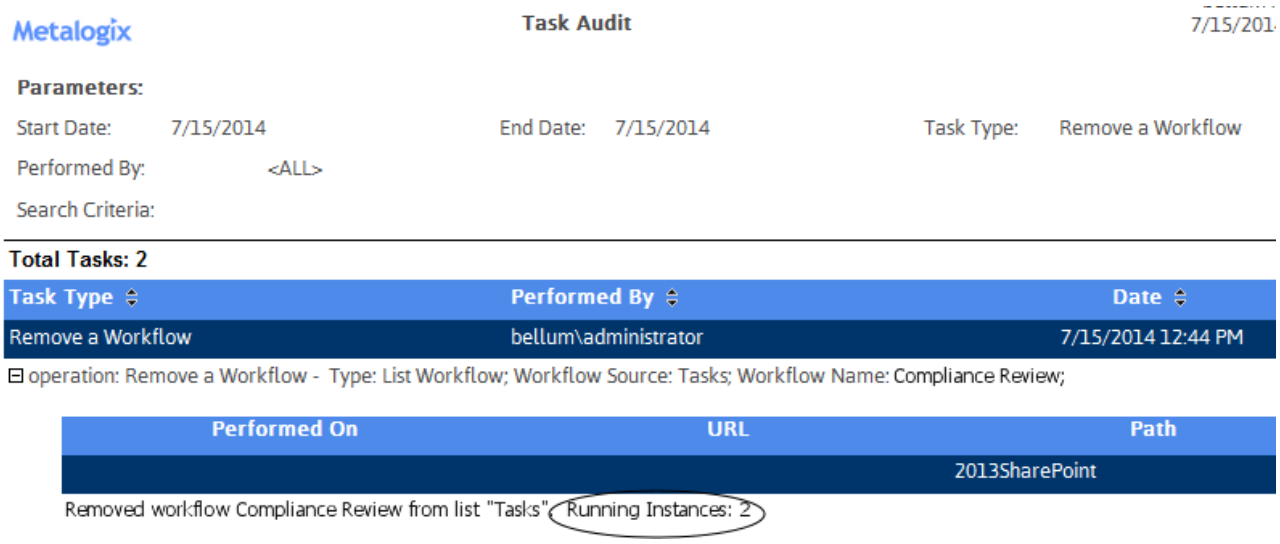
If you chose the Run Now, option, after the operation has been processed:

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

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

See also Auditing ControlPoint Administrator Tasks.

Note that the Task Audit will record the number of running instances of the workflow (if any) that were removed from an object.



Using ControlPoint Policies to Control Your SharePoint Environment

You can use ControlPoint Policies to prevent and/or send out a notification when an attempt is made to:

- delete a subsite
- exceed a quota imposed on a subsite
- delete documents/items
- create content
- upload a file that exceeds a specified size limit
- additionally, for **SharePoint 2010 and later** farms:
  - create a subsite
  - create a subsite with a specific template
  - create a subsite after a certain depth
  - create or delete a list (optionally, with a specific template)
  - upload files of one or more specific types
- additionally, for **SharePoint 2013 and later** farms:
  - add or delete a permission
  - add, delete, or update a Permissions Level
  - add, delete, or update a SharePoint group
  - add or delete SharePoint group members
  - break or restore permissions inheritance

You can configure your policy to

- include in the policy—or exclude from the policy—either:
  - all users
  - specific users and Active Directory groups
  - users in one or more SharePoint groups

OR

- exclude from the policy users with a specified Permissions Level.

If you are registered for Sensitive Content Manager, you can also create policies to scan content for sensitive policies whenever an item or document is added to—or updated in—a SharePoint list or library.

In a multi-farm environment, you can create and manage ControlPoint policies for the home farm only.

Factors to Consider When Creating ControlPoint Policies

Policies that can be Created:

For SharePoint **2010 and later** farms, you can create ControlPoint polices to control:

- subsite creation
- creation of subsites with specific templates
- creation of subsites after a certain depth
- subsite deletion
- the creation and deletion of lists
- the enforcement of subsite-level quotas
- the deletion of documents/items (and optionally, attachments)
- content creation, using a custom Web service
- the uploading of files over a specified size
- the uploading of files of one or more specific types
- if you are registered for Sensitive Content Manager, the submission of a document/item for sensitive content analysis whenever it is added to—and/or updated in—a list or library

Additionally, for SharePoint **2013 and later** farms:

- the adding or deleting of permissions
- the adding, deleting, or updating of Permissions Levels
- the adding, deleting, or updating SharePoint groups
- the adding or deleting of SharePoint group membership
- permissions inheritance breaking or restoring

For SharePoint **2007** farms, you can create policies to control:

- subsite deletion
- the enforcement of subsite-level quotas
- the deletion of documents/items (and optionally, attachments)
- content creation using a custom Web service

Excluding Specific Users from All Policies

ControlPoint Application Administrators can exclude selected users—such as farm administrators—from *all* policies via the ControlPoint Configuration Setting Users to Exclude from All ControlPoint Policies (CPPOLICYSUPERUSERS). Refer to the *ControlPoint Administration Guide* for details.

NOTE: Users specified in this setting will always be excluded from all policies, even if they are explicitly added to a policy.

How Policies Impact Operations Performed in ControlPoint

Any action on a SharePoint site that is initiated through ControlPoint is actually *carried out* by the ControlPoint Service Account rather than the logged in user. Therefore, if the ControlPoint Service Account is included in a policy, the policy will be enforced for any ControlPoint action that is restricted by that policy (for example, Delete Site and Copy/Move Site--which involves site creation/deletion), regardless of the user who initiated it.

When "Include Children" Applies to Your Scope

Most policies created at the site collection level or above will include all child sites by default. If a policy is created for a site (other than the root site) or subsite, by default the policy will apply to the selected site and not its child sites. This behavior is consistent with the model for Selecting Objects on Which to Perform a ControlPoint Operation.

EXCEPTION: Because the action applies specifically to the creation of child sites, **Control Subsite Creation in Certain Depth** will always include child sites, regardless of whether "Include Children" is explicitly checked in the Selection panel.

Including and Excluding Users and Active Directory Groups

You can either include or exclude users and/or Active Directory groups from a policy.

Creating Policies That Control Subsite Quota

Subsite-level quotas do not supersede the quota set for an entire site collection. That is, once a site collection quota is reached, no more content can be added.

NOTE: Because the contents of Recycle Bins are managed at the *site collection* level, they are not considered in a subsite-level quota.

Creating Policies That Affect Users Based on Permissions Level

You can only *exclude* (not include) a SharePoint permissions level from a policy.

Creating Policies Involving Site Templates

If you want to control the creation of sites that use one or more specific templates, you can choose from any template that has been deployed for the entire farm. The creation of a site using a certain template cannot literally be "prevented," since it is only upon successful creation of the site that ControlPoint can evaluate the template. The way ControlPoint enforces this type of policy is by deleting a site that is in violation immediately after it is created.

Creating Content Insertion Policies Using a Custom Web Service

You can create a policy to invoke a custom Web service whenever content in a SharePoint list or library is inserted or updated. For example, you may want documents and attachments to be scanned for sensitive content and have a notification sent when the policy is violated.

A content insertion policy can be created if:

- the Web service includes the logic necessary to integrate with ControlPoint and is accessible by ControlPoint Service account. (Details can be found in the guide *Running ControlPoint Actions Programmatically*.)

AND

- the ControlPoint Configuration Setting Content Creation Policy URL (POLICYSERVICEURL) is populated with the path to the Web Service asmx file. (Details can be found in the *ControlPoint Administration Guide*.)

NOTE: The ControlPoint policy cannot *prevent* content that violates a policy from being added.

Users Subject to Multiple Polices

If a user is restricted by more than one similar policy, all policies, including the most restrictive one, will be enforced.

EXCEPTION: If a policy is created at the *list* level, any similar policies at a higher scope will be ignored.

Updating or "Re-Registering" a Policy When a New Site Collection or Subsite is Added to the Scope

For a SharePoint 2010 or later farm, whenever you add a Web application or site collection to the scope covered by a policy, you must "re-register" the policy so that the new site collection will be included. This assigns the new object to the SharePoint event handlers that watch for the actions covered by the policy. In SharePoint 2010 and later, when a subsite is created the event handlers are automatically propagated to the new site.

For a SharePoint 2007 farm, you must re-register a policy whenever a Web application, site collection or subsite is created. It is recommended that the re-registering of policies be scheduled to run on a recurring basis to ensure that it occurs regularly.

See Re-Registering a New Site Collection for a Policy.

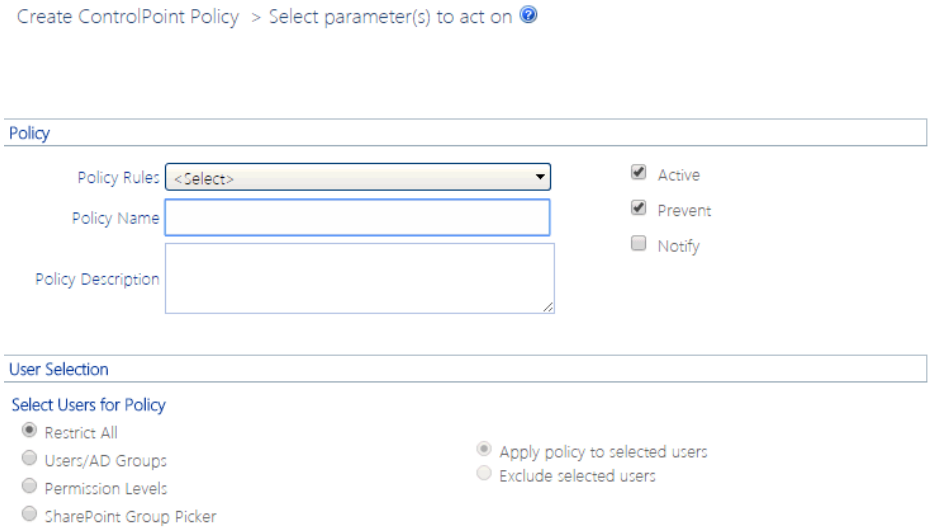
Creating a ControlPoint Policy

Before creating a ControlPoint policy, it is recommended that you review Factors to Consider When Creating ControlPoint Policies.

To create a ControlPoint policy:

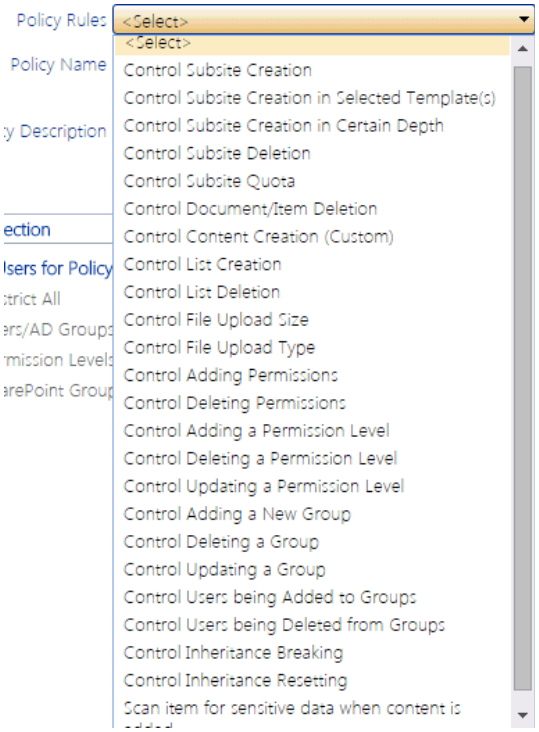
1 Select the object(s) for which you want to create the policy.

2 Choose Automation > Create a ControlPoint Policy.

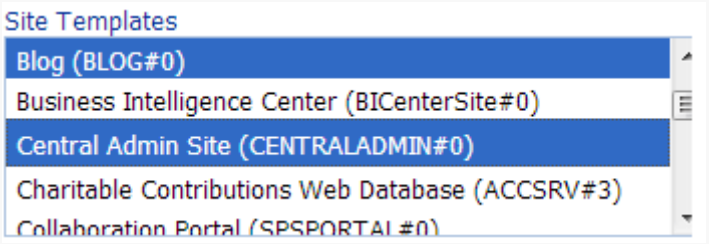
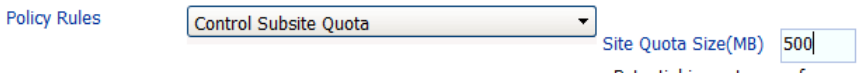
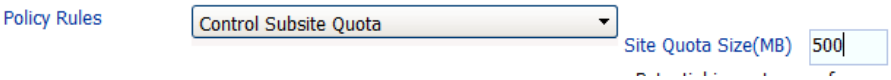
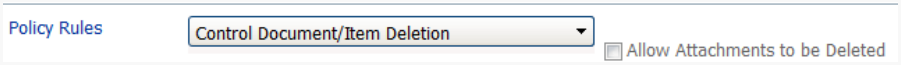


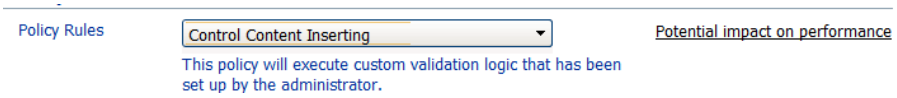
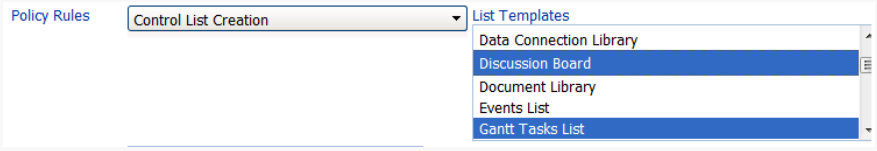
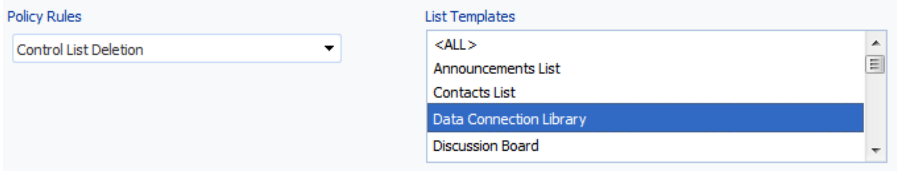
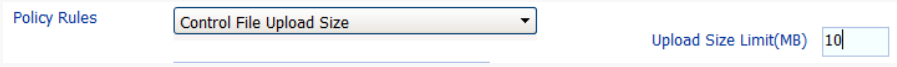
3 Complete the **Policy** section as follows:

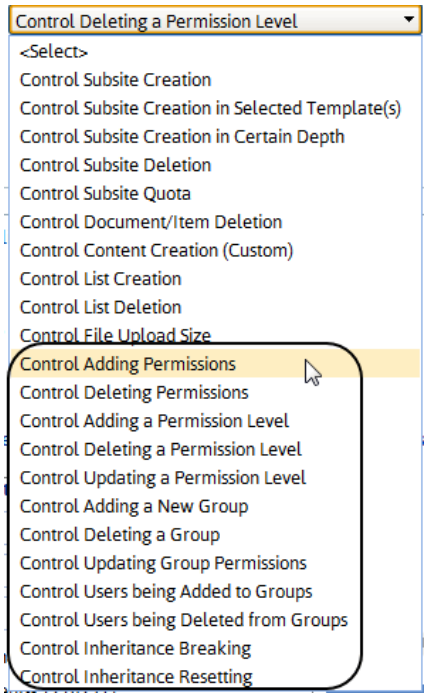
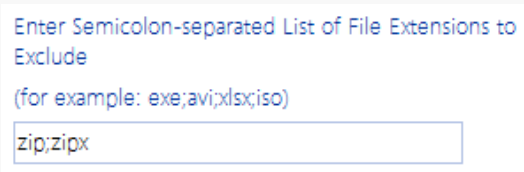
a) Select one of the **Policy Rules**. Use the information in the following table for guidance.



If you want to ...	Then ...
control the creation of all new sites	select **Control Subsite Creation**.

If you want to ...	Then ...
(SharePoint 2010 and later)	
control the creation of sites based on one or more specific templates (SharePoint 2010 and later)	Select **Control Subsite Creation in Selected Template.** Highlight each of the **Site Templates** you want to include in the policy.  REMINDER: The Site Templates list contains all of the templates that have been deployed for the entire farm, and ControlPoint can only "prevent" a policy violation by deleting the site soon after it is created.
control the creation of sites beyond a certain depth (SharePoint 2010 and later)	▪ Select **Control Subsite Creation in Certain Depth**. ▪ Enter the maximum **Site Depth** you want the policy to allow. 
control the deletion of a site	select **Control Subsite Deletion.**
control a subsite-level quota*	▪ Select **Control Subsite Quota**. ▪ Enter the quota (in MB) that you want to set.  REMINDER: Subsite-level quotas do not supersede the quota set for an entire site collection. That is, once a site collection quota is reached, no more content can be added.
control the deletion of documents and list items*	▪ Select **Control Document/Item Deletion**.  ▪ If you want to allow attachments to be deleted from list items, check the **Allow Attachments to be Deleted** box.

If you want to ...	Then ...
	NOTE: If you leave this box unchecked, users subject to the policy are prevented from both the item itself *and* any attachments to items.
control the creation of content based on a rule defined for your organization	Select **Control Content Creation (Custom)**.  REMINDER: You can only *notify* but not *prevent* content in violation of the policy from being created for a policy that uses this rule to be created, the ControlPoint Configuration Setting Content Creation Policy URL (POLICYSERVICEURL) must contain the service url for the rule. Details can be found in the *ControlPoint Administration Guide*.
control the creation of a list (SharePoint 2010 and later)	• Select **Control List Creation**. • If you want to limit the policy to certain *types* of lists, highlight on or more **List Templates**. 
control the deletion of a list (SharePoint 2010 and later)	• Select **Control List Deletion**. • If you want to limit the policy to certain *types* of lists, highlight on or more **List Templates**. 
control the uploading of any file that exceed a specified size	• Select **Control File Upload Size**. • Enter an **Upload Size Limit** (in megabytes). 
control the changing of: • Permissions OR • Permissions Levels OR	Select the applicable option from the drop-down:

If you want to ...	Then ...
• SharePoint group permissions or group membership OR • Permissions inheritance (SharePoint 2013 and later)	
control the uploading of files of a particular type (SharePoint 2010 and later)	• Select Control File Upload by Type. • Enter one or more file type extension(s). (Enter multiple extensions as a semicolon-separated list.) 
If you are registered for Sensitive Content Manager	
• submit a new document/item for scanning whenever it is *added to* a list or library AND • have ControlPoint automatically apply a Compliance Action based on the results of the scan.	A. Select **Scan item for sensitive data when content is added**. B. Select a **Profile for the scan** from the drop-down. See also Using Sensitive Content Manager to Analyze SharePoint Content for Compliance.
• submit a document/item for	A. Select **Scan item for sensitive data when content is updated or saved**. B. Select a **Profile for the scan** from the drop-down.

If you want to ...	Then ...
scanning whenever it is *updated or saved in* a list or library AND • have ControlPoint automatically apply a Compliance Action based on the results of the scan.	See also Using Sensitive Content Manager to Analyze SharePoint Content for Compliance.

*If you are creating a policy to control subsite quota, content creation, or document/item deletion, ControlPoint must process every event that the policy covers. Therefore, if the scope of the policy is exceptionally large (for example, it covers an entire farm with hundreds of sites, lists, and libraries) or the policy includes sites with a high volume of activity, performance of both ControlPoint and SharePoint may be impacted.

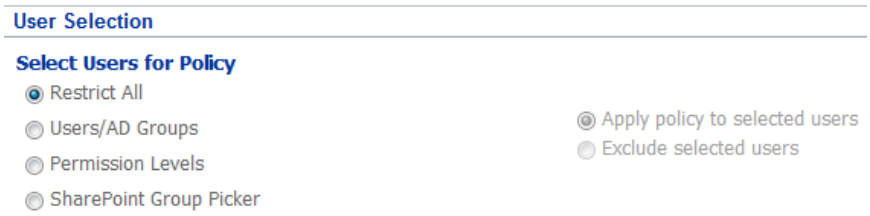
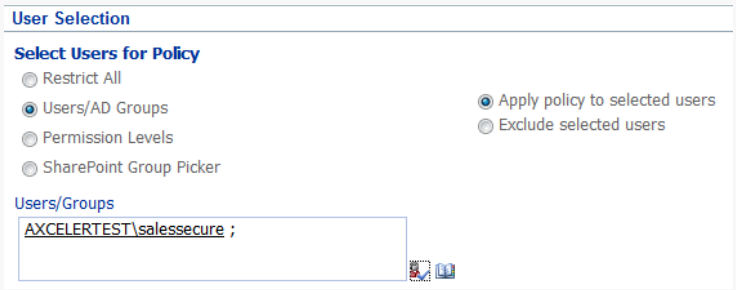
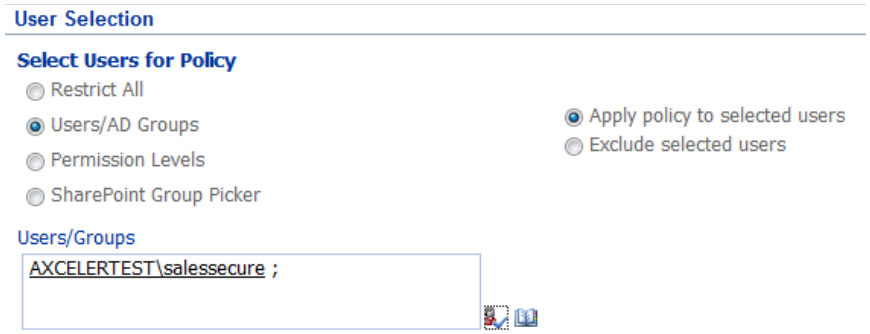
b) Enter a **Policy Name** and **Policy Description**.

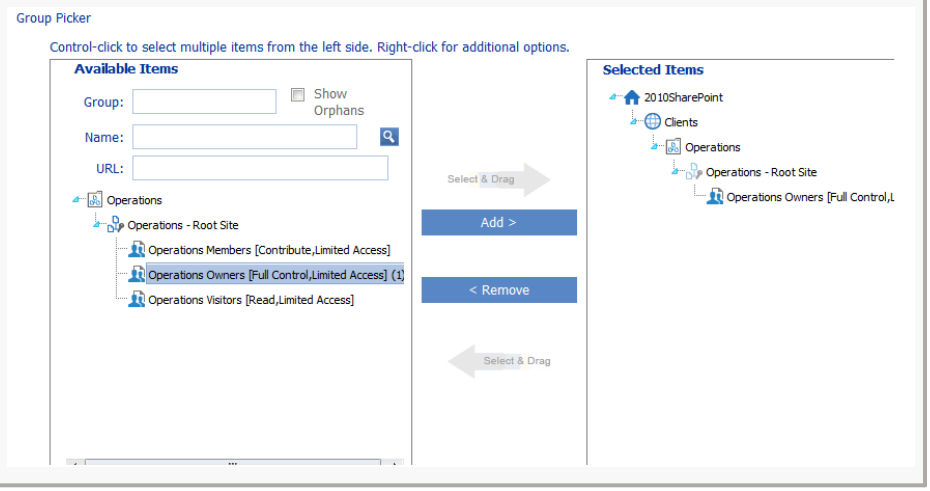
c) Select either or both of the options described in the following table.

If you want to ...	Then ...
prevent users from violating the policy	leave the **Prevent** box checked. If you uncheck this box, the **Notify** box *must* be checked, which means that users will be able to carry out the controlled action, but a notification will be sent to the violator and/or user(s) of your choice. NOTE: The Prevent option is not available for Control Content Creation.
have an email notification sent to one or more specified users (and optionally, the violator of the policy)	check the **Notify** box.

4 Complete the **User Selection** section as described in the following table.

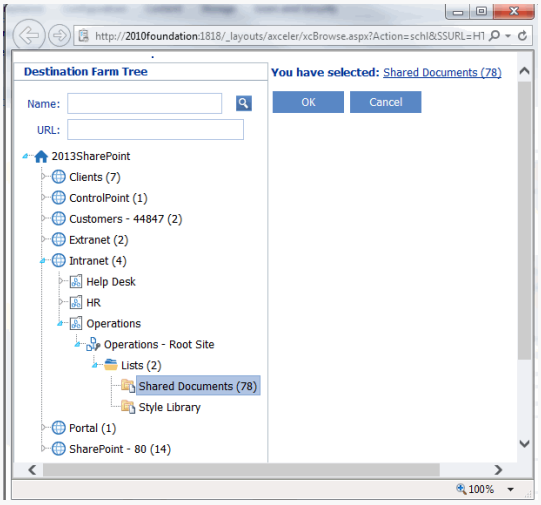
REMINDER: Any user that the ControlPoint Application Administrator has specified as a "super user" in the ControlPoint Configuration Setting Users to Exclude from All ControlPoint Policies (CPPOLICYSUPERUSER) will be excluded from the policy regardless of whether that user is *explicitly* included in the policy.

If you want the policy to ...	Then ...
include all SharePoint users	select **Restrict All**. 
include or exclude one or more SharePoint users or Active Directory groups	• Select **Users/AD Groups**. • Select either **Apply policy to selected users** or **Exclude selected users**. • Select the user(s) and/or AD group(s) you want to include in or exclude from the policy. 
exclude a specific Permissions Level	• one of the **Permissions Levels** from the drop-down.  REMINDER: You cannot *include* a permissions level in a ControlPoint policy.
include or exclude one or more SharePoint groups	• Select **SharePoint Group Picker**. • Select either **Apply policy to selected users** or **Exclude selected users**. • From the **Group Picker**, select the SharePoint group(s) that you want to include in or exclude from the policy.

If you want the policy to ...	Then ...
	

5 If you checked the **Notify** box, select the **Enforce Policy** tab and complete the **Distribution Details** as described in the following table.

If, when the policy is violated ...	Then ...
you want an email sent to one or more specified recipients	• In the **Send To** field, select the user(s) you want to notify of a policy violation. • Complete the **Subject** and **Message** fields.
you want a notification of the policy violation to be posted to a document library as a text file	• Complete the **Subject** and **Message** fields • Complete the **Add to Library or List** field as follows: ▪ Click [**Select**] to display the Destination Selection Page pop-up dialog, and select a document library from the Destination Farm Tree. (Note that only lists and libraries within the current farm for which you have Full Control access display). ▪ Select a library from the tree. (You can also enter a full or partial **Name** or **URL** to narrow your selection.)

If, when the policy is violated ...	Then ...
	 • Click [**OK**] to dismiss the dialog and populate the field with the full url path to the selected library. NOTE: The title of the text file includes the Policy Name along with a date and time stamp.
you want any policy violators to receive an email notification	check the **Send To Violator** box.
you want any policy violator to receive a customized message	• Check the **Use Custom Message To Violator** box. • Complete the **Subject** and **Message** fields. NOTE: If you leave this box unchecked, violators will receive the same email as any other specified recipient(s).

6 Click [**Run Now**].

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.

See also Auditing ControlPoint Administrator Tasks.

Managing ControlPoint Policies

The Manage ControlPoint Policies action lets you view ControlPoint policies for a selected scope. You can:

- view/edit the details of a ControlPoint policy
- delete a policy, and

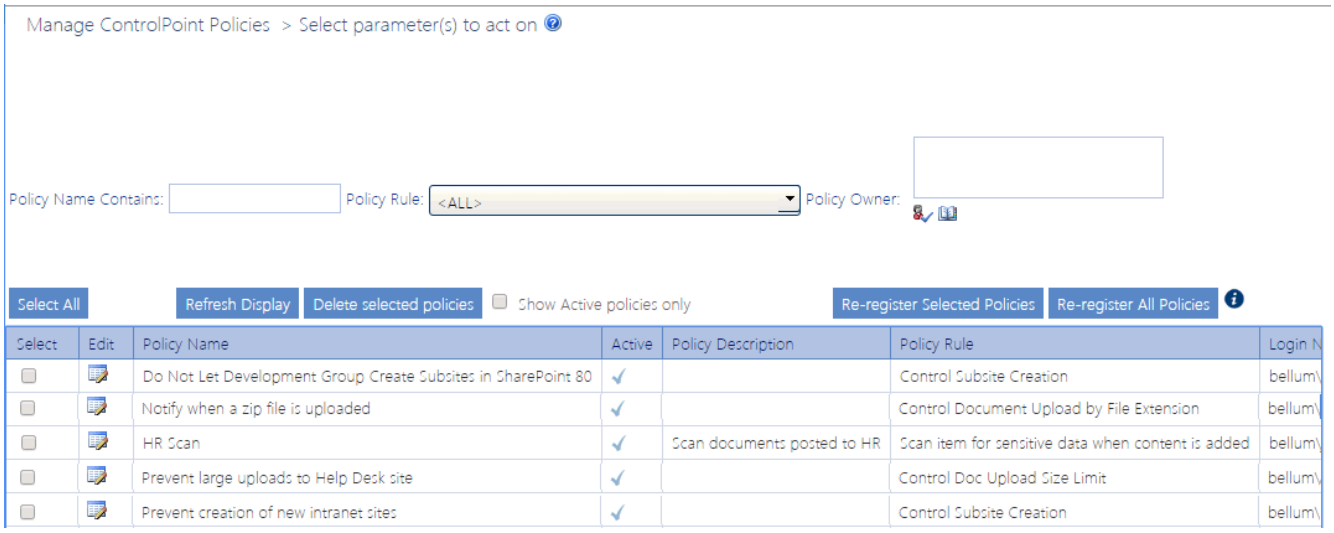
- re-register policies when a new Web application, site collection or subsite is added.

NOTE: If you are a Farm Administrator, you will be able to view all policies within the selected scope; otherwise, you will only be able to view policies that you have created.

To manage ControlPoint policies:

1 Select the object(s) whose policies you want to manage).

2 Choose Automation > Manage Policies.



All of the policies that apply to the selected scope display, along with the following information:

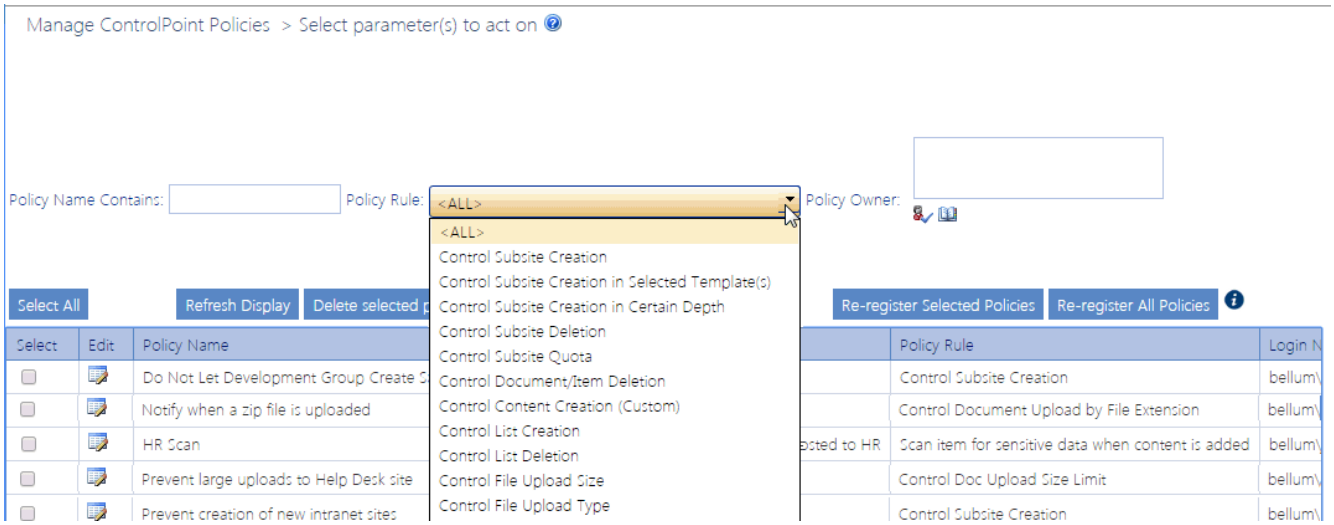
- the **Policy Name** and **Policy Description**
- an indication of whether the policy is **Active**
- the **Owner** (creator) of the policy
- the policy's **Created Date**
- the user the policy was last **Updated By**.

3 If you want to narrow the list to include only policies that meet specific criteria:

a) Specify one or more of the following filters:

- **Policy Name contains**
- **Policy Rule**
- **Policy Owner**

- **Show Active policies only**



b) Click [**Refresh Display**]

Now you can:

- open a policy for viewing/editing
- re-register one or more policies
- delete one or more policies.

Viewing/Editing a ControlPoint Policy

From the Manage ControlPoint Policies interface you can access a ControlPoint policy whose details you want to view or edit.

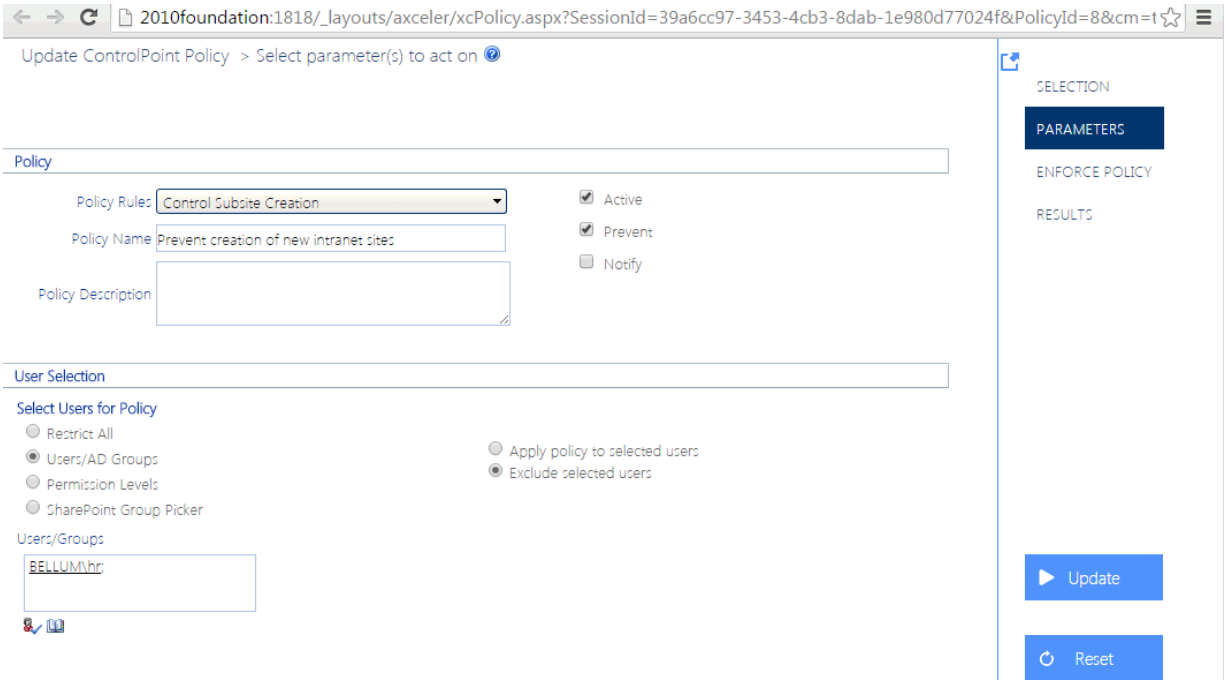
To access a ControlPoint policy's details:

From the Manage ControlPoint Policies table, click the policy's **Edit** icon ( ).

The Update ControlPoint Policy page opens in a separate browser window.

To edit the policy:

1 Modify the appropriate fields as you would for Creating a ControlPoint Policy.



2 To save changes click [**Update**].

Deleting ControlPoint Policies

From the Manage ControlPoint Policies page you can delete one or more ControlPoint policies.

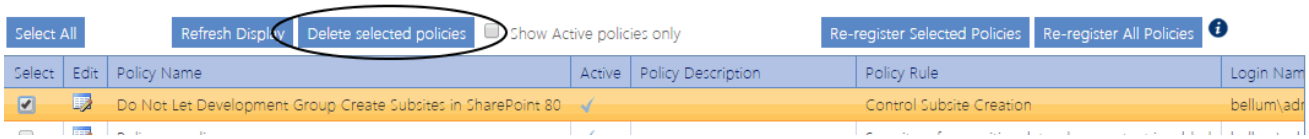
NOTE: If you delete a policy, it will no longer be included in the ControlPoint Policies Report. You can, alternatively, deactivate a policy—which would also give you the option of reactivating it at a later time—via the Update ControlPoint Policy page.

To delete one or more selected ControlPoint policies:

1 In the ControlPoint Policies table, check the Selected box for each policy you want to delete.

If you want to delete all policies, click **Select All**. (Note that, if the ControlPoint Policies table contains more than one page, policies on all pages will be selected).

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



Re-Registering a New Site Collection for a Policy

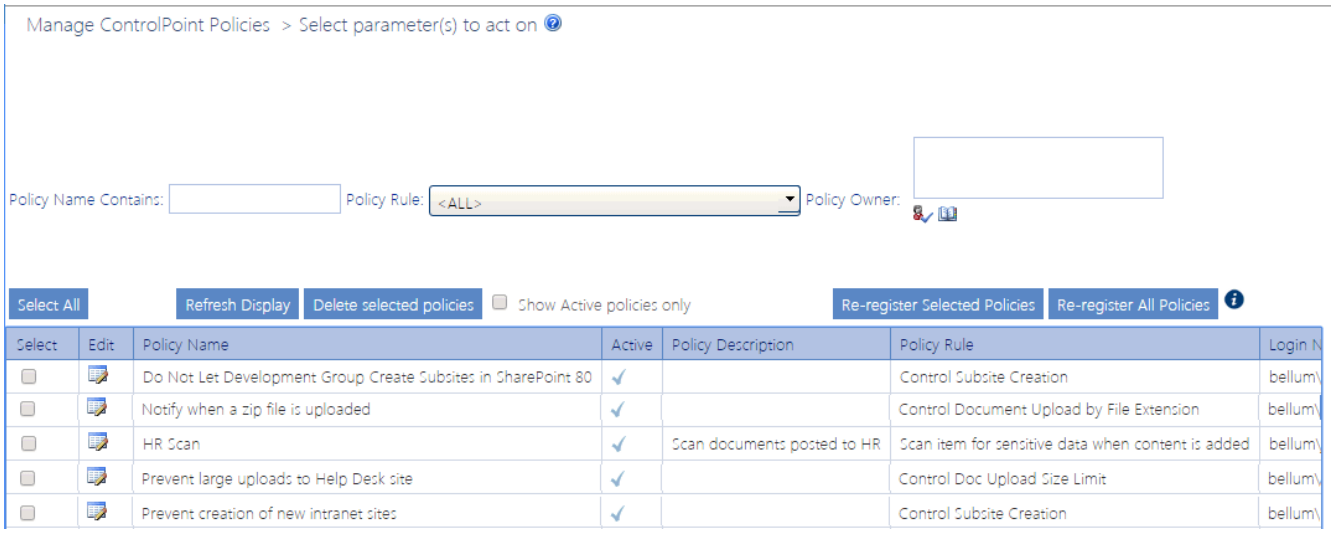
In a SharePoint 2010 or later farm, whenever you add a Web application or site collection to the scope covered by a policy, you must "re-register" the policy so that the new objects will be assigned to the SharePoint event handlers that watch for the actions covered by the policy. In a SharePoint 2007 farm, you must re-register a policy whenever either a site collection *or* a subsite is added to the scope of the policy.

You can either:

- re-register one or more policies in real time (for example, as soon as a new site collection or subsite is added)

OR

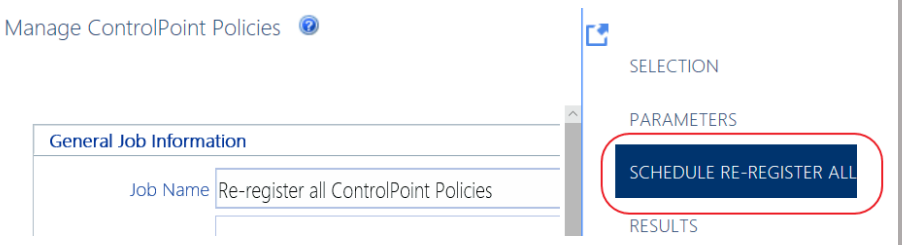
- schedule the re-registration of all policies to run either one time or on a regular basis (such as nightly) to ensure that new site collections/subsites will always be added to policies.



To Re-register Selected Policies:

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

If you want to re-register ...	Then ...
selected policies immediately*	• Check the Select box each policy you want to re-register. • Click [**Re-register Selected Policies**].
all policies immediately*	click [**Re-register All Polices**].
all policies on a one-time or recurring schedule	• Open the **Schedule Re-Register All** panel. • Schedule the re-registration to run at a later time and/or on a recurring basis.

If you want to re-register ...	Then ...
	

*CAUTION: Depending on the number and scope of the policies you are re-registering, the process may be time- and resource-intensive.

Managing SharePoint User Permissions

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

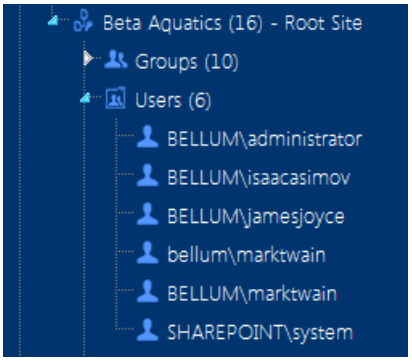
These actions are accessible from various levels of the hierarchy, enabling you to act on a single site collection or site, multiple site collections, sites, and/or lists within a Web application, or across the entire farm.

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

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

Accessing SharePoint Pages for Managing User Permissions

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

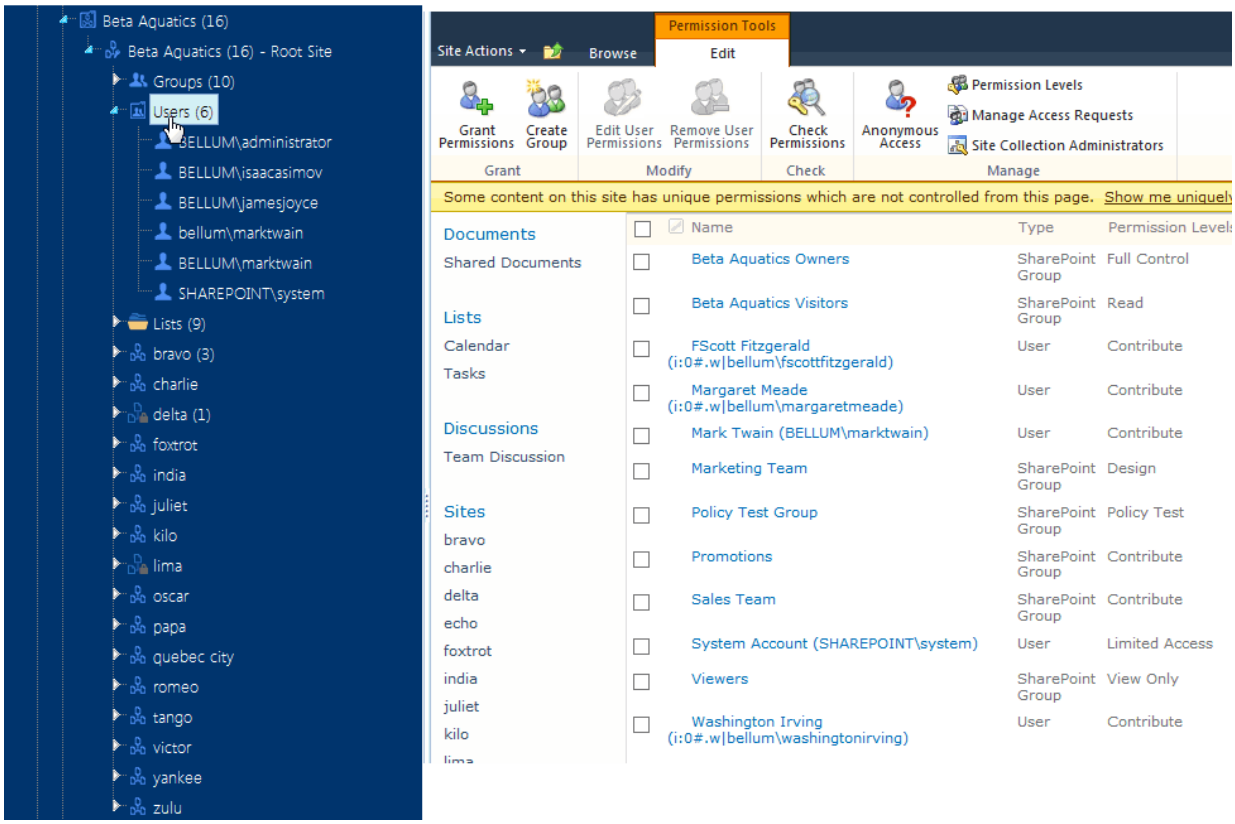


NOTE: Users do not display for sites whose permissions are *inherited* (as indicated by a site icon).

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

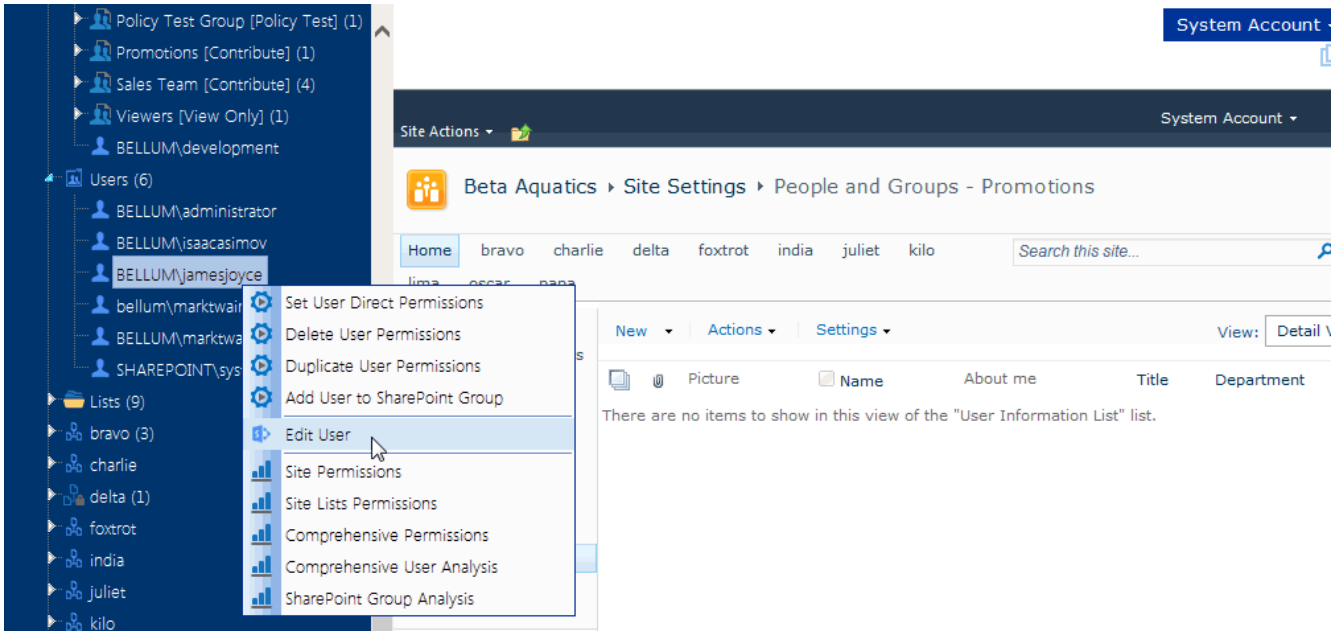
To view user permissions for the site collection/site in SharePoint

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



To view/edit information about a user in SharePoint:

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

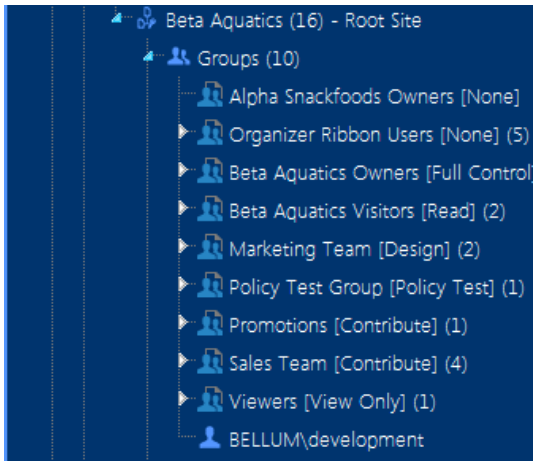


As an alternative to managing permissions through SharePoint, you can use ControlPoint value-added features for managing user permissions. These features are especially useful if you want act on multiple users and/or across multiple sites in a single operation.

Accessing SharePoint Pages for Managing Groups

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

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

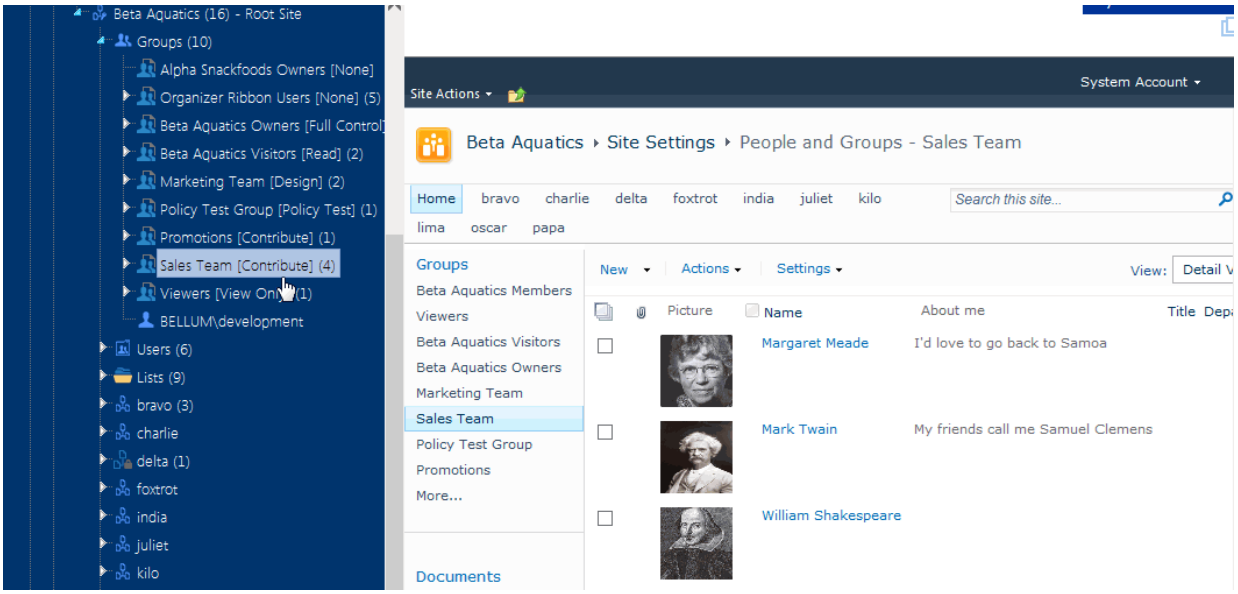


NOTE: Groups do not display for sites whose permissions are *inherited* (as indicated by the icon).

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

To view/edit an existing group in SharePoint:

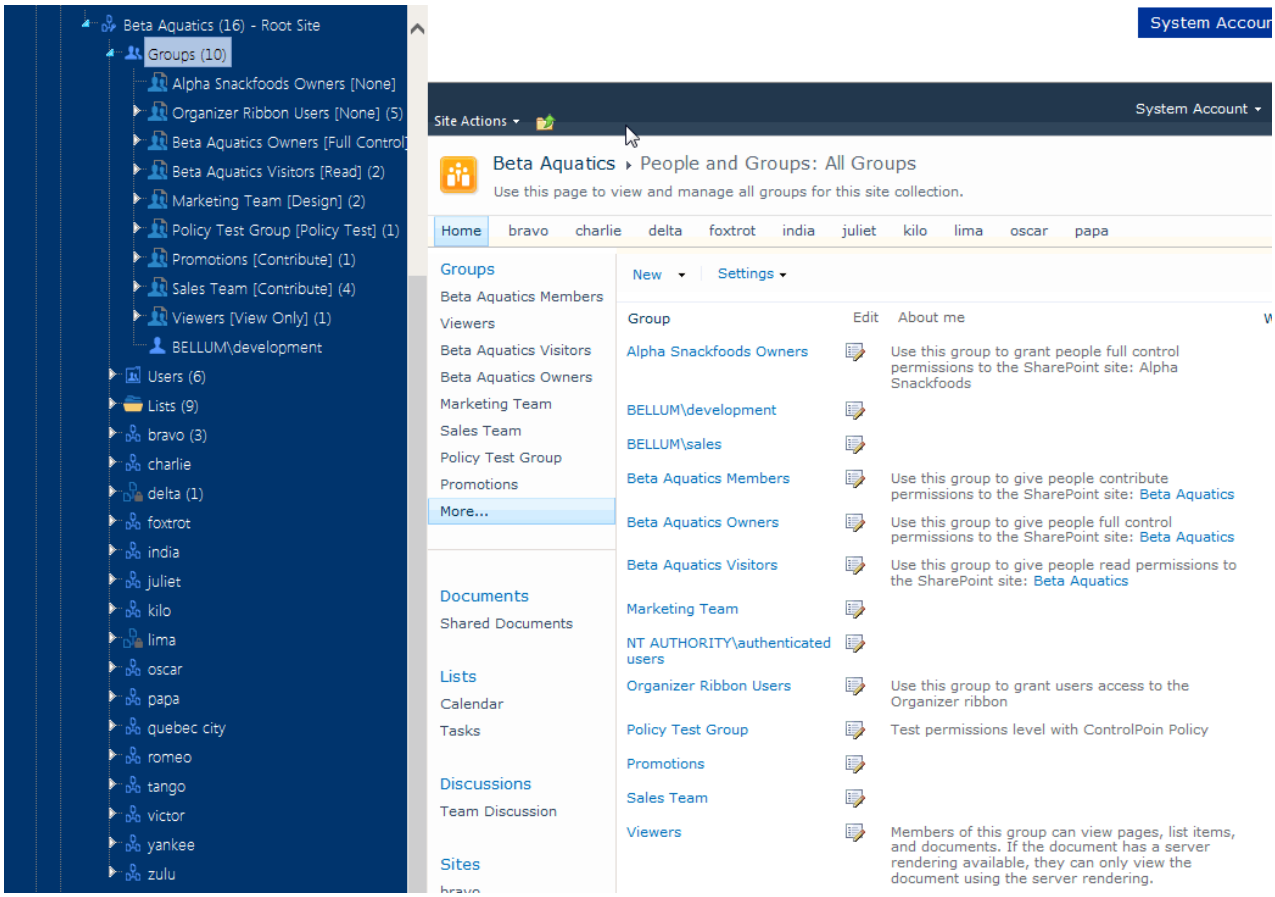
Click on a SharePoint group name to access the SharePoint People and Groups page for that group.



To view/edit groups in SharePoint:

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

Consult your SharePoint documentation for instructions on creating a group.



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

Setting User Direct Permissions

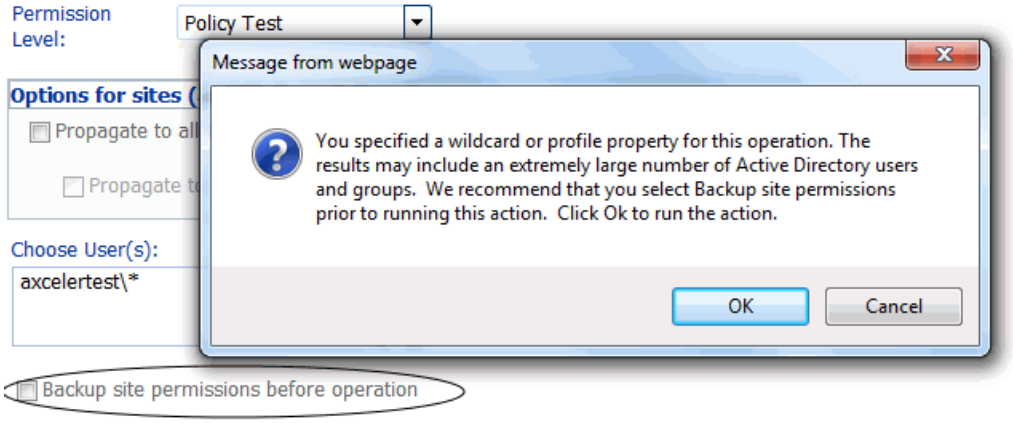
Set User Direct Permissions is a ControlPoint action that lets you grant users direct permissions to one or more SharePoint sites, lists/libraries, and/or items. (The action will not, however, overwrite or replace any direct permissions a user may already have.)

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

In a multi-farm environment, direct permissions can be set across multiple farms.

Setting Permission for Multiple Users Using a Wildcard

If a wildcard is used to select users, at the time you attempt to run, schedule, or save the operation a pop-up dialog will display, warning that you may be running the operation on a large number of Active Directory users and groups.



If you want to back up all permissions for the selected site(s) before running, saving, or scheduling the operation and have not already elected to do so, click [**Cancel**] to cancel the operation and check the **Backup site permissions before operation** box. To dismiss the dialog and run, schedule, or save the operation, click [**OK**].

Because the action requires an Active Directory lookup, a full domain name must be specified in the People Picker (that is, a wildcard cannot be used in place of the domain name or any part of it). For example, axcelertest* is supported, but *\marktwain is not. It also means that alternate authentication methods (that is, other than Active Directory) are not supported.

To set user direct permissions:

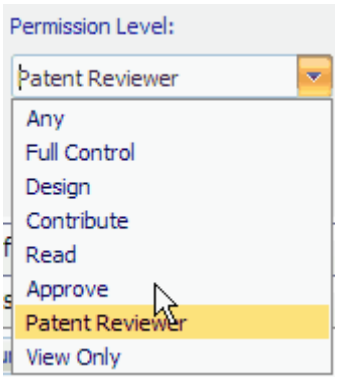
1 Select the object(s) to which you want to grant user permissions.

2 Choose Users and Security > Set User Direct Permissions.

3 Complete the Parameters section as follows:

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

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



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

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

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

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

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

Deleting User Permissions

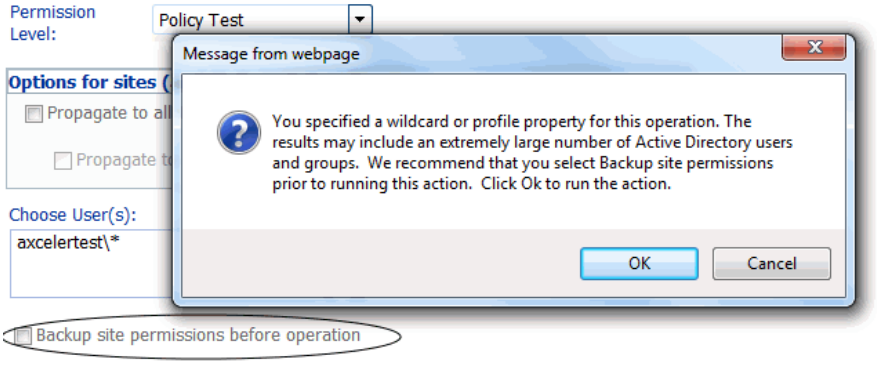
Delete User Permissions is a ControlPoint action that lets you delete SharePoint user permissions from one or more site collections/sites. You can also choose whether to:

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

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

NOTE: This action does *not* remove users from any Web application policies, workflows that may be in effect, or Active Directory.

If a wildcard is used to select users, at the time you attempt to run, schedule, or save the operation a pop-up dialog will display, warning that you may be running the operation on a large number of Active Directory users and groups.



If you want to back up all permissions for the selected site(s) before running, saving, or scheduling the operation and have not already elected to do so, click [**Cancel**] to cancel the operation and check the **Backup site permissions before operation** box. To dismiss the dialog and run, schedule, or save the operation, click [**OK**].

CAUTION: Deleting Users from SharePoint Groups

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

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

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

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

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

To delete the permissions of one or more users:

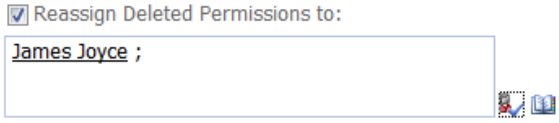
1 Select the object(s) from which you want to delete permissions.

2 Choose Users and Security > Delete User Permissions.

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

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

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

If you want to ...	Then ...
remove the user(s) from the site collection's People and Group list	check the **Delete User Entries from the Site Collection** box .(If you leave this box unchecked, permissions will be deleted but user entries will remain in the People and Groups list). NOTES: • The action will not be carried out for explicitly-selected objects that have unique permissions, as removing a user from the People and Group list will, by extension, also delete any other permissions the user might have within that site collection. • If a user was granted permissions *only* through an Active Directory group, that user may have an "invisible entry" in the site collection's People and Group list. This action will remove that entry. • If the **Delete direct permissions only** is selected, this option becomes disabled. The removal of a user from the site collection would remove *all* of that user's permissions, including those granted through membership in SharePoint groups.
remove *only* direct permissions and retain permissions granted through SharePoint group membership	check the **Delete direct permissions only (Leave group permissions intact)** box. NOTE: If **Delete User Entries from the Site Collection is selected**, this option becomes disabled. Removal of a user from the site collection would remove *all* of that user's permissions, including those granted through membership in SharePoint groups.
reassign the permissions of the user(s) to be deleted to one or more other users	a. Check the **Reassign Deleted Permissions to** box. b. Select the user(s) to whom you want to copy the permissions. 

If you want to ...	Then ...
	NOTE: If you entered the name of more than one user in the Delete Users field, the permissions of every one of those users (if different) will be reassigned to the target user.
delete SharePoint alerts that have been set for the user(s)	check the **Delete Alerts** box.
delete the user My Site site collection(s)	check the **Delete My Sites** box.

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

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

Duplicating a User's Permissions

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

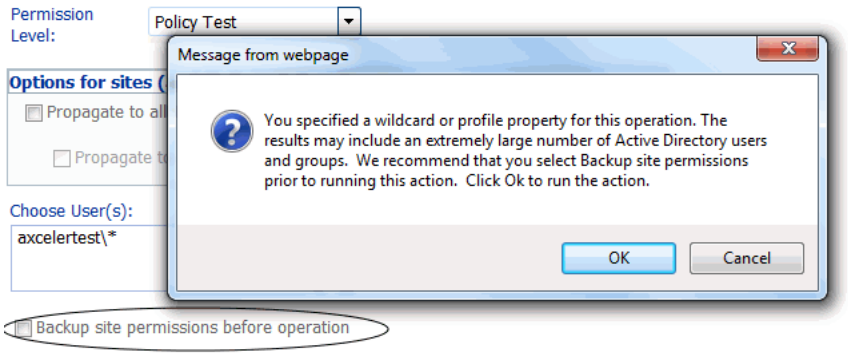
EXCEPTIONS: You cannot duplicate *Site Collection Administrator* privileges using this action. You also cannot duplicate permissions that were granted via an Active Directory group (as an alternative, you can simply add the new user(s) to the Active Directory group).

All of a user's permissions for a site collection, including any unique permissions for sites, lists, and libraries, and items are copied. Any Web Application policy permissions are not copied, however.

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

In a multi-farm environment, a user's permissions can be duplicated across multiple farms.

If a wildcard is used to select users, at the time you attempt to run, schedule, or save the operation a pop-up dialog will display, warning that you may be running the operation on a large number of Active Directory users and groups.



If you want to back up all permissions for the selected site(s) before running, saving, or scheduling the operation and have not already elected to do so, click [**Cancel**] to cancel the operation and check the **Backup site permissions before operation** box. To dismiss the dialog and run, schedule, or save the operation, click [**OK**].

To duplicate a user's permissions:

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

2 Choose Users and Security > Duplicate User Permissions.

3 Complete the Parameters section as follows:

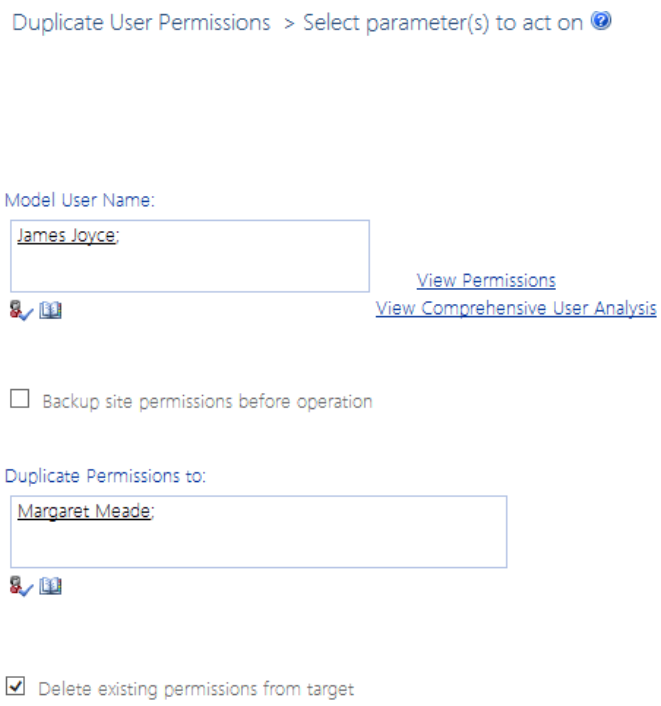
a) For **Model User Name**, select the user(s) whose permissions you want to duplicate.

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

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

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

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



Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

Duplicating a Permissions Level

The Duplicate Permissions Levels action lets you copy a SharePoint permissions level as it is defined for a selected site collection or site to one or more other site collections and/or sites. For target sites that inherit permissions levels, you can choose whether to copy the permissions level to the root site, skip any sites whose permissions level are inherited, or break inheritance and apply the permissions level from the source site. You can also choose whether or not to override a permissions level of the same name on a target site.

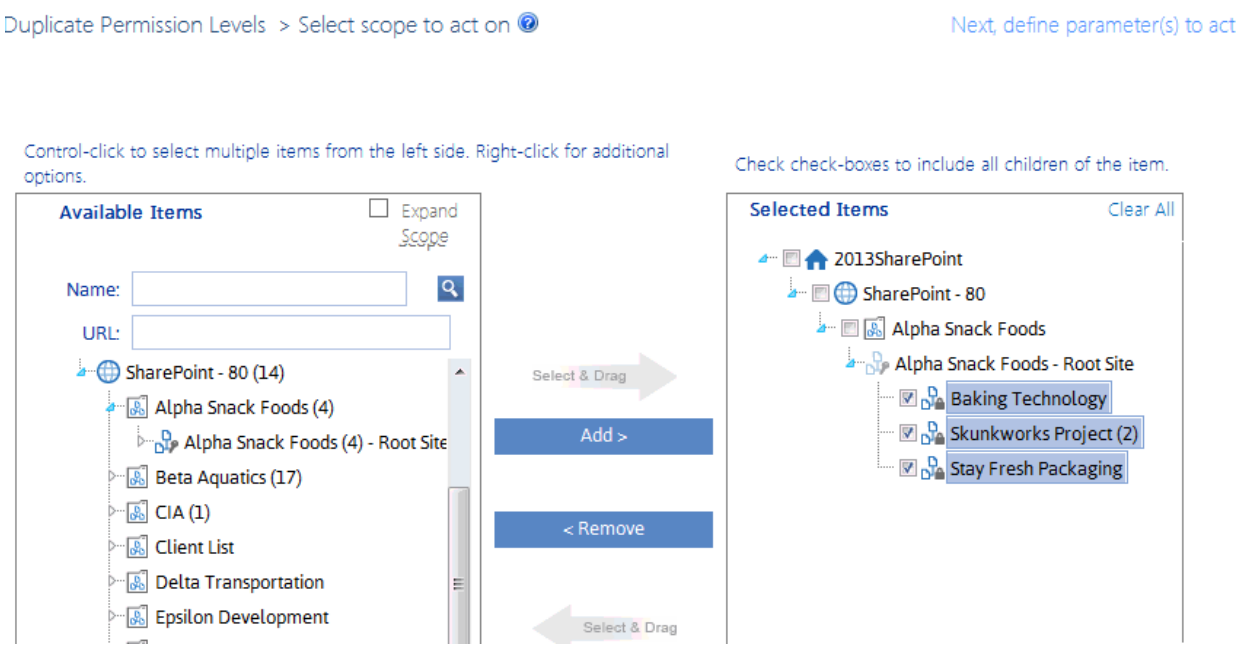
To duplicate a permissions level:

1 Select the site collection or site whose permissions level you want to duplicate.

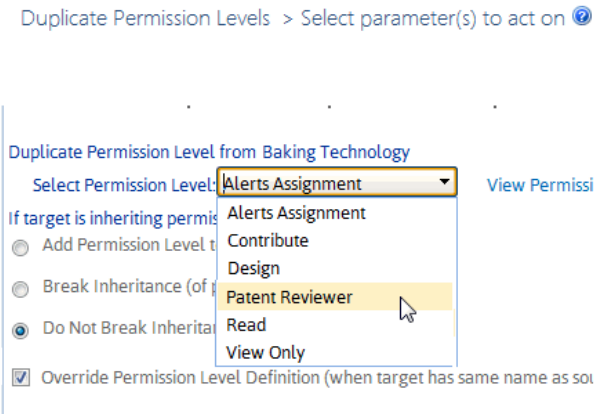
NOTE: Unlike many other ControlPoint operations—which are initiated for *target* objects (that is, objects that you want to act *on*)—you initiate the Duplicate List Properties operation by selecting the *source* list (that is, the list you want to copy *from*).

2 Choose Users and Security > Duplicate Permission Levels.

3 From the Selection panel, select the site collection(s) and/or sites to which you want to copy the permissions level, then click **[Apply]**.



4 From the **Select Permissions Level** drop-down, select the permissions level you want to duplicate.



If you want to open the SharePoint Permissions Level Page, where you can view and edit permissions level for the source site, click the **View Permissions Levels** link.

5 Use the information in the following table to determine the appropriate **If target is inheriting permissions levels**: selection.

If you want to ...	Select ...
add the permissions level to the root site of each site collection within the selected scope (and by extension, to all subsites that inherit from it)	**Add Permission Level to Root Site**.
break permissions level inheritance of all sites within the selected scope that have inherited permissions and add the permissions level to each of those sites	**Break Inheritance (of permissions and levels)**.
skip the action for any sites that inherit permissions	**Do Not Break Inheritance (Skip Action)**.

6 If you want to skip sites for which a permissions level with the same name already exists, uncheck the **Override Permissions Level Definition** box.

If you leave this box checked and ControlPoint encounters a permissions level with the same name, it will be overwritten with the permissions level definition from the source site.

TIP: If you leave the **Override Permission Level Definition** box checked, you may also want to schedule the action to run on a recurring basis to ensure that any changes to the permissions level definition on the source site will be applied to the target site(s).

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

Cleaning Up User Permissions

The **Clean-up Permissions** action lets you analyze the permissions of individual users within site collections and identify SharePoint Groups and/or Active Directory groups with matching permissions.

If you have chosen to include SharePoint groups in the action, you then have the option of moving users with direct permissions into SharePoint groups with matching permissions in accordance with SharePoint best

practices. (Because Active Directory groups are managed independent of SharePoint, you cannot use this action to add users to Active Directory groups.)

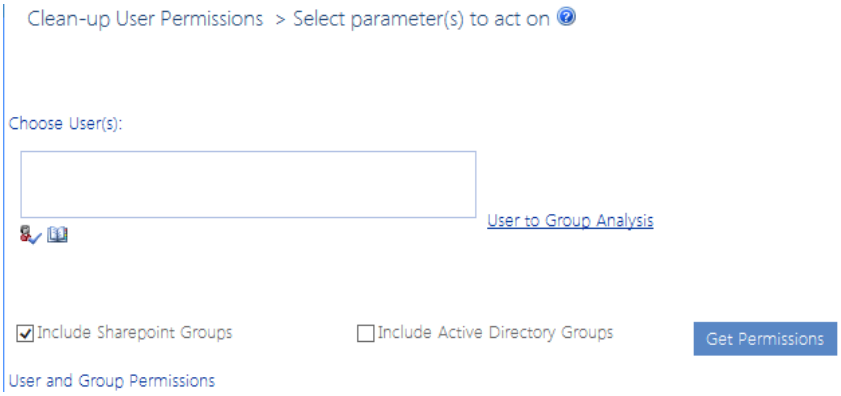
Before cleaning up permissions, it is recommended that you run a User to Group Analysis for more detailed information about a user's direct permissions and the permissions of comparable SharePoint groups.

NOTE: You can initiate a Clean-Up Permissions action from the site collection level of the SharePoint Hierarchy only. However, you can include multiple site collections in your selection.

To clean up user permissions:

1 Select the site collection(s) for which you want to clean up permissions.

2 Choose Automation > Clean-up User Permissions.



3 Select the user(s) whose permissions you want to clean up.

4 If different from the default (**Include SharePoint Group**s only), check/uncheck the appropriate option(s) to **Include Active Directory Groups** only or both **Include SharePoint** and **Include Active Directory Groups**.

NOTE: At least one of these options must be checked.

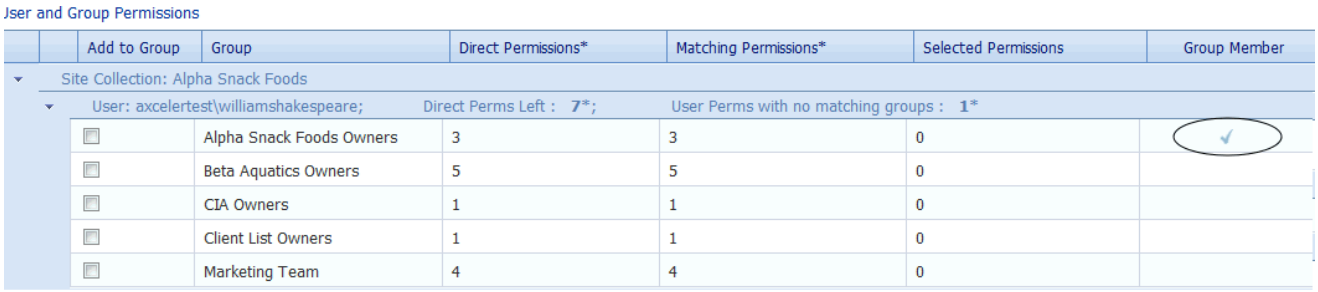
5 Click [**Get Permissions**].

NOTE: Retrieving permissions is a resource-intensive process. Depending on the scope and number of users you have selected, the operation may take a long time to complete. If you want to cancel the operation, click **[Cancel Get Permissions]**.

The following information is returned for each site collection and user within the scope of your analysis:

- he user's login name and the number of unique (non-inherited) **Direct Permissions** he/she currently has, and
- a list of SharePoint and/or Active Directory groups that are candidates for adding the user to—that is, they have the same permissions or fewer
- the number of **Matching Permissions** between the user and group.

Note that, if the user is already a member of a group with matching permissions, a check mark will display in the Group Member column.



To replace a user's direct permissions with membership in a SharePoint group with comparable permissions:

Check the **Add to Group** box to the left of the SharePoint group to which you want to add the user.

NOTES:

- If the user is already a member of the selected group, the action will delete the direct permissions and retain his/her membership in that group. Otherwise, the action will add the user to the selected group and delete his/her direct permissions.
- If you chose to include *Active Directory* groups, the action identifies—but does not allow you to add to—matching groups. (If matching Active Directory groups are found, the **Add to Group** checkbox will be absent.)

Note that, when you check an **Add to Group** box, the **Direct Perms Left** count is decreased by the number of matching permissions, and those permissions are added to the **Selected Permissions** column.

NOTE: If the number of direct permissions that a user has is greater than the number of permissions for the matching group, you may want to create a new SharePoint group for the remaining permissions after completing the cleanup operation. The ControlPoint User to Group Analysis.

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

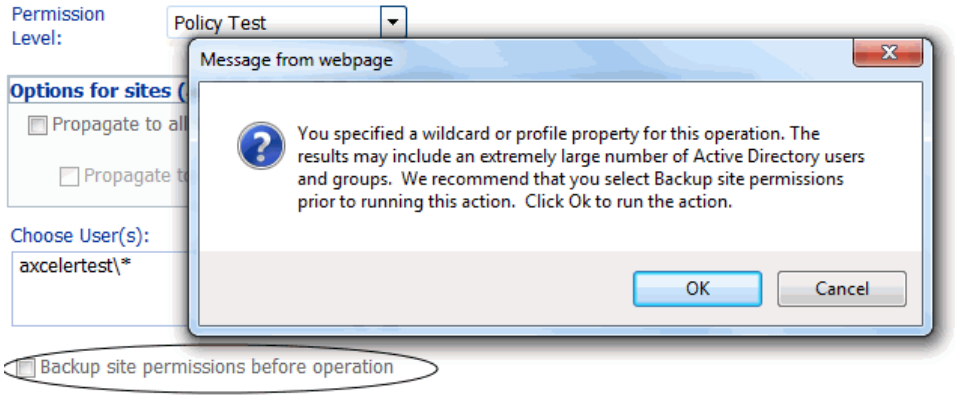
Adding Users to SharePoint Groups

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

In a multi-farm environment, users can be added to SharePoint groups on a single farm; either the home farm or a remote farm.

Adding Multiple Users to SharePoint Groups Using a Wildcard

If a wildcard is used to select users, at the time you attempt to run, schedule, or save the operation a pop-up dialog will display, warning that you may be running the operation on a large number of Active Directory users and groups.



If you want to back up all permissions for the selected site(s) before running, saving, or scheduling the operation and have not already elected to do so, click [**Cancel**] to cancel the operation and check the **Backup site permissions before operation** box. To dismiss the dialog and run, schedule, or save the operation, click [**OK**].

Because the action requires an Active Directory lookup, a full domain name must be specified in the People Picker (that is, a wildcard cannot be used in place of the domain name or any part of it). For example, axcelertest* is supported, but *\marktwain is not. It also means that alternate authentication methods (that is, other than Active Directory) are not supported.

To add users to SharePoint groups:

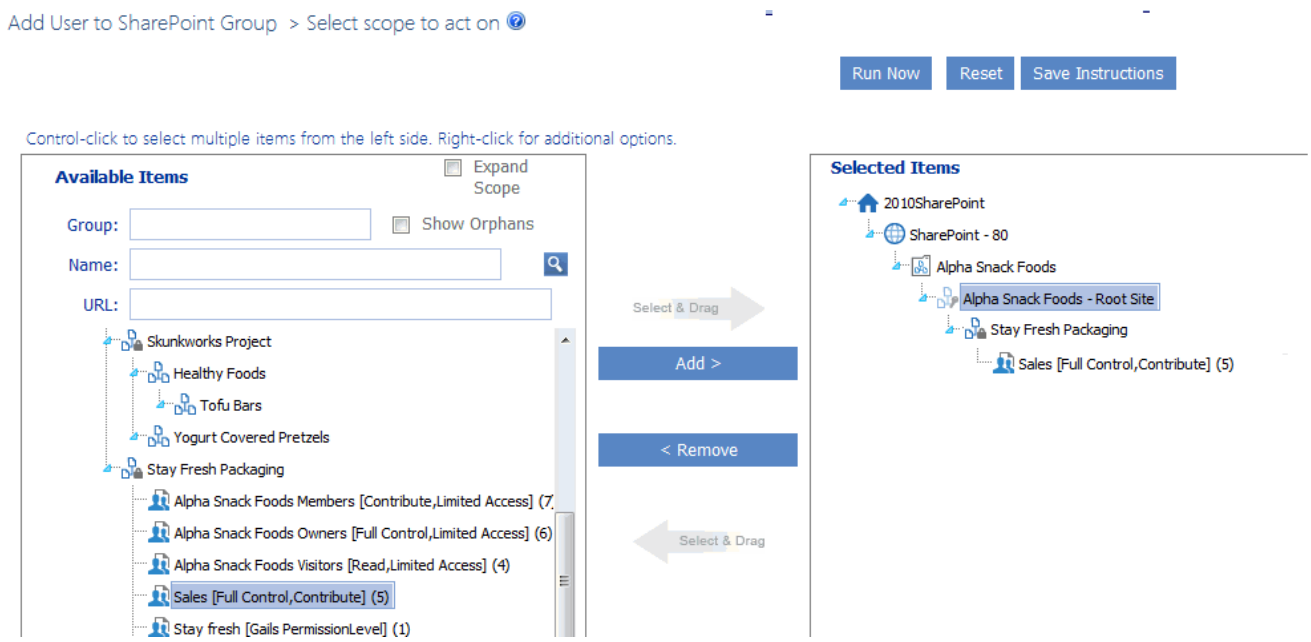
1 Select the object(s) for which you want to add users to groups.

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

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

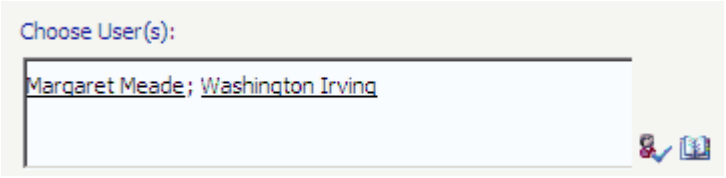
   a) From the **Available Items** list, select the group(s) to which you want users and move them to the **Selected Items** list.

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



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

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



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



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

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

Setting SharePoint Group Permissions

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

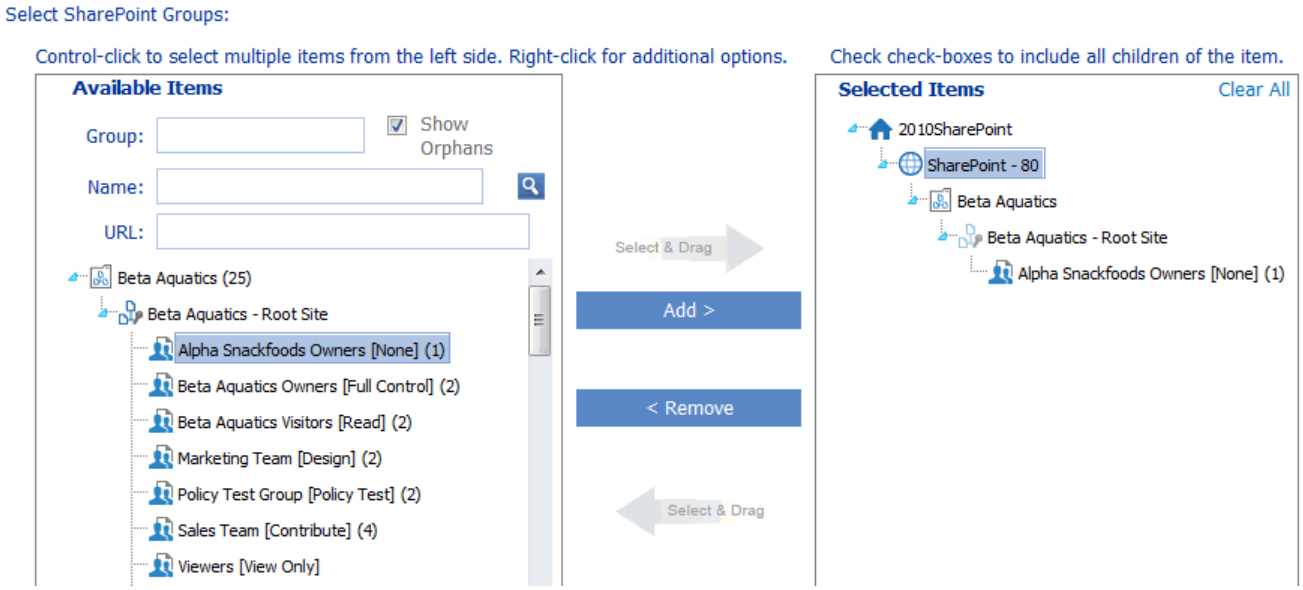
By default, only groups that have existing permissions within the site collection can be selected. In that case, the action *adds* to the existing permissions (it does not replace them). ControlPoint Application Administrators can, however, choose to display? and allow the selection of? groups that exist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

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

To set SharePoint Group Permissions

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

2 Choose Users and Security > Set SharePoint Group Permissions.



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

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

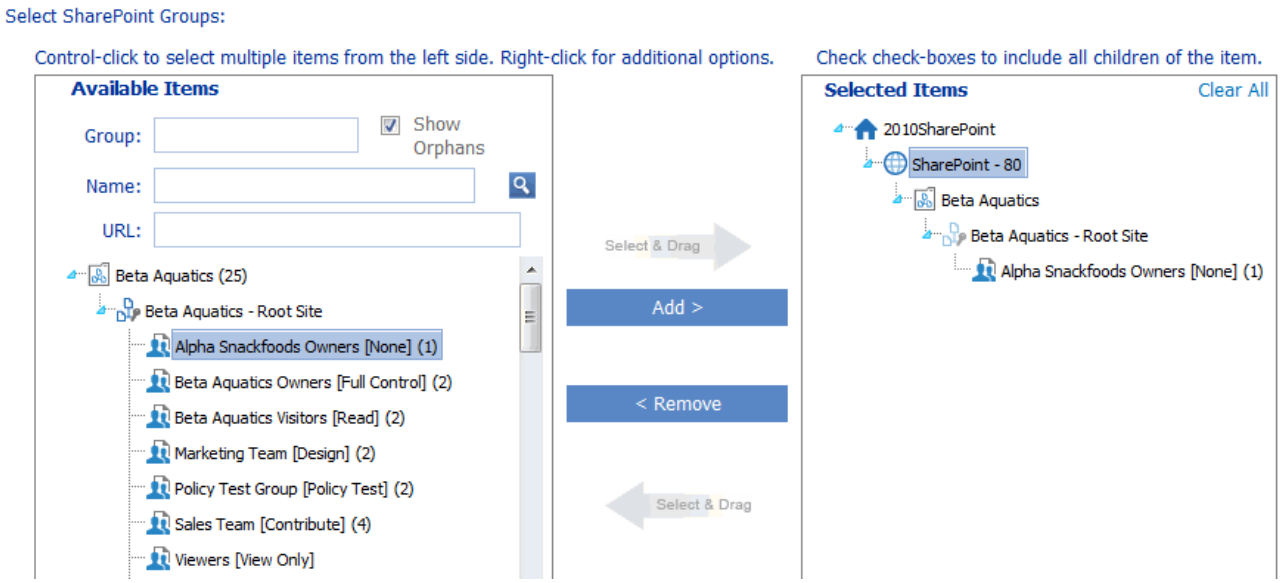
Note that all groups defined for the entire site collection that have at least one associated permissions level display beneath the root site. Groups with unique permissions also display beneath the site granting those permissions. Any group that does not have at least one associated permissions level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

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

b) Click [**Apply**].

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

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



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

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

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

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

Now you can either:

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

OR

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

OR

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

Deleting SharePoint Group Permissions

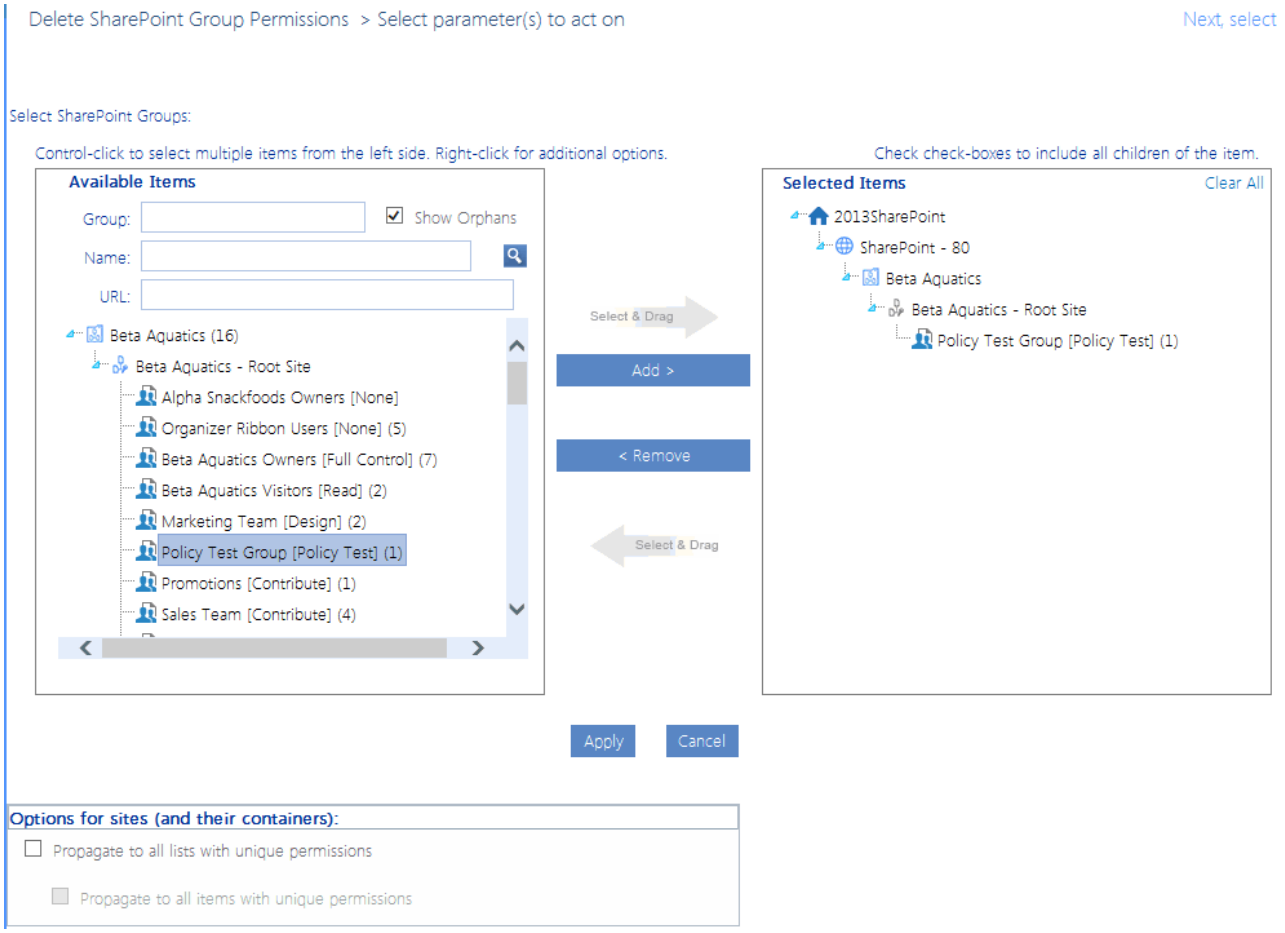
The Delete SharePoint Group Permissions lets you delete the permissions of one or more SharePoint groups from a single site collection or site without removing its members or deleting the group itself.

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

To delete SharePoint Group Permissions:

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

2 Choose Users and Security > Delete SharePoint Group Permissions.



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

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

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

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

b) Click [**Apply**].

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

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

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

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

Deleting SharePoint Groups

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

To delete one or more SharePoint groups:

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

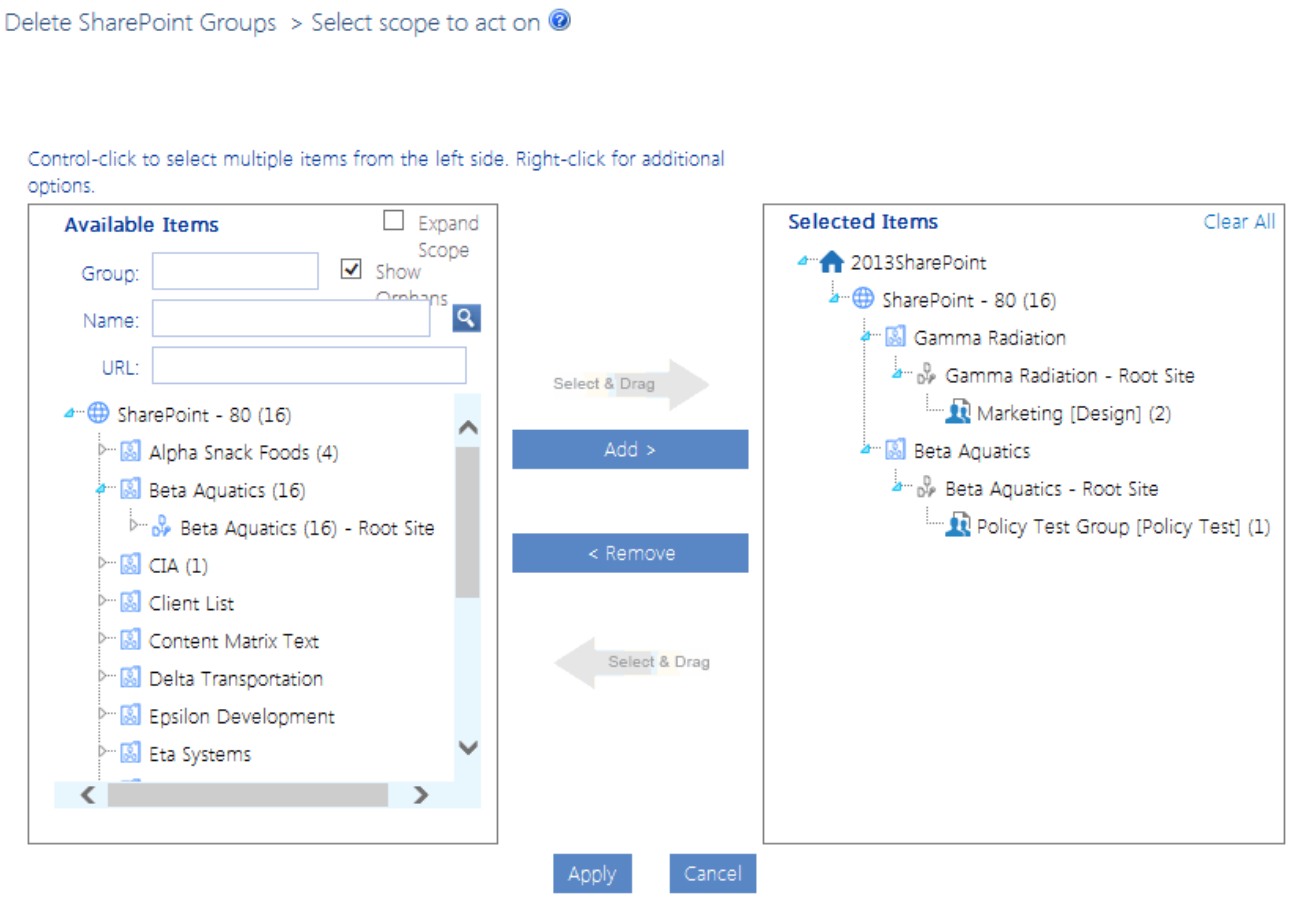
2 Choose Users and Security > Delete SharePoint Groups.

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

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

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

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



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

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

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

Managing Permissions Inheritance

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

In a multi-farm environment, permissions inheritance can be managed across multiple farms.

SharePoint Objects Included in the Operation by Default

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

Operation	Scope	Objects Included by Default
Restore Inheritance	• Farm • Web Application, or • Site Collection	All sites, subsites, lists, folders and items within the selected scope. NOTE: You can use the Change Selection option if you want to exclude individual sites, lists, folders, and items.
	Site	The site itself and all lists, folders and items within the site. NOTE: If you have checked the **Include Children** box in the Selection pane (that is, you want to include child sites of the selected site), you can also choose to *exclude* the selected site itself (so that child sites will inherit from it).
	List	The list itself. NOTE: By default folders and items are not acted upon. You can, however, use the Change Selection option to explicitly select any folders, and items you want to include.
Break Inheritance	• Farm • Web Application, or • Site Collection	All sites and subsites within the selected scope. NOTE: By default, lists, folders, and items are not acted upon. You can, however, use the Change Selection option to explicitly select any lists, folders, and items you want to include.
	Site	The site itself and all subsites. NOTES:

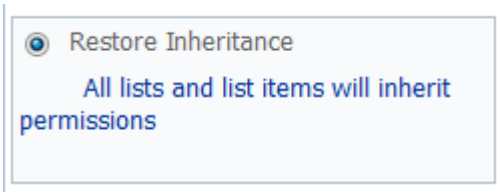
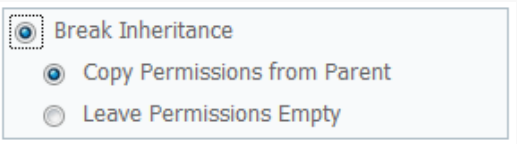
Operation	Scope	Objects Included by Default
		• By default, lists, folders, and items are not acted upon. You can, however, use the Change Selection option to explicitly select any lists, folders, and items you want to include. • If you have checked the **Include Children** box in the Selection pane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

To manage permissions inheritance:

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

2 Choose Users and Security > Manage Permissions Inheritance.

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

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

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



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

Now you can either:

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

OR

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

OR

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

Managing SharePoint Groups

ControlPoint Manage SharePoint Groups is a farm-level action that lets you propagate the permissions and membership of a SharePoint group on one site with groups on one or more different sites in the same farm. You can either:

- overwrite the membership and permissions of an existing group (but retain the group's name)

EXCEPTION: Permissions of a group within a list, folder, or item that has unique (non-inherited) permissions will not be changed.

OR

- create a new group with the same name, membership, and permissions as the model group.

ControlPoint Group Management Terminology

Association - The relationship between the SharePoint group whose permissions and membership you want to propagate and all of the groups *to which* you want to propagate them.

Model Group -The SharePoint group whose permissions and membership you want to propagate.

Dependent Group(s) - The SharePoint group(s) to which you are propagating the membership and permissions of the model group. You "adopt" a new dependent group when you add it to an association.

Synchronize - The act of propagating permissions and membership of a model group to its dependent groups. Whenever you synchronize groups within an association, the existing permissions and/or membership of dependent groups are overwritten with those of the model group.

NOTE: Synchronization is a one-way process (that is, model to dependents only). Although changes to model groups are not automatically propagated to dependent groups, you can schedule a synchronization to run on a regular basis to ensure that model and dependent groups remain in sync. You can choose to synchronize the permissions of the model group only, the group's membership only, or both permissions and membership.

In a multi-farm environment, SharePoint groups can be managed for a single farm; either the home farm or a remote farm.

To access the Manage SharePoint Groups workspace:

From the farm or Web Application level of the SharePoint Hierarchy, choose Automation > Manage SharePoint Groups.



The top grid lists all existing associations with the following information:

- the **Association Name**
- a link that enables you to **Edit** the Association Name.
- the model **Group Name**
- the **Group Description** (as specified in SharePoint Group Settings page)
- the **Site Name** and **Site URL** where the model group resides
- **Permissions** associated with the group
- the **# of Users** with Permissions for the group
- a **Details** link that lets you open the SharePoint People and Groups page for the model group.

When you select a group in the top grid, the bottom grid lists all of the dependent groups in the association, along with the following information:

- the dependent **Group Name**
- the **Site Name** and **Site URL** where the dependent group resides
- the **Adoption Date** (that is, the date the dependent group was added to the association)
- a **View Details** link that lets you open the SharePoint People and Groups page for the dependent group.

Now you can:

- Associate a SharePoint Group from One Site with Other Sites
- Maintain SharePoint Group Associations
- Dissolve Group Associations and/or Delete SharePoint Groups.

Associating a SharePoint Group from One Site with Other Sites

Factors to Consider Before Associating Groups

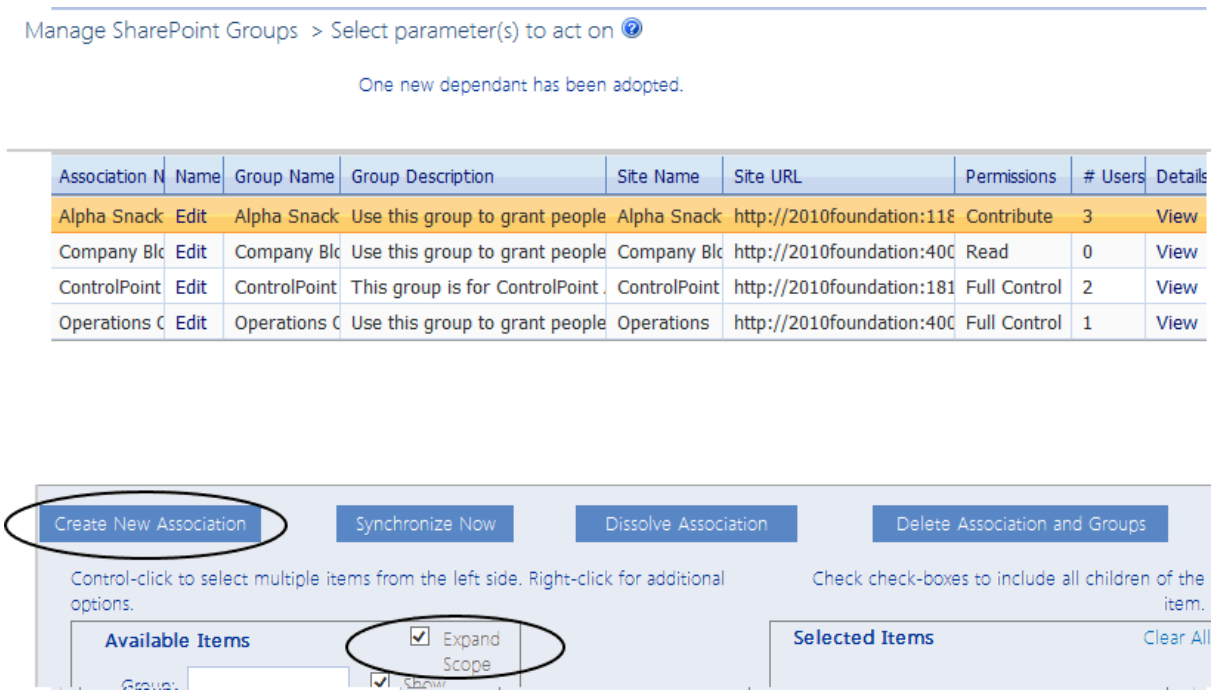
- A group can be a member of only one association; *either* as a model *or* a dependent.
- A dependent group cannot be created on a site that inherits permissions from its parent.
- If the permission level of the model group does not exist in the target site collection, it will be created there.
- If the owner of the model group is either a valid "user" or a SharePoint group that exists in the target site collection, that user or group will become the owner of the dependent group. If the owner is not a valid user (for example, a SharePoint group or built-in account such as SharePoint\system or NT AUTHORITY\authenticated users) or is a SharePoint group that does *not* exist in the target site collection, the user requesting the action will become the owner of the dependent group.

EXCEPTION: If the dependent group already exists in the target location (that is, you are not creating a new group), group ownership will remain unchanged.

To create a new association:

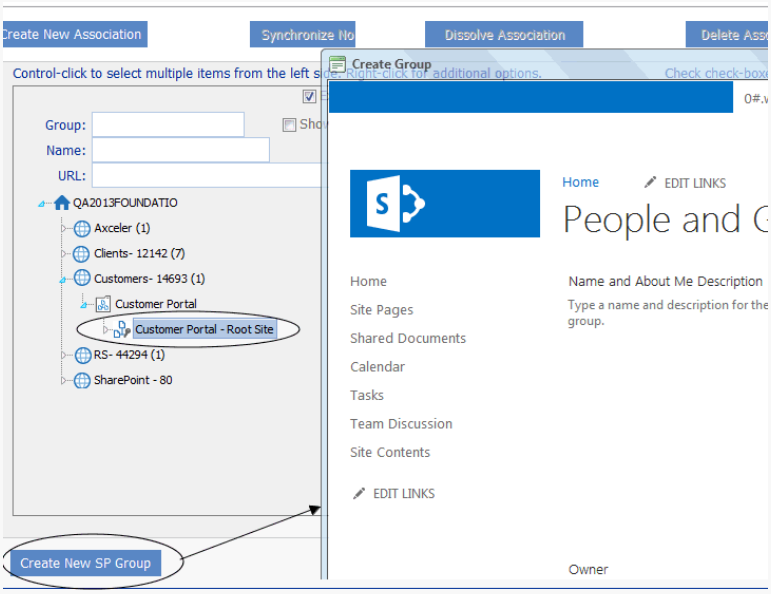
1 From the Group Management workspace, click [**Create New Association**] to display the model group picker.

NOTE: By default, the left side of the picker includes Web Applications within the selected scope. You can, however, check the **Expand Scope** box to include all Web Applications within the farm.



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

If you want to ...	Then ...
use an existing group as the model	select the *group* that you want to use as a model from the left pane and move it to the right pane. NOTE: You cannot select a group that already belongs to an association (either as a model or a dependent).
create a new group to use as a model	a. Select the site within which you want to create the model group in the left pane. b. Click [**Create New SP Group**].

If you want to ...	Then ...
	 c. Complete the appropriate fields on the SharePoint New Group page. d. Click [**Create**] to close the page. The group you just created will now be available for selection in the model group picker.

3 Click [**Create Association**].

The model group displays in the grid at the top of the workspace with the following information:

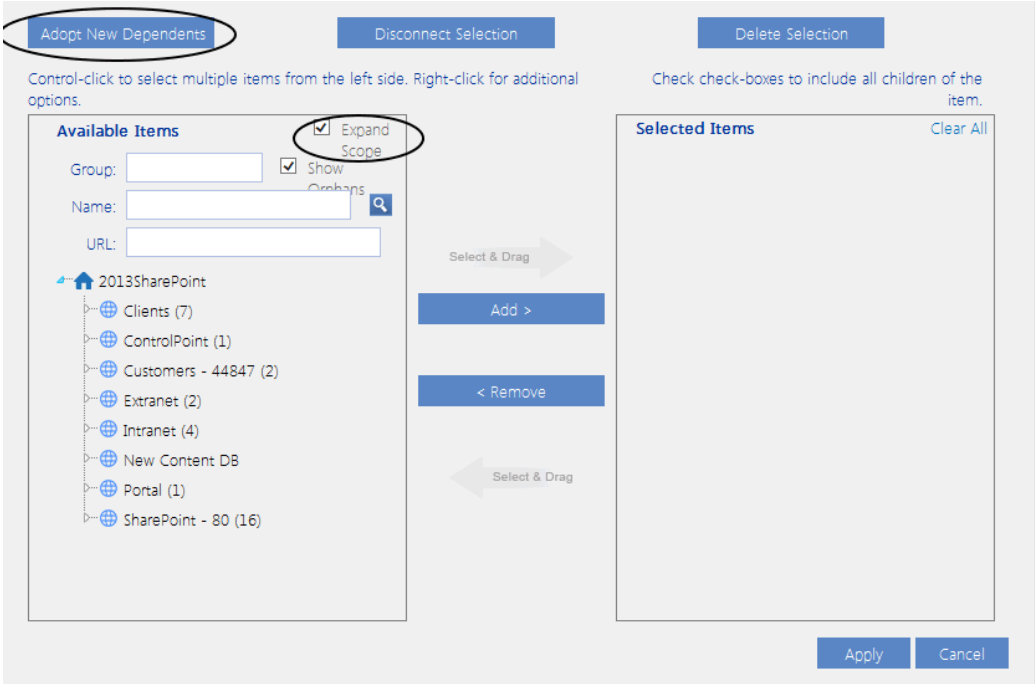
- **Association Name** (This is, by default, the name of the model group. You can, however click the **Edit Assoc. Name** Edit link and specify a different name.)
- **Group Name** and **Group Description** (as specified on the SharePoint Group Settings page)
- **Site Name** and Site **URL**
- **Permissions** level(s)
- **# Users** in the group.

Association Name	Name	Group Name	Group Description	Site Name	Site URL	Permissions	# Users	Details
Alpha Snackfoods	Edit	Alpha Snackfoc	Use this group to grant people contribu	Alpha Snackfoo	http://2010foundation:11808/sit	Contribute	3	View

To open the SharePoint People and Groups page for the group, click the View link in the **Details** column.

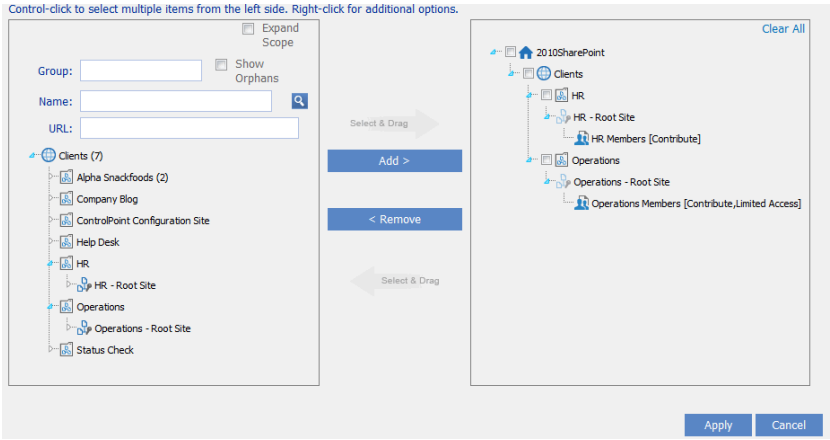
4 Scroll to the bottom of the workspace.

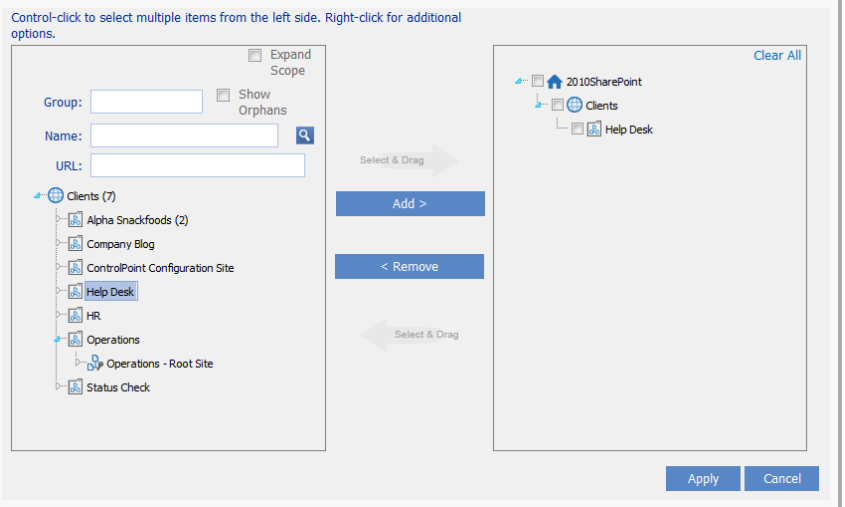
5 Click [**Adopt New Dependents**] to display the dependent group picker.



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

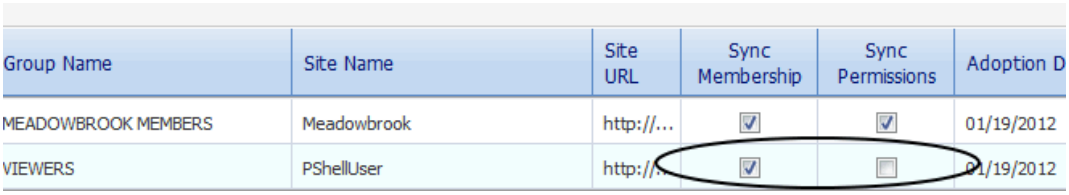
NOTES: By default, the left side of the picker includes Web Applications within the selected scope. You can, however, check the **Expend Scope** box to include all Web Applications within the farm. If you want to associate a dependent group in a newly-created site, it may take several minutes for the site to appear in the picker.

If you want to ...	Then ...
associate one or more existing groups with the model group	select the group(s) from the left pane and move them to the right pane.
NOTE: When you choose this option, the name and owner of the dependent group will remain the same, but the membership and permissions will be overwritten with those of the model group.	
create a new group to associate with the model group	select the site within which you want to create the dependent group and move it to the right pane.

If you want to ...	Then ...
NOTE: When you choose this option the name, membership, and permissions of the dependent group will be the same as those of the model group.	

7 Click [**Apply**].

By default, both group membership and permissions are synchronized. However, if you want to synchronize *only* permissions *or* membership, uncheck the other option.



Group Name	Site Name	Site URL	Sync Membership	Sync Permissions	Adoption D
MEADOWBROOK MEMBERS	Meadowbrook	http://...	☑	☑	01/19/2012
VIEWERS	PShellUser	http://...	☑	☐	01/19/2012

Now you can either:

- synchronize model and dependent group(s) immediately, (by clicking [**Synchronize**])

OR

- complete the Schedule Synchronization section and schedule the synchronization to run at a later time or on a recurring basis.

TIP: Schedule the synchronization to run on a recurring basis if you want to ensure that groups *remain* in sync.

Maintaining SharePoint Group Associations

Synchronizing Associated SharePoint Groups

When you create a new association, the membership and site-level permissions associated with the model group are copied to the dependent group(s) as part of the operation. To copy future changes to group membership or permissions, you must synchronize the model group with its dependents.

TIP: You can run a synchronization on a regular schedule, to ensure that groups remain in sync.

Synchronization applies to an entire association (that is, any changes to the model group will be propagated to *all* dependents in the association). Keep in mind that that, when you synchronize an association, any changes that have been made directly to a dependent group will be overwritten.

To synchronize associated groups:

1 In the Group Management workspace, highlight the model group (in the top grid) whose dependents you want to synchronize.

2 Either

- synchronize groups immediately, by clicking the [**Synchronize**] button

OR

- schedule the synchronization to run at a later time and/or on a regular schedule.

NOTE: You can only synchronize (or schedule a synchronization for) one association at a time, and you cannot schedule a synchronization for a newly-created site until Discovery has been run.

Dissolving Group Associations and Deleting SharePoint Groups

You can:

- dissolve an association, and either:
  - retain the model and dependent groups in their respective SharePoint sites

  OR

  - delete the model group and all of its dependents from their respective SharePoint sites
- disconnect one or more dependent group(s) from an association, and either:
  - retain the group in the SharePoint site

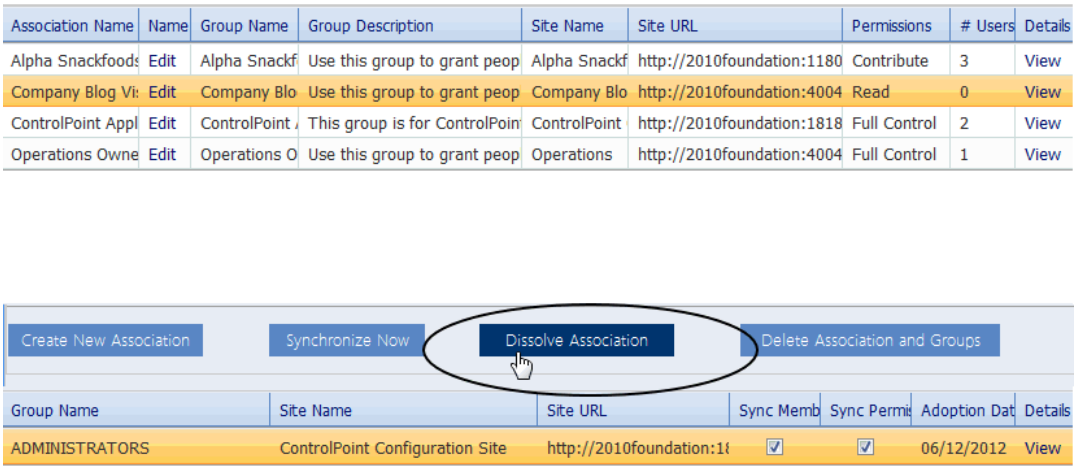
  OR

  - delete the group from SharePoint.

To dissolve an association and retain model and dependent groups in SharePoint

1 In the Manage SharePoint Groups association (upper) grid, highlight the association that you want to dissolve.

2 Click [**Dissolve Association**].



Both the association model and dependent groups are:

- removed from the grids
- retained in their respective SharePoint sites.

To dissolve an association and delete model and dependent groups from SharePoint

1 In the Manage SharePoint Groups association (upper) grid, highlight the association that you want to dissolve.

2 Click [**Delete Association and Groups**].

Both the association model and dependent groups are

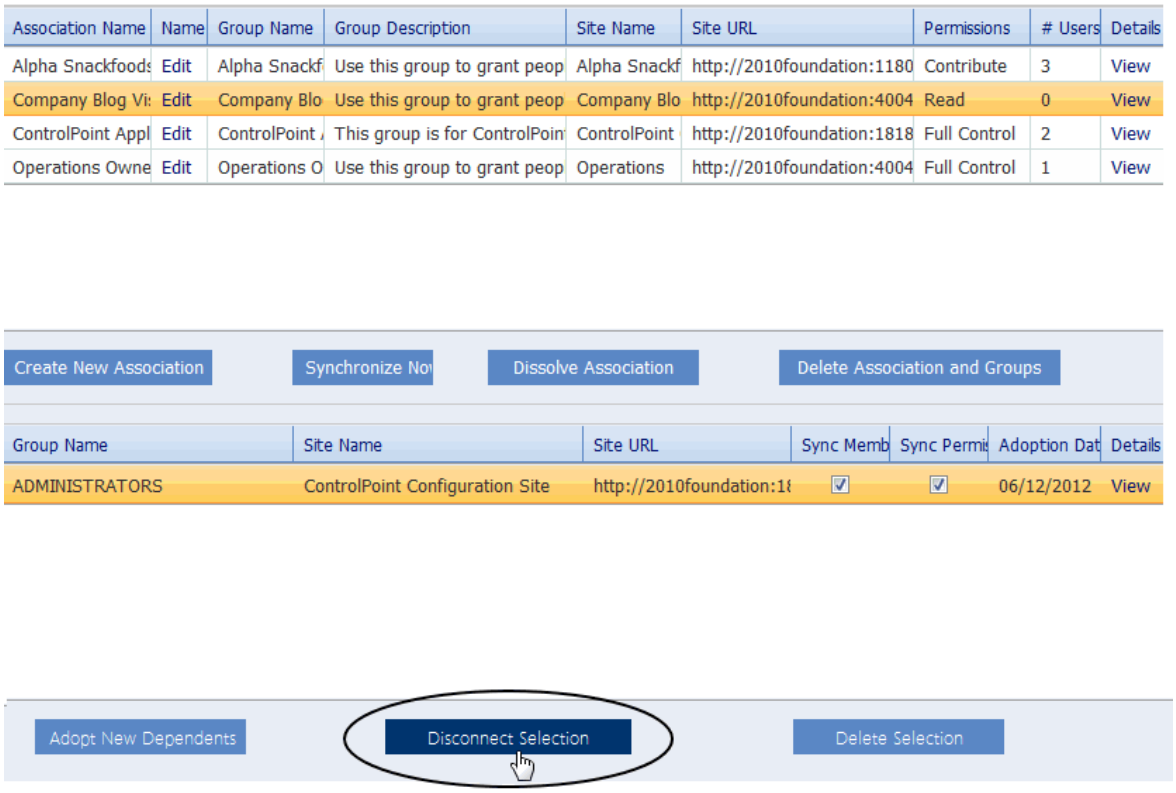
- removed from the grids
- removed from their respective SharePoint sites.

To disconnect dependent groups from an association and retain the groups in SharePoint:

1 In the Manage SharePoint Groups association (upper) grid, highlight the association from which you want to disconnect dependent group(s).

2 In the dependent (lower) grid, highlight the group(s) that you want to disconnect.

3 Click [**Disconnect Selection**].



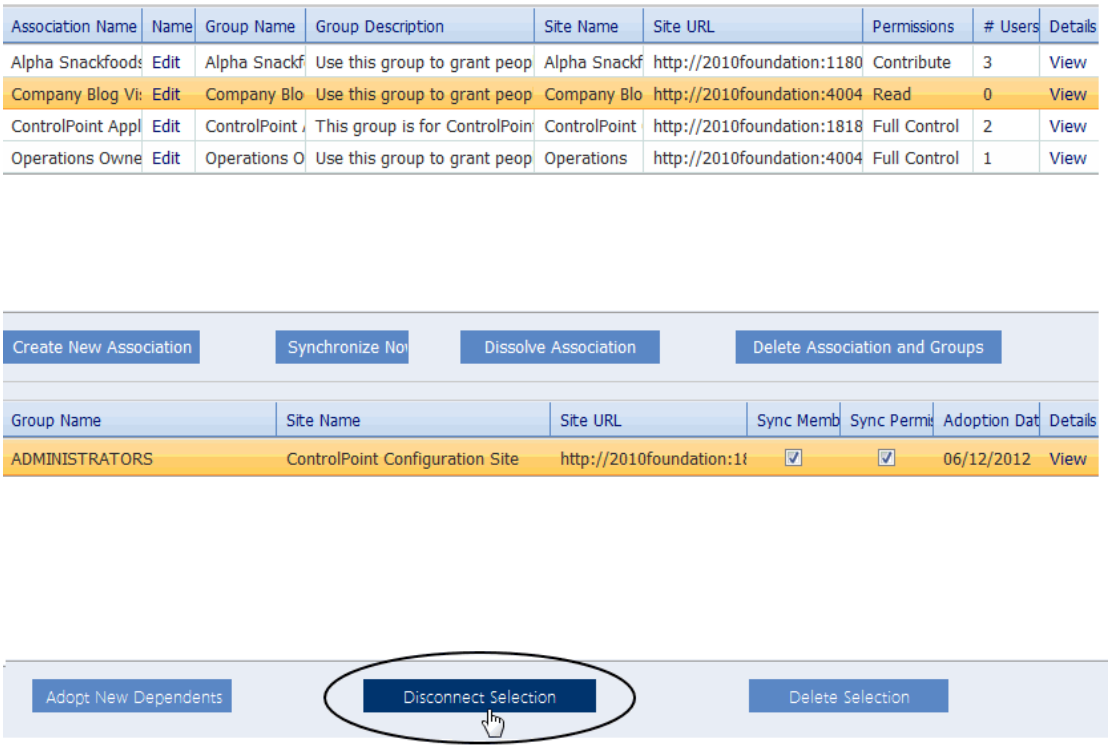
The selected dependent groups are:

- removed from the grid, and
- retained in SharePoint sites.

To disconnect dependent groups from an association and delete them from SharePoint:

1 In the Manage SharePoint Groups association (upper) grid, highlight the association from which you want to disconnect dependent group(s).

2 In the dependent (lower) grid, highlight the dependent group(s) that you want to disconnect.



3 Click [**Delete Selection**].

The selected dependent groups are:

- removed from the Group Management grid, and
- removed from SharePoint sites.

Backing Up and Restoring Site Permissions

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

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

The following are *not* backed up:

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

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

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

Restoring Permissions from a Backup

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

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

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

Backing Up Site Permissions

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

For example, you may want to back up permissions:

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

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

NOTE: Depending on the scope of the operation and the number of objects (sites, lists, and/or list items) with unique permissions, the permissions backup process can be time-consuming and resource-intensive.

Therefore, it is recommended that you perform the operation—or schedule the operation to run—when system usage is low.

To back up site permissions:

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

2 Choose Users and Security > Backup Permissions.

Now you can either:

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

OR

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

OR

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

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

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

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

See also Auditing ControlPoint Administrator Tasks.

Restoring Site Permissions from a Backup

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

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

REMINDER: Permissions That are Restored/Not Restored

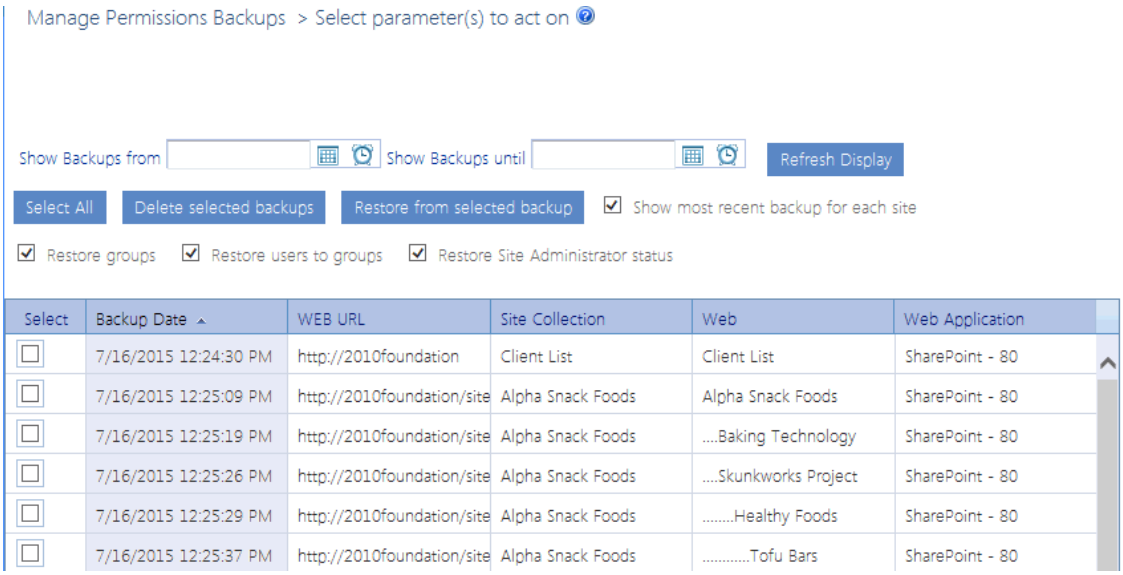
- Definitions of permissions levels cannot be backed up, and therefore cannot be restored. If a permissions level was deleted from a site since the Backup Date, an error will be reported.
- Any sites that have been deleted since the Backup Date will not be restored, nor will permissions for users who are no longer valid on the server or in Active Directory (that is, deleted or disabled users).
- For any object that currently that has unique permissions but had inherited permissions as of the Backup Date, inheritance will be restored. Conversely, for any object with unique permissions that had inherited permissions as of the Backup date, the unique permissions will be restored.

- The permissions of any user who was given *direct* permissions since the Backup Date will be deleted. If you choose to restore group membership, however, any user added to a SharePoint group since the Backup Date will *not* be deleted, as that user may have permissions to other sites in the collection via membership in the group.
- Any lists and list items created after the Backup Date will remain intact.

To restore permissions backups:

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

2 Choose Users and Security > Manage Permissions Backups.



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

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

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

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

4 Check the appropriate restore option(s):

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

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

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

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

Now you can either:

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

OR

- schedule the restore to run at a later time

OR

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

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

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

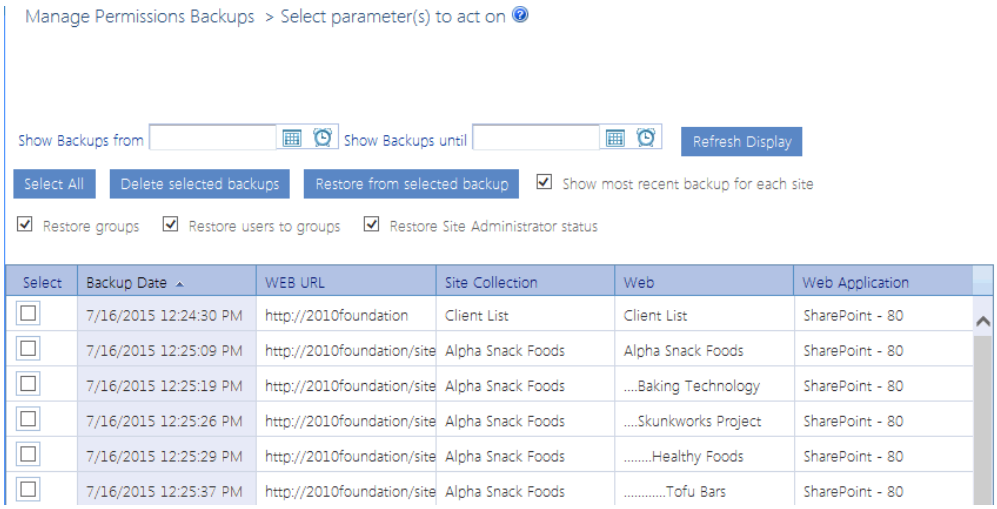
If you schedule the operation, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

Deleting Permissions Backups

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

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



To delete selected backup(s):

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

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

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

To delete all backups:

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

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

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

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

Duplicating Security from One Site to Others

The **Duplicate Site Security** action lets you to copy the security settings (users, groups, and permissions) of a SharePoint site to one or more other sites within the same farm. This may be useful, for example, if you have created one or more new SharePoint sites and want them to have the same users, groups, and permissions as an existing site.

You also have the option of backing up destination site permissions before the Duplicate Site Security action is carried out.

In a multi-farm environment, site security can be duplicated within a single farm; either the home farm or a remote farm.

Factors to Consider before Duplicating Site Security

- Duplicate Site Security is a one-time action. Any ongoing changes to permissions on the source site will not be replicated to the destination site(s). You can, however, schedule the action to run on a recurring basis.
- The action will replace the list of users with direct permissions on a destination site with that of the source site.
- Any permissions level referenced in the source site that does not exist in the destination site collection will be created there as a custom permissions level (even if it exists as a SharePoint *default* permission level in the source site collection). If custom permissions levels with the same name but different definitions exist in both locations, you can choose whether or not to overwrite the definitions in the destination site collection.
- If you duplicate security to a site that inherits permissions from its parent, that inheritance will be broken and it will become a site with unique permissions that have been copied from the source. Conversely, if you duplicate security to a parent site, child objects with inherited permissions will inherit the new permissions that have been copied from the source.

- You have the option of duplicating permissions (and breaking any existing inheritance) to target lists with identical names (for example, Calendar to Calendar; Shared Documents to Shared Documents). You cannot, however, duplicate permissions of list *items*.
- Any list with unique permissions on the destination site that does not exist in the source site will remain intact.

How "Matching" Groups Are Handled

SharePoint groups that include the name of the source site (such as Owners, Members, and Visitors) will be matched to equivalent groups on the destination site, using the destination site name. (For example, Source Owners will be matched to Target Owners and so on.) Whenever a "matching" group already exists on the destination site, the action can:

- add members of the source group to the target group, if they are not already there

OR

- replace members of the target group with members of the source group

OR

- leave the target group membership unchanged.

If a group on the destination site has a matching name but the permissions level is different, ControlPoint will replace the permissions level of the destination group with that of the source group.

Other group settings, including Group Owner, will not be changed.

If a matching group is not found at the destination:

It will be created—using the name of the destination site—and the membership will be copied from the source. Additional settings will be handled as described in the following table.

Setting	Action That Will be Taken
Group Owner	ControlPoint will attempt to use the group owner—which may be either an individual or another SharePoint group—from the source site (provided that owner *already* exists on the destination site). If the owner does not exist at the definition, the ControlPoint user who is performing the action will become the group owner.
Other group settings	the SharePoint *default* values will be used (regardless of whether they match the settings for the source group).

To duplicate site security:

1 In the SharePoint Hierarchy, select the site whose security you want to duplicate.

NOTE: This action is only available at the site level.

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

3 If you want to back up permissions on the destination site(s) before performing the duplicate action, check the **Backup site permissions before duplicating** box.

NOTE: If you check this box and encounter issues with the operation, you can restore permissions from the backup using the procedure for Restoring Site Permissions from a Backup.

4 If you want custom permissions level definitions from the source to replace any in the destination site collection that have the same name, leave the **Replace custom permission level definition if it is not the same in the target** box checked.

NOTE: If you uncheck this box, existing custom permissions level definitions will not be changed.

5 If you want permissions of source site lists to be carried over to destination site lists of the same name, leave the **Duplicate permissions on lists with matching names** checked.

NOTE: If you uncheck this box, permissions for lists with matching names will not be changed.

6 Specify how you want the action to proceed **When a matching group name is encountered**:

- Add members from source site if they are not already in target site

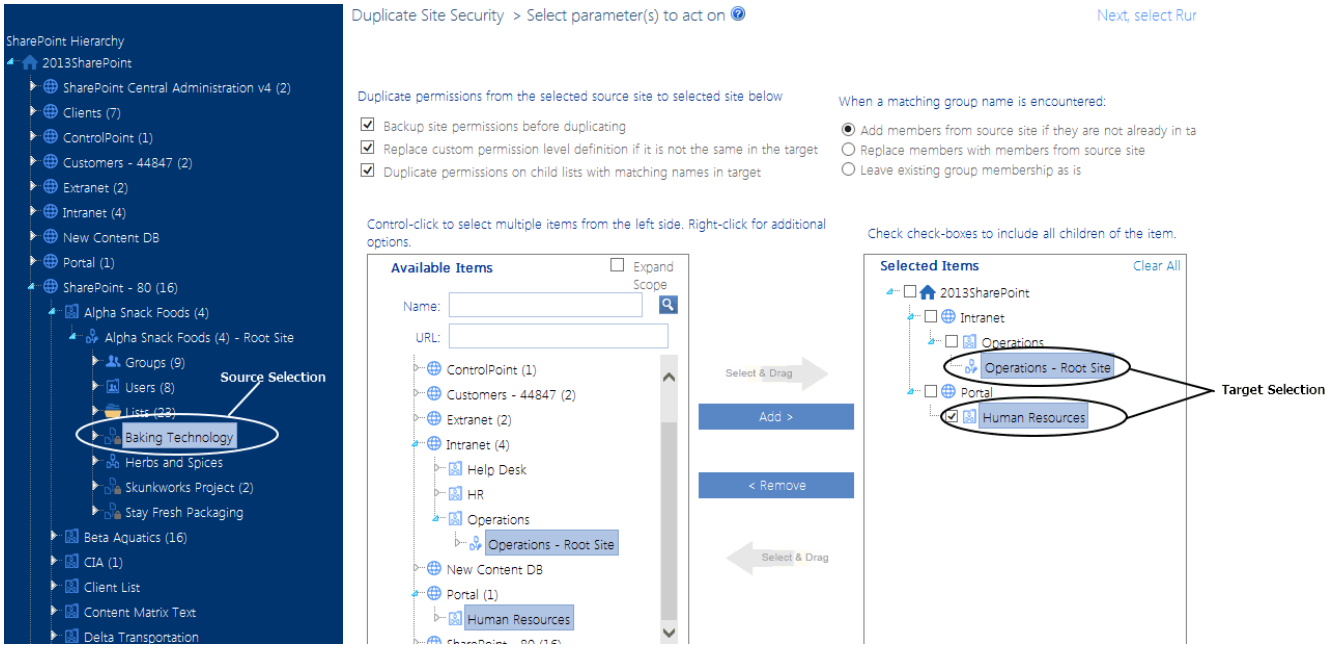
OR

- Replace members with members from source site

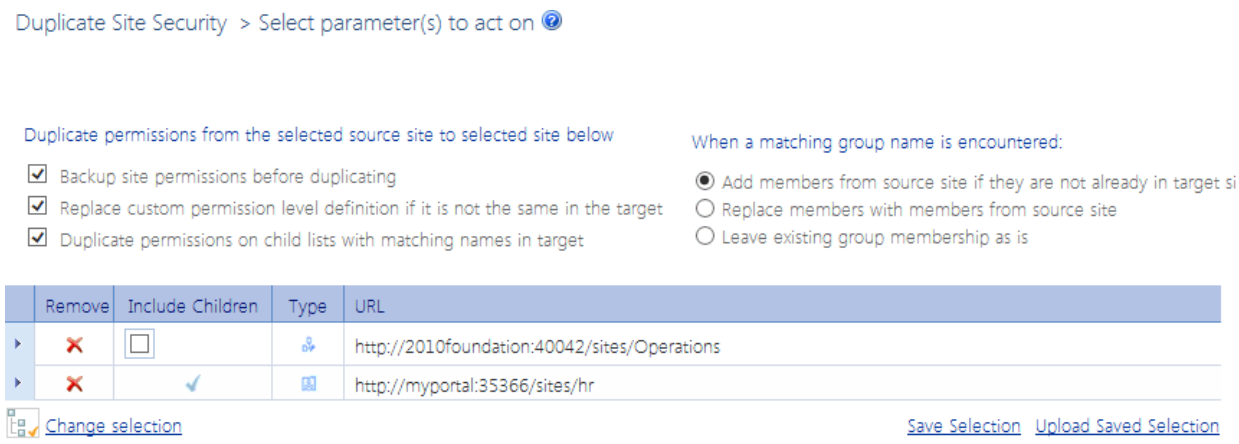
OR

- Leave existing group membership as is

7 From the **Available Items** list, select the site(s) to which you want permissions duplicated and move them to the **Selected Items** list.



8 When you have finished selecting sites, click [**Apply**]



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.

Migrating Active Directory Accounts for SharePoint User (SharePoint 2007 and 2010)

The Migrate Users action lets you update user accounts in SharePoint 2007 or 2010 farms when:

- Active Directory accounts have been moved from one domain to another

OR

- a user's Active Directory login name has changed.

You can also

- duplicate Active Directory group permissions, and

- if the account was moved in a way that preserved the SID history, verify the SID history to ensure that the old and new accounts correspond.

NOTES:

- In order to use the "Preserve SID History" flag, the ControlPoint Service Account must have dbowner rights to the User Profile Service Application Profile Database.
- For a simple account rename, the same SID is used and a SID history is not generated, so the verification of SID history cannot be performed.

In a multi-farm environment, users can be migrated for a single farm; either the home farm or a remote farm.

NOTE: This action is *not* available for SharePoint 2013 or later farms.

Factors to Consider Before Using the ControlPoint Migrate Users Action

Migrating Multiple Users

You can migrate only one individual user at a time using the ControlPoint application interface. If you want to migrate multiple users, you can:

- use a wildcard (for example *domain_name*)*

NOTE: If you use a wildcard, you also have the option of excluding specified users from the migration.

- save the operation as xml, add users to the xml file, then execute the xml instructions.

For the sake of performance, when a wildcard is used users are collected from the ControlPoint cache, which is updated whenever the ControlPoint Discovery process. This information is current as of the date and time of the last Discovery.

IMPORTANT: Permissions of Old and New Accounts

ControlPoint gives you the option *not to* remove any existing permissions of target users. If you select this option, ControlPoint will check for the existence of permissions granted to the target account of an individual user using permissions information collected during the last Discovery, and if found, will skip the migration for that account and will continue on to the next account. For Active Directory groups, permissions from the source account will be appended to the target account without deleting existing permissions. Individual user accounts that have been skipped will be reported in the ControlPoint Task Audit.

If you choose to remove existing permissions for the target user:

- The default stsadm -o migrateuser behavior will apply for individual Active Directory users. That is, if a user has given permissions in SharePoint using the new account name prior to the Migrate Users action, those permissions will, by default, be deleted as part of the migration. The permissions originally granted to the old account are transferred to the new account after deleting the permissions for the new account. Note that this means:

  - You should not run the function two times, as the second execution will remove the permissions transferred to the new account by the first execution.
  - After running this function, the old account will still exist in Active Directory, but will no longer have permissions in SharePoint.
- In the case of Active Directory *groups*, permissions of the new group will replace existing permissions of the old group.

NOTE: If your ultimate goal is to copy permissions to users in a target domain while retaining all existing permissions in *both* domains, you can do so using the ControlPoint Duplicate User Permissions action.

Before Migrating Users in ControlPoint

Before using the ControlPoint Migrate Users action, make sure that the changes have been made in Active Directory (that is, new accounts have been created or renamed accounts have been renamed).

How Names Appear After Migration

SharePoint's handling of display names after rename in Active Directory and/or an execution of Migrate Users depends on many factors, including which versions of SharePoint you are running, whether and how several Profile Synchronization jobs are configured. In WSS and SharePoint Foundation, no shared profile exists. Display names are stored only in each individual site collection and must be modified directly there. By default, there is no automated process to update the display names.

In MOSS and SharePoint Server, a shared profile is available. This should normally be updated using whatever methods are in place in your environment.

In general, if your environment is configured to have SharePoint Profile Synchronization jobs run on a regular basis, until it runs, SharePoint and ControlPoint will show:

- the *new* account name, and
- the *old* display name.

After the Profile Synchronization jobs have run, the new display name normally will show in both SharePoint and ControlPoint, with the following exceptions:

- Activity by User, Activity by Document, and Change Log Analyses will continue to show the old display name.
- Any ControlPoint analysis using cached data will show the old display name until the next time Discovery runs.

Migrating Users

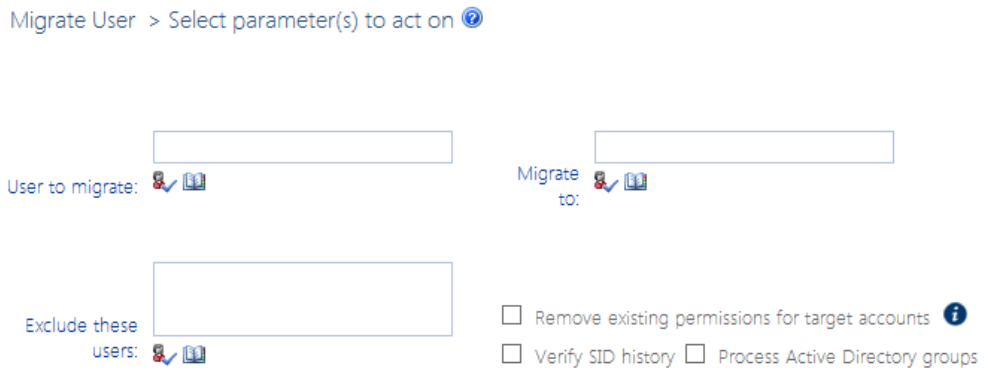
REMINDER: The Migrate Users action is not available for SharePoint 2013 or later farms.

Before carrying out the ControlPoint Migrate Users actions, it is recommended that you review Factors to Consider Before Using the ControlPoint Migrate Users Action.

To migrate users:

1 From SharePoint Hierarchy farm node, choose Users and Security > Migrate Users.

2 Check the appropriate option(s) using the information in the following table for guidance.



If ...	Then ...
• you have migrated users from one domain to another in a way that preserves SID history, and • you want to verify the SID history to ensure that the old and new accounts correspond.	check **Verify SID history**. REMINDER: • For a simple account rename, leave this box unchecked because the same SID is used and a SID history is not generated. If this box is checked and a SID history does not exist, the operation will fail. • In order to use the "Preserve SID History" flag, the ControlPoint Service Account must have dbowner rights to the User Profile Service Application Profile Database.
you have migrated Active Directory groups from one domain to another and you want to update permissions granted to Active Directory groups	check **Process Active Directory groups**. NOTE: if you leave this box unchecked, Active Directory group names will not be updated
• you want to remove any permissions that have been granted to individual Active Directory user accounts at the target and replace them with the permissions from the source account (which is default stsadm -o migrateuser behavior) • replace the permissions of Active Directory groups at the target with the permissions of corresponding source groups	check **Remove existing permissions for target accounts.** NOTE: If you leave this box unchecked, the Migrate action will skip any individual Active Directory accounts that already have permissions. (Skipped accounts will be recorded in the ControlPoint Task Audit.) For Active Directory *groups*, the action will *append* permissions from the source group to any permissions that exist for the target group. The Migrate User operation only evaluates permissions collected during the last Discovery run.

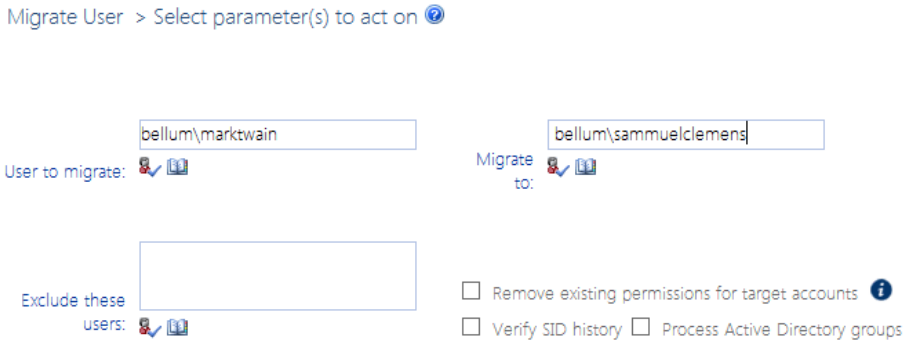
3 For **User to migrate**, enter a single user name or wildcard.

Note that you can only enter one wildcard, anywhere within the entry.

REMINDER: When a wildcard is used, users are collected from the ControlPoint data cache, which is current as of the date and time of the last Discovery run.

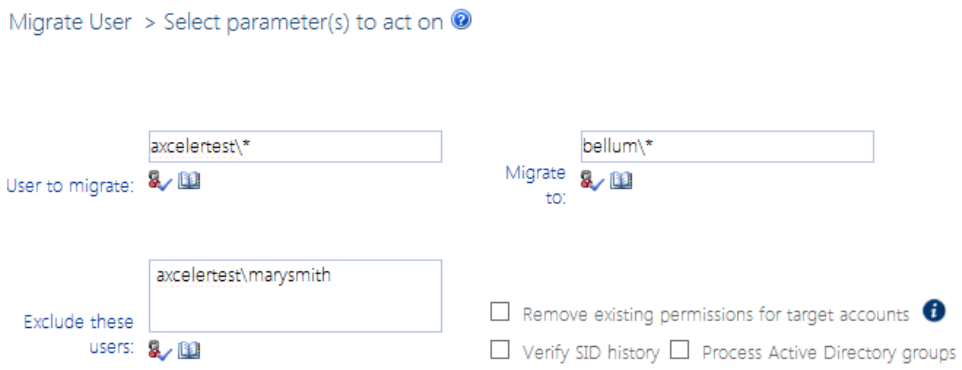
EXAMPLES:

- In the following, we want all instances of the login name axcelertest\marktwain in our SharePoint farm to be changed to the new login name axcelertest\sammuelclemens. Note that **Process Active Directory groups** option is not relevant for this operation.



- In the following example, we want to change the domain for all users in our SharePoint farm from the old Active Directory domain (axcelertest) to the new domain (metalogixtest). We want to exclude axcelertest\marysmith from the process, because she was assigned a different account name in the new domain. The **Process Active Directory groups** option is checked, so that permissions of all Active Directory groups in the old domain will be transferred to corresponding Active Directory groups in the new domain. **Remove existing permissions for target accounts** is also checked, to ensure that any existing permissions for a target account will be replaced with those from the matching source account.

REMINDER: Once the operation is run, the old account will still exist in Active Directory, but will no longer have permissions in SharePoint.



Now you can either:

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

OR

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

OR

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

If you chose to **Save XML Instructions** and want to specify additional users to migrate, enter each user as a separate item with:

- the old login name as a string between the <key></key> tags
- the new login name as a string between the <value></value> tags.



Data Analysis and Reporting

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

- a summary of components and statistics at different levels of the SharePoint Hierarchy
- activity throughout the SharePoint farm
- storage used by various SharePoint objects
- site content
- information about users, including:
  - permissions for Web applications, site collections, sites, and pages, and
  - "orphaned" users, which are users who have permissions within SharePoint but are no longer listed in the Active Directory
- trends over a specified time period
- the contents of SharePoint audit and change logs.

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

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

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

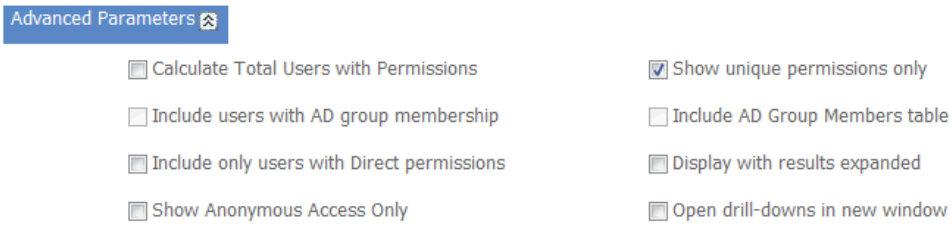
NOTE: This chapter describes all of the ControlPoint analysis tools provided by Metalogix. Depending on the configuration of your ControlPoint menus, however, the analysis tools to which you have access, and their location in the menus invoked from the left navigation pane, may vary.

You can also create dashboards for monitoring key statistics within your farm.

Specifying Parameters for Your Analysis

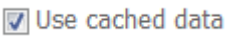
When you select a ControlPoint analysis tool from the left navigation pane, you are prompted to specify the parameters you want to use. The most common parameters used in various ControlPoint analysis tools are described below.

Note that, depending on the analysis, some parameters may be located in the **Advanced Parameters** section.



Cached vs. Real-time Data

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



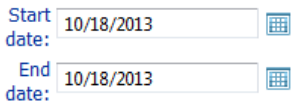
If the **Use cached data** box is checked, your analysis will include data that has been collected by ControlPoint during the last run of Discovery . The advantage of using cached data is that the analysis will be processed more quickly and will not compete for system resources. Because Full Discovery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

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

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

Specific Date or Time Period

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



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

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

IMPORTANT: Historical data that predates the ControlPoint cache will not be reflected in analysis results. For example, if the ControlPoint cache was created two weeks ago, a maximum of two weeks-worth of data

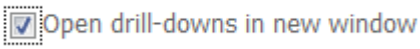
is available for analysis, regardless of the date range you specify. Similarly, any historical data that postdates the last run of Discovery will not be reflected in results. For example, if you request data for a time period that covers the last 30 days and the last time Discovery ran was 10 days ago, analysis results will reflect the time period *up to* the last Discovery run date.

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

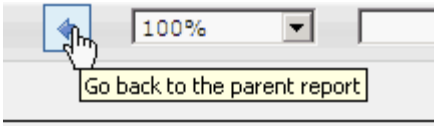
It is worth noting that deleted sites will display in activity and storage analysis results if they were active during the specified time period.

Open drill-down Options

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



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

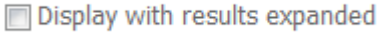


Note that, when you link to a *SharePoint page* from analysis results, it always displays in a separate window.

Expanded Results Option

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

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



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

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

Additional Parameters for Permissions Analyses

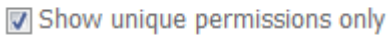
The following parameters are specific to SharePoint user permissions analyses:

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



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

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



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

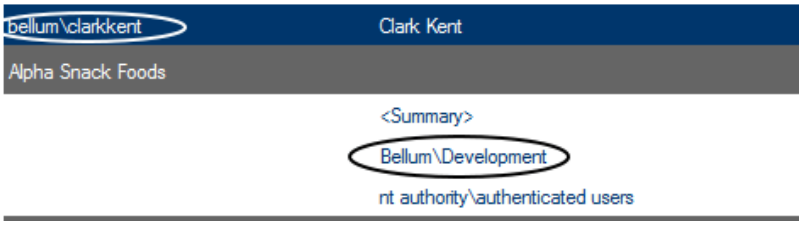
- If you want results to include only users who have direct permissions (that is, do not have permissions via a SharePoint group), check the **Include only users with Direct permissions** box.



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

- If your selection includes Active Directory groups and you are running the analysis using real-time data:
  - You can include separate line items for users who have permissions through those groups by checking the **Include users with AD group membership** box.





If you leave this box unchecked, only the permissions of the AD group itself (not the users within it) will be included in analysis results.

- You can include a summary section at the end of the analysis that lists the Active Directory groups within the scope of your analysis along with all of their members by checking the Include **AD Group Members table** box.

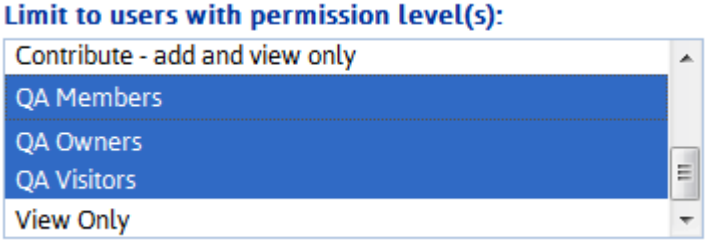


Active Directory Group Members

Group / User	Total members in AD group
bellum\development	5
bellum\jamesjoyce	
bellum\marktwain	
bellum\isaacasimov	
bellum\clarkkent	
bellum\agathachristie	
bellum\patentattorneys	5
bellum\jamesjoyce	
bellum\marktwain	
bellum\washingtonirving	
bellum\isaacasimov	
bellum\olivertwist	

NOTES:

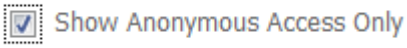
- You cannot display membership in Active Directory groups if you are running the analysis on *cached* data (and the checkbox will be disabled). If the ControlPoint Application Administrator has configured the application to prevent members of Active Directory groups from being displayed, this option will not be visible. Built-in groups (such as authenticated users) are not counted.
- If you want to limit results to one or more specific permissions levels, select them from the **Limit to Users with permissions level(s)** list box. (All built-in and custom permissions levels that are currently assigned to at least one user on at least one site within the scope of your analysis display in the this box.)



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



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



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



Total Users with Permissions includes:

  - Web application Service Accounts
  - Users granted permissions through Web application policies
  - Site Collection Administrators
  - Users within Active Directory groups to which the ControlPoint Service Account has access (that is, within the same domain or forest, in a different domain/forest for which with a two-way trust exists, or in a different domain/forest with a one-way outgoing trust that ControlPoint can authenticate via the ControlPoint Manage Forest Access feature). Disabled Active Directory accounts are included in this total. If an Active Directory user has been renamed but still has permissions in SharePoint under the old name, each name will be counted as a separate user.

  Excluded from this total are built-in groups and special accounts, such as nt authority\authenticated users (or any account that begins with "nt authority") and sharepoint\system, and users granted permissions via augmented Claims or alternate authentication providers.

NOTE: If you choose to run the analysis using cached data, Total Users with Permissions uses data recorded in the ControlPoint Administration Database (xcadmin), and is current as of the last Discovery run. (The actual number of users *within Active Directory groups* are always counted in real-time, however.) If you run the analysis using real-time data, all users are counted in real time, which may significantly increase the amount of time it takes to run the analysis.

Analysis Results Display

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

Analysis Results Toolbar

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

Above the toolbar are links that enable you to:

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

Analysis Results Detail

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

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

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

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

Analysis Results Footer Information

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

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

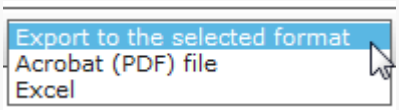
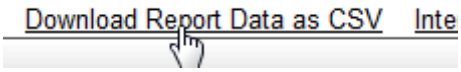
Selection Summary

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

Working with Data Analysis Results

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

If you want to ...	Then ...
print analysis results	from the results toolbar: a) Click the print preview icon (

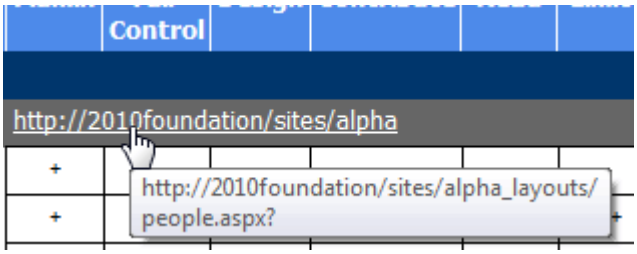
If you want to ...	Then ...
	b) Click the print icon ( ). (Printed results will contain only the data that is currently expanded.)
export analysis results	choose an **Export to the selected format** option from the drop-down, then click the **Export** link.  NOTE: If you export to Excel, all data will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

Linking to SharePoint Pages and Other ControlPoint Analyses from Analysis Results

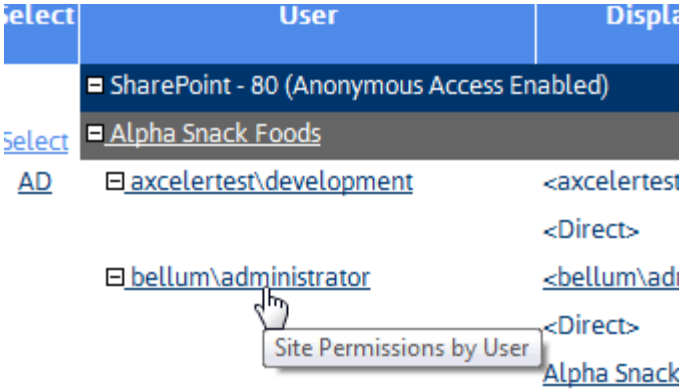
When run interactively*, from the results of most ControlPoint analyses, you can:

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

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



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



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

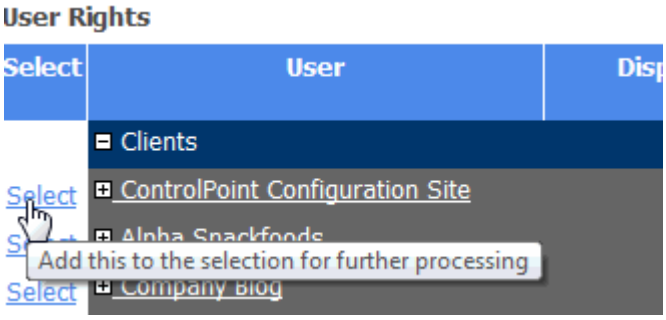
Acting on Search or Data Analysis Results

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

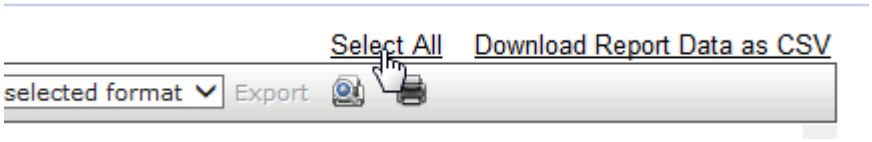
This feature can facilitate the performance of a variety of administrative tasks. For example, you can generate a Site Permissions analysis to identify the users who have been granted permissions directly, then initiate the appropriate action (such as Add User to SharePoint Group).

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

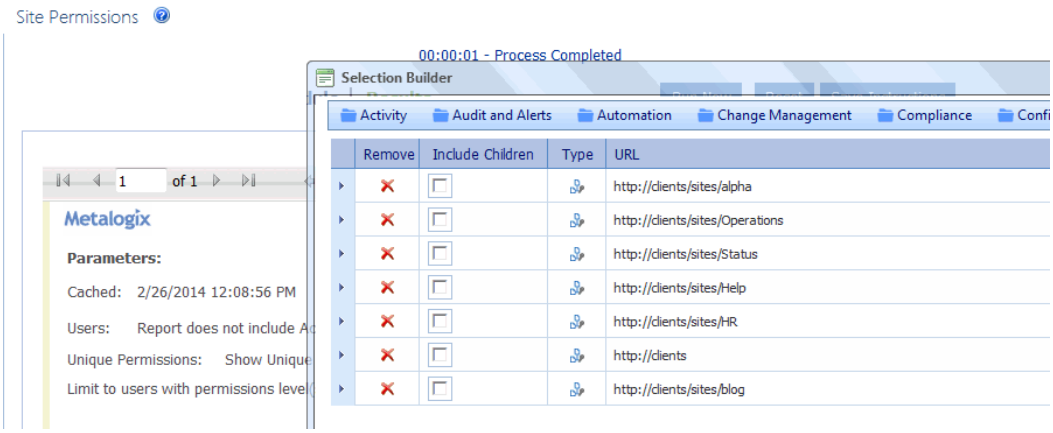
1 Click the **Select** link for the object on which you want to act.



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



The Selection Builder opens in a separate window.



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

2 If you want to select additional objects, either:

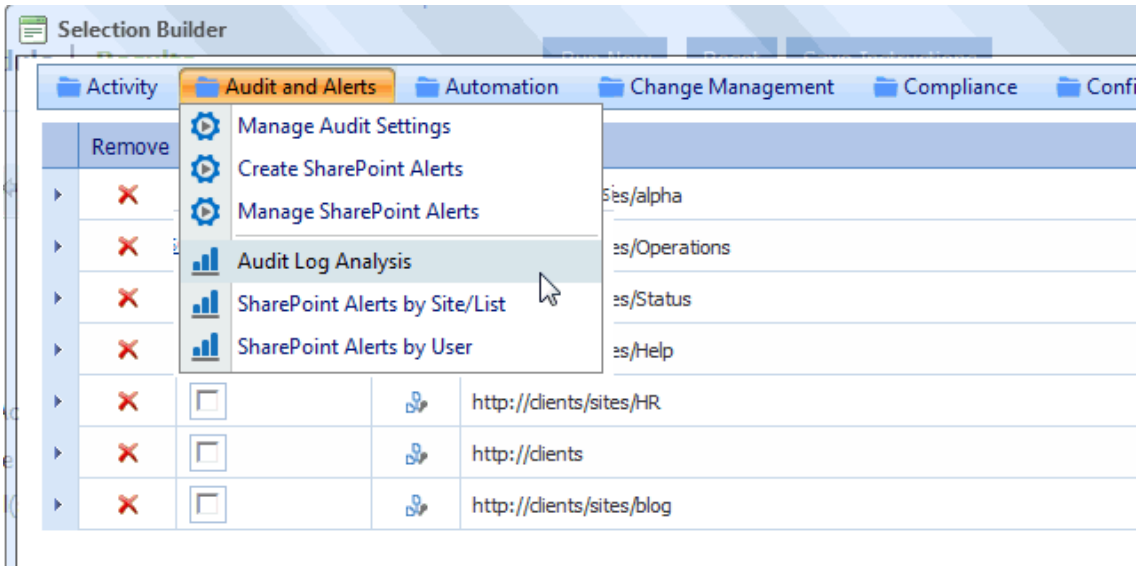
- click the **Select All** link in the analysis results Select column for each additional item you want to add to the Selection Builder.

OR

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

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

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



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

Working With Analysis Results Interactively

The ControlPoint Interactive Analysis functionality lets you work with raw data underlying a ControlPoint analyses in an interactive, tabular format. You can:

- create customized interactive analysis configurations
- create charts using selected data points
- print/export results
- initiate a ControlPoint operation on selected rows of data.

NOTE: This option is *not* available for farms running SharePoint 2013 or later.

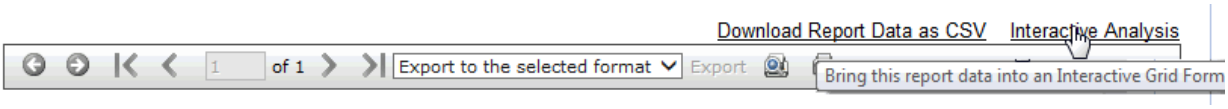
Prerequisite

To use ControlPoint Interactive Analysis functionality, the appropriate version of Microsoft Silverlight must be installed locally. If it is not, you will be prompted to download it from the Microsoft Silverlight website. Once it has been installed, you will have to restart your browser.

NOTE: If you are prohibited by company policy from installing Silverlight on your machine, you will be unable to use Interactive Analysis functionality. ControlPoint Application Administrators can also configure the application so that the Interactive Analysis link is hidden.

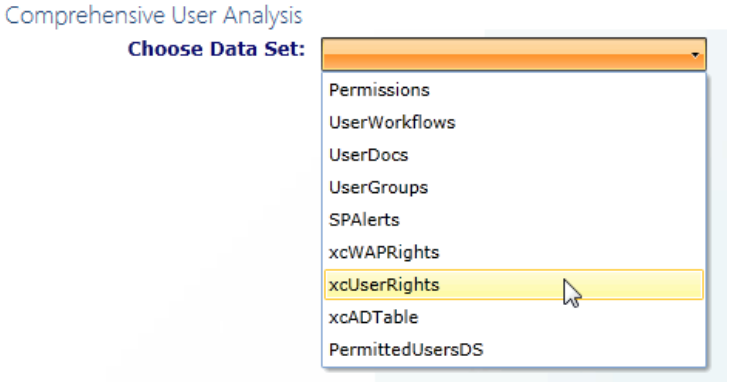
To access the Interactive Analysis functionality:

From the analysis results toolbar, click the **Interactive Analysis** link.

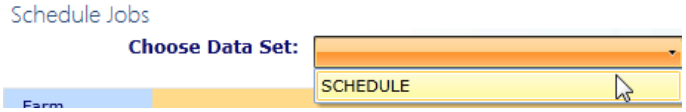


A drop-down from which to choose a data set displays. The number of data sets available depends on the complexity of the analysis. For example:

The Comprehensive User Report is a complex analysis with multiple sections and therefore, multiple datasets.

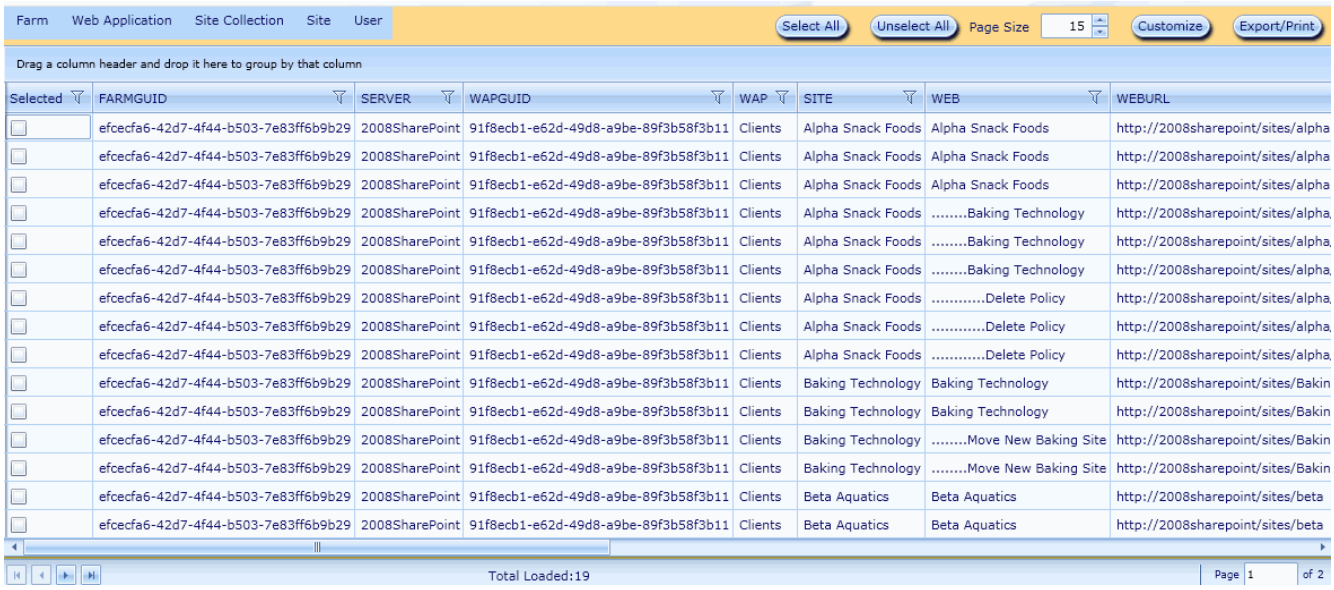


The Scheduled Jobs Report is a more simplified, "flat" analysis with a single data set.



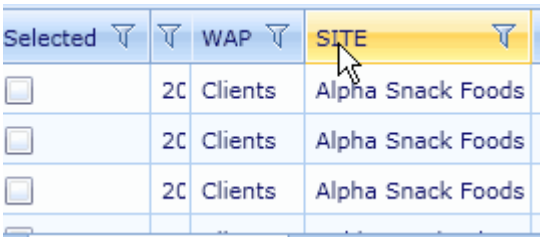
Analyzing Data Sets in Tabular Format

By default, all of the data in the selected data set displays in the interactive analysis table.

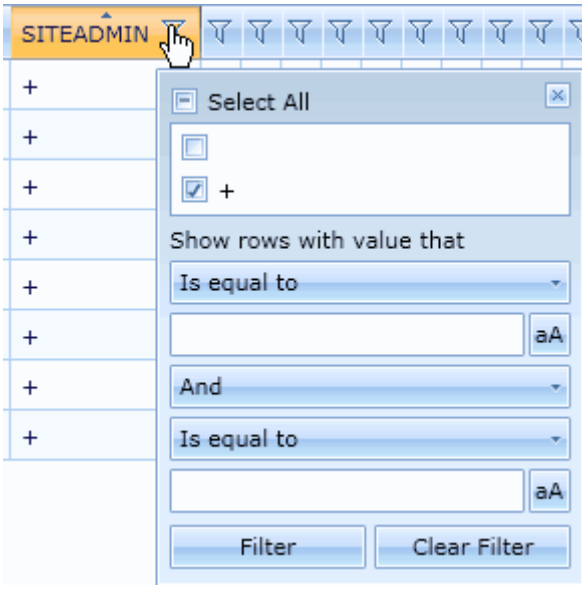


You can

- sort by any column (by clicking the column header)



- filter by values within a column (by clicking the  icon then specifying filter criteria)



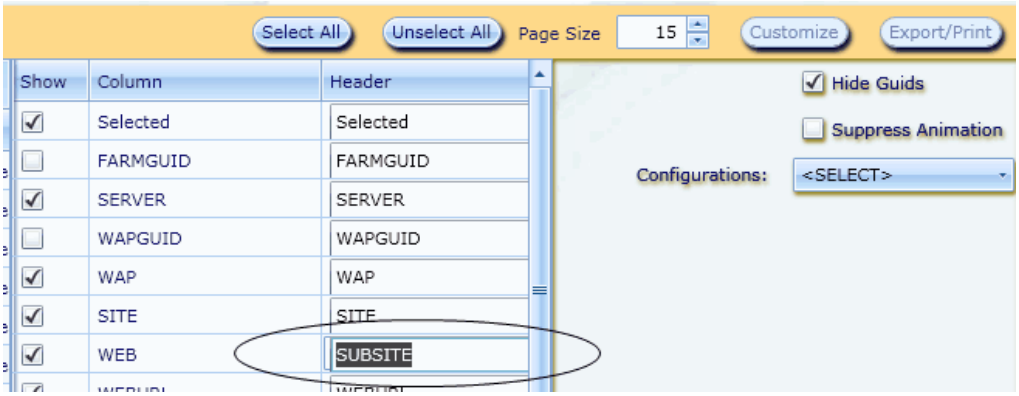
- change the order of columns (by dragging/dropping a column header).



Customizing the Configuration of the Dataset

If you want to customize the configuration of the current dataset, click the [**Customize**] button. You can then:

- select/deselect columns that you want to show/hide (including all Guids)
- change the names of column headers



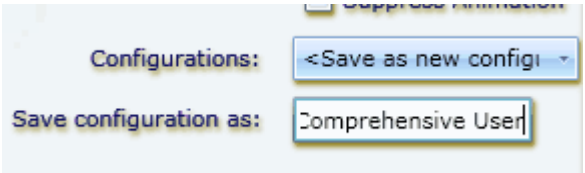
To apply configuration changes (and close the customization panel), click [**OK**].

NOTE: Changes to the data set display are analysis- and user-specific and are "sticky." That is, the next time you launch an interactive analysis for an analysis of the same type, any customizations you made will be retained for your login. You can also save a custom configuration to share with other ControlPoint users.

To save a customized configuration for sharing with other ControlPoint users:

1 From the **Configurations:** drop-down, select **<Save as new configuration>**.

2 In the **Save configuration as:** field, enter the name you want to give to the configuration.

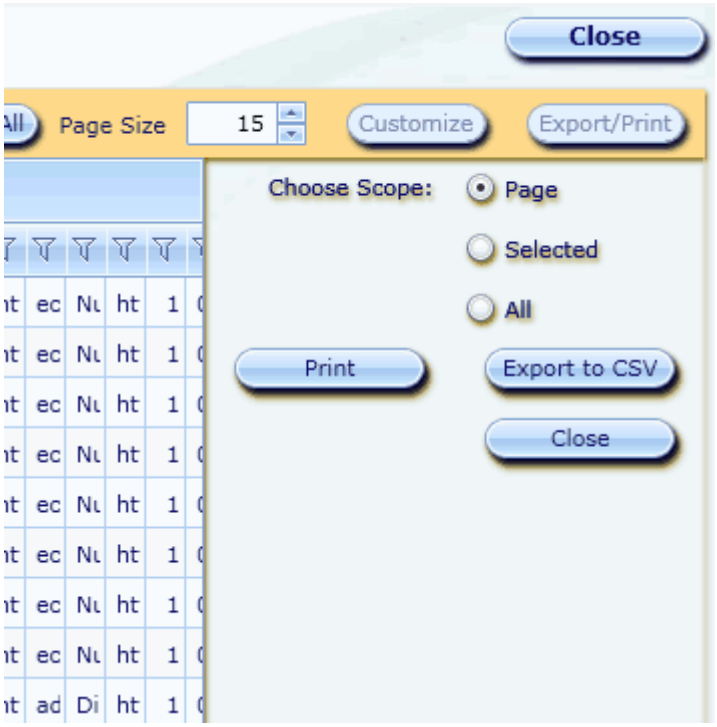


3 Click [**OK**].

4 The new configuration is added to the **Configurations:** drop-down for the selected analysis type and is available for selection by all ControlPoint users.

Printing or Exporting the Current Dataset Configuration

Click [**Export/Print**], then Select the appropriate option(s).



NOTE: The dataset will print to a single page, but it cannot be automatically scaled or resized to fit within a specific print area. You can adjust the configuration and column widths of the dataset, and you may be able to adjust your printer settings (paper size, orientation, and so on) to compensate.

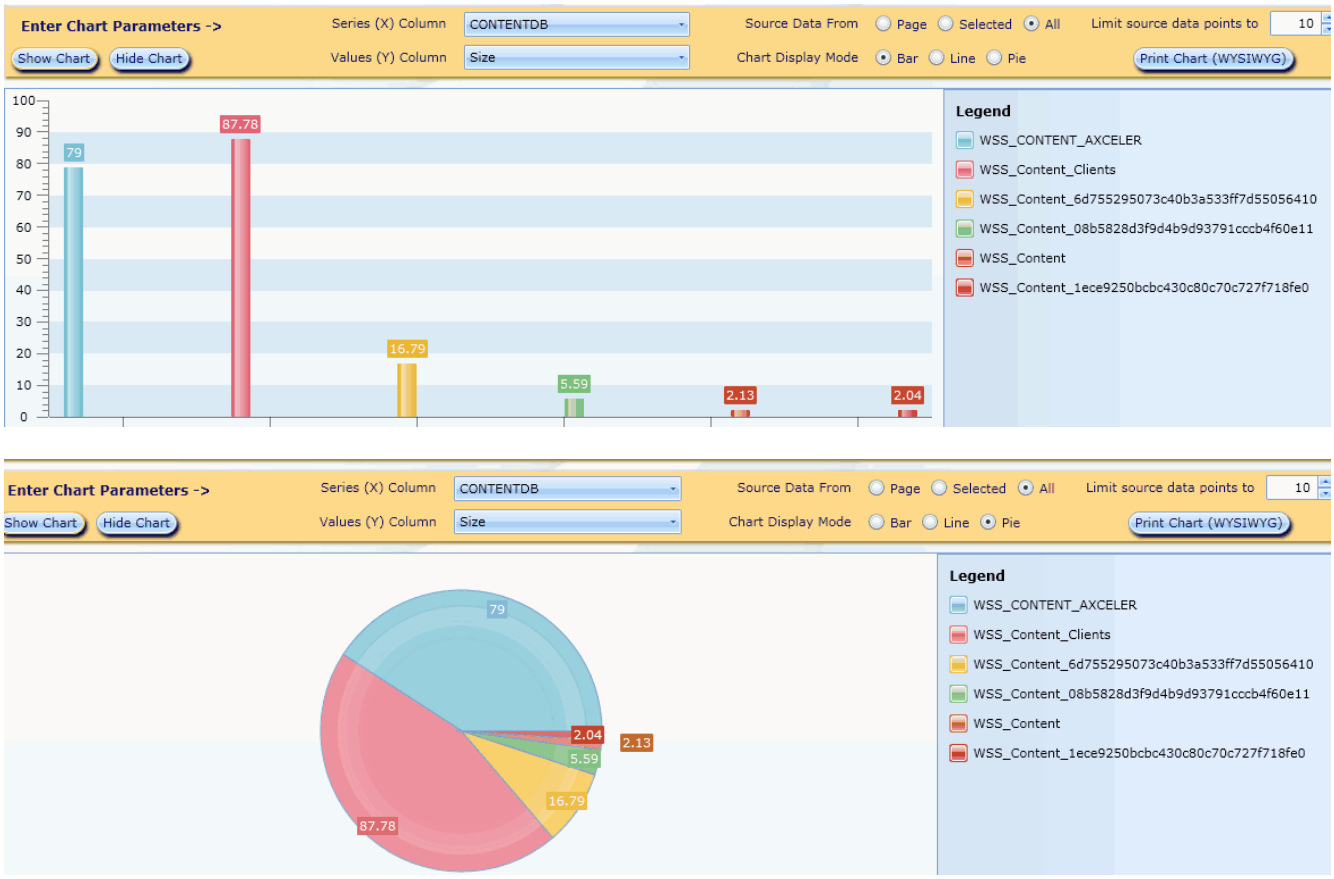
Creating a Chart from the Current Dataset Configuration

You can create an ad-hoc pie, bar, or line charts to graphically represent selected data points. The **Values (y) column** drop-down contains data points with numerical values; **the Series (x) column** drop-down contains data points with all other data types.

NOTE: Remember that because both drop-downs are populated with *raw data*, not every dataset or combination of data points will produce a meaningful chart.

After selecting data points—and after making any changes to a chart—click [**Show Chart**] button to refresh the display.

The examples below compare the size of each content database in a SharePoint farm using a bar chart and a pie chart.



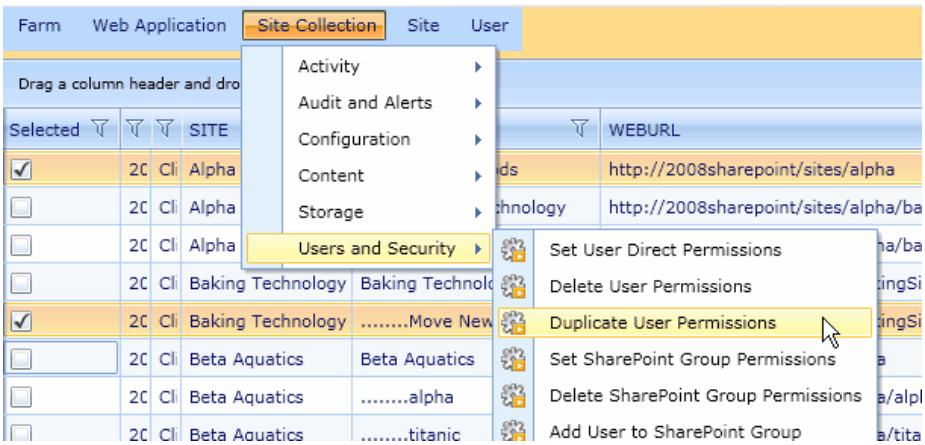
To print a chart, click [**Print Chart (WYSIWYG)**].

NOTE: In this context, "WYSIWYG" means that the chart will not be automatically scaled or resized to fit within a specific print area. You may be able to adjust your printer settings (paper size, orientation, and so on) to compensate.

To initiate a ControlPoint operation from an interactive analysis:

1 Select each row of data containing the object that you want to include in the operation (by checking the corresponding **Selected** box).

2 Select an operation from the appropriate menu.



Generating a SharePoint Summary Report

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

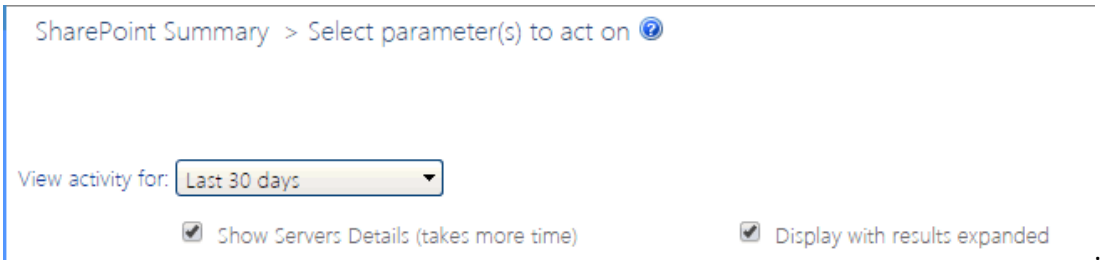
You also have the option of including details about servers in your SharePoint farm—such as storage, performance, and usage statistics—which is collected from Windows Performance Monitor. This option can, however, significantly increase the time it takes to generate the report.

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

To generate a SharePoint Summary report:

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

2 If different from the default values, specify the following parameters for your analysis:



- Select a **View Activity for** date or time period from the drop-down.

NOTE: If you are running a WSS-only environment, Cumulative Hits is the only available option.

- If you want to **Show Servers Details**, check this box.
- If you do *not* want to **Display expanded results**, uncheck the box.

Now you can either:

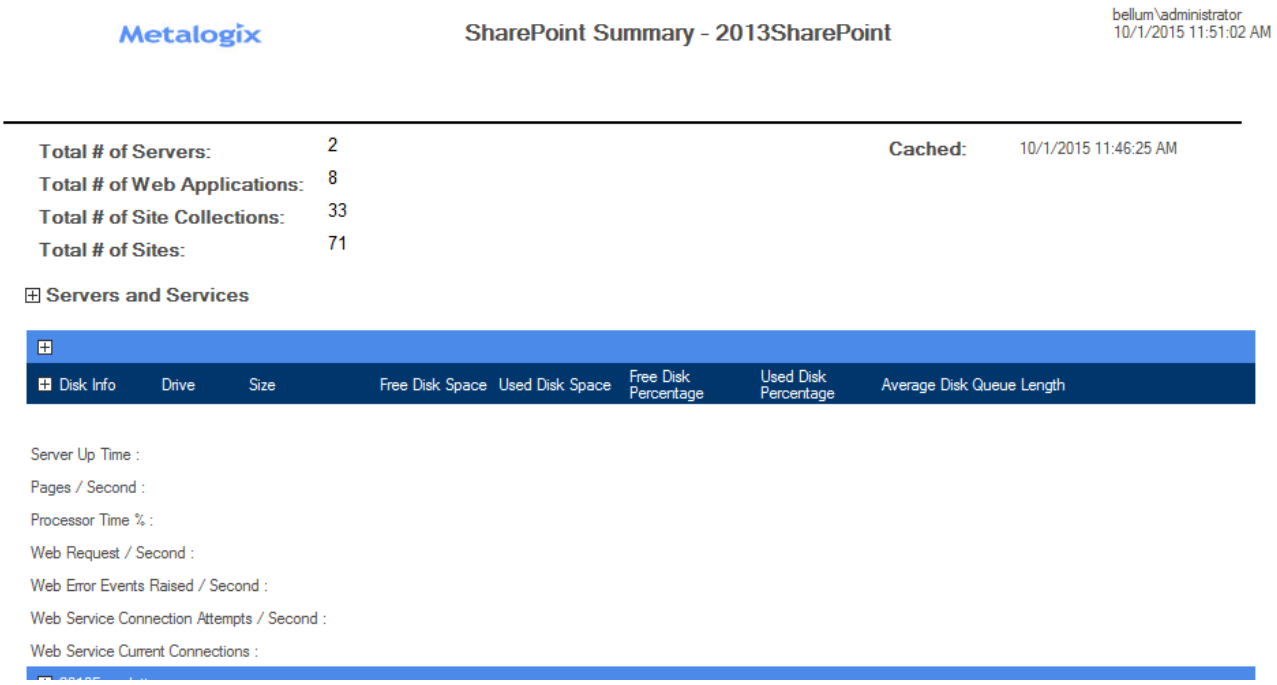
- run the operation immediately (by clicking the [**Run Now**] button)

OR

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

OR

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



The SharePoint Summary consists of the following sections:

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

Farm Components Summary

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

Total # of Servers:	2
Total # of Web Applications:	6
Total # of Site Collections:	37
Total # of Sites:	213

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

Servers and Services

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

Disk Info	Drive	Size	Free Disk Space	Used Disk Space	Free Disk Percentage	Used Disk Percentage	Average Disk Queue Length
	C:	150.0 GB	20.3 GB	129.7 GB	13.6 %	86.4 %	0.32
Server Up Time :			22 day(s), 7 hour(s), 33minute(s), 56 second(s)				
Pages / Second :			2.87				
Processor Time % :			43.76				
Web Request / Second :			0				
Web Error Events Raised / Second :			0				
Web Service Connection Attempts / Second :			0				
Web Service Current Connections :			10				

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

Web Applications

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

- the number of:
  - Site **Collections**
  - **Sites -** which includes root sites and any subsites that have been created
  - **Lists -** which includes both user-created (visible) lists and internal (hidden) lists, such as galleries, that are necessary for the functioning of the site, and
  - **Files** - which includes web pages as well as documents
- **Size**, (in **MB**) - the total size of the Web application's *content*, which:

  - does not include elements such as metadata, logs, free space, and other overhead
  - is not the disk size of the content database
- If *all* site collections within a Web application have quotas:
  - **Free Space**
  - **% Usage**

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

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

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

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

Web Applications (Activity Data is for Last 30 days) **-Cumulative hits value, usage reports not available

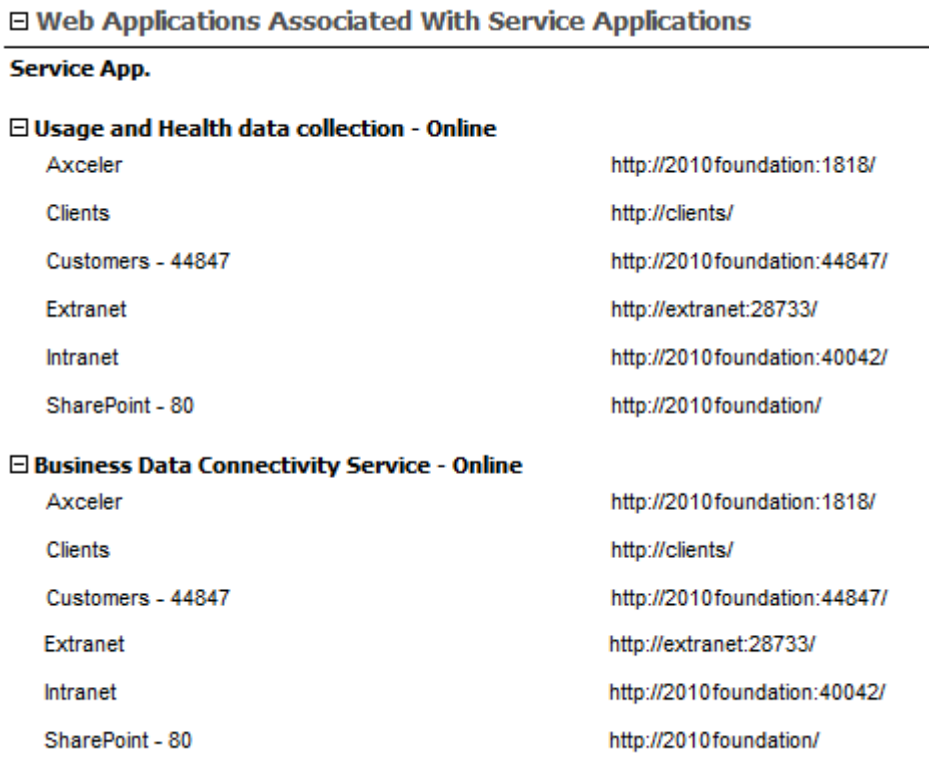
Web App. / Databases	Collections	Sites	Lists	Files	Size (MB)	Free Space	% Usage	Page Vie
Clients - http://clients/ [Claims Enabled]	7	9	107	1146	20.73	N/A	N/A	0
Application Pool: SharePoint - 11808 - BELLUM\Administrator								
WSS_Content_991ca6b7060e4a81b07ff55fdc46e164(2010Foundation)	7(Max-15000)							
ControlPoint - http://2010foundation:1818/	1	1	14	398	25.14	N/A	N/A	230
Application Pool: ControlPoint - BELLUM\Administrator								
WSS_CONTENT_AXCELER(2010Foundation)	1(Max-5000)							
Customers - 44847 - http://2010foundation:44847/	2	4	38	560	7.41	N/A	N/A	21
Application Pool: Customers - 44847 - BELLUM\Administrator								
WSS_Content_Customers(2010Foundation)	2(Max-15000)							
Extranet - http://extranet:28733/	2	2	33	291	3.51	N/A	N/A	0
Application Pool: SharePoint - Extranet28733 - BELLUM\Administrator								
WSS_Content_516d8aac887e4e3780499a4570eb1b4e (2010Foundation)	2(Max-15000)							
Intranet - http://2010foundation:40042/	4	3	45	511	51.91	N/A	N/A	15
Application Pool: SharePoint - 40042 - BELLUM\Administrator								
WSS_Content_16df22ac82e14cb9815621195c0ba176(2010Foundation)	4(Max-5000)							
New Content DB - http://2010foundation:43571/	0	0	0	0	0	N/A	N/A	0
Application Pool: SharePoint - 43571 - 2010FOUNDATION\Administrator								
WSS_Content_3eb24e600f474e24934c7d753f36df65(2010Foundation)	0(Max-5000)							

Service Application Associations (SharePoint 2010)

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

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

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



Analyzing Activity

ControlPoint offers the following analysis tools that enable you to examine activity within your organization's SharePoint farm for a specific date or time period:

- **Most/Least Activity** analysis lets you examine site collections, sites, users, lists, and list items that have had the most and/or least activity over a specific time period
- **Site Collection Activity Analysis** provides detailed activity statistics for one or more site collections.
- **Site Activity Analysis** provides detailed activity statistics for one or more sites
- **Activity by User** analysis lets you examine specific pages and documents requested by one or more users.
- **Activity by Document** analysis lets you examine request detail for each page and document within one or more sites.
- **Inactive Users** analysis lets you find users who have had no activity for one or more site collections or sites over the past 30 days.

You can also analyze trends in activity over a specified time period. See Analyzing Trends.

NOTE: The nightly Full 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 the *nightly* Full Discovery task was run (that is, the option to run an activity analysis on real-time data is not available, and you cannot capture this data by running a manual (interactive) Discovery).

IMPORTANT: To generate a *fully-functional* Activity analysis:

- in **SharePoint 2007**:
  - MOSS must be installed, and
  - Usage Tracking must be enabled for both MOSS and WSS. (Consult your SharePoint documentation for specific instructions.)
- in **SharePoint 2010 and later**, Usage Data Collection must be used by all Web applications in the farm.

Variations in Activity Data

Activity Data for WSS-only Environments

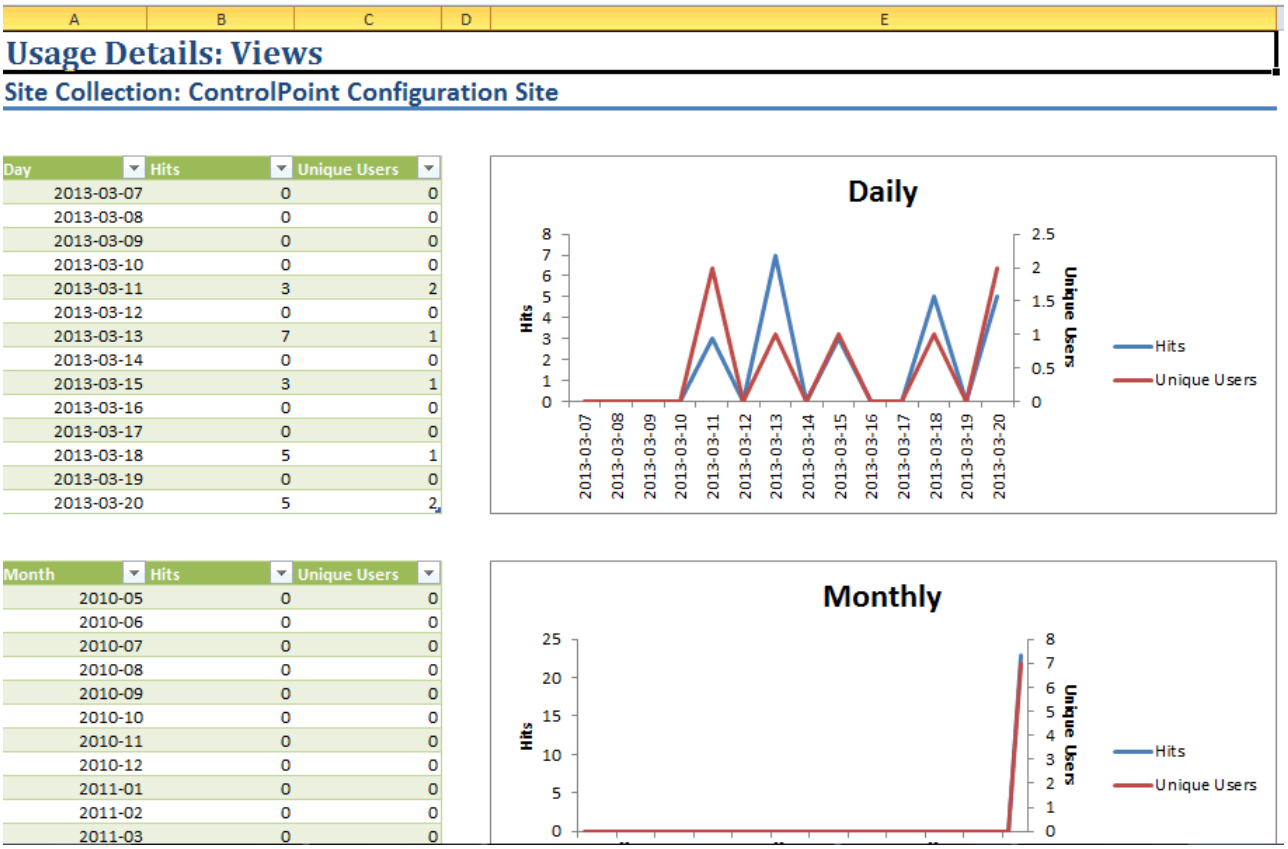
On a MOSS or SharePoint Server system, you can report daily requests/page views *or* cumulative hits. If you have WSS only, only cumulative activity data can be reported, as identified by two asterisks (**) following the activity data.

Variations in Site Usage Data

Typically, ControlPoint activity analysis data (including Farm Summary and Top Sites) is based on daily request data compiled by SharePoint.

At the site level, this data is normally presented:

- in a **SharePoint 2013 and later environment**, in various Usage and Search reports.



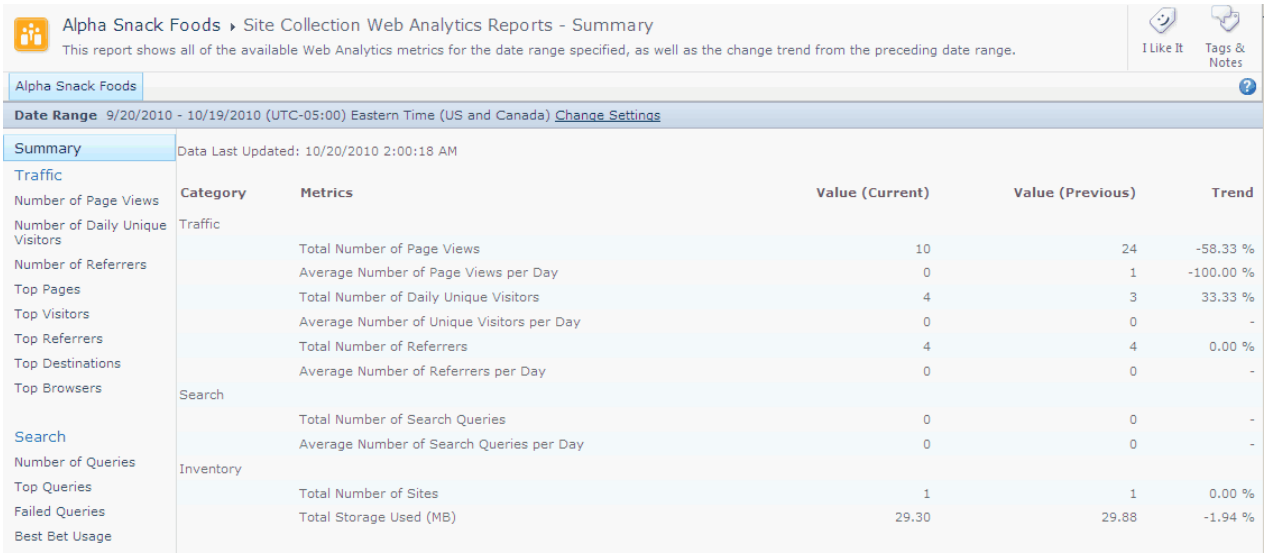
Usage Details: Views

Site Collection: ControlPoint Configuration Site

Day	Hits	Unique Users
2013-03-07	0	0
2013-03-08	0	0
2013-03-09	0	0
2013-03-10	0	0
2013-03-11	3	2
2013-03-12	0	0
2013-03-13	7	1
2013-03-14	0	0
2013-03-15	3	1
2013-03-16	0	0
2013-03-17	0	0
2013-03-18	5	1
2013-03-19	0	0
2013-03-20	5	2

Month	Hits	Unique Users
2010-05	0	0
2010-06	0	0
2010-07	0	0
2010-08	0	0
2010-09	0	0
2010-10	0	0
2010-11	0	0
2010-12	0	0
2011-01	0	0
2011-02	0	0
2011-03	0	0

- in a **SharePoint 2010 environment**, in SharePoint Web Analytics reports.



Alpha Snack Foods ▸ Site Collection Web Analytics Reports - Summary

This report shows all of the available Web Analytics metrics for the date range specified, as well as the change trend from the preceding date range.

I Like It | Tags & Notes

Alpha Snack Foods

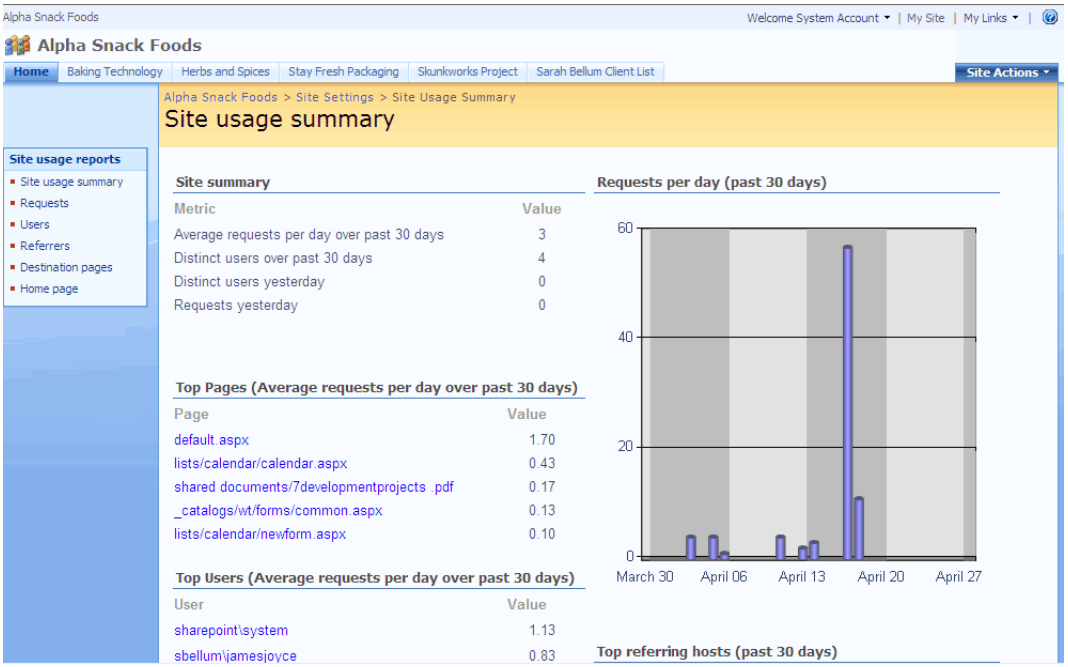
Date Range 9/20/2010 - 10/19/2010 (UTC-05:00) Eastern Time (US and Canada) Change Settings

Summary
Traffic
Number of Page Views
Number of Daily Unique Visitors
Number of Referrers
Top Pages
Top Visitors
Top Referrers
Top Destinations
Top Browsers
Search
Number of Queries
Top Queries
Failed Queries
Best Bet Usage

Data Last Updated: 10/20/2010 2:00:18 AM

Category	Metrics	Value (Current)	Value (Previous)	Trend
Traffic				
	Total Number of Page Views	10	24	-58.33 %
	Average Number of Page Views per Day	0	1	-100.00 %
	Total Number of Daily Unique Visitors	4	3	33.33 %
	Average Number of Unique Visitors per Day	0	0	-
	Total Number of Referrers	4	4	0.00 %
	Average Number of Referrers per Day	0	0	-
Search				
	Total Number of Search Queries	0	0	-
	Average Number of Search Queries per Day	0	0	-
Inventory				
	Total Number of Sites	1	1	0.00 %
	Total Storage Used (MB)	29.30	29.88	-1.94 %

- in a **SharePoint 2007 (MOSS)** environment, in Site Usage reports.



You can link directly to the applicable page for your SharePoint environment from ControlPoint Activity Analysis results.

Depending on a number of factors, including the SharePoint variation that you are running and which features are activated in a particular site collection or site, the SharePoint site usage report data may be different from either of those shown in the example above.

NOTE: Because they are calculated differently, if the SharePoint site usage page reports Hits, this number will typically be higher than the number of Requests/Page Views reported by ControlPoint.

Analyzing Most/Least Activity

Use the ControlPoint Most/Least Activity analysis to examine SharePoint objects within a selected scope and specific date range, ranked according to:

- most or least active site collections and/or sites
- most or least active lists, list items, users, and/or pages.

You can further narrow your result set to include only objects that meet specific criteria and/or thresholds.

NOTE: In a MOSS environments, activity reporting is done for the last 30 days for lists, list items, and users. This analysis is not available in WSS-only environments.

To generate a Most/Least Activity analysis:

1 Select the object(s) for which you want to analyze most/least activity.

2 Choose Activity > Most/Least Activity.

3 Specify the following parameters for your analysis:

a) Select the object types you want to analyze:

- **Site Collections and Sites**

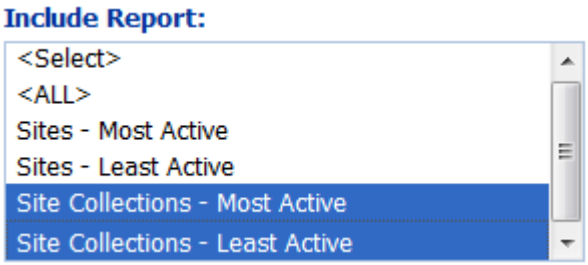
OR

- **Documents, Pages, and Users**.



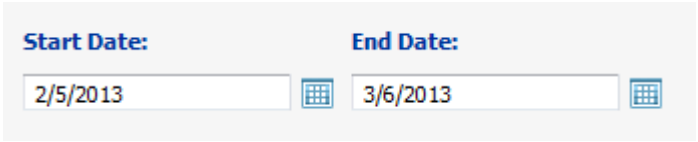
Note that remaining parameters are populated based on the object type selected.

b) From the **Include Report** list box, select the type(s) of activity that you want to include in your analysis.



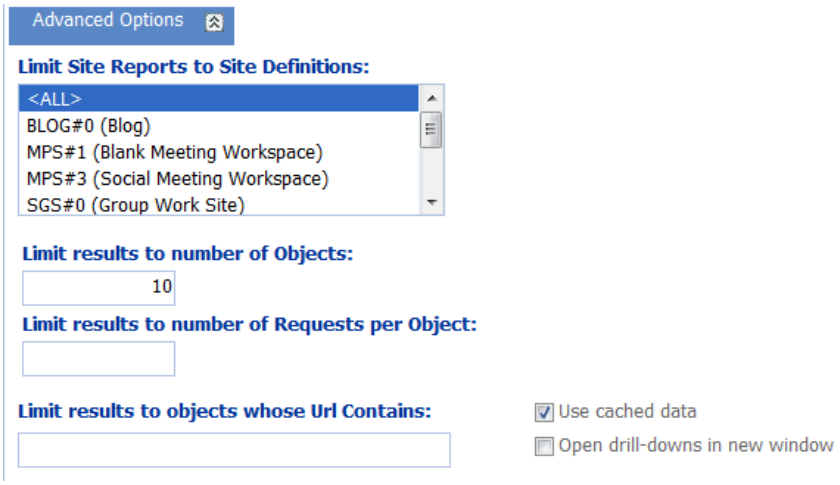
NOTE: If you choose multiple types of activity, each result set will be displayed in a separate subsection.

c) If you want results to cover a time period different than the default date range (the past 30 days), specify a different **Start Date** and/or **End Date**.



EXCEPTION: In a MOSS environment, the past 30 days is the only option for documents, pages, and/or users

4 If you want to further refine your results, expand the **Advanced Options** panel.



a) If you want to limit your result set to objects that meet one or more specific criteria, use the information in the following table for guidance.

If you want to limit each results set...	Then ...
to objects with one or more specific site definitions (templates)	select from the **Limit Site Reports to Site Definitions** list.
to more or less than 10 objects	change the **Limit results to number of Objects** default value. NOTE: If this field is blank, the default value (10 objects) will be used.
based on number of requests*	enter a number for **Number of Requests per Object.**
to objects whose url contains a specified text string	enter that string in the **Limit results to objects whose URL** field. NOTE: If your analysis includes multiple activity types, this limit will apply to each individual result set.
For Documents, Pages, and Users:	
to lists of one or more specific list definitions	select from the **List Definitions** list.
to exclude lists that do not display in the site's View all Site Content page	check the **Omit Hidden Lists** box. NOTE: If you choose to include hidden lists in analysis results, they are flagged in analysis results with a plus sign (+).

If you want to limit each results set...	Then ...
based on number of items in a list*	enter a number for **Limit results to number of List Items per List**.

* NOTE: If your analysis includes "most" activity, results will include objects *at or above* that limit; for "least" activity, results will include objects *at or below* that limit.

b) If your analysis includes *site collections* and you want to use usage data collected directly from SharePoint rather than the ControlPoint cache, uncheck the **Use cached data** box.

NOTE: Using cached data can significantly reduce the time it takes to generate an analysis on large site collections. Activity at other levels of the hierarchy is always performed in real-time.

Now you can either:

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

OR

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

OR

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

The body of the analysis includes a subsection for each usage type.

Site Collections, Sites, or Users with No Activity

Note that if the number of site collections, sites, or users with no activity exceeds the value you specified for **Limit Display to**, a single line item with the total number with no activity will be returned rather than individual line items.

EXCEPTION: If your analysis includes Site Collections -Least Active and is run using cached (not realtime) data, results will show only site collections with the least amount of *actual* activity (site collections with *no* activity will not be included).


Top 5 Site Collections with Least Activity (1/29/2014 - 2/27/2014)

The number of inactive site collections (26) exceeds your threshold - increase the threshold to see the entire list of inactive site collections

Parameters:

URL Contains:

Use cached data when available: True

Threshold: N/A

Select	Rank	Name	URL	Owner	Sites	Size (MB)	Page Views	Avg. Unique Users/Day	Quota (MB)	Last Accessed
Select	1	Alpha Snackfoods	(http://clients/sites/alpha)	i:0#.w|axcelertest\jamesjoyce	3	10.02	0	0	1000	
Select	2	Company Blog	(http://clients/sites/blog)	i:0#.w|axcelertest\washingtonirving	1	1.54	0	0	1000	
Select	3	ControlPoint Configuration Site	(http://clients)	i:0#.w|axcelertest\jamesjoyce	1	2.34	0	0	0	
Select	4	Help Desk	(http://clients/sites/Help)	i:0#.w|axcelertest\isaacasimov	1	1.77	0	0	1000	
Select	5	HR	(http://clients/sites/HR)	i:0#.w|axcelertest\jamesjoyce	1	1.56	0	0	1000	

TIP: If you want to see all of the site collections, sites or users with no activity, generate another analysis with **Limit Display to** set to the number shown as the Inactive Count.

Analyzing Site Collection Activity

The Site Collection Activity Analysis provides activity statistics for selected site collections, including:

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

To generate a Site Collection Activity Analysis:

1 Select the object(s) (farm, Web application(s), or site collections) for which you want to analyze activity.

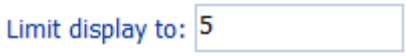
2 Choose Activity > Site Collection Activity Analysis.

3 Specify the parameters for your analysis.

Note that, in addition to the "standard" parameters:

- A **Limit Display to** must be specified. The value in this field (which is 10 by default, but may be changed) represents the number of site collections with the most activity that you want to examine more closely. These sites are listed in a separate section at the bottom of the analysis Results section.

  EXCEPTIONS: If you are running in a WSS-only environment, you can only **View Activity for** Cumulative Hits, and Top Sites are not displayed. See Variations in Activity Data.



  NOTE: If you want to perform an analysis that focuses exclusively on top site collections that meet specific activity or storage criteria, you can generate a Most/Least Activity Analysis.

Now you can either:

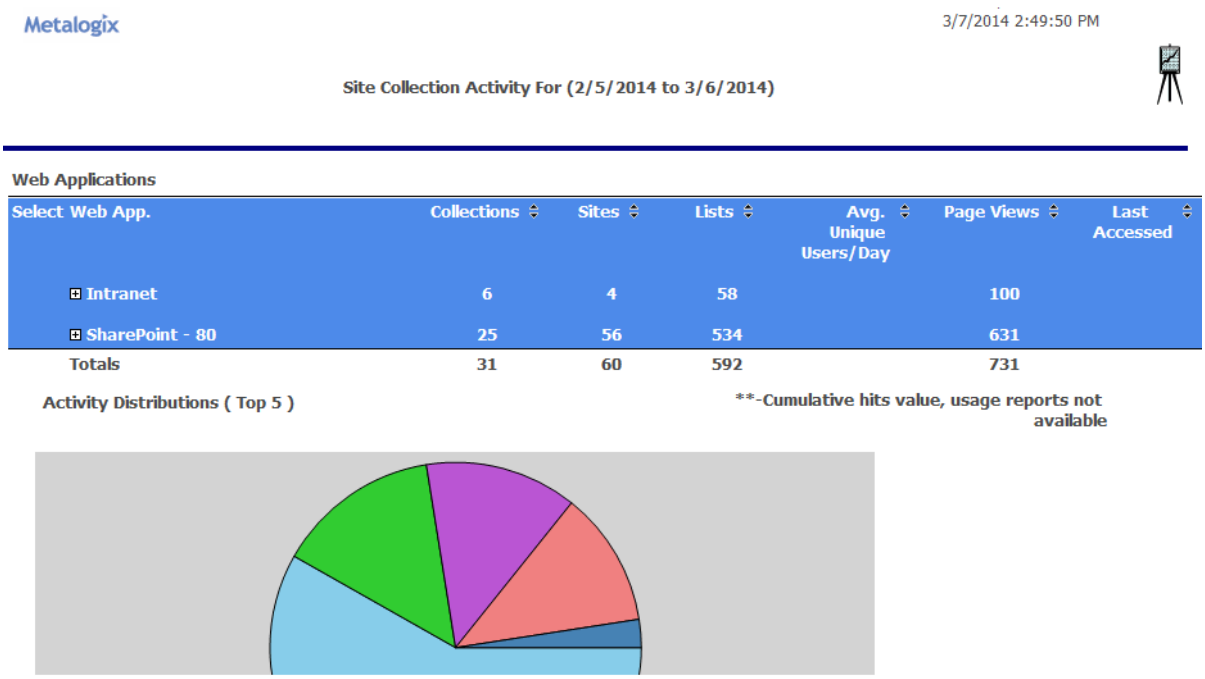
- run the operation immediately (by clicking the [**Run Now**] button)

OR

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

OR

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


Metalogix

3/7/2014 2:49:50 PM

Site Collection Activity For (2/5/2014 to 3/6/2014)

Web Applications

Select Web App.	Collections	Sites	Lists	Avg. Unique Users/Day	Page Views	Last Accessed
⊞ Intranet	6	4	58		100	
⊞ SharePoint - 80	25	56	534		631	
Totals	31	60	592		731	

Activity Distributions (Top 5)

**-Cumulative hits value, usage reports not available

The Activity Report displays the following sections:

- **Web Applications**
- **Activity Distribution**
- **Top Site Collections**

Web Applications Section

The Web Applications section lists all of the Web applications within the scope of your analysis, along with the following statistics for individual Web applications, as well as cumulative totals:

- the number of **Collections**, **Sites**, and **Lists** in each Web application

  NOTE: The number of Lists includes both user-created (visible) lists and internal (hidden) lists, such as galleries, that are necessary for the functioning of the site.

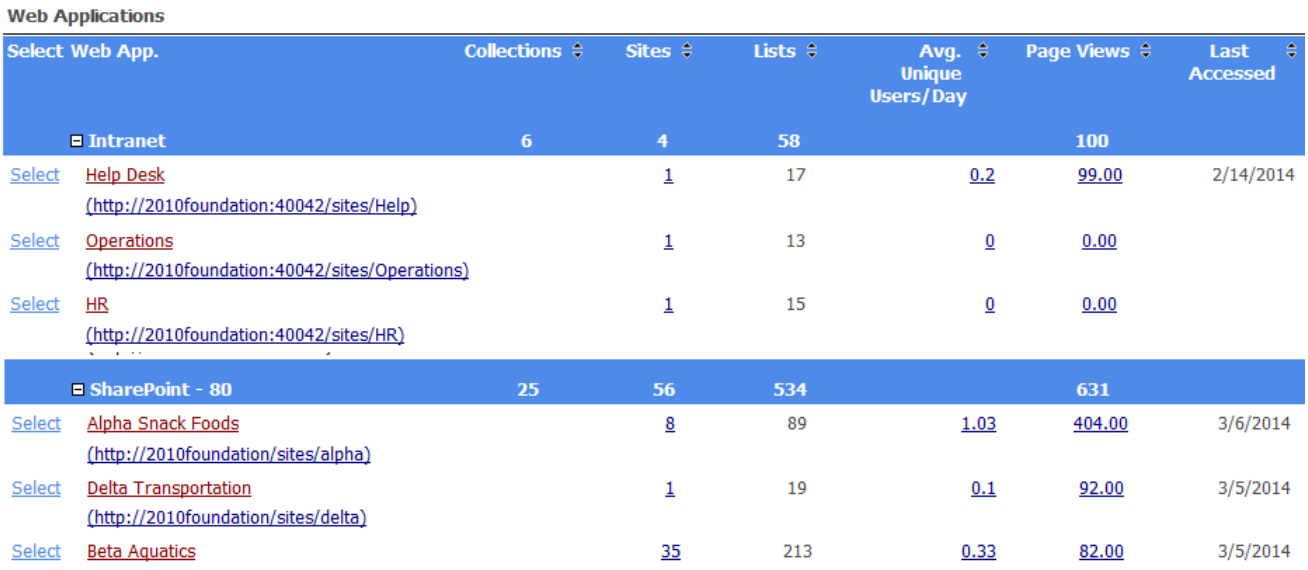
- the total number of **Requests** (the term used for MOSS farm), or **Page Views** (the term used for SharePoint 2010 farm) cumulative **Hits** (for a WSS-only farm) that site collections within the Web application have received for the specified day or time period.

Most statistics are hyperlinked to relevant SharePoint pages for Usage (for a MOSS or 2010 Foundation farm) or Web Analytics (for a SharePoint 2010 Server farm).

When expanded, statistics for individual site collections within each Web application displays, including:

- the **site collection** *name* (with a hyperlink for generating a ControlPoint Site Activity analysisfor the selected site collection/time period.)and *url*
- the number of **Sites** and **Lists** within the collection
- the **Avg. Unique Users/Day** who have visited the site collection for the specified day or time period (That is, any user who has more than one set of permissions to a site is only counted once.)

- the number of **Requests** (the term used for a MOSS farm), cumulative **Hits** (for a WSS-only farm) or **Page Views** (the term used for a SharePoint 2010 farm) that the site collection has received for the specified day or time period.
- the date when the site collection was **Last Accessed** (within the date range specified by the analysis).



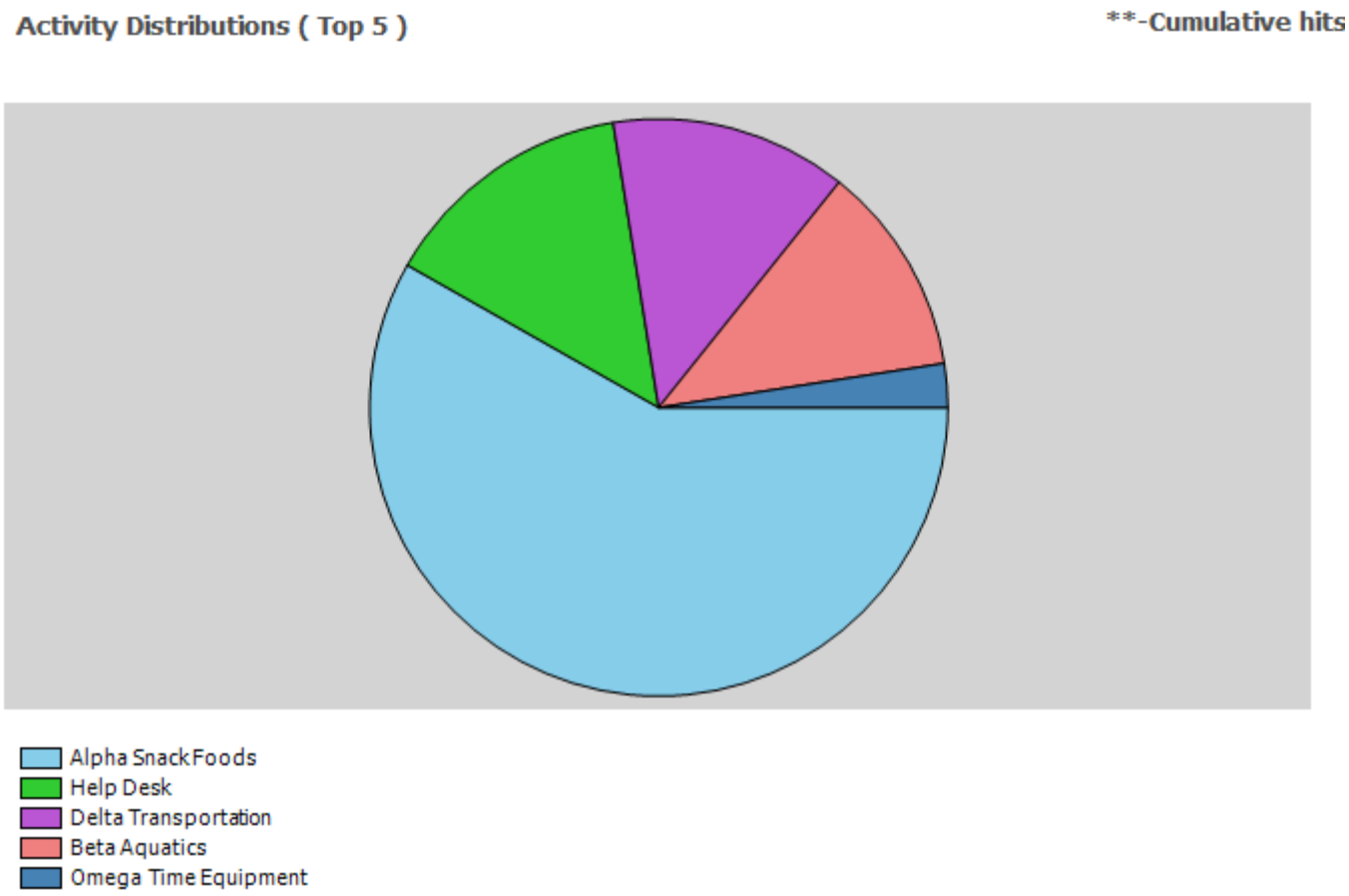
Web Applications

Select	Web App.	Collections	Sites	Lists	Avg. Unique Users/Day	Page Views	Last Accessed
	⊟ Intranet	6	4	58		100	
Select	Help Desk (http://2010foundation:40042/sites/Help)		1	17	0.2	99.00	2/14/2014
Select	Operations (http://2010foundation:40042/sites/Operations)		1	13	0	0.00	
Select	HR (http://2010foundation:40042/sites/HR)		1	15	0	0.00	
	⊟ SharePoint - 80	25	56	534		631	
Select	Alpha Snack Foods (http://2010foundation/sites/alpha)		8	89	1.03	404.00	3/6/2014
Select	Delta Transportation (http://2010foundation/sites/delta)		1	19	0.1	92.00	3/5/2014
Select	Beta Aquatics		35	213	0.33	82.00	3/5/2014

Most statistics are hyperlinked to relevant SharePoint pages for Usage (for a MOSS or farm) or Web Analytics (for a SharePoint 2010 Server farm).

Activity Distribution Section

The Activity Distribution section consists of a pie chart that depicts the distribution of activity among the Web applications returned by your analysis.

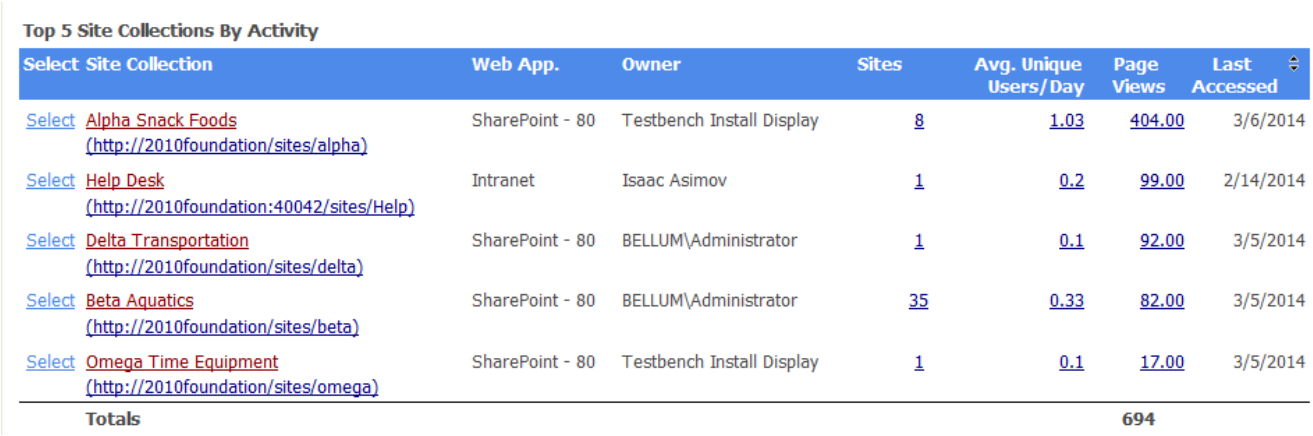


NOTE: If the analysis was generated for a single Web application, the pie chart will show the distribution of activity among site collections within that Web application. If your environment is WSS-only environment or you chose to view activity for Cumulative Hits, this data is unavailable.

Top Site Collections Section

This section shows statistics for the site collections within the scope of your analysis with the most activity. The number of site collections that displays in this section is determined by the value you entered in the Parameters section for **Limit Display to**.

NOTE: The **Last Accessed** date shows the last time the site collection was accessed *within the date range covered by the analysis*. Any activity that occurred before or after the specified date range will not be reflected in results.



Top 5 Site Collections By Activity

Select	Site Collection	Web App.	Owner	Sites	Avg. Unique Users/Day	Page Views	Last Accessed
Select	Alpha Snack Foods (http://2010foundation/sites/alpha)	SharePoint - 80	Testbench Install Display	8	1.03	404.00	3/6/2014
Select	Help Desk (http://2010foundation:40042/sites/Help)	Intranet	Isaac Asimov	1	0.2	99.00	2/14/2014
Select	Delta Transportation (http://2010foundation/sites/delta)	SharePoint - 80	BELLUM\Administrator	1	0.1	92.00	3/5/2014
Select	Beta Aquatics (http://2010foundation/sites/beta)	SharePoint - 80	BELLUM\Administrator	35	0.33	82.00	3/5/2014
Select	Omega Time Equipment (http://2010foundation/sites/omega)	SharePoint - 80	Testbench Install Display	1	0.1	17.00	3/5/2014
	Totals					694	

See also Analyzing Most/Least Activity.

Analyzing Site Activity

The Site Activity Analysis provides activity statistics for one or more selected sites, including the distribution of activity among sites within the scope of your analysis.

If you have selected a single site collection in a SharePoint 2007 MOSS farm, analysis results also include the number of top pages (that is, pages within the site collection with the most activity).

NOTE: This analysis is not available for SharePoint 2007 WSS-only farms.

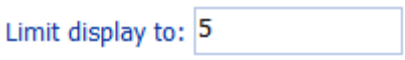
To generate a Site Activity Analysis:

1 Select the object(s) for which you want to analyze site activity.

2 Choose Activity > Site Activity Analysis.

3 Specify the parameters for your analysis.

Note that, in addition to the "standard" parameters, A **Limit Display to** must be specified. The value in this field (which is 10 by default, but may be changed) represents the number of pages with the most activity that you want to compare graphically (in the form of a pie chart).



The Site Activity Analysis displays the following sections:

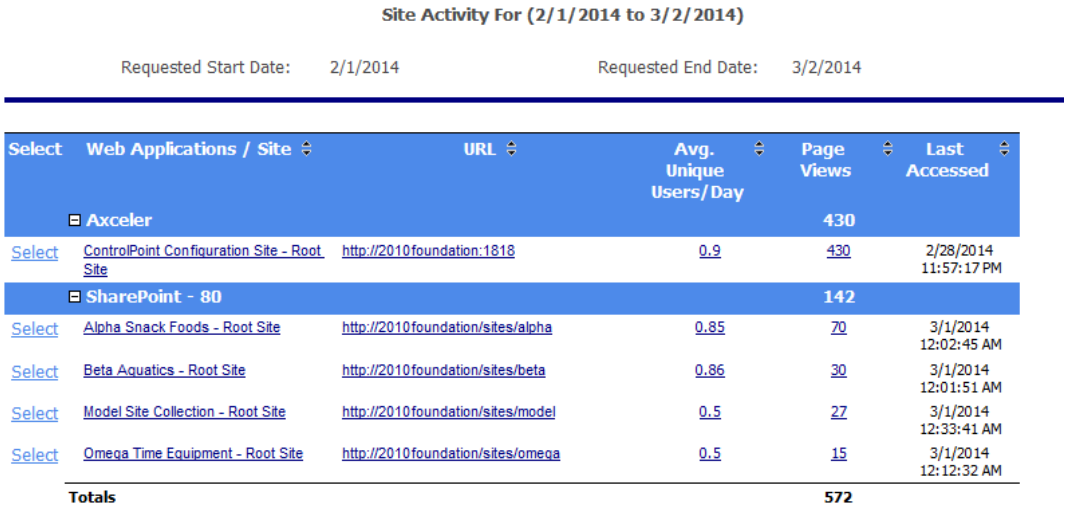
- site collections and sites
- Activity Distribution

Site Collections and Sites Section

The site collections and sites section lists the sites within the scope of your analysis, along with the following statistics for the specified day or time period:

- each site and subsite within the scope of your selection
- the site URL
- the **Avg. Unique Users/Day**
- total **Requests** (SharePoint 2007 and later) and **Home Page Requests** (SharePoint 2007) or **Page Views** (SharePoint 2010)
- the date when the site was **Last Accessed**.

NOTE: The **Last Accessed** date shows the last time the site was accessed *within the date range covered by the analysis*. Any activity that occurred before or after the specified date range will not be reflected in results.



Site Activity For (2/1/2014 to 3/2/2014)

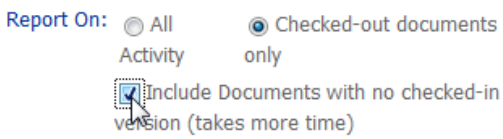
Requested Start Date: 2/1/2014 Requested End Date: 3/2/2014

Select	Web Applications / Site	URL	Avg. Unique Users/Day	Page Views	Last Accessed
	Axceler			430	
Select	ControlPoint Configuration Site - Root Site	http://2010foundation:1818	0.9	430	2/28/2014 11:57:17 PM
	SharePoint - 80			142	
Select	Alpha Snack Foods - Root Site	http://2010foundation/sites/alpha	0.85	70	3/1/2014 12:02:45 AM
Select	Beta Aquatics - Root Site	http://2010foundation/sites/beta	0.86	30	3/1/2014 12:01:51 AM
Select	Model Site Collection - Root Site	http://2010foundation/sites/model	0.5	27	3/1/2014 12:33:41 AM
Select	Omega Time Equipment - Root Site	http://2010foundation/sites/omega	0.5	15	3/1/2014 12:12:32 AM
	Totals			572	

Note that the indentation of each site and subsite within a site collection reflect the appropriate hierarchical level.

Activity Distribution Section

The Activity Distribution section consists of a pie chart that depicts the distribution of activity among sites within the scope of your analysis.



NOTE: If the analysis encompasses only one site, the pie chart will appear solid.

Analyzing Activity by User

The Activity by User analysis lets you examine SharePoint pages and documents requested by one or more users.

You can analyze activity for MOSS and all SharePoint 2010 and later farms over the past 30 days.

You can analyze activity beyond 30 days for **SharePoint 2010 Server farms**, as long as the Web Analytics Service is used by the Web Application.

You can also use this analysis to identify only files that are currently checked out.

NOTE: This analysis is not available for SharePoint 2007 WSS-only farms.

Note About "Common" File Names

Lists of "common file names" and "common file extensions" are maintained in XML files located on the Web front-end server where ControlPoint is installed, in the following **SharePoint hive** subdirectory: **\TEMPLATE\LAYOUTS\Axceler\App_Data.**

The purpose of this list is to give you the option of either including or excluding frequently used files from analysis results. You can customize the XML files to include file names specific to your environment. For example, you may want to filter out image files used on many pages that do not reflect actual patterns of user activity. You can also remove any of the default file names provided by Metalogix. Files containing common file names and extensions are described in the following table.

File	Description
ActivityByUserOrDoc_ExcludedFileNames2007.xml	Names in this file will populate the **Exclude File Names** parameter for a **SharePoint 2007** farm. By default, this list includes SharePoint 2007 internal files. When you specify the parameters for your analysis, you can exclude some or all of the file names in this list.
ActivityByUserOrDoc_ExcludedFileNames_2010.xml	Names in this file will populate the **Exclude File Names** parameter for a **SharePoint 2010 or higher** farm. By default, this file includes SharePoint internal files. When you specify the parameters for your analysis, you can exclude some or all of the file names in this list.

Changes that you make to these files must be copied to any additional Web front-end servers in your farm. Also, whenever you install a ControlPoint update or patch, these files are overwritten with files containing the default lists. Therefore, if you choose to make modifications, it is recommended that you keep a backup of the file in a different location so that you can replace the default version after an update or patch.

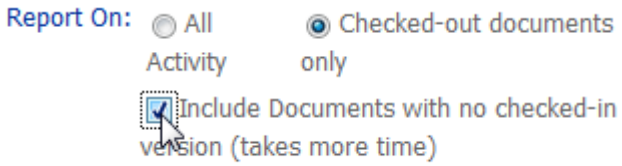
To generate an Activity by User analysis:

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

2 Choose Activity > Activity by User.

3 Specify the parameters for your analysis.

In addition to "standard" parameters (and the ability to exclude files, as described above), you can choose to have analysis results display information about **Checked-out documents only**. Results will include documents that were checked out between the specified start and end date, but have not been checked back in as of the analysis run date. If you select this option and also check **Include Documents with no checked-in version**, only documents that have never been checked in (which may happen, for example, if a document was uploaded but a value was not provided for a required property).



NOTE: If you accept the default (**All Activity**), the **Include Documents with no checked-in version checkbox** will always be ignored.

Now you can either:

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

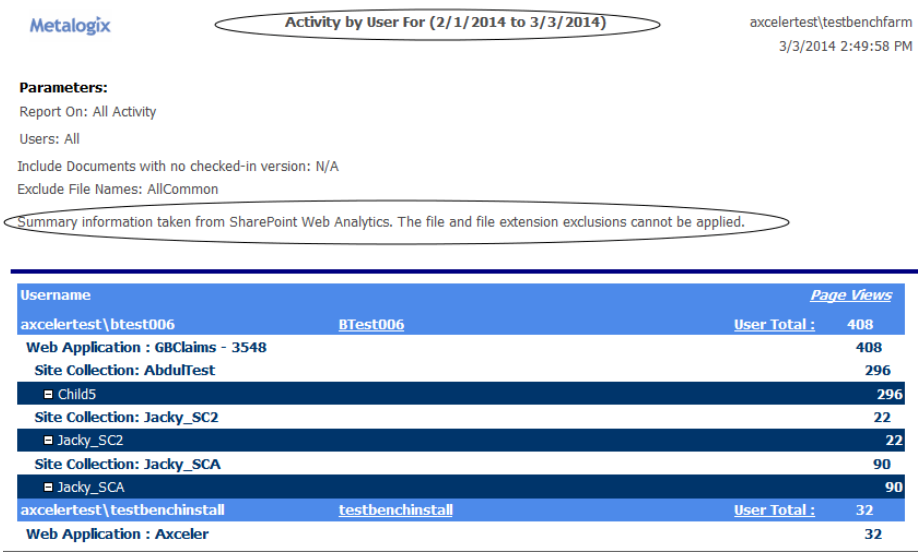
OR

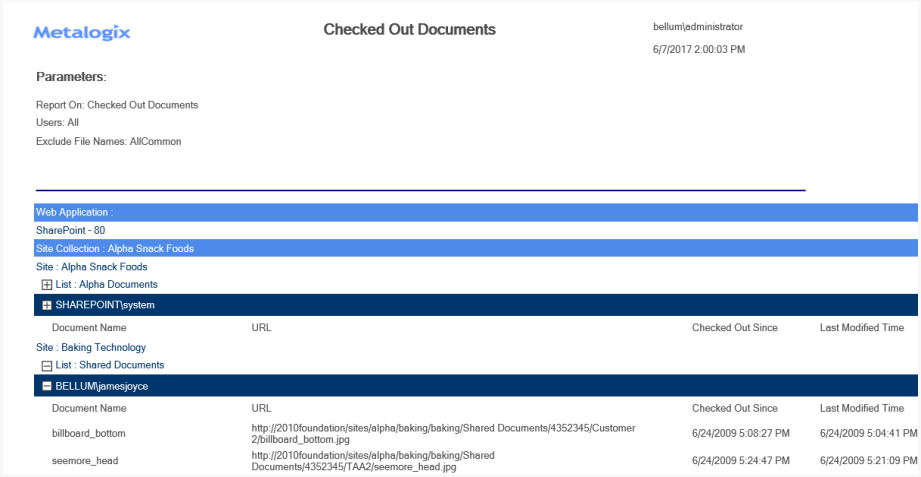
- schedule the operation to run at a later time or on a recurring basis.

OR

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

If you chose to analyze...	Then ...
All Activity	The top level of the analysis displays the following information for each user: • **username** (login name) and **Display Name** • for each Web application: the cumulative number of user **Requests** (the term for MOSS) or **Page Views** (the term used for SharePoint 2010) for all selected site collections within the Web application (as determined by the scope of your selection) • for each site collection: the cumulative number of user **Requests/Page Views** for all of the sites within the site collection • for each site: the total number of user Requests/page views for pages and documents within the site, and • the total number of requests/page views made by the user.

If you chose to analyze...	Then ...
	When a site is expanded, a list of all of the documents and pages that the user requested/viewed displays, along with the following information: • the relative url for each page or document, and • the number of requests by the user for each page or document.  Note that, if the analysis was run on a SharePoint 2010 Server farm beyond the past 30 days, individual file detail cannot be reported and file exclusions cannot be applied. 
Checked-out documents only	Analysis results display the following information for each checked out document: • the **Document Name** (with a link to the ControlPoint Audit Log analysis or the specified date range) NOTE: If SharePoint auditing is not enabled for the check in/check out event, the Audit Log analysis will show No Results to Display. • the **URL** to the document within the library • the date and time that the document has been **Checked Out Since** • the **Last Modified Time**

If you chose to analyze...	Then ...
	 If you chose to **Include Documents with no checked-in version**, documents that meet that criteria (if any) will also be included in analysis results, identified by the symbols **##**.

Analyzing Activity by Document

The **Activity by Document** analysis lets you examine request detail for each document or page within a selected scope for a selected date range.

You can analyze activity for MOSS and all SharePoint 2010 and 2013 farms over the past 30 days.

You can analyze activity beyond 30 days for **SharePoint 2010 Server farms**, as long as the Web Analytics Service is used by the Web Application.

You can also use this analysis to identify only files that are currently checked out. (If you want to identify *all* currently-checked out documents, regardless of date range, use the Checked Out Documents analysis.)

NOTE: This analysis is not available for SharePoint 2007 WSS-only farms.

Note About "Common" File Names

Lists of "common file names" and "common file extensions" are maintained in XML files located on the Web front-end server where ControlPoint is installed, in the following **SharePoint hive** subdirectory: **\TEMPLATE\LAYOUTS\Axceler\App_Data.**

The purpose of this list is to give you the option of either including or excluding frequently used files from analysis results. You can customize the XML files to include file names specific to your environment. For example, you may want to filter out image files used on many pages that do not reflect actual patterns of user activity. You can also remove any of the default file names provided by Metalogix. Files containing common file names and extensions are described in the following table.

File	Description
ActivityByUserOrDoc_ExcludedFileNames2007.xml	Names in this file will populate the **Exclude File Names** parameter for a **SharePoint 2007** farm. By default, this list includes SharePoint 2007 internal files. When you specify the parameters for your analysis, you can exclude some or all of the file names in this list.
ActivityByUserOrDoc_ExcludedFileNames_2010.xml	Names in this file will populate the **Exclude File Names** parameter for a **SharePoint 2010 or higher** farm. By default, this file includes SharePoint internal files. When you specify the parameters for your analysis, you can exclude some or all of the file names in this list.

Changes that you make to these files must be copied to any additional Web front-end servers in your farm. Also, whenever you install a ControlPoint update or patch, these files are overwritten with files containing the default lists. Therefore, if you choose to make modifications, it is recommended that you keep a backup of the file in a different location so that you can replace the default version after an update or patch.

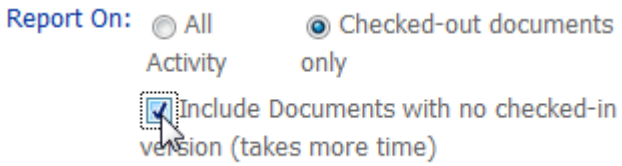
To generate an Activity by Document analysis:

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

2 Choose Activity > Activity by Document.

3 Specify the parameters for your analysis.

In addition to "standard" parameters (and the ability to exclude files, as described above), you can choose to have analysis results display information about **Checked-out documents only**. Results will include documents that were checked out between the specified start and end date, but have not been checked back in as of the analysis run date. If you select this option and also check **Include Documents with no checked-in version**, documents for which no checked version exists (which may happen, for example, if a document was uploaded but a value was not provided for a required property) will also be included and will be flagged.



NOTE: If you accept the default (**All Activity**), the **Include Documents with no checked-in version checkbox** will always be ignored.

Now you can either:

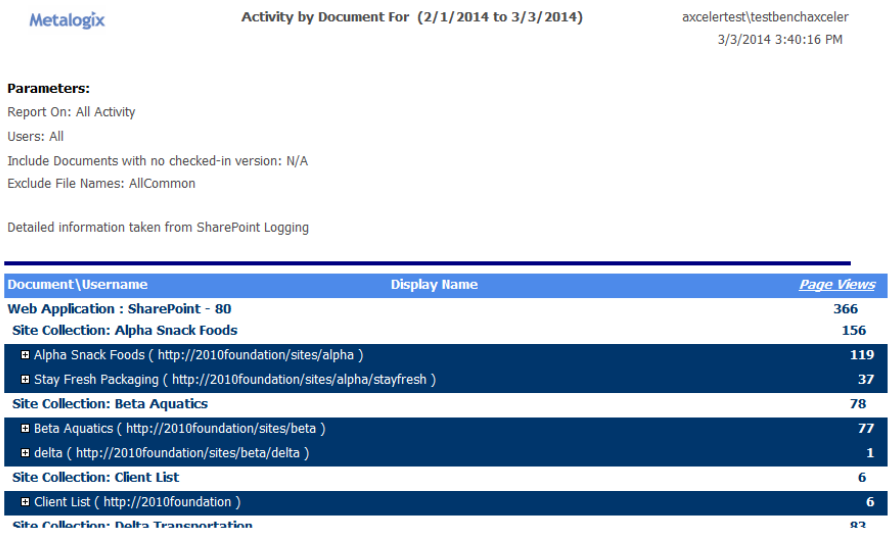
- run the operation immediately (by clicking the [**Run Now**] button)

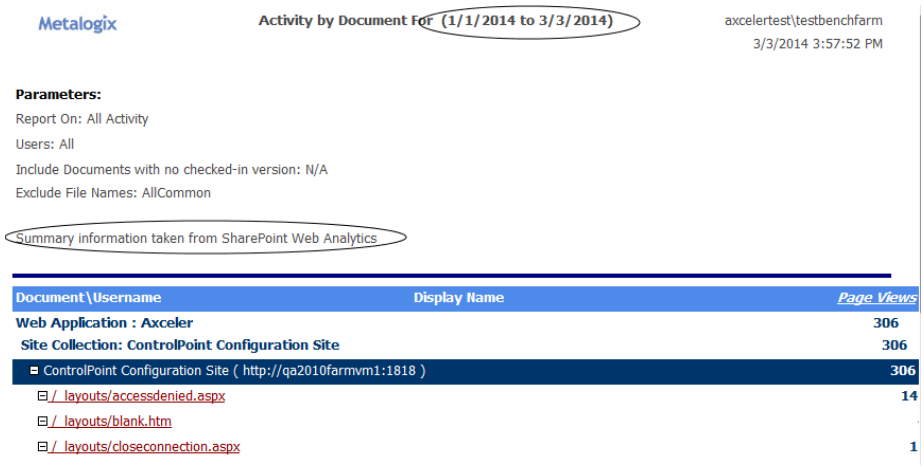
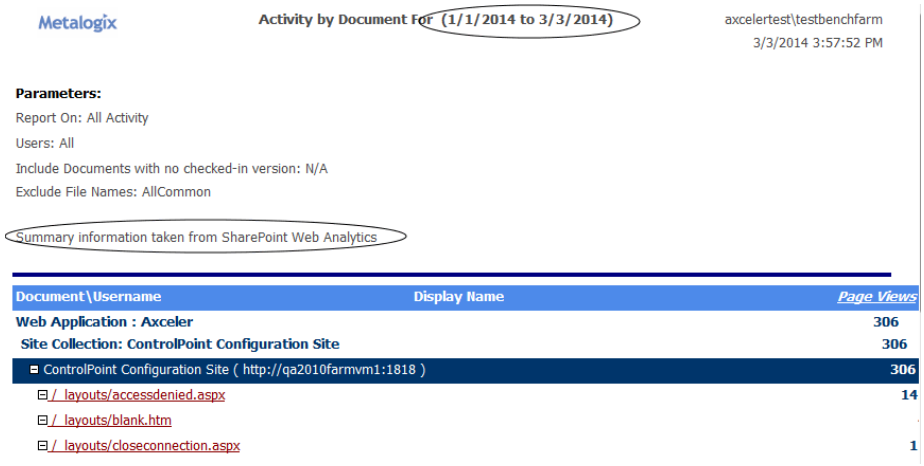
OR

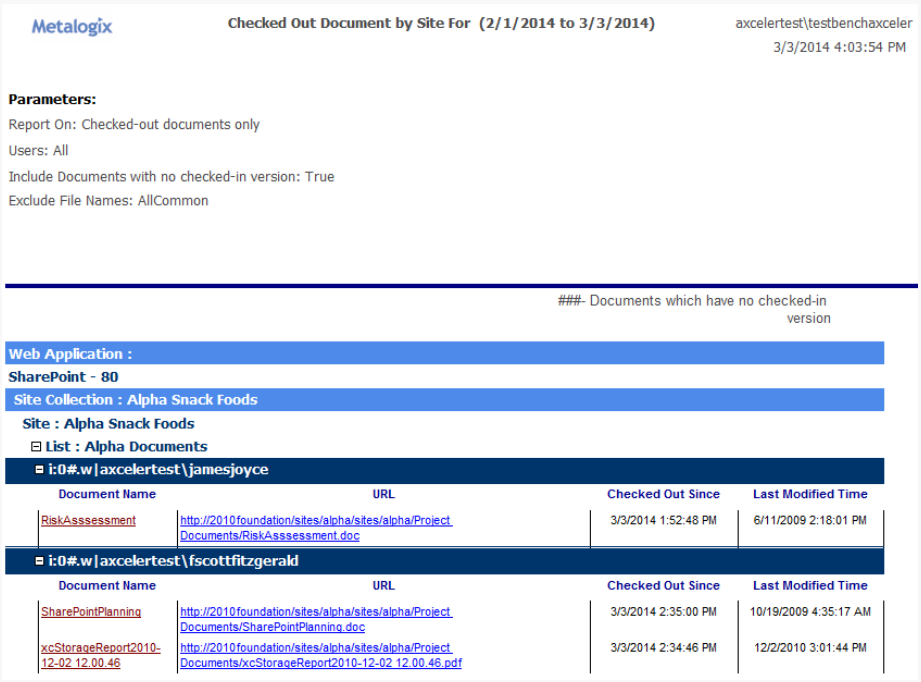
- schedule the operation to run at a later time or on a recurring basis.

OR

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

If you chose to analyze...	Then ...
All Activity	The top level of the analysis displays the following information: • for each Web application: the cumulative number of document or page **Requests** (the term used for MOSS) or **Page Views** (the term used for SharePoint 2010) within the Web application (as determined by the scope of your selection) • for each site collection: the cumulative number of document or page **Requests/Page Views** for all of the sites within the site collection, and • for each site: the total number of document or page **Requests/Page Views** within the site. • for each document or page which has had activity: the total **Requests/Page Views** for that document or page.  Metalogix Activity by Document For (2/1/2014 to 3/3/2014) axcelertest\testbenchaxceler 3/3/2014 3:40:16 PM **Parameters:** Report On: All Activity Users: All Include Documents with no checked-in version: N/A Exclude File Names: AllCommon Detailed information taken from SharePoint Logging Document\Username / Display Name / Page Views Web Application : SharePoint - 80 366 Site Collection: Alpha Snack Foods 156 Alpha Snack Foods (http://2010foundation/sites/alpha) 119 Stay Fresh Packaging (http://2010foundation/sites/alpha/stayfresh) 37 Site Collection: Beta Aquatics 78 Beta Aquatics (http://2010foundation/sites/beta) 77 delta (http://2010foundation/sites/beta/delta) 1 Site Collection: Client List 6 Client List (http://2010foundation) 6 Site Collection: Delta Transportation 83 When a site is expanded, the following information displays for each document/page: • the relative url for the page or **Document** • the **Username** (login name) and **Display Name** of each user who requested/viewed the document or page, and • the number of **Requests/Page Views** for each document or page.

If you chose to analyze...	Then ...
	 Note that, if the analysis was run on a SharePoint 2010 Server farm beyond the past 30 days, individual file detail cannot be reported and file exclusions cannot be applied. 
Checked-out documents only	Analysis results display the following information for each checked out document: ○ the **Document Name** (with a link to the ControlPoint Audit Log analysis for the specified date range) NOTE: If SharePoint auditing is not enabled for the check in/check out event, the Audit Log analysis will show No Results to Display. • the **URL** to the document within the library • the date and time that the document has been **Checked Out Since** • the **Last Modified Time**

If you chose to analyze...	Then ...
	 If you chose to **Include documents that have never been checked out**, documents that meet that criteria (if any) will also be included in analysis results, flagged by the symbols **###**.

Identifying Checked Out Documents

The **Checked Out Documents** analysis lets you identify all files that are currently checked out of SharePoint for a selected scope.

NOTE: If you want to identify only those files that have been checked out over a given date range, use the Activity by Document analysis.

Note About "Common" File Names

Lists of "common file names" and "common file extensions" are maintained in XML files located on the Web front-end server where ControlPoint is installed, in the following **SharePoint hive** subdirectory: **\TEMPLATE\LAYOUTS\Axceler\App_Data.**

The purpose of this list is to give you the option of either including or excluding frequently used files from analysis results. You can customize the XML files to include file names specific to your environment. For example, you may want to filter out image files used on many pages that do not reflect actual patterns of user activity. You can also remove any of the default file names provided by Metalogix. Files containing common file names and extensions are described in the following table.

File	Description
ActivityByUserOrDoc_ExcludedFileNames2007.xml	Names in this file will populate the **Exclude File Names** parameter for a **SharePoint 2007** farm. By default, this list includes SharePoint 2007 internal files. When you specify the parameters for your analysis, you can exclude some or all of the file names in this list.
ActivityByUserOrDoc_ExcludedFileNames_2010.xml	Names in this file will populate the **Exclude File Names** parameter for a **SharePoint 2010 or higher** farm. By default, this file includes SharePoint internal files. When you specify the parameters for your analysis, you can exclude some or all of the file names in this list.

Changes that you make to these files must be copied to any additional Web front-end servers in your farm. Also, whenever you install a ControlPoint update or patch, these files are overwritten with files containing the default lists. Therefore, if you choose to make modifications, it is recommended that you keep a backup of the file in a different location so that you can replace the default version after an update or patch.

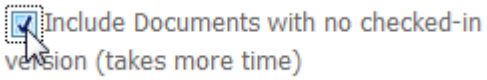
To generate a Checked Out Documents analysis:

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

2 Choose Activity > Checked Out Documents.

3 Specify the parameters for your analysis.

In addition to "standard" parameters (and the ability to exclude files, as described above), you can choose to **Include Documents with no checked-in version.** When this box is checked, documents for which a checked-in version does not exist (which may happen, for example, if a document was uploaded but a value was not provided for a required property) will also be included in results and will be flagged.



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

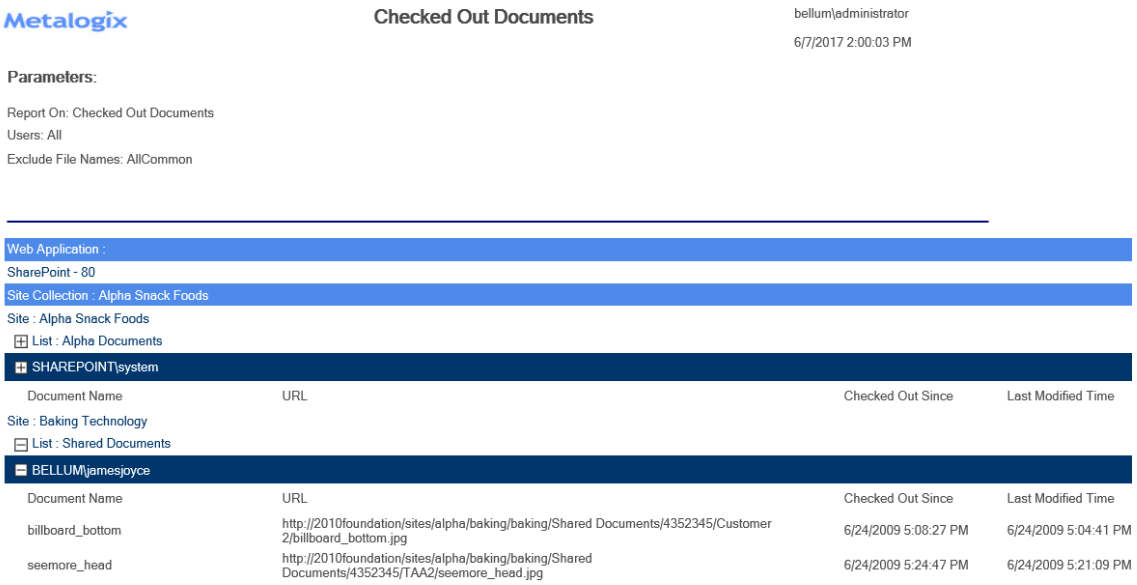
- save the operation as XML Instructions that can be executed at a later time.

For each user who has checked out documents, analysis results display the following information for each:

- the **Document Name** (with a link to the ControlPoint Audit Log analysis for the specified date)

NOTE: If SharePoint auditing is not enabled for the check in/check out event, the Audit Log analysis will show No Results to Display.

- the **URL** to the document within the library
- the date and time that the document has been **Checked Out Since**
- the **Last Modified Time**


Metalogix

Checked Out Documents

bellum\administrator

6/7/2017 2:00:03 PM

Parameters:

Report On: Checked Out Documents

Users: All

Exclude File Names: AllCommon

Web Application :

SharePoint - 80

Site Collection : Alpha Snack Foods

Site : Alpha Snack Foods

List : Alpha Documents

SHAREPOINT\system

Document Name	URL	Checked Out Since	Last Modified Time

Site : Baking Technology

List : Shared Documents

BELLUM\jamesjoyce

Document Name	URL	Checked Out Since	Last Modified Time
billboard_bottom	http://2010foundation/sites/alpha/baking/baking/Shared Documents/4352345/Customer 2/billboard_bottom.jpg	6/24/2009 5:08:27 PM	6/24/2009 5:04:41 PM
seemore_head	http://2010foundation/sites/alpha/baking/baking/Shared Documents/4352345/TAA2/seemore_head.jpg	6/24/2009 5:24:47 PM	6/24/2009 5:21:09 PM

If you chose to **Include Documents with no checked-in version**, documents that meet that criteria (if any) will also be included in analysis results, flagged by the symbols **###**.

Identifying Inactive Users

The Inactive User analysis identifies users who have had no SharePoint activity for a selected scope:

- in a **SharePoint 2010** or **higher** farm - for a specified date range

OR

- in a **SharePoint 2007** farm - over the past 30 days.

NOTE: This analysis is not available for SharePoint 2007 WSS-only farms.

ControlPoint compiles this list by finding all unique users with permissions then eliminating those with activity within the time period covered by the analysis:

Total Users with Permissions includes:

- Web application Service Accounts
- Users granted permissions through Web application policies
- Site Collection Administrators
- Users within Active Directory groups to which the ControlPoint Service Account has access (that is, within the same domain or forest, in a different domain/forest for which with a two-way trust exists, or in a different domain/forest with a one-way outgoing trust that ControlPoint can authenticate via

the ControlPoint Manage Forest Access feature. Disabled Active Directory accounts are included in this total. If an Active Directory user has been renamed but still has permissions in SharePoint under the old name, each name will be counted as a separate user.

- Excluded from this total are built-in groups and special accounts, such as nt authority\authenticated users (or any account that begins with "nt authority") and sharepoint\system, and users granted permissions via augmented Claims or alternate authentication providers.

To generate an Inactive Users analysis:

1 Select the object(s) for which you want to find inactive users.

2 Choose Activity > Inactive Users.

3 Specify the parameters for your analysis.

Now you can either:

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

OR

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

OR

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

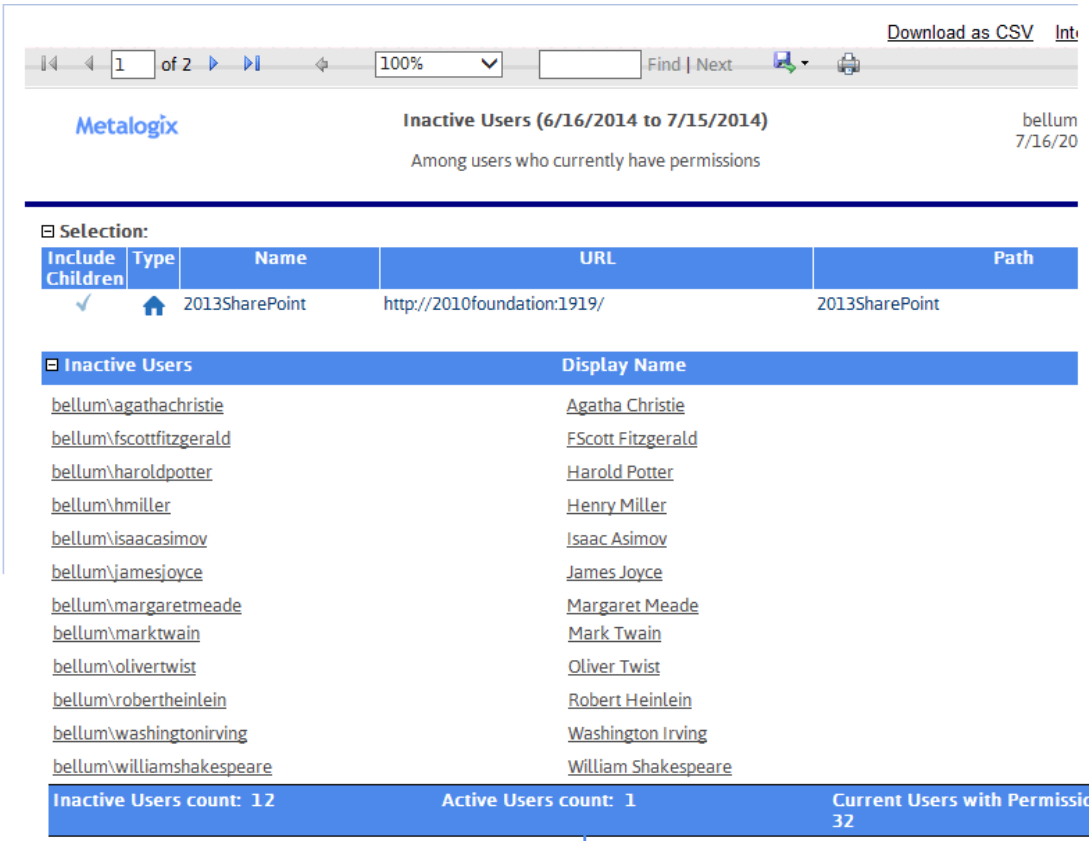
Analysis results include:

- a listing of inactive users.

AND

- the total number of:
  - inactive users
  - active users, and

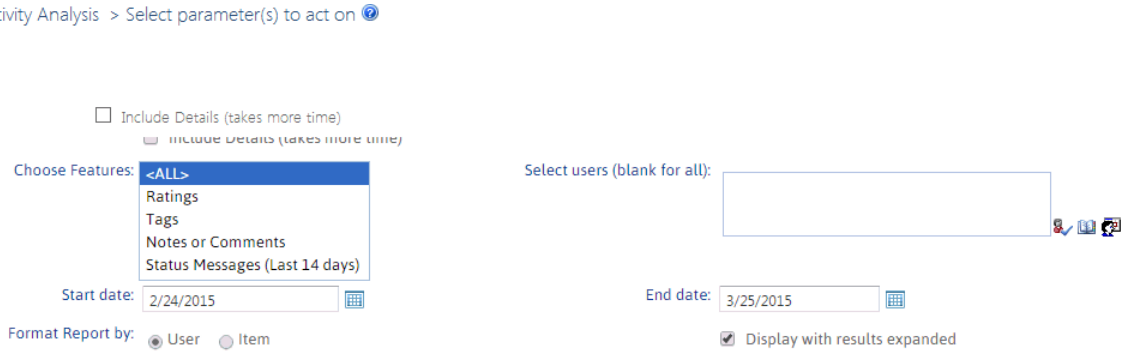
- users with permissions.



Analyzing Social Activity (SharePoint 2010 Server)

The Social Activity Analysis provides a summary of user activity for one or more of the following social features within a SharePoint 2010 Server farm:

- for a specified date range and scope:
  - ratings
  - tags (as long as they have not been marked private)



  - notes or comments
- the user's profile status message(s) over the last 14 days.

By default, the results are presented as a high-level "scorecard" with the total number of users and instances of activity for each social feature. You have the option of also including details, which may be grouped by user or by feature.

NOTE: To run this analysis, the User Profile Service Application must be enabled and used by each of the Web applications that you want to analyze. If more than one instance of this Service Application is in use by a Web application—or if the scope of your analysis includes Web applications that use *different* User Profile Service Applications—a Web application's default instance will always be used.

To generate a Social Activity Analysis:

1 Select the object(s) for which you want to analyze social activity.

2 Choose Activity > Social Activity Analysis.

3 Specify the parameters for your analysis.

NOTE: Ratings, Tags, and Notes or Comments are for SharePoint objects within the selected scope and date range. Status Messages are from a user's profile and only those that have been modified within the past 14 days, regardless of the date range specified.

4 If you want to include details about each instance of social activity, click **Include Details**.

NOTE: If you check this box, ControlPoint must iterate through all user activity. Depending on the scope of your analysis and the number of users selected, processing time may increase noticeably.

Note that, if you chose to include details, you have the option to **Format Report by User** or **Item**.

Now you can either:

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

OR

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

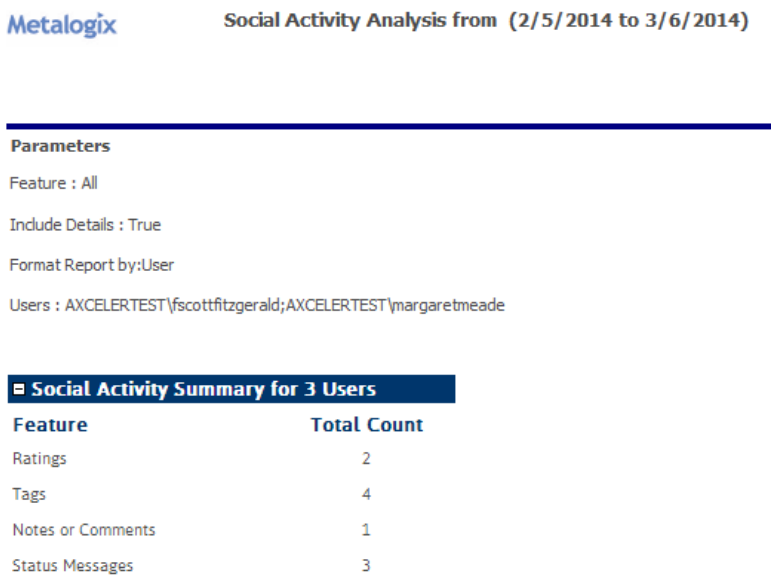
OR

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

Analysis results identify:

- the number of users within the scope of your analysis that have user profiles within the default User Profile Service, and

- Total Count of activity instances by those users for each feature listed.



Metalogix Social Activity Analysis from (2/5/2014 to 3/6/2014)

Parameters

Feature : All

Include Details : True

Format Report by:User

Users : AXCELERTEST\fscottfitzgerald;AXCELERTEST\margaretmeade

Social Activity Summary for 3 Users

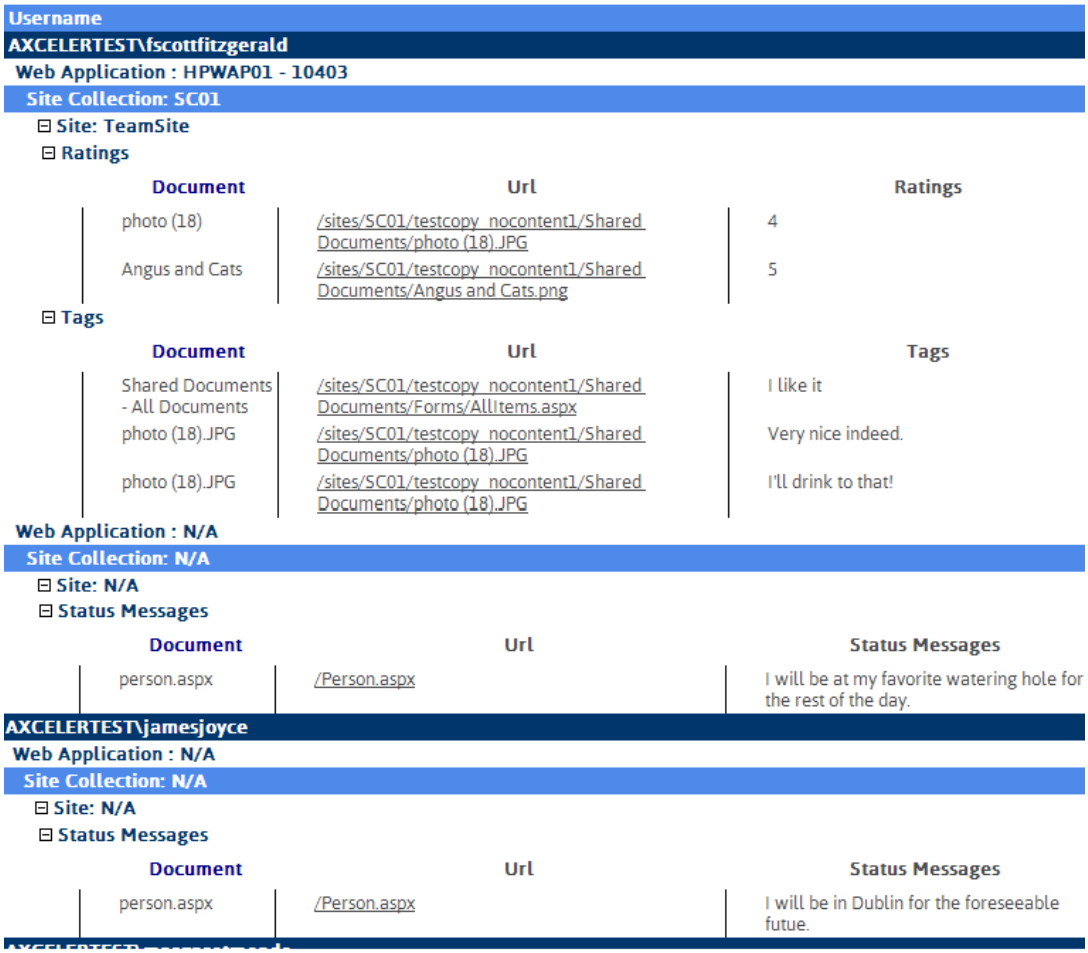
Feature	Total Count
Ratings	2
Tags	4
Notes or Comments	1
Status Messages	3

If you chose to **Include Details**, the following additional information displays for each user/feature.

If grouped by user:

- the **Username** of the user whose social activity is being reported
- the **Web Application**, **Site Collection**, and **Site** where the social activity occurred
- for each line item:
    - the **Document** and Document **URL** where the social activity occurred
    - the actual content of the social activity instance.

NOTE: In the case of **Ratings**, the number is the rating itself, *not* a count of the ratings.



Username
AXCELERTEST\fscottfitzgerald
Web Application : HPWAP01 - 10403
Site Collection: SC01
Site: TeamSite
Ratings

Document	Url	Ratings
photo (18)	/sites/SC01/testcopy_nocontent1/Shared Documents/photo (18).JPG	4
Angus and Cats	/sites/SC01/testcopy_nocontent1/Shared Documents/Angus and Cats.png	5

Tags

Document	Url	Tags
Shared Documents - All Documents	/sites/SC01/testcopy_nocontent1/Shared Documents/Forms/AllItems.aspx	I like it
photo (18).JPG	/sites/SC01/testcopy_nocontent1/Shared Documents/photo (18).JPG	Very nice indeed.
photo (18).JPG	/sites/SC01/testcopy_nocontent1/Shared Documents/photo (18).JPG	I'll drink to that!

Web Application : N/A
Site Collection: N/A
Site: N/A
Status Messages

Document	Url	Status Messages
person.aspx	/Person.aspx	I will be at my favorite watering hole for the rest of the day.

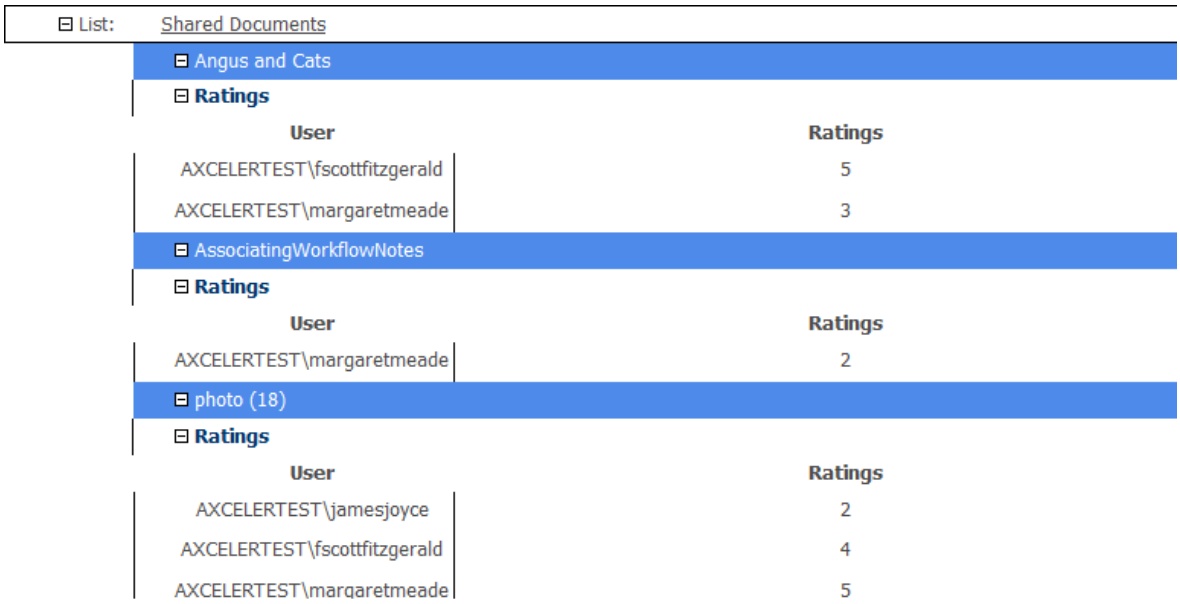
AXCELERTEST\jamesjoyce
Web Application : N/A
Site Collection: N/A
Site: N/A
Status Messages

Document	Url	Status Messages
person.aspx	/Person.aspx	I will be in Dublin for the foreseeable futue.

If grouped by item:

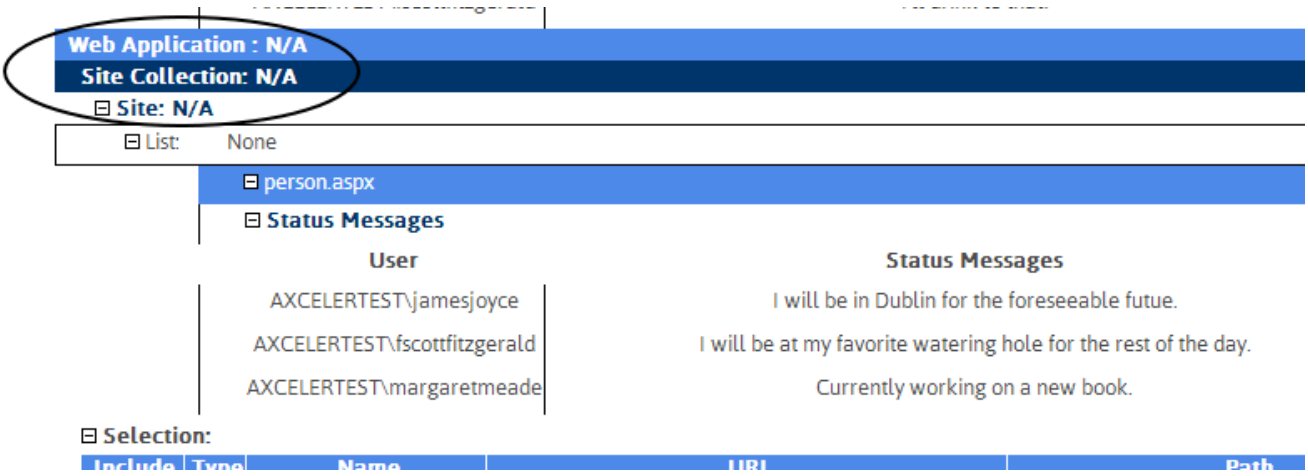
- the **Web Application**, **Site Collection**, **Site**, **List**, and **Item/Document** where the social activity occurred
- the type of social activity (**Ratings**, **Notes** or **Comments**, or **Status Messages**)
- for each line item:
  - the **Document** and Document **URL** where the social activity occurred
  - the **User** whose social activity is being reported
  - the actual content of the social activity instance.

NOTE: In the case of **Ratings**, the number is the rating itself, *not* a count of the ratings.



Additional Information About Status Messages

- **Status Messages** will display only if the status message has been updated within the past 14 days.
- The SharePoint User Profile Change cleanup job renders status messages that are older than 14 days unretrievable. Therefore, if a user has not modified his/her status message within 14 days, it will not be included in analysis results.
- If the user does not have a My Site (that is, the message exists in the user's profile only), **N/A** will display for the Web application, site collection, and site.



Analyzing Blog Post Activity

The Blog Post Activity analysis provides activity statistics about blog posts created by SharePoint users over a specified period of time, including the post's author, date published, and the number of unique visitors.

To generate a Blog Post Activity analysis:

1 Select the object(s) containing the blog(s) whose posts you want to analyze.

2 Choose Activity > Blog Post Activity.

3 Specify the parameters for your analysis

NOTE: In addition to the "standard" parameters you have the option of grouping results for each blog post **By Post** or **By Author**.

Now you can either:

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

OR

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

OR

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

The top level of the analysis shows all of the blog sites within the selected scope. As you drill-down, the following information displays for each post or author (depending on the Group By parameter you chose) within the specified date range:

- **#Comments**
- **Creation Date**
- **Publish Date**
- **#Unique Visitors**
- **# Hits** (that is, the total number of visits to that page).

Author	# Comments	Creation Date	Publish Date	# of Unique Visitors	Hits
⊞ .....custm sub 2	http://2010foundation/sites/beta/bravo/custom/custom1/custom2				
⊟ .....Deep Thoughts	http://2010foundation/sites/beta/delta/deep				
⊟ bellum\jamesjoyce					
⊟ Welcome to your Blog!	http://2010foundation/sites/beta/lists/posts/post.aspx?ID=1				
	1	6/5/2015 2:38:09 PM	6/5/2015 2:38:06 PM	1	6
⊟ Computer Skills	http://2010foundation/sites/beta/lists/posts/post.aspx?ID=2				
	2	6/5/2015 2:40:40 PM	6/5/2015 2:38:00 PM	2	3
⊞ bellum\isaacasimov					
⊟ .....A Stitch in Time	http://2010foundation/sites/beta/echo/stitch				
⊟ SHAREPOINT\system					
⊟ Welcome to your Blog!	http://2010foundation/sites/beta/lists/posts/post.aspx?ID=1				
	0	6/2/2015 1:10:19 PM	6/2/2015 1:10:14 PM	0	0
⊟ Poor Richard says....	http://2010foundation/sites/beta/lists/posts/post.aspx?ID=2				
	2	6/2/2015 1:59:04 PM	6/2/2015 1:57:00 PM	2	8
⊟ bellum\isaacasimov					
⊟ Wink at small faults	http://2010foundation/sites/beta/lists/posts/post.aspx?ID=3				
	0	6/5/2015 3:56:49 PM	6/5/2015 5:54:00 PM	0	0

Note that SharePoint considers the date and time when the post was initiated (even before the **[Publish]** button was clicked) to be the original Publish Date. Therefore, if the post is published immediately, the Publish Date/time may actually be *earlier* than the Creation Date.

Author	# Comments	Creation Date	Publish Date
⊟ .....Deep Thoughts	http://2010foundation/sites/beta/delta/deep		
⊟ bellum\jamesjoyce			
⊟ Computer Skills	http://2010foundation/sites/beta/lists/posts/post.aspx?ID=2		
	2	6/5/2015 2:40:40 PM	6/5/2015 2:38:00 PM

Blog post that was created and published immediately

If the post was not published immediately (for example, the post was scheduled to be published at a later time or Saved as a Draft), the Publish Date/time will be *later* than the Creation Date/time. If it is saved as a draft, the Publish Date reflects the date and time when the draft was saved. The Publish Date will be updated when the draft is re-saved, published, or scheduled to be published.

Author	# Comments	Creation Date	Publish Date
⊟ .....A Stitch in Time	http://2010foundation/sites/beta/echo/stitch		
⊟ The Science of Electricity	http://2010foundation/sites/beta/lists/posts/post.aspx?ID=4		
bellum\jamesjoyce	0	6/5/2015 3:59:34 PM	6/5/2015 5:53:00 PM

Blog post that was created and Saved as a Draft

In the case a post for which was scheduled to be published, the **Publish Date** will reflect the scheduled Date/time, even if it is in the future.

Metalogix

Blog Post Activity

bellum\jamesjoyce
6/8/2015 5:38:48 PM

Requested Start Date: 5/9/2015 Requested End Date: 6/8/2015

Parameters:

Users: <ALL>

Resume Blog Post Activity

Author	# Comments	Creation Date	Publish Date	# of Unique Visito
⊟ .....A Stitch in Time	http://2010foundation/sites/beta/echo/stitch			
⊟ Schedule to run 6/8/2015 at 6:00 PM	http://2010foundation/sites/beta/lists/posts/post.aspx?ID=6			
bellum\jamesjoyce	1	6/8/2015 3:37:44 PM	6/8/2015 6:00:00 PM	0

Blog post that was scheduled to be published in the future.

Analyzing Activity by Profile Property

If you are running ControlPoint in a SharePoint 2010 or later Server environment and are using the SharePoint User Profile Service application, you can analyze user activity statistics within Web applications and site collections associated with a specific a Profile Property.

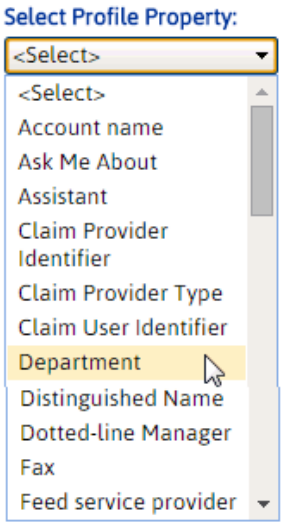
To generate an Activity by Profile Property analysis:

1 Select the Web application(s) and/or site collection(s) on which you want to perform the analysis.

2 Choose Activity > Activity by Profile Property.

3 Specify the parameters for your analysis.

In addition to the "standard" parameters, you must **Select Profile Property** for which you want results.



NOTE: The **Select Profile Property** drop-down contains all of the default properties used by the User Profile Service Application(s) within the scope of your analysis. Also included are custom properties that are public (that is, identified in the profile definition as "Everyone.") Excluded are custom properties that are private (identified in the profile definition as "Just Me").

Now you can either:

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

OR

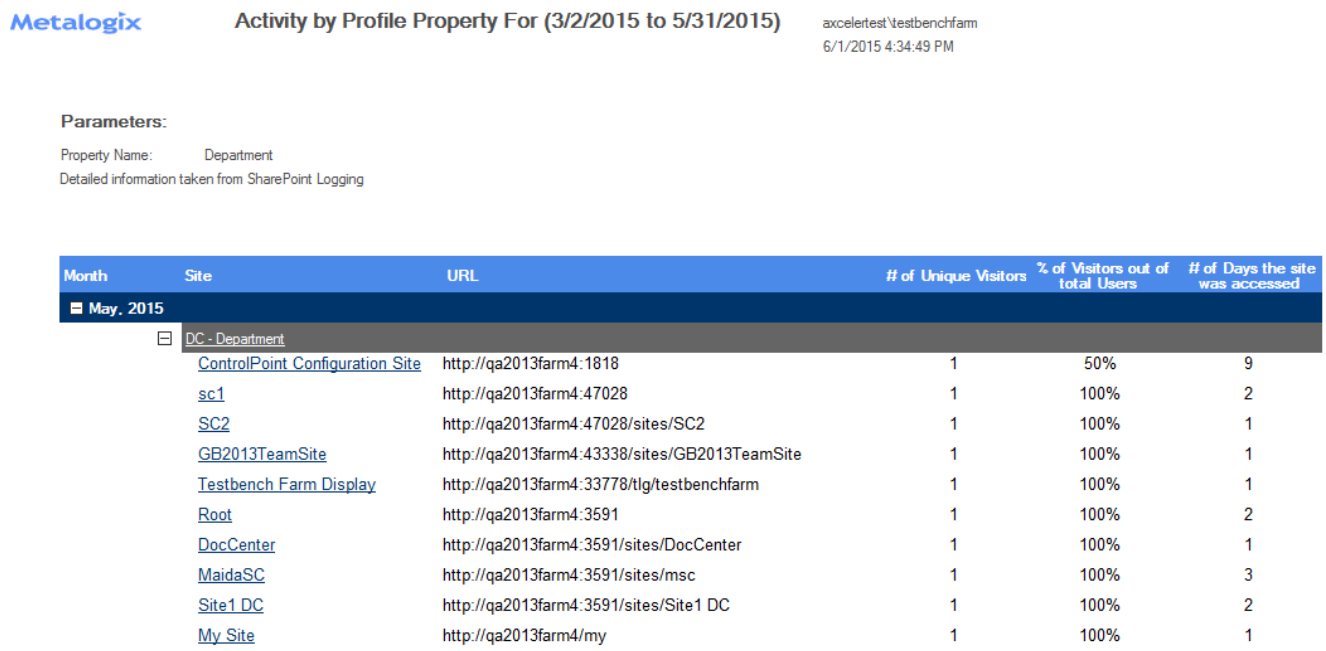
- schedule the operation to run at a later time or on a recurring basis.

OR

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

Analysis results display all of the sites accessed by users associated with the selected Profile Property/specified date range (grouped by month), along with:

- the **Site** name and **URL**
- the **# of Unique Visitors** associated with the Profile Property
- the **% of Visitors out of total Users** associated with the Profile Property
- the **# of Days the site was accessed** for the month (or the portion of the month represented by the specified the date range).



Metalogix Activity by Profile Property For (3/2/2015 to 5/31/2015) axcelertest\testbenchfarm 6/1/2015 4:34:49 PM

Parameters:

Property Name: Department
Detailed information taken from SharePoint Logging

Month	Site	URL	# of Unique Visitors	% of Visitors out of total Users	# of Days the site was accessed
May, 2015					
DC - Department					
	ControlPoint Configuration Site	http://qa2013farm4:1818	1	50%	9
	sc1	http://qa2013farm4:47028	1	100%	2
	SC2	http://qa2013farm4:47028/sites/SC2	1	100%	1
	GB2013TeamSite	http://qa2013farm4:43338/sites/GB2013TeamSite	1	100%	1
	Testbench Farm Display	http://qa2013farm4:33778/tlg/testbenchfarm	1	100%	1
	Root	http://qa2013farm4:3591	1	100%	2
	DocCenter	http://qa2013farm4:3591/sites/DocCenter	1	100%	1
	MaidaSC	http://qa2013farm4:3591/sites/msc	1	100%	3
	Site1 DC	http://qa2013farm4:3591/sites/Site1 DC	1	100%	2
	My Site	http://qa2013farm4/my	1	100%	1

Analyzing Object Properties

ControlPoint lets you view properties for objects at different levels of the SharePoint hierarchy via the following reports:

- **Farm Summary Report** provides a comprehensive summary of the components (servers, services, Web applications, site collections, and sites) in your SharePoint farm.
- **Site Collection Property Report** provides information about one or more site collections in your farm, including the Site Collection Administrator(s), quota details, site collection workflows audit setting that are/are not enabled, and a list of activated/deactivated features
- **Site Property Report** provides information about one or more sites in your farm, including the date and time when the site was created and last updated, the size of the site, users with Full Control permissions, audit settings that are/are not enabled, and a list of activated/deactivated site features
- **List Property Report** provides information about one or more lists in your farm, including the properties of the list, including versioning and advanced settings and audit settings that are/are not enabled for the list.

Analyzing Site Collection Properties

The **Site Collection Properties** analysis provides information about one or more site collections in your farm, including:

- the Site Collection Administrator(s)
- quota details
- site collection workflows

- audit settings that are/are not enabled (with the option of including *only* site collections for which auditing is enabled)
- for SharePoint 2010 and 2013 farms, settings for both SharePoint Designer and audit trimming, and
- a list of site collection features (with the option of including activated features only and/or hidden features).

You can further limit your results to include only site collections for which specific features are activated or deactivated.

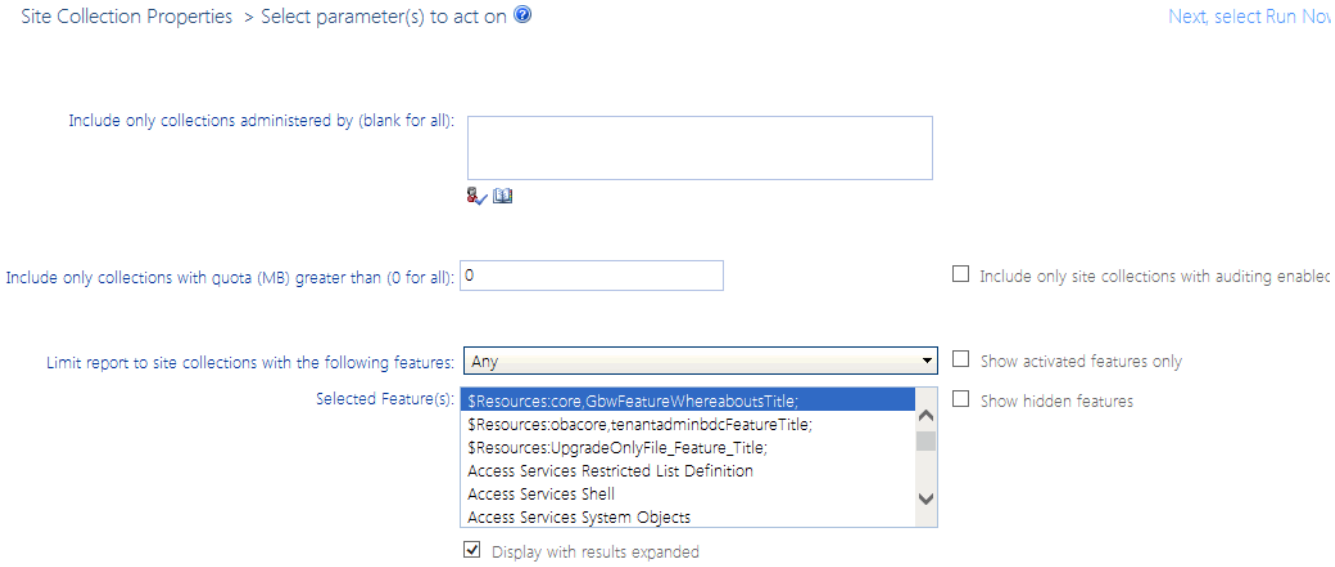
NOTE: Analysis results will include only site collections for which you are a Site Collection Administrator.

To generate a Site Collection Properties analysis:

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

2 Choose Configuration > Site Collection Properties.

3 Specify the following parameters for your analysis:



a) If you want results to **Include only collections administered by** one or more specific users, select the applicable user(s).

b) If you want to limit results to site collections whose quota exceeds a specific size (in MB), enter that value in the **Include Only Collections with quota >** field.

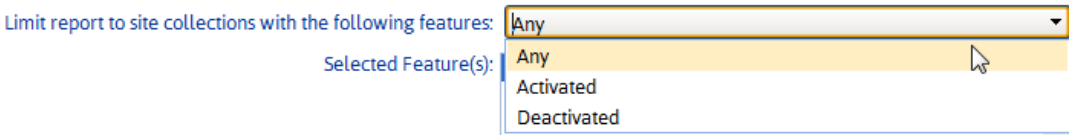
NOTE: If you accept the default value of 0, all site collections within the scope—including those for which a quota has *not* been set—will be included

c) If you want to **Show activated features only**, check this box.

NOTE: If you leave this box unchecked, all installed features will be listed beneath each site collection, and those that are currently activated will be flagged. If you *check* this box, all installed features will be listed once, at the top of the result set, and only activated features will be listed beneath each site collection.

d) If you want to limit results to site collections for which one or more features are activated/deactivated:

- Select the appropriate option from the **Limit Report to Site Collections with the following features:** drop-down.



- From the **Selected Feature(s):** list, select the feature(s) you want to include/exclude (you can select multiple features using the [**CTRL**] or [**SHIFT**] key in the conventional manner).

NOTE: If you select multiple features, results will include site collections for which any one or more of those features is activated/deactivated.

e) If you want to **Include only collections with auditing enabled**, check this box.

f) If you want to **Show hidden features**, check this box.

NOTE: Hidden features are those that are not visible in the SharePoint Site Features list. (Hidden features are activated from a command line, using custom code, or through the dependency of another feature.)

Now you can either:

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

OR

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

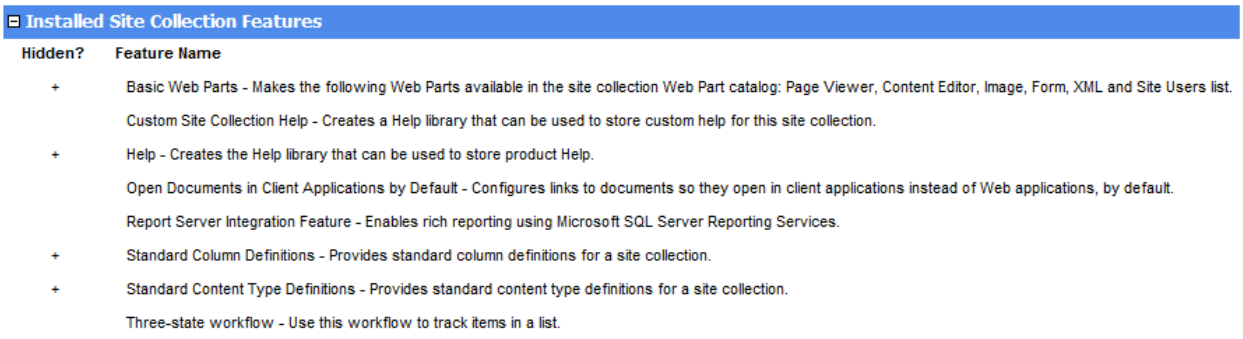
OR

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

Analysis results list each of the site collections within the scope of your analysis, along with the content database that the site collection uses.



REMINDER: If you chose to show activated features only, an expandable list of *all* **Installed Site Collection Features** displays at the top of the result set, with only activated features displaying beneath each site collection. (Otherwise, the full set of installed site collection features will display beneath each site collection).



When expanded, the following information displays for each site collection:

- **Site Collection Administrators**



- **Site Collection Quota** (including the current storage used, % of quota, and the threshold at which a warning email is sent)

⊟ Site Collection Quota

Site Collection Storage Maximum : 100 (MB)	Warning email sent when site collection storage reaches : 90 (MB)
Current storage used : 22.76 (MB)	% of Quota : 22.76%

- All of the available **Audit Settings** (settings that are currently enabled are flagged)

⊟ Audit Settings

Enabled?	Lists, Libraries and Sites - Events to audit	Enabled?	Documents and Items - Events to audit
+	Editing content types and columns	+	Opening or downloading documents, viewing items in lists, or viewing item properties
	Searching site content		Editing items
+	Editing users and permissions	+	Checking out or checking in items
	Deleting child objects		Moving or copying items to another location in the site
		+	Deleting or restoring items

- Site collection **Workflows**, including each workflow's current status, associations (that is, the number of lists, document libraries, and/or content types associated with the workflow), and the number of instances of the workflow that are in progress.

⊟ Workflows

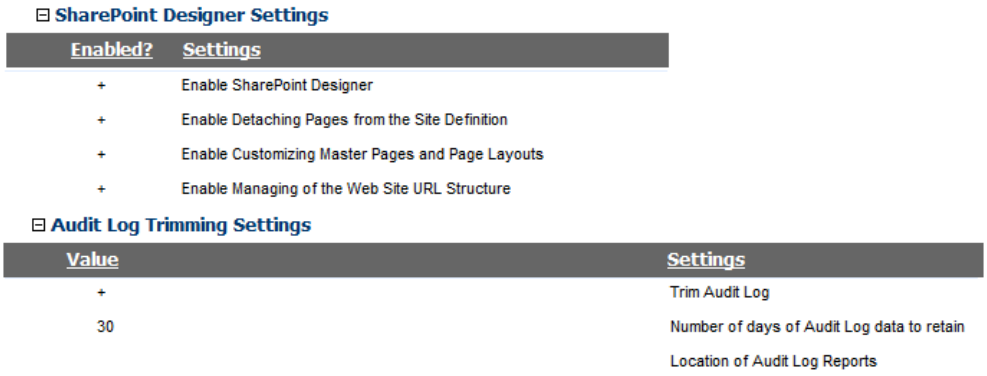
Workflow	Status	Associations	In Progress
Approval	Active	14	1
Collect Feedback	Active	14	4
Collect Signatures	Active	14	0
Disposition Approval	Active	0	0
Three-state	Active	0	0
Translation Management	Active	0	0

- Site collection **Features**. Hidden features (if included) and Activated features are flagged.

Site Collection Features

Hidden?	Activated?	Feature Name - Description
+	+	Basic Web Parts - Makes the following Web Parts available in the site collection Web Part catalog: Page Viewer, Content Editor, Image, Form, XML and Site Users list.
+	+	BizApps Site Templates - SharePoint Portal site templates and web parts
	+	Collect Signatures Workflow - Gathers signatures needed to complete a Microsoft Office document.
	+	Disposition Approval Workflow - Manages document expiration and retention by allowing participants to decide whether to retain or delete expired documents.
+	+	Excel Services Site Feature - Adds site-level Excel Services Features to the Windows SharePoint Services framework
+	+	InfoPath Forms Services support - InfoPath Forms Services lists and related pages to enable server side rendering of Forms.
+	+	Microsoft Office Server workflows - This feature provides support for Microsoft Office Server workflows.
	+	Office SharePoint Server Enterprise Site Collection features - Features such as the business data catalog, forms services, and Excel Services, included in the Office SharePoint Server Enterprise License
	+	Office SharePoint Server Standard Site Collection features - Features such as user profiles and search, included in the Office SharePoint Server Standard License
+	+	Portal Layouts Feature - Portal feature that uploads all the layouts to the master page gallery
	+	Reporting - Creates reports about information in Windows SharePoint Services.
	+	Routing Workflows - Workflows that send a document for feedback or approval.
+	+	SharePoint Portal Server Business Appications Content Type Definition - SharePoint Portal Server Business Appication content type definitions
+	+	SharePoint Portal Server Local Site Directory Capture Control - SharePoint Portal Server Local Site Directory Capture Control
+	+	Site Settings Link to Local Site Directory Settings page. - Site Settings Link to Local Site Directory Settings page.
+	+	SPS Biz Apps Field Definition - OOB field definitions for Biz Apps
+	+	Standard Column Definitions - Provides standard column definitions for a site collection.

- for SharePoint 2010 and 2013 Server farms, **SharePoint Designer Settings** and **Audit Log Trimming Settings**.



⊟ SharePoint Designer Settings

Enabled?	Settings
+	Enable SharePoint Designer
+	Enable Detaching Pages from the Site Definition
+	Enable Customizing Master Pages and Page Layouts
+	Enable Managing of the Web Site URL Structure

⊟ Audit Log Trimming Settings

Value	Settings
+	Trim Audit Log
30	Number of days of Audit Log data to retain
	Location of Audit Log Reports

Analyzing Site Properties

The **Site Properties** analysis provides information about one or more sites in your farm, including:

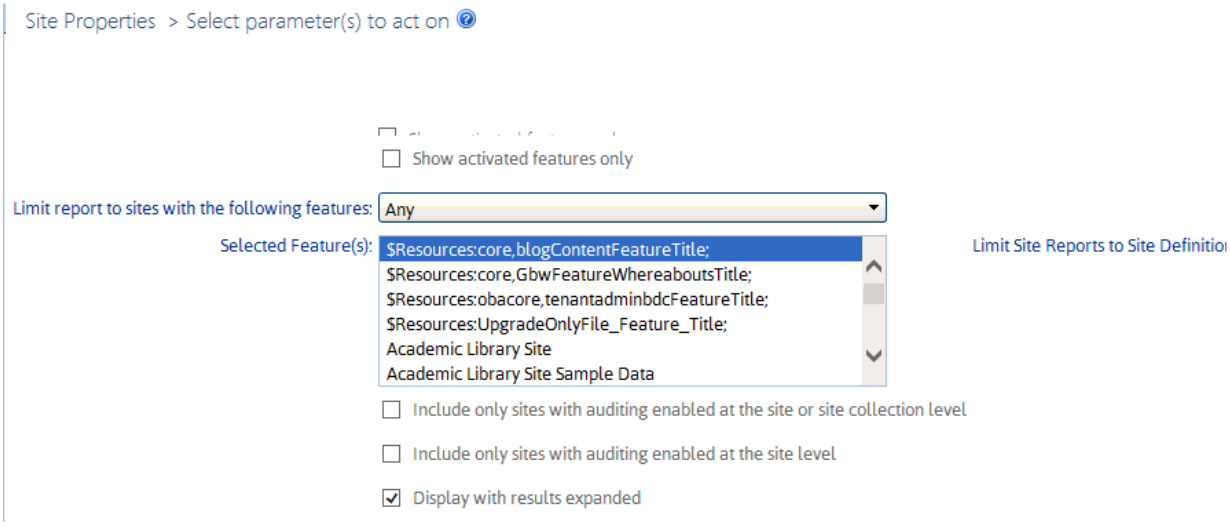
- the account that created the site as well as the date and time when the site was created and last updated
- the size of the site
- whether the site has unique permissions
- users with Full Control permissions for the site.
- audit settings that are/are not enabled for the site (with the option of including only sites for which auditing has been enabled at the site collection level)
- a list of site features (with the option of including activated features only and/or hidden features)

To generate a Site Properties analysis:

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

2 Choose Configuration > Site Properties.

3 Specify the following parameters for your analysis:

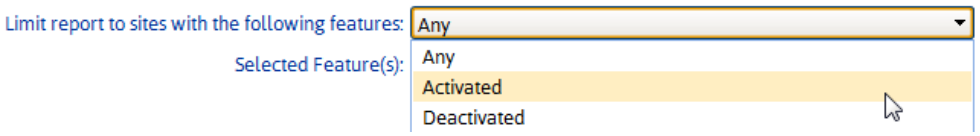


a) If you want to **Show activated features only**, check this box.

NOTE: If you leave this box unchecked, all installed features will be listed beneath each site, and those that are currently activated will be flagged. If you *check* this box, all installed features will be listed once, at the top of the result set, and only activated features will be listed beneath each site.

b) If you want to limit results to sites for which one or more features are activated/deactivated:

- Select the appropriate option from the **Limit Report to Sites with the following features:** drop-down.



- From the **Selected Feature(s):** list, select the feature(s) you want to include/exclude (you can select multiple features using the [**CTRL**] or [**SHIFT**] key in the conventional manner).

NOTE: If you select multiple features, results will include sites for which any one or more of those features has been activated/deactivated.

c) If you want to **Include hidden features**, check this box.

NOTE: Hidden features are those that are not visible in the SharePoint Site Features list. (Hidden features are activated from a command line, using custom code, or through the dependency of another feature.)

d) If you want to **Include only sites with auditing enabled at the site collection level**, check this box.

NOTE: If you check this box, results will include sites that inherit audit settings from the parent site collection. See also Managing Audit Settings.

e) If you want to **Include only sites with auditing enabled at the site level**, check this box.

NOTE: The only audit setting that can be enabled directly for a site is **Opening or downloading documents, viewing items in lists, or viewing item properties** via the ControlPoint action Manage Audit Settings.

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.

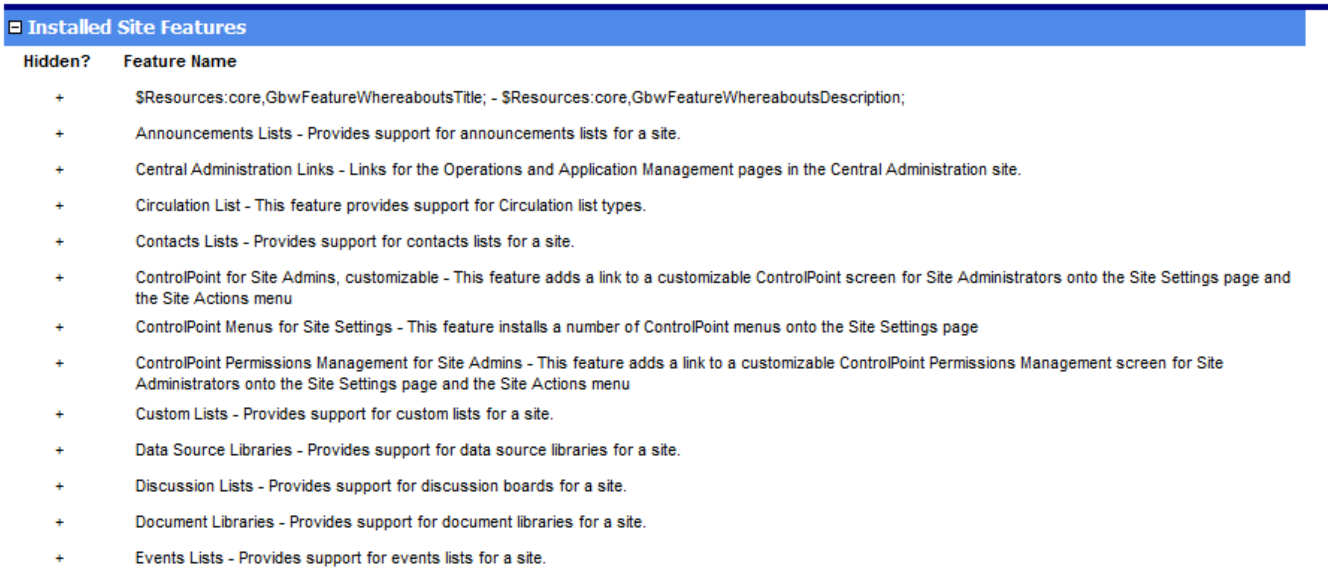
OR

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

Site Properties analysis results list each site within the scope of your analysis, along with the content database it uses (from which you can link directly to a Content Database Storage analysis.



REMINDER: If you chose to show activated features only, an expandable list of *all* **Installed Site Features** displays at the top of the result set, with only activated features displaying beneath each site. (Otherwise, the full set of installed site features will display beneath each site.)



When expanded, the following information displays for each site:

- the account that the site was **Created By**
- the site's **Size** (in **KB**)
- the date and time when the site was **Created** and **Last Updated**
- whether the site has **Unique Permissions**

- whether the site has been configured to **Allow RSS Feeds**
- the **Language** used by the site
- a list of users with **Full Control** permissions (that is, users considered to be site Owners).

Select ⊟ **Alpha Snack Foods (http://2010foundation/sites/alpha)** wss_content_clients

⊟ Created By	Size (KB)	Created	Last Updated	Unique Perm.	Allow RSS Feeds	Language
BELLUM\administrator	284670.99	11/1/2008 2:23:10 PM	2/27/2014 3:01:13 PM	True	True	English (United States)

Site Template: STS#0 (Team Site) **Description:** The best chips around - they go faster than any others

- All of the available **Audit Settings**, with settings that are currently enabled for the site identified with a plus sign (+). Audit settings that are inherited from the parent site collection are also flagged with >.

⊟ **Audit Settings** (Note: '>' indicates that the audit item is inherited from the parent site collection.)

Enabled?	Lists, Libraries and Sites - Events to audit	Enabled?	Documents and Items - Events to audit
	Editing content types and columns		Opening or downloading documents, viewing items in lists, or viewing item properties
	Searching site content		Editing items
	Editing users and permissions	>	Checking out or checking in items
	Deleting child objects		Moving or copying items to another location in the site
		>	Deleting or restoring items

- For SharePoint 2010 or 2013 farms running the Managed Metadata Service Application , any Custom Properties that have been applied to the site.

⊟ **Custom Properties**

CustomPropertyLocation:;Industry Col:;RelCol:;Jan:;

- Site collection **Features**. Hidden features (if included) and Activated features are flagged.

⊟ **Site Features**

Hidden?	Activated?	Feature Name	Feature Description
+	+	Announcements Lists	Provides support for announcements lists for a site.
+	+	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.
+	+	Document Libraries	Provides support for document libraries for a site.
+	+	Events Lists	Provides support for events lists for a site.
+	+	External Lists	Provides support for external lists for a site.
+	+	Gantt Chart Tasks Lists	Provides support for Gantt-chart tasks lists for a site.
+	+	Grid Lists	Provides support for editing custom lists in a grid for a site.
+	+	Issues Lists	Provides support for issues lists for a site.

Analyzing List Properties

The **List Properties** analysis provides information about one or more lists in your farm, including:

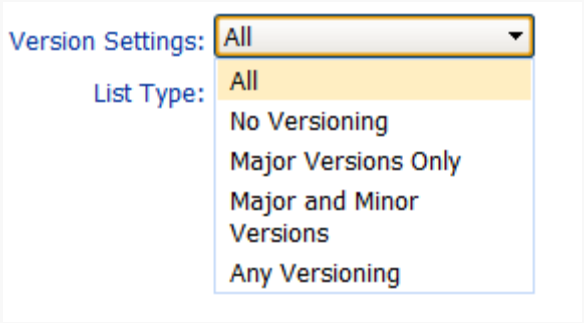
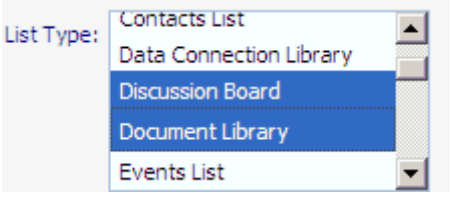
- the properties of the list, including versioning and advanced settings
- audit settings that are/are not enabled for the list.

To generate a List Properties analysis:

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

2 Choose Configuration > List Properties.

3 If you want results to include only lists that meet one or more specific criteria, specify one or more of the parameters described in the following table.

If you want results to include only lists...	Then ...
whose name contains a specific text string	enter the text string in the **List Name contains** field. 
that have a particular version setting	select from the **Versions Setting** drop-down. 
of one or more specific types	select from the **List Types** drop-down. 

Now you can either:

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

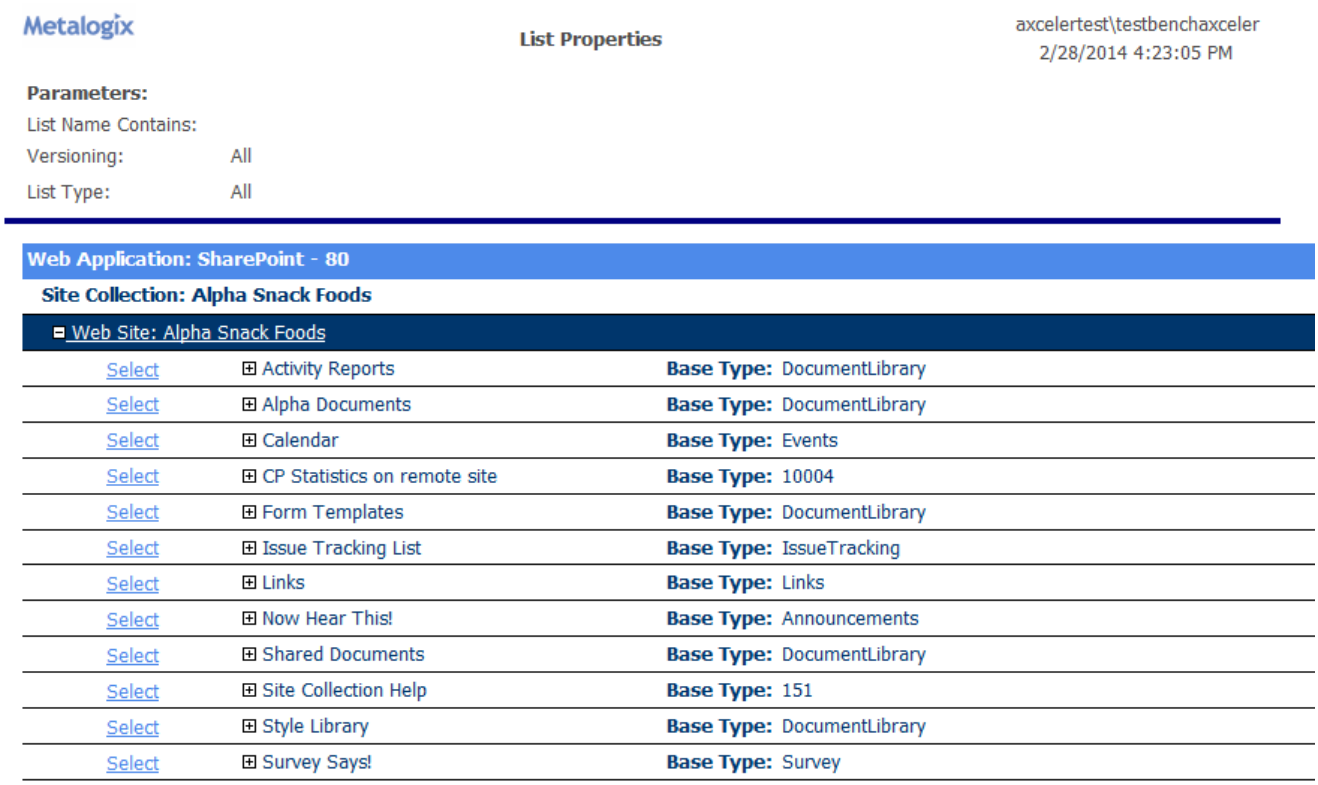
OR

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

OR

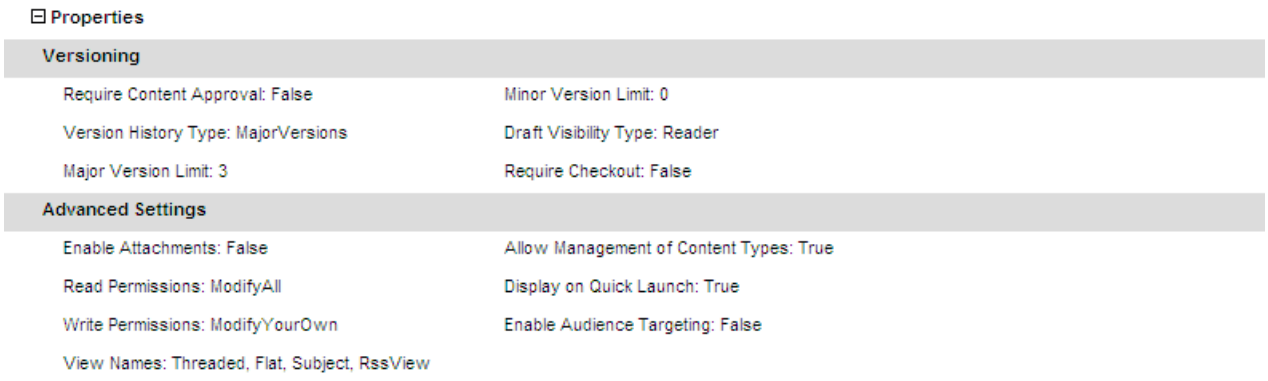
- save the operation as XML Instructions that can be executed at a later time.

The top level of the analysis lists each Web application, site collection, site, and list within the scope of your analysis, along with the list's **Base Type**.



When expanded, the following information is displayed for each list:

- list **Properties**, including versioning and advanced settings detail



- all of the available **Audit Settings**, with settings that are currently enabled for the list identified by a plus sign (+).

NOTE: Audit settings that are inherited from the site collection are flagged with >.

⊟ **Audit Settings** (Note: ' > ' indicates that the audit item is inherited from the parent site collection.)

Enabled?	Lists, Libraries and Sites - Events to audit	Enabled?	Documents and Items - Events to audit
	Editing content types and columns	+	Opening or downloading documents, viewing items in lists, or viewing item properties
	Searching site content		Editing items
	Editing users and permissions	>	Checking out or checking in items
	Deleting child objects		Moving or copying items to another location in the site
		>	Deleting or restoring items

- list **Columns** settings

⊟ **Columns**

Name	Column Type	Column Description	Content Types
Approval Status	Moderation Status	Moderation Status	N/A
Approver Comments	Multiple lines of text	Multiple lines of text	N/A
Attachments	Attachments	Attachments	N/A
Body	Multiple lines of text	Multiple lines of text	Discussion, Message
Body Was Expanded	Computed	Computed	Discussion, Message
Content Type	Single line of text	Single line of text	Discussion, Message
Content Type ID	Content Type Id	Content Type Id	N/A
Copy Source	Single line of text	Single line of text	N/A
Correct Body To Show	Computed	Computed	Discussion, Message
Created	Date and Time	Date and Time	N/A
Created By	Person or Group	Person or Group	N/A
Discussion Subject	Computed	Computed	Discussion, Message
Discussion Title	Lookup	Lookup (information already on this site)	Discussion, Message

Analyzing Storage

ControlPoint offers three levels of analysis that enable you to examine storage usage for a specific date or time period:

- **Most/Least Storage** analysis lets you examine site collections, sites, lists, and list items that are using the most and/or least amount of storage space
- **Site Collection Storage Analysis** shows storage usage for one or more site collections
- **Site Storage Analysis** shows storage usage for sites within one or more site collections.
- **Content Database Storage** shows current information about content databases used by site collections in your SharePoint farm
- **Site Lists and Libraries Storage** shows storage usage for each individual page and document within a site.

- **Storage by File Type** shows the amount of storage used by file extension.

You can also analyze trends in storage use over a specified time period. See Analyzing Trends.

In addition, the Duplicate Files Report lets you locate files across lists and libraries in your farm that have the same file name, extension, and relative size. You can use this information to help you free up storage space in content databases.

Analyzing Most/Least Storage

Use the ControlPoint Most/Least Storage analysis to examine SharePoint objects (site collections, sites, lists, and/or list items) within a selected scope ranked according to those using the most or least amount of storage.

You can further narrow your result set to include only objects that meet specific criteria and/or thresholds.

To generate a Most/Least Storage analysis:

1 Select the object(s) for which you want to analyze most/least storage.

2 Choose Storage > Most/Least Storage.

3 Specify the parameters for your analysis:

a) Select the object types you want to analyze:

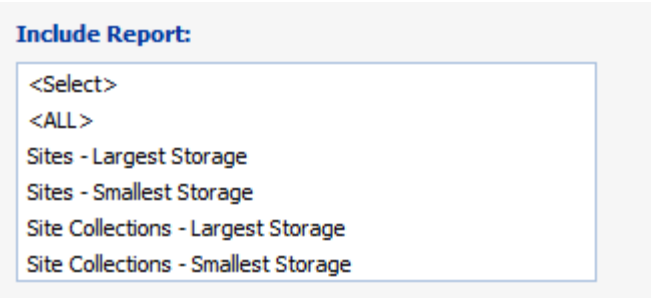
- **Site Collections and Sites**

OR

- **Lists and Files**

Note that remaining parameters are populated based on the object type selected.

b) From the **Include Report** list box, select the type(s) of storage that you want to include in your analysis.



NOTE: If you choose multiple storage types, each result set will be displayed in a separate subsection.

c) If you want to limit each result set to more or less that 10 objects, change the default value for **Limit Results to number of Objects** field.

NOTE: This field cannot be left blank.

d) If you want to limit each result set based on the amount of storage used, complete the **Limit results to the amount of Storage used (in MB)** field.

NOTE: If your analysis includes "most" storage, results will include objects *at or above* that limit; for "least" storage, results will include objects *at or below* that limit. If you leave the field blank, no storage size limit will be applied.

e) If you are reporting on **Lists and Files** and you want to limit each result set based on number of items within a list, complete the **Limit results to number of List Items per List** field.

NOTE: If your analysis includes "most" storage, results will include lists with the specified number of items *or more*; for "least" storage, results will include lists with the specified number of items *or fewer*. If you leave the field blank, no limit will be applied.

4 If you want to further refine your results, expand the **Advanced Options** tab.

a) If you want to limit your result set to objects that meet one or more specific criteria, use the information in the following table for guidance.

If you want to limit each results set...	Then ...
to objects with one or more specific site definitions (templates)	select from the **Limit Site Reports to Site Definitions** list.
to objects whose url contains a specified text string	enter that string in the **Limit results to objects whose URL** field. NOTE: If your analysis includes multiple types, this limit will apply to each individual result set.
For Documents, Pages, and Users:	
to lists of one or more specific list definitions	select from the **List Definitions** list.
to exclude lists that do not display in the site's View all Site Content page	check the **Omit Hidden Lists** box. NOTE: If you choose to include hidden lists in analysis results, they are flagged in analysis results with a plus sign (+).

Now you can either:

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

OR

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

OR

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

The body of the analysis includes a subsection for each usage type, as shown in the following examples:

Largest and Smallest Storage Used (Sites)

Top 5 Sites with Largest Storage

Parameters:

URL Contains:

Limit Site Reports to Site Definitions: All

Threshold: N/A

Select	Rank	Name	URL	Created By	Size (MB)	Page Views	Last Accessed	Last Updated
Select	1	Alpha Snack Foods	(http://2010foundation/sites/alpha)	BELLUM\administrator	278.45	233	3/4/2014	3/5/2014
Select	2	CIA	(http://2010foundation/sites/CIA)	BELLUM\administrator	13.62	0	1/1/0001	2/11/2014
Select	3	Client List	(http://2010foundation)	BELLUM\administrator	13.26	0	1/1/0001	2/11/2014
Select	4	bravo	(http://2010foundation/sites/beta/bravo)	SHAREPOINT\system	9.34	0	1/1/0001	10/29/2012
Select	5	Delta Transportation	(http://2010foundation/sites/delta)	BELLUM\administrator	6.09	91	3/3/2014	3/3/2014

Top 5 Sites with Smallest Storage

Parameters:

URL Contains:

Limit Site Reports to Site Definitions: All

Threshold: N/A

Select	Rank	Name	URL	Created By	Size (MB)	Page Views	Last Updated
Select	1	bravolevelthree	(http://2010foundation/sites/beta/bravo/reg/leveltwo/bravolevelthree)	SHAREPOINT\system	0.12	0	2/21/2012
Select	2	bravoleveltwo	(http://2010foundation/sites/beta/bravo/reg/leveltwo)	SHAREPOINT\system	0.12	0	2/21/2012
Select	3	charlie	(http://2010foundation/sites/beta/charlie)	SHAREPOINT\system	0.22	0	2/21/2012
Select	4	delta	(http://2010foundation/sites/beta/delta)	SHAREPOINT\system	0.22	1	3/3/2014
Select	5	echo	(http://2010foundation/sites/beta/echo)	SHAREPOINT\system	0.22	0	2/21/2012

Largest Number of Items (Lists)

Top 5 Lists with Largest Number of Items

Parameters:

URL Contains:

Limit Site Reports to Site Definitions: All

Limit List Reports to List Templates: All

Omit Hidden Lists: True

Threshold: N/A

Select	Rank	Name	Parent Site	Hidden?	Size (MB)	Items	Last Updated
Select	1	Alpha Documents	(http://2010foundation/sites/alpha)		145.01	220	3/4/2014
Select	2	Shared Documents	(http://2010foundation/sites/alpha)		119.35	150	3/4/2014
Select	3	xcMostLeastReport_Storage_Dates	(http://2010foundation/sites/alpha)		0.05	48	2/13/2014
Select	4	Shared Documents	(http://2010foundation/sites/alpha/baking)		3.60	26	7/14/2011
Select	5	Shared Documents	(http://2010foundation/sites/CIA)		11.91	26	1/10/2013

Analyzing Site Collection Storage

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

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

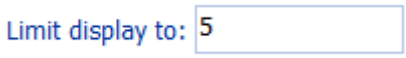
To generate a Site Collection Storage Analysis:

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

2 Choose Storage > Site Collection Storage Analysis.

3 Specify the parameters for your analysis.

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



Now you can either:

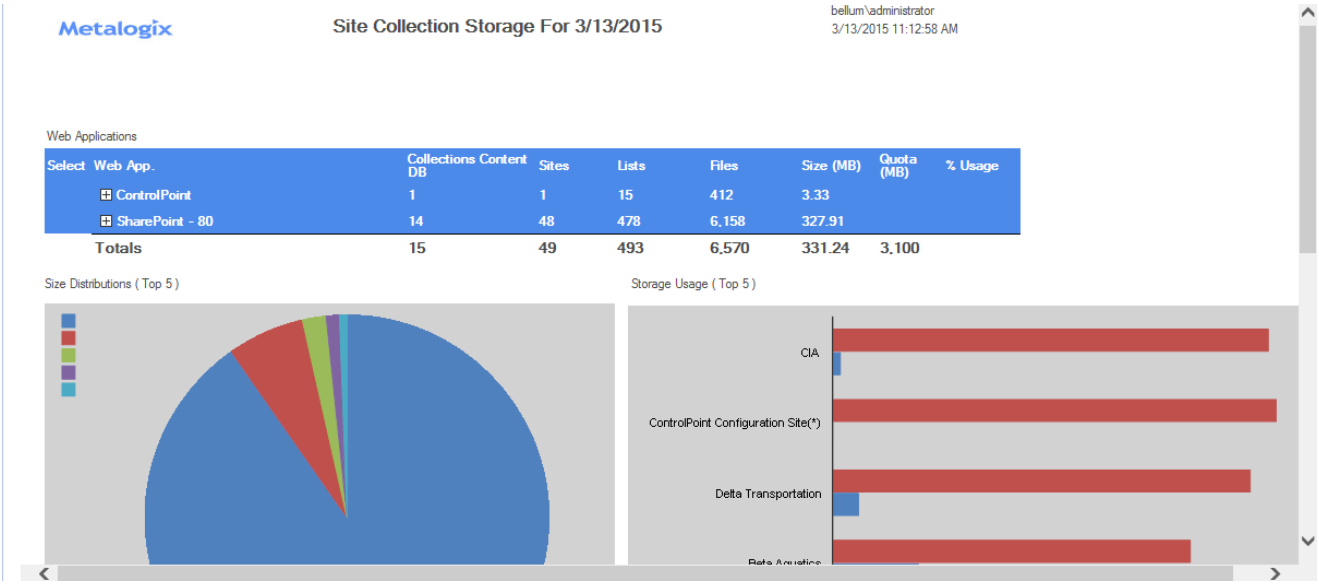
- run the operation immediately (by clicking the [**Run Now**] button)

OR

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

OR

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



The Site Collection Storage analysis consists of the following sections:

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

Web Applications Section

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

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

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

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

- the **Content DB** used by the site collection
- **Quota** in megabytes **(MB)**
- **%Usage** relative to the quota..

Web Applications

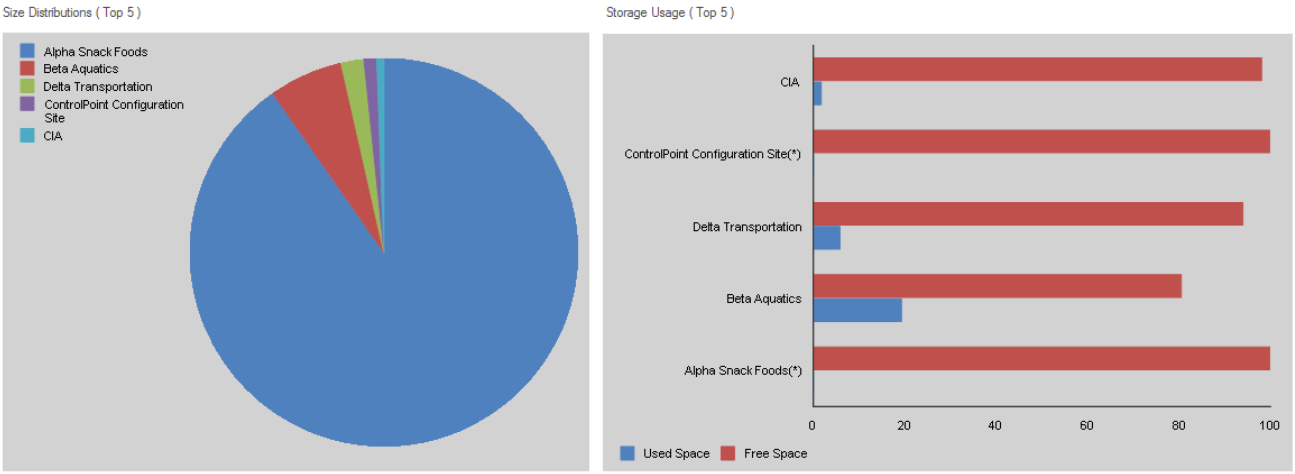
Select	Web App.	Collections Content DB	Sites	Lists	Files	Size (MB)	Quota (MB)	% Usage
	ControlPoint	1	1	15	400	4.53		
Select	ControlPoint Configuration Site (http://2010foundation:1818)	WSS_CONTENT_AXCELER	1	15	400	4.53	0	N/A
	SharePoint - 80	14	48	478	6,158	327.91		
Select	Alpha Snack Foods (http://2010foundation/sites/alpha)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

Size Distributions and Storage Usage Sections

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

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

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



Top Site Collections by Size

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

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

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

Analyzing Site Storage

The Site Storage Analysis provides storage statistics for one or more selected sites, including the distribution of storage usage among sites within the scope of your analysis.

To generate a real-time Site Storage analysis:

1 Select the object(s) for which you want to analyze site storage.

2 Choose Storage > Site Storage Analysis.

Now you can either:

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

OR

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

OR

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

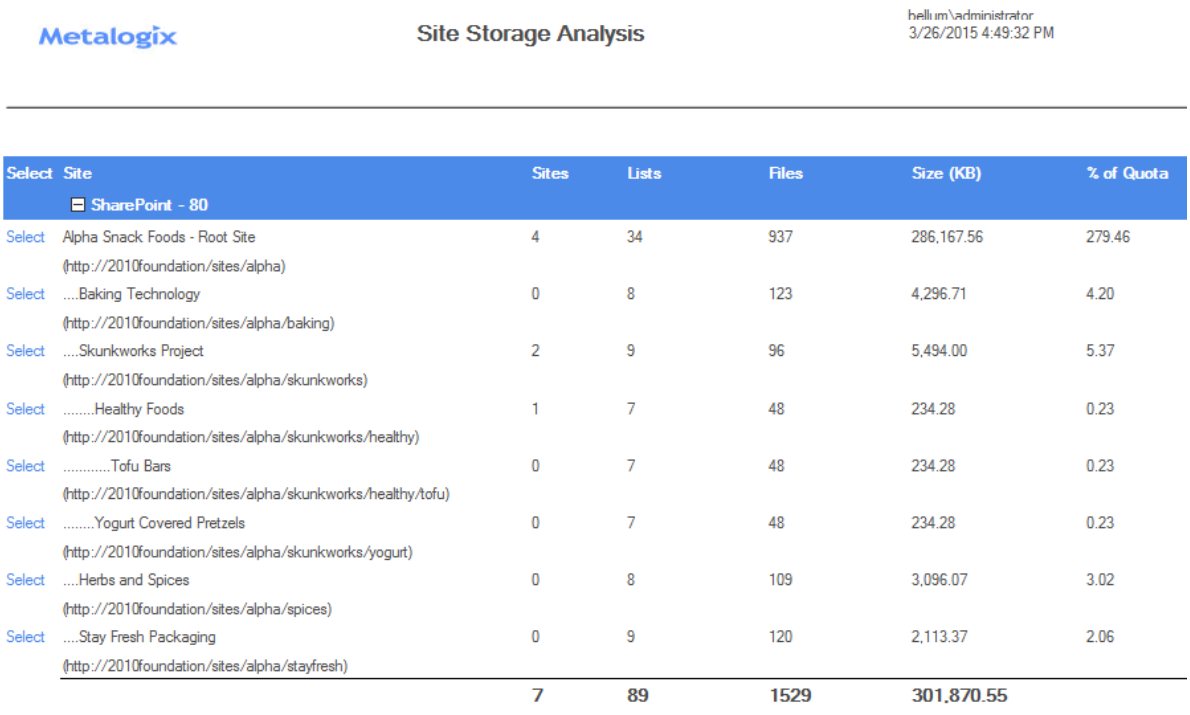
The Site Storage analysis consists of following sections:

- Sites
- Size Distributions

Site Section

The site section lists the sites within the site collection, along with statistics for

- the number of **Sites**, **Lists** and **Files**
- **Size** in **KB**
- **% of Quota** set for the site collection that is being used by the site

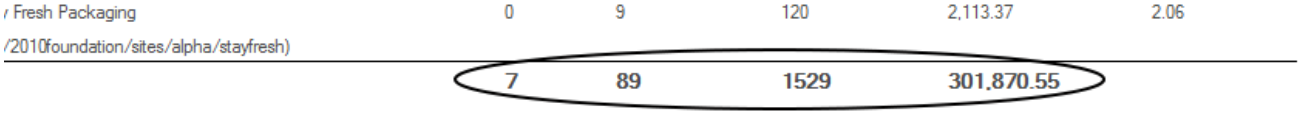


Metalogix Site Storage Analysis

hellum\administrator
3/26/2015 4:49:32 PM

Select	Site	Sites	Lists	Files	Size (KB)	% of Quota
	SharePoint - 80					
Select	Alpha Snack Foods - Root Site (http://2010foundation/sites/alpha)	4	34	937	286,167.56	279.46
Select	....Baking Technology (http://2010foundation/sites/alpha/baking)	0	8	123	4,296.71	4.20
Select	....Skunkworks Project (http://2010foundation/sites/alpha/skunkworks)	2	9	96	5,494.00	5.37
Select	.....Healthy Foods (http://2010foundation/sites/alpha/skunkworks/healthy)	1	7	48	234.28	0.23
Select	.....Tofu Bars (http://2010foundation/sites/alpha/skunkworks/healthy/tofu)	0	7	48	234.28	0.23
Select	.....Yogurt Covered Pretzels (http://2010foundation/sites/alpha/skunkworks/yogurt)	0	7	48	234.28	0.23
Select	....Herbs and Spices (http://2010foundation/sites/alpha/spices)	0	8	109	3,096.07	3.02
Select	....Stay Fresh Packaging (http://2010foundation/sites/alpha/stayfresh)	0	9	120	2,113.37	2.06
		7	**89**	**1529**	**301,870.55**	

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



/ Fresh Packaging	0	9	120	2,113.37	2.06
/2010foundation/sites/alpha/stayfresh)					
	7	**89**	**1529**	**301,870.55**	

Analyzing Storage Used by a Site's Lists, Libraries, and Files

The Site Lists and Libraries Storage analysis lets you view the storage usage of each list, library, and file on a selected site, including all hidden lists (such as Master Page Gallery, Reporting Metadata, and User Information).

You can also open a list, library, or file directly from analysis results.

To generate a Site Lists and Libraries Storage analysis:

1 Select the site for which you want to analyze storage used by lists, libraries, and files.

NOTE: This analysis can only be performed on a single site. If you multi-select, only the site on which you right-clicked will apply.

2 Choose Storage > Site Lists and Libraries Storage.

3 If different than the default (1000), enter **Number of files by size** (that is, files that use the most storage) to display.

The Site Lists and Libraries Storage Analysis consists of the following sections:

- Lists and Libraries
- Files

Lists and Libraries section

The Lists and Libraries section lists all of the lists and libraries within the selected site, along with

- a SharePoint icon identifying the list or library type
- the **Title** of the list or library
- the list or library **Type**
- the number of **Items** in the list or library
- the **URL** (path) to the list or library
- the date and time when the list or library was **Last Updated**

- the **Size** of the list or library in kilobytes (**KB**)



Metalogix Site Lists and Libraries Storage

bellum\administrator
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Alpha Snack Foods - http://2010foundation/sites/alpha

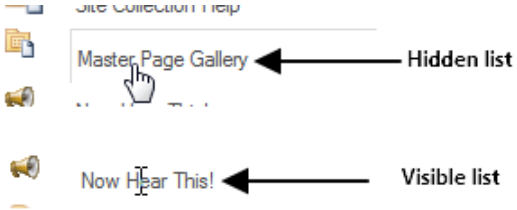
Content Database: wss_content_clients

Lists and Libraries

Title	Type	Items	URL	Versioning	Last Upd.	Size (KB)
Alpha Documents	Document Library	221	http://2010foundation/sites/alpha/Project Documents/Forms/AllItems.aspx	No	3/7/2014 5:02:39 PM	153733.96
Shared Documents	Document Library	151	http://2010foundation/sites/alpha/Shared Documents/Forms/AllItems.aspx	No	4/1/2014 12:02:05 PM	123132.22
Site Collection Help	151	5	http://2010foundation/sites/alpha/Lists/Site Collection Help/Forms/AllItems.aspx	Yes	3/4/2014 11:02:51 AM	3208.57
Master Page Gallery	Master Pages Gallery	19	http://2010foundation/sites/alpha/_catalogs/masterpage/Forms/AllItems.aspx	Yes	6/27/2013 6:19:06 PM	1171.72
Now Hear This!	Announcements List	3	http://2010foundation/sites/alpha/Lists/Announcements/AllItems.aspx	Yes	3/4/2014 11:26:28 AM	956.25
Theme Gallery	123	20	http://2010foundation/sites/alpha/_catalogs/theme/Forms/AllItems.aspx	No	7/26/2010 8:02:35 AM	867.15
Tasks	Tasks List	6	http://2010foundation/sites/alpha/Lists/Tasks/AllItems.aspx	No	3/5/2014 12:01:47 PM	752.21
Solution Gallery	121	2	http://2010foundation/sites/alpha/_catalogs/solutions/Forms/AllItems.aspx	No	9/18/2014 3:45:57 PM	630.33
Web Part Gallery	Web Part Gallery	57	http://2010foundation/sites/alpha/_catalogs/wp/Forms/AllItems.aspx	No	7/14/2011 3:06:09 AM	152.12
Reporting Templates	Document Library	3	http://2010foundation/sites/alpha/Reporting Templates/Forms/AllItems.aspx	No	9/6/2011 5:52:34 PM	110.72
Activity Reports	Document Library	1	http://2010foundation/sites/alpha/Activity Reports/Forms/AllItems.aspx	No	5/19/2011 11:38:20 AM	107.45
Form Templates	Document Library	0	http://2010foundation/sites/alpha/FormServerTemplates/Forms/AllForms.aspx	No	7/14/2011 3:06:08 AM	103.38
Reporting Metadata	Generic List	22	http://2010foundation/sites/alpha/Lists/Reporting	No	3/16/2015 1:08:27 AM	94.68

The **Total** number of lists and libraries in the site, as well as the total size of all lists and libraries (excluding Recycling Bin contents) displays at the end of the section.

Note that, as long as a list is visible in SharePoint, you can link to a List Properties analysis for that list by clicking the **Title** hyperlink. If a list is *hidden,* however the hyperlink will not be available.

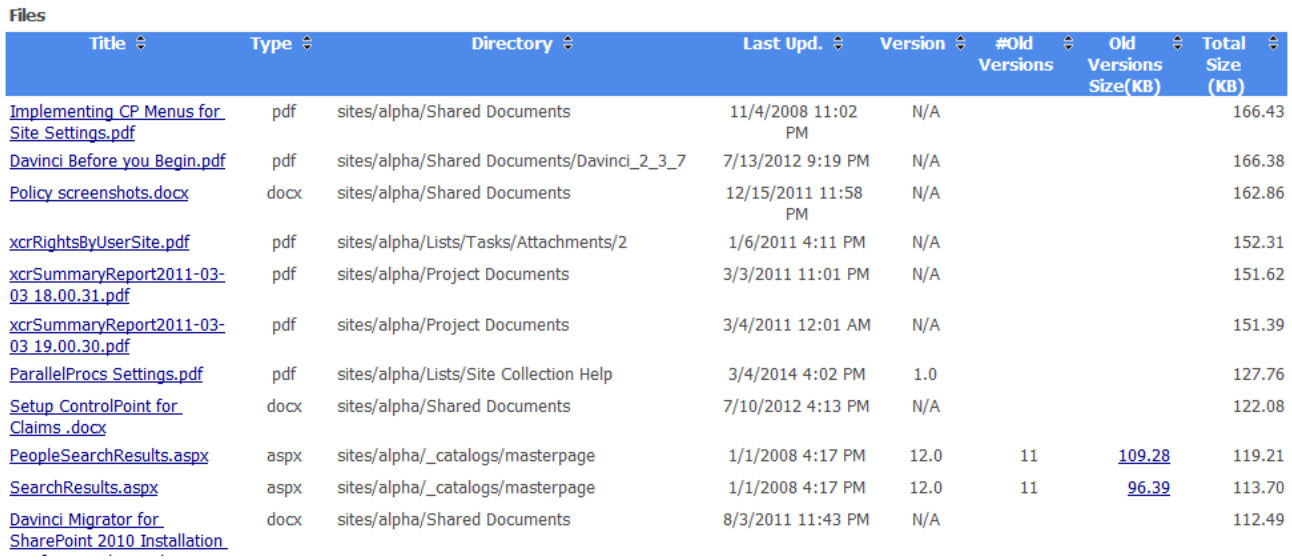


Files section

The Files section lists up to the number of top files that you specified (which may include posted content, templates, aspx files and web parts if applicable), along with the following information:

- a **Title** hyperlink that links directly to the file
- the file **Type**
- the **Directory** in which the file is contained
- the current **Version** number
- if more than one version exists, the **#Old Versions** and the total Old **Version Size (KB)**
- the date and time when the file was **Last Updated**

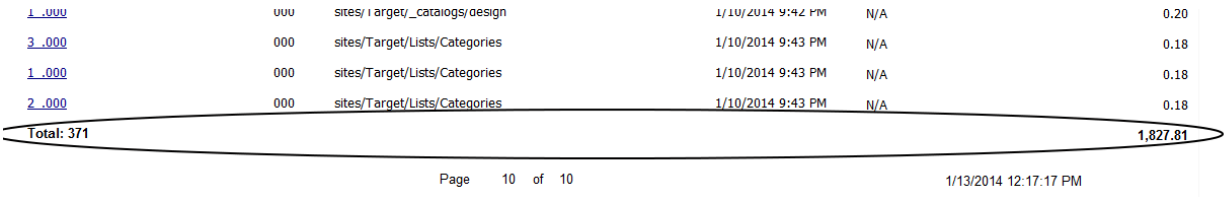
- the **Total Size** of all versions of the file, in kilobytes (**KB**).



Files

Title	Type	Directory	Last Upd.	Version	#Old Versions	Old Versions Size(KB)	Total Size (KB)
Implementing CP Menus for Site Settings.pdf	pdf	sites/alpha/Shared Documents	11/4/2008 11:02 PM	N/A			166.43
Davinci Before you Begin.pdf	pdf	sites/alpha/Shared Documents/Davinci_2_3_7	7/13/2012 9:19 PM	N/A			166.38
Policy screenshots.docx	docx	sites/alpha/Shared Documents	12/15/2011 11:58 PM	N/A			162.86
xcrRightsByUserSite.pdf	pdf	sites/alpha/Lists/Tasks/Attachments/2	1/6/2011 4:11 PM	N/A			152.31
xcrSummaryReport2011-03-03 18.00.31.pdf	pdf	sites/alpha/Project Documents	3/3/2011 11:01 PM	N/A			151.62
xcrSummaryReport2011-03-03 19.00.30.pdf	pdf	sites/alpha/Project Documents	3/4/2011 12:01 AM	N/A			151.39
ParallelProcs Settings.pdf	pdf	sites/alpha/Lists/Site Collection Help	3/4/2014 4:02 PM	1.0			127.76
Setup ControlPoint for Claims .docx	docx	sites/alpha/Shared Documents	7/10/2012 4:13 PM	N/A			122.08
PeopleSearchResults.aspx	aspx	sites/alpha/_catalogs/masterpage	1/1/2008 4:17 PM	12.0	11	109.28	119.21
SearchResults.aspx	aspx	sites/alpha/_catalogs/masterpage	1/1/2008 4:17 PM	12.0	11	96.39	113.70
Davinci Migrator for SharePoint 2010 Installation	docx	sites/alpha/Shared Documents	8/3/2011 11:43 PM	N/A			112.49

The **Total** number of files (up to the limit specified in the **Number of files by size** parameter), as well as the total size of all files, displays at the end of the section.



1 .000	000	sites/Target/_catalogs/design	1/10/2014 9:42 PM	N/A	0.20
3 .000	000	sites/Target/Lists/Categories	1/10/2014 9:43 PM	N/A	0.18
1 .000	000	sites/Target/Lists/Categories	1/10/2014 9:43 PM	N/A	0.18
2 .000	000	sites/Target/Lists/Categories	1/10/2014 9:43 PM	N/A	0.18
Total: 371					1,827.81

Page 10 of 10 1/13/2014 12:17:17 PM

Analyzing Storage Used by Content Databases

The **Content Databases Storage** analysis provides current information about content databases used in your SharePoint farm, including:

- the Web application with which the database is associated
- the database's size, status, and the maximum number of sites allowed
- storage used by the database, the log file, and the audit log
- each of the site collections, sites, lists, and files that use the database.

To generate a Content Databases storage analysis:

1 Select the object(s) for which you want to analyze content database storage.

2 Choose Storage > Content Database Storage.

3 Specify the parameters for your analysis.

Now you can either:

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

OR

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

OR

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

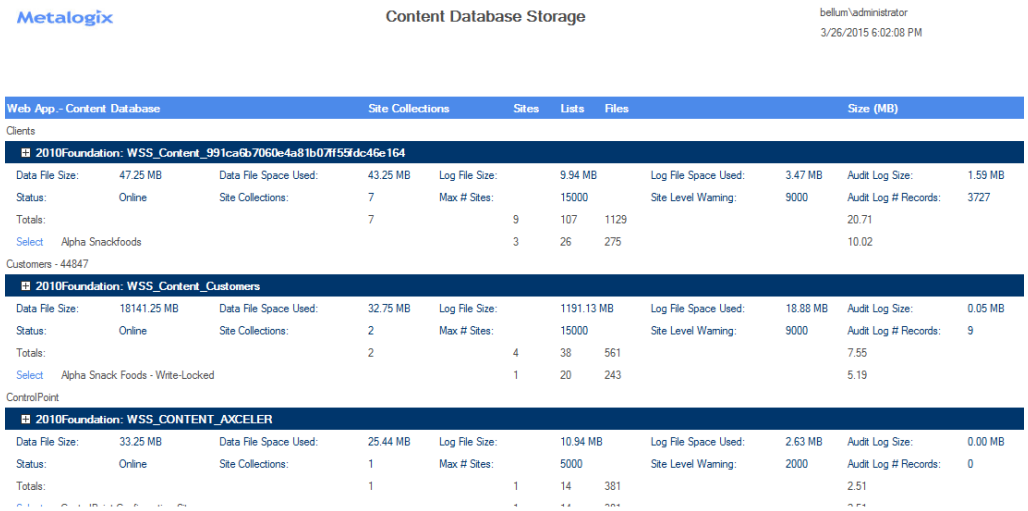
Content Database Storage Analysis Results

The top level of the analysis lists the Web application(s) within the selected scope, the associated content database(s) along with the following information:

- **Data File Size**
- **Data File Space Used**
- the database's **Log File Size**
- the **Log File Space Used**
- the **Audit Log Size** (in MB)
- the database's **Status**, which may be:
  - Online
  - Disabled
  - Offline
  - Unprovisioning
  - Provisioning
  - Upgrading

  (Consult your SharePoint documentation for status definitions)
- the **Current # of Sites** using the database
- the number of sites that can use the database before a **Site Level Warning** is generated
- the **Max # of Sites** that can use t++
- he database

NOTE: All sizes are in megabytes (MB). The Data File Size includes content, metadata and other storage overhead.



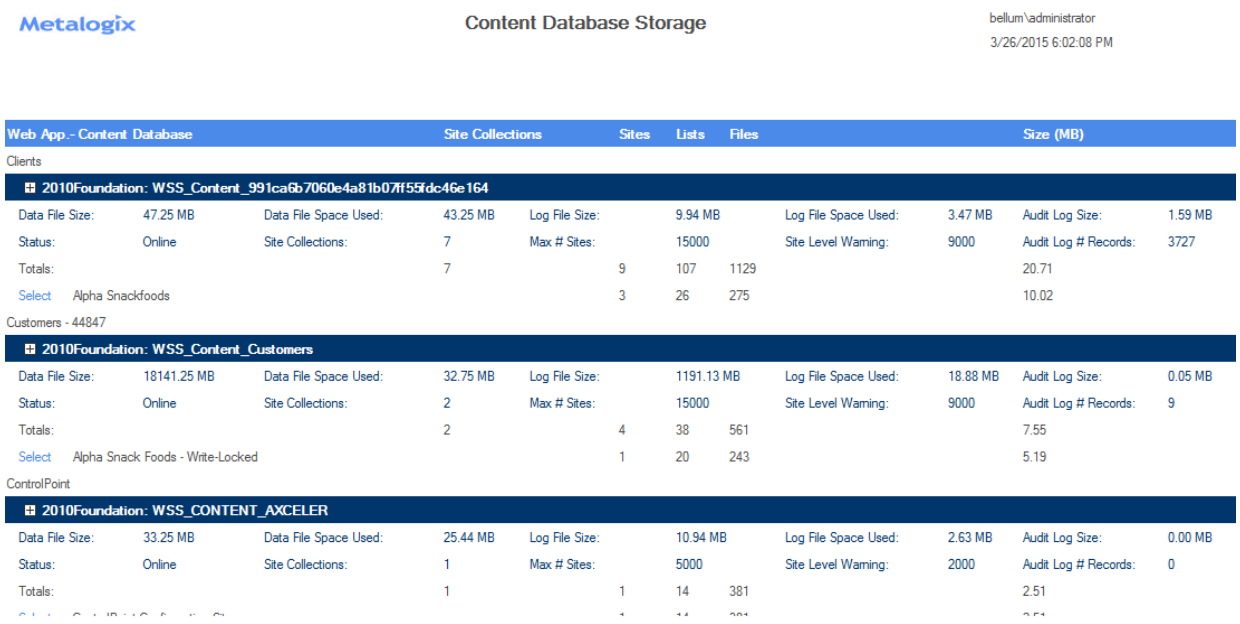
When expanded, the following information displays for each content database:

- each of the site collections within the scope of your analysis that uses the database, along with:
  - the number of **Sites**, **Lists**, and **Files** within the site collection

    NOTE: The number of Lists includes all hidden lists (such as Master Page Gallery and User Information).

  - the total **Size** of the site collection in MB (and only if a quota has been set, hyperlinked to the SharePoint site Usage Summary page)

    NOTE: The Site Collection Size includes content only (no metadata or overhead).



Analyzing Storage by File Type

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

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

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

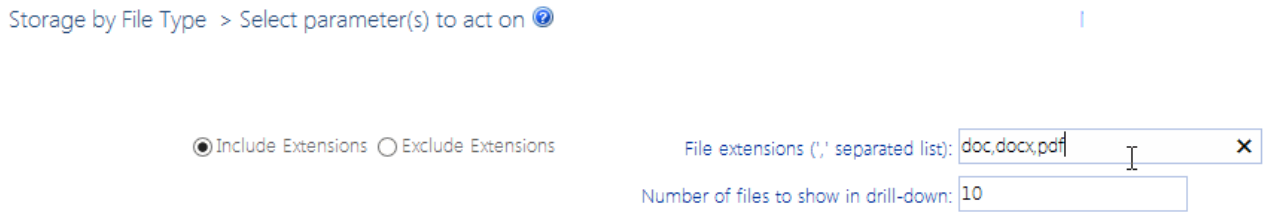
To generate a Storage by File Type analysis:

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

2 Choose Storage > Storage by File Type.

3 Specify the following parameters for your analysis:
If you want include or exclude specific file types:

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



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

For **Number of files to show in drill-down**, enter the number of files that use the most amount of storage upon drilling down to an analysis for a selected file type.

Now you can either:

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

OR

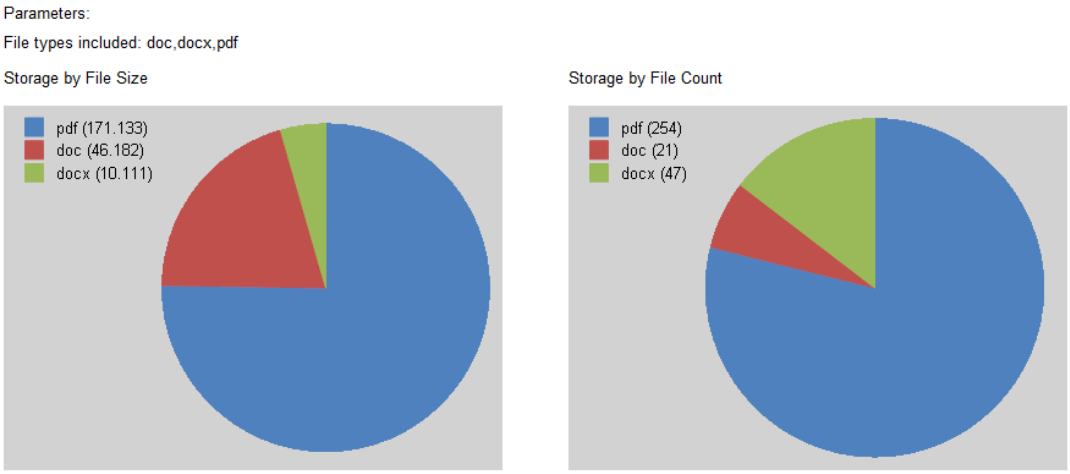
- schedule the operation to run at a later time or on a recurring basis.

OR

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

Analysis results include:

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



- a listing that includes the **Extension(s)**, **Total Files** and **Total Size (MB)** for each file type.
  Click an Extension(s) hyperlink to generate a Most/Least Storage analysis that shows the files with that extension that use the most storage (the number of which was specified in the **Number of Files to Show in Drill-down**).

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

Analyzing Content of Recycle Bins

The Recycle Bin Report lets you examine the contents of Recycle Bins for one or more site collections in your SharePoint farm.

To generate a Recycle Bin Report:

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

2 Choose Storage > Recycle Bins.

3 Specify whether or not you want to **Display with results expanded**.

Now you can either:

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

OR

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

OR

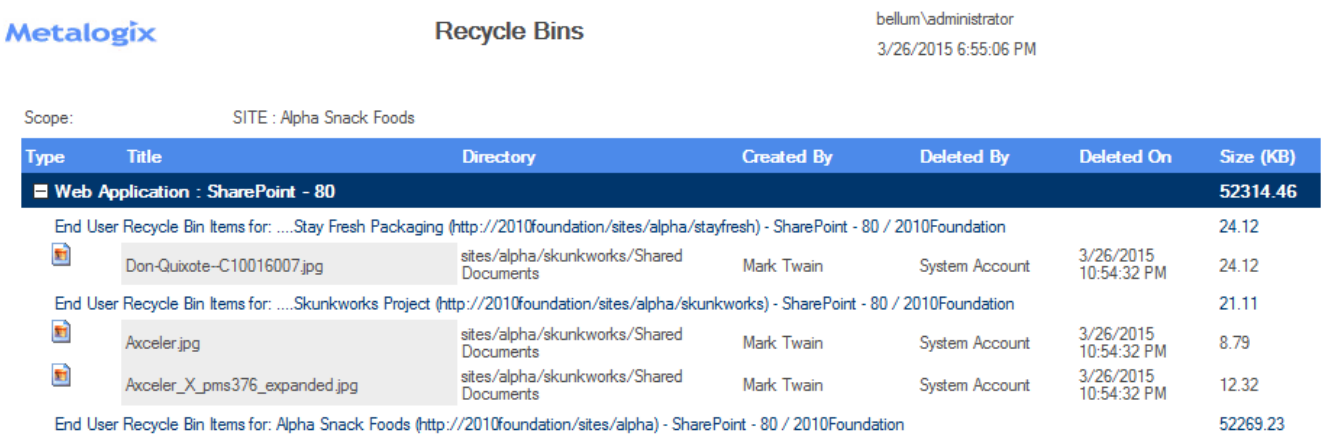
- save the operation as XML Instructions that can be executed at a later time.

The top level of analysis results lists:

- the Web application(s) within the scope of your analysis that contain Recycle Bin items
- the site collection containing the recycle bin items
- the total size of the items in all recycle bins.

When expanded, the following additional information displays:

- the Recycle Bin for each site collection within the scope of your analysis, along with the size (in KB) of all of the items contained within it
- for each item in a Recycle Bin:
  - an icon that represents the file **Type**
  - the **Title** of the item
  - the **Directory** from which the item was deleted
  - the user account that the item was **Created by**
  - the user account that the item was **Deleted By**
  - the date the item was **Deleted On**
  - the **Size** of the item in kilobytes (**KB**):


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Recycle Bins

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Scope: SITE : Alpha Snack Foods

Type	Title	Directory	Created By	Deleted By	Deleted On	Size (KB)
Web Application : SharePoint - 80						52314.46
End User Recycle Bin Items for: ....Stay Fresh Packaging (http://2010foundation/sites/alpha/stayfresh) - SharePoint - 80 / 2010Foundation						24.12
	Don-Quixote--C10016007.jpg	sites/alpha/skunkworks/Shared Documents	Mark Twain	System Account	3/26/2015 10:54:32 PM	24.12
End User Recycle Bin Items for: ....Skunkworks Project (http://2010foundation/sites/alpha/skunkworks) - SharePoint - 80 / 2010Foundation						21.11
	Axceler.jpg	sites/alpha/skunkworks/Shared Documents	Mark Twain	System Account	3/26/2015 10:54:32 PM	8.79
	Axceler_X_pms376_expanded.jpg	sites/alpha/skunkworks/Shared Documents	Mark Twain	System Account	3/26/2015 10:54:32 PM	12.32
End User Recycle Bin Items for: Alpha Snack Foods (http://2010foundation/sites/alpha) - SharePoint - 80 / 2010Foundation						52269.23

Finding Duplicate Files

The **Duplicate Files Report** lets you to locate files across lists and libraries in your farm that have the same file name, extension, and relative size. You may want to use the information in this report to help you free up storage space in content databases.

Note About "Common" File Names and Extensions

Lists of "common file names" and "common file extensions" are maintained in XML files located on the Web front-end server where ControlPoint is installed, in the following **SharePoint hive** subdirectory: **\TEMPLATE\LAYOUTS\Axceler\App_Data.**

The purpose of these lists is to give you the option of either including or excluding frequently used files from analysis results. You can customize the XML files to include file names and extensions specific to your environment. For example, you may want to filter out company-specific files that are in multiple document libraries by design. You can also remove any of the names and extensions provided by Metalogix.

Files containing common file names and extensions are described in the following table.

File	Description
DuplicateFiles_CommonFileNames_2007.xml	Names in this file will populate the **Exclude File Names** parameter for a **SharePoint 2007** farm. By default, this list includes file names associated with SharePoint 2007 built-in templates. When you specify the parameters for your analysis, you can exclude some or all of the file names in this list.
DuplicateFiles_CommonFileNames_2010.xml	Names in this file will populate the **Exclude File Names** parameter for a **SharePoint 2010 or 2013** farm. By default, this file includes file names associated with SharePoint 2010 built-in templates. When you specify the parameters for your analysis, you can exclude some or all of the file names in this list.
DuplicateFiles_CommonFileNames_Wildcards.xml	Names in this file will be added to the **Include File Extensions** only parameter. By default, this file includes the entry ***.000**, which gives you the option of excluding SharePoint temporary files from results. You can specify additional wildcards that you can exclude from analysis results. Enter wildcards in one of the following formats: • **name* • *name** • **name*'* Examples: • **.aspx* • *template.** • **master**
DuplicateFiles_Extensions.xml	By default, this file includes both file extensions associated with SharePoint templates and many common file

File	Description
	formats, allowing you to filter results to include files with specific extensions. NOTE: This file is shared with the Storage by File type

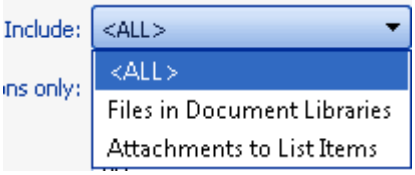
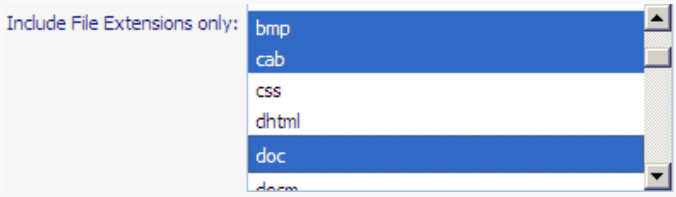
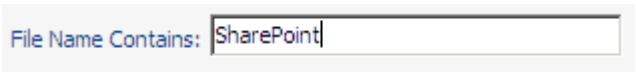
Changes that you make to these files must be copied to any additional Web front-end servers in your farm. Also, whenever you install a ControlPoint update or patch, these files are overwritten with files containing the default lists. Therefore, if you choose to make modifications, it is recommended that you keep a backup of the file in a different location so that you can replace the default version after an update or patch.

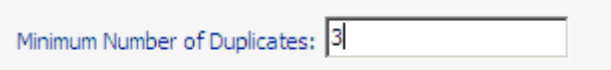
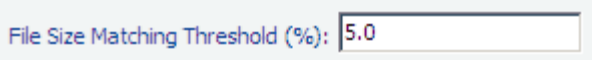
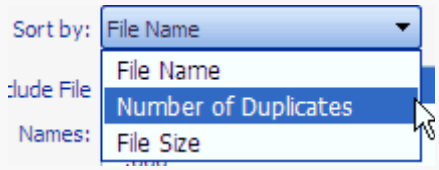
To generate a Duplicate Files Report:

1 Select the object(s) for which you want to find duplicate files.

2 Choose Storage > Duplicate Files.

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

If you want to ...	Then ...
include only files that are *either* **Files in Document Libraries** *or* **Attachments to List Items**	select the appropriate option from the **Include** drop-down 
include only files with specific file extensions	select from the **Include File Extensions only** list box. (You can select multiple items using the [**Shift**] and [**Ctrl**] keys in the conventional manner.)  REMINDER: This list is populated by DuplicateFiles_Extensions.xml, located in the SharePoint hive subdirectory: \TEMPLATE\LAYOUTS\ Axceler\App_Data.
include only files whose name include a particular text string	enter the text string in the **File Name Contains** field. 

If you want to ...	Then ...
include only duplicate files of which there are more than two (2) instance	change the default value for **Minimum Number of Duplicates**. For example, if you enter 3, results will include only files for which three or more instances exist. 
consider files whose size varies within a specified percentage to be "duplicates"	specify a **File Size Matching Threshold (%)**  NOTE: The default value of 5% is intended to take into account variations in metadata and version histories that may be found in files that otherwise have exactly the same content (this often occurs with Microsoft Office files, for instance). Changes in file size can occur when they are uploaded to SharePoint. If you want all files with the same file name and type to be included, regardless of size, enter 0.
sort results by **Number of Duplicates** or **File Size**	select the appropriate option from the **Sort By** drop-down.  By default, results are sorted by **File Size**..

Now you can either:

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

OR

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

OR

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

Analysis results include all duplicate files that meet the criteria of your analysis, along with the following information:

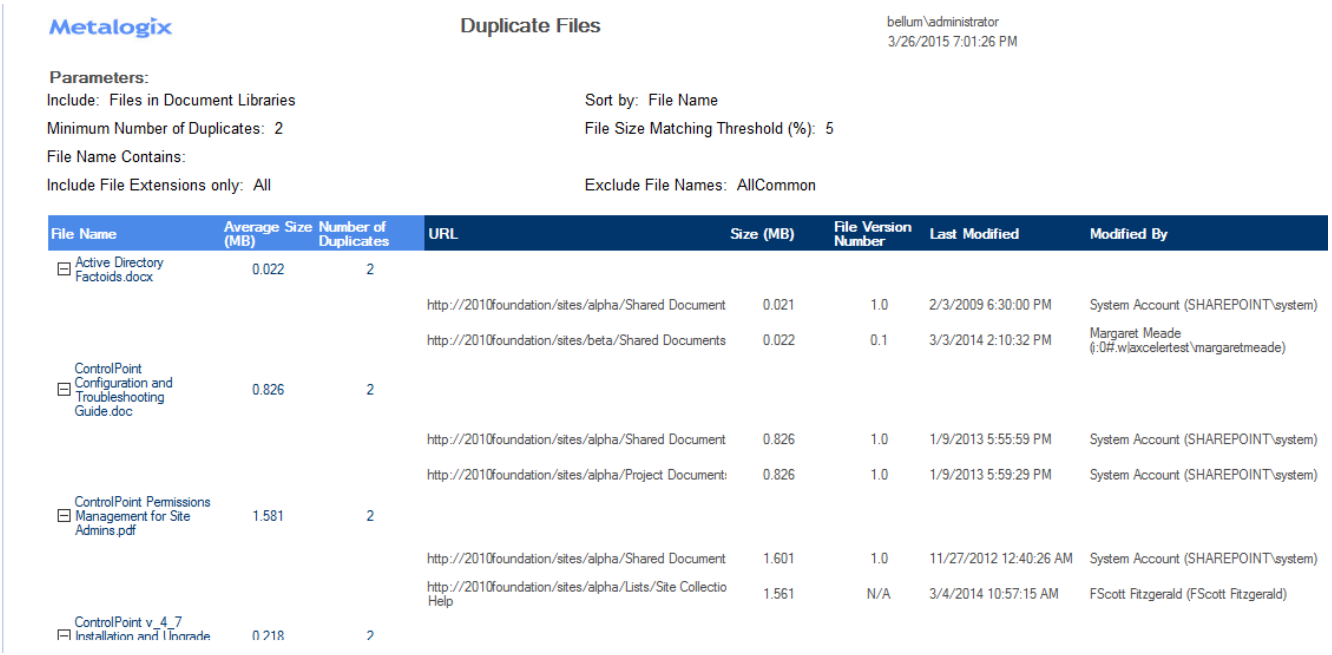
- **File Name**
- **Average Size (MB)**
- **Number of Duplicates**

When expanded, the following additional information displays for each group of duplicate files:

- The **URL** for the list or library where each file is located
- The **Size (MB)** of each file
- The **File Version Number**

NOTE: If versioning is not enabled for a document library or if the file is an attachment to a list, the version number will always display as 1.0.

- The user the file was last **Modified By**.



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Duplicate Files

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Parameters:

Include: Files in Document Libraries
Sort by: File Name
Minimum Number of Duplicates: 2
File Size Matching Threshold (%): 5
File Name Contains:
Include File Extensions only: All
Exclude File Names: AllCommon

File Name	Average Size (MB)	Number of Duplicates	URL	Size (MB)	File Version Number	Last Modified	Modified By
Active Directory Factoids.docx	0.022	2					
			http://2010foundation/sites/alpha/Shared Document	0.021	1.0	2/3/2009 6:30:00 PM	System Account (SHAREPOINT\system)
			http://2010foundation/sites/beta/Shared Documents	0.022	0.1	3/3/2014 2:10:32 PM	Margaret Meade (i:0#.w|axcelertest\margaretmeade)
ControlPoint Configuration and Troubleshooting Guide.doc	0.826	2					
			http://2010foundation/sites/alpha/Shared Document	0.826	1.0	1/9/2013 5:55:59 PM	System Account (SHAREPOINT\system)
			http://2010foundation/sites/alpha/Project Document	0.826	1.0	1/9/2013 5:59:29 PM	System Account (SHAREPOINT\system)
ControlPoint Permissions Management for Site Admins.pdf	1.581	2					
			http://2010foundation/sites/alpha/Shared Document	1.601	1.0	11/27/2012 12:40:26 AM	System Account (SHAREPOINT\system)
			http://2010foundation/sites/alpha/Lists/Site Collectio Help	1.561	N/A	3/4/2014 10:57:15 AM	FScott Fitzgerald (FScott Fitzgerald)
ControlPoint v_4_7 Installation and Upgrade	0.218	2					

NOTE: The **Number of Duplicates** represents the total number of files found. The **URL** column lists those for which you have permissions.

Analyzing Content

ControlPoint provides the following tools for analyzing site content:

- The **Metadata Usage** analysis shows where and how Managed Metadata is used in SharePoint 2010 and later Server farms
- The **Content Types** analysis shows properties and usage details of SharePoint content types.
- The **Recycle Bin Report** lets you examine the contents of recycle bins for one or more site collections.
- **Web Parts by Part** and **Web Parts by Site** include detailed statistics about Web Parts used in selected sites.

You can also analyze trends in site count over a specified time period.

Analyzing Managed Metadata Usage

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

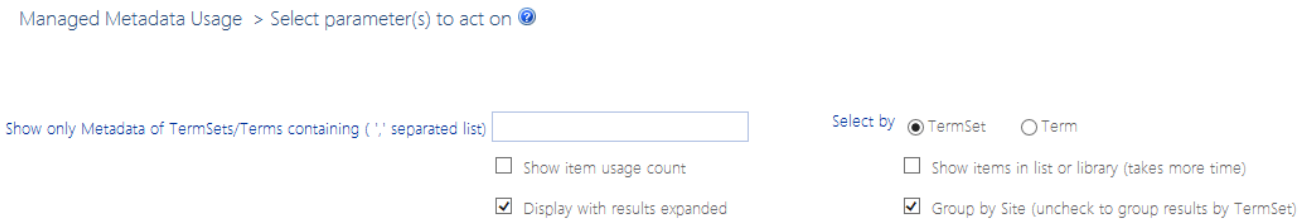
NOTE: Because it relies on data from the Managed Metadata Service that is only available in the Server version of SharePoint 2010 and later, this analysis is not available for SharePoint 2007 or SharePoint Foundation.

To generate a Managed Metadata Usage analysis:

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

2 Choose Content > Managed Metadata Usage.

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



If you ...	Then ...
want results to include only metadata with term sets OR terms that contain a specific text string	• enter the string in **Show only Metadata of TermSets/Terms containing** field. NOTE: You can enter multiple text strings as a comma-separated list. • choose the applicable **Select by** option (to indicate whether you want ControlPoint to search for **TermSet** or **Term**)
want results to include the *number of* list items that have a value in the column that uses the metadata	check the **Show item usage count** box.
want results to include the actual list items that have a value in the column that uses the metadata	check the **Show items in list or library** box. NOTE: If you check this box, ControlPoint must iterate through all list items. Depending on the scope of your analysis and the number of items within that scope, processing time may increase noticeably.

If you ...	Then ...
want to group results by term set rather than by site	uncheck the **Group by Site** box.

Now you can either:

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

OR

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

OR

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

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

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

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

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



Metalogix — Managed Metadata Usage — axcelertest\testbenchfarm 3/17/2014 12:46:50 PM

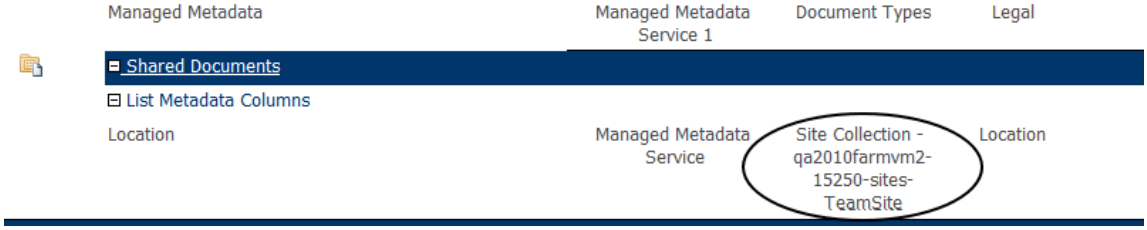
Show item usage count : True | Show items in list or library : False | Group by Site : True

Select	Column referencing the Metadata	Term Store	Term Group	Term Set	Term	Item Usage Count
Abdul WAP 2 - 15250						
TeamSite (http://qa2010farmvm2:15250/sites/TeamSite)						
Select	TeamSite	http://qa2010farmvm2:15250/sites/TeamSite				
	Announcements					
	List Metadata Columns					
	Managed Metadata	Managed Metadata Service 1	Document Types	Legal		5
	Shared Documents					
	List Metadata Columns					
	Location	Managed Metadata Service	Site Collection - qa2010farmvm2-15250-sites-TeamSite	Location		0
GB WAP1 - 22909						
DocumentWorkspace (http://qa2010farmvm2:22909/sites/DocumentWorkspace)						
Select	....TeamSite	http://qa2010farmvm2:22909/sites/DocumentWorkspace/testgb				
	Announcements					
	List Metadata Columns					
	Managed Metadata	Managed Metadata Service 1	Document Types	Legal		5
	Lists/ControlPoint v. 4.1 is the best yet!					
	Managed Metadata	Managed Metadata Service 1	Document Types	Legal	HR	
	Lists/Get Started with Windows SharePoint Services!					

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

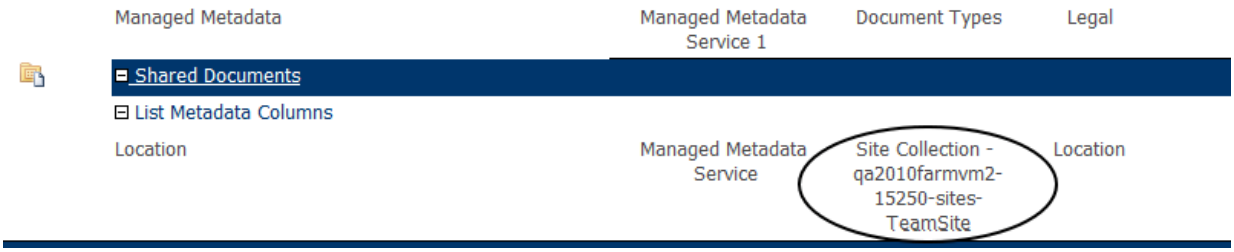
- The top level of the analysis shows each Term Store providing the metadata, followed by each **Term Group** and **Term Set**.
- When expanded, the following information displays for each term set:
  - the site that uses the metadata
  - for each list that uses the metadata:
    - the name of the **Column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

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



Managed Metadata	Managed Metadata Service 1	Document Types	Legal
Shared Documents			
List Metadata Columns			
Location	Managed Metadata Service	Site Collection - qa2010farmvm2-15250-sites-TeamSite	Location

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



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

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

Analyzing Content Types

The Content Type Analysis provides information about SharePoint content types within a selected scope, including

- the content type's parent object
- the site or list where the content type was defined.

You can specify additional parameters to include more detail (such as a count of items that use the content type and/or a list of the items themselves), and you can choose to group results by either content type or site.

Note About "Common" Content Types

A list of "common content types" is maintained in the file **CommonContentTypes.xml**, which is located on the Web front-end server where ControlPoint is installed, in the following **SharePoint hive** subdirectory: **\TEMPLATE\LAYOUTS\Axceler\App_Data.**

By default, this list includes default content types associated with SharePoint built-in templates. The purpose of this list is to give you the option to "filter out" commonly used content types from analysis results.

You can customize this file to include "common" content types specific to your environment that you would like to have the option of excluding. For example, you may want to filter out a company-specific content type that is used in every site in your farm. You may also want to remove a default content type from the list.

Changes that you make to this file must be copied to any additional Web front-end servers in your farm. Also, whenever you install a ControlPoint update or patch, this file is overwritten with a file containing the default list. Therefore, if you choose to make modifications, it is recommended that you keep a backup of the file in a different location so that you can replace the default version after an update or patch.

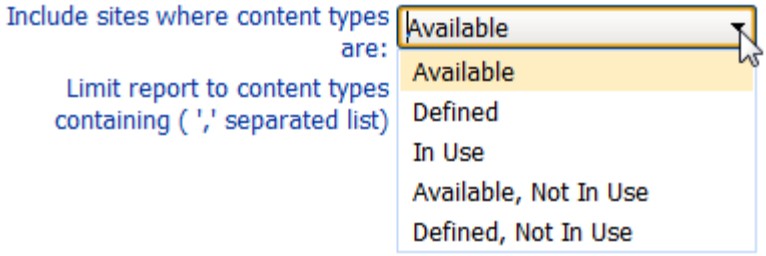
To generate a Content Type Analysis:

1 Select the object(s) whose content types you want to analyze.

2 Choose Change Management > Content Types.

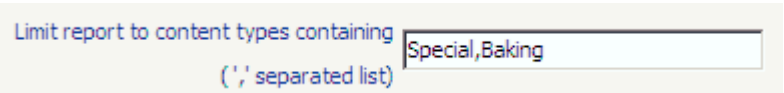
3 Specify the parameters for your analysis:

a) For **Include sites where content types are**, select one of the values described in the following table.



If you want results to include sites ...	Select ....
for which the content types are available, regardless of whether they have been "adopted" by a list/library	**Available**.
where the content types are defined, regardless of whether they have been "adopted" by a list/library	**Defined.**
containing lists/libraries that have "adopted" the content types	**In Use**. NOTE: A content type that has been adopted by a list or library is considered "in use" regardless of whether it has actually been associated with any items.
for which the content types: • are available, and • have not been adopted by a list/library	**Available, Not In Use.**
where the content types: • are defined, and • have not been adopted by a list/library.	**Defined, Not in Use.**

If you want to limit results to content types that contain a specific text string, enter that string in **the Limit report to content types containing** field. (You can enter multiple text strings as a comma-separated list).



b) Specify the remaining checkbox criteria using the guidelines in the following table.

If you ...	Then ...
want to group results by content type rather than by site	uncheck the **Group results by site** box.
want results to include the names of content type columns	check the **Show content type column names** box.
want results to include a count of the number of items with which the content type is associated	check the **Show item usage count** box. NOTE: If you check this box, ControlPoint must iterate through all list items. Depending on the scope of your analysis and the number of items within that scope, processing time may increase noticeably.
want to *exclude* common content types from results (see "About Common Content Types," above)	check the **Exclude common content types** box.
want results to include the lists and libraries that use the content type	check the **Show items in list or library** box. NOTE: If you check this box, ControlPoint must iterate through all list items. Depending on the scope of your analysis and the number of items within that scope, processing time may increase noticeably.

Now you can either:

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

OR

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

OR

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

The analysis results header includes all of the parameters that you specified.

The top levels of the analysis shows either:

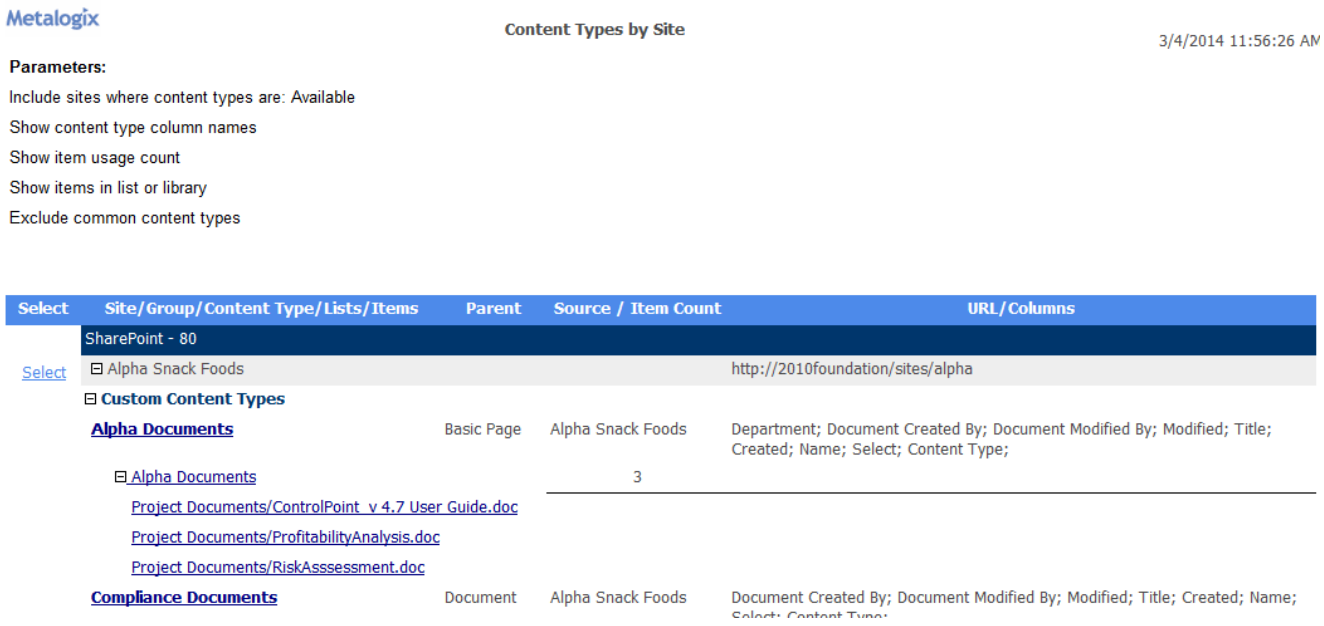
- all of the sites within the scope or your analysis, followed by the content types that are used within each site (if you chose to group results by site)

OR

- each of the content types within the scope of your analysis, followed by the sites that use it (if you chose to group results by content type).

When results are expanded, the following information displays for each content type:

- the name of the **Content Type**
- the content types **Parent** object (that is, the content type from which the content type was created)
- the content type's **Source** (that is, the site or list where the content type was defined)
- each of the **Lists**/libraries
- if selected in the Parameters section:
  - the item **Count** (that is, the number of items within each list or library using that content type)
  - the content type's **Column Names**
  - a list of the **Items** that use the content type.



Metalogix

Content Types by Site

3/4/2014 11:56:26 AM

Parameters:

Include sites where content types are: Available
Show content type column names
Show item usage count
Show items in list or library
Exclude common content types

Select	Site/Group/Content Type/Lists/Items	Parent	Source / Item Count	URL/Columns
	SharePoint - 80			
Select	⊟ Alpha Snack Foods			http://2010foundation/sites/alpha
	⊟ **Custom Content Types**			
	Alpha Documents	Basic Page	Alpha Snack Foods	Department; Document Created By; Document Modified By; Modified; Title; Created; Name; Select; Content Type;
	⊟ Alpha Documents		3	
	Project Documents/ControlPoint_v 4.7 User Guide.doc			
	Project Documents/ProfitabilityAnalysis.doc			
	Project Documents/RiskAsssessment.doc			
	Compliance Documents	Document	Alpha Snack Foods	Document Created By; Document Modified By; Modified; Title; Created; Name;

NOTE: If you chose **Show item usage count** and/or **Show items in list or library**, an **Item Count** will be included. If you chose neither of these parameters, the Item Count column header will not be visible.

Analyzing SharePoint Workflows

The Workflow Analysis provides the following information about workflows in your SharePoint farm:

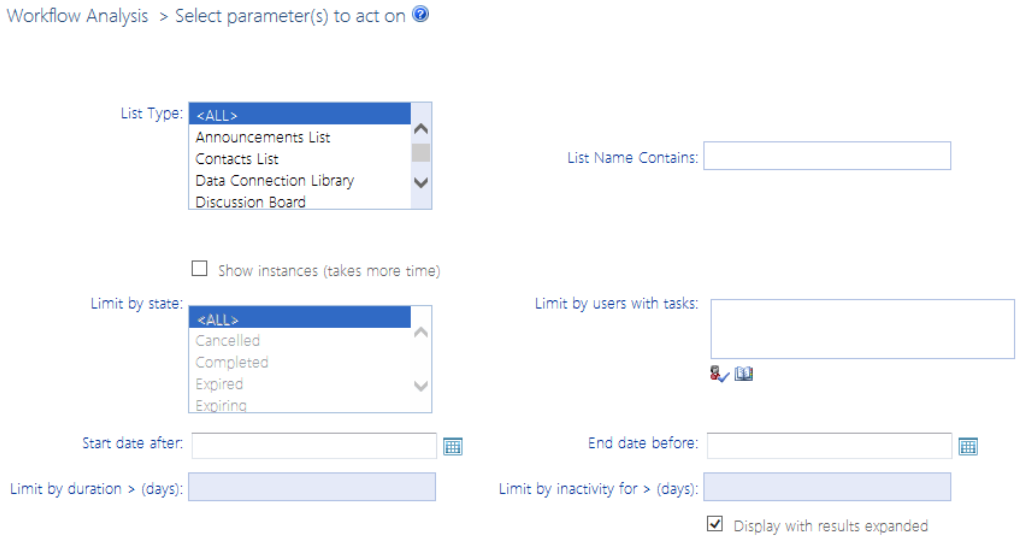
- a summary of all workflows defined for a site collection
- each list and library with which a workflow is associated
- optionally, detail about each workflow instance, including item name, workflow state, time started, last modified date, and last modified by.

NOTE: This analysis only includes workflows that have been defined within SharePoint or SharePoint Designer. Workflows created by other methods (for example, using Visual Studio Designer or third-party tools) will not be included in the analysis.

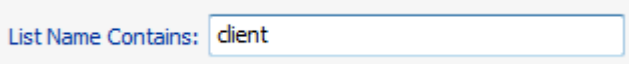
To generate a Workflow Analysis:

1 Select the object(s) whose workflows you want to analyze.

2 Choose Change Management > Workflow Analysis.



3 If you want to limit results to specific lists, specify the appropriate parameters. Use the information in the following table for guidance.

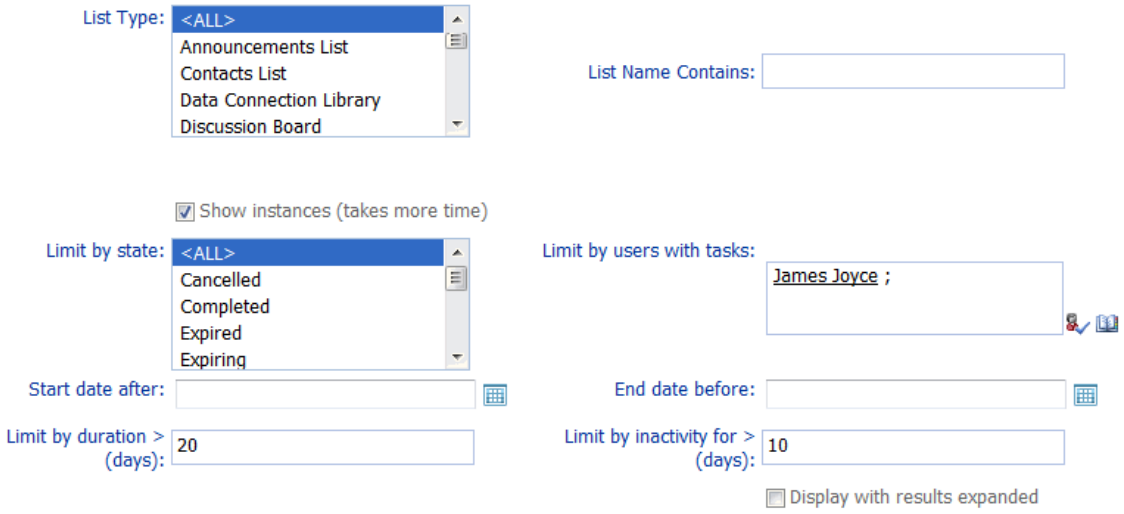
If you want to limit results to ...	Then ...
workflows in specific types of lists	select one or more **List Types**. By default, analysis results include *all* list types.
lists whose name contains a specific text string	complete the **List Name** Contains field. 

4 If you want analysis results to include each instance of a workflow that has been associated with a document or list item:

a) Check the **Show instances** box.

NOTE: If you check this box, ControlPoint must iterate through all list items. Depending on the scope of your analysis and the number of items within that scope, processing time may increase noticeably.

b) If you want to further filter your results, specify the appropriate parameters. Use the information in the following table for guidance.



If you want to show only instances ...	Then ...
that are currently in a specific state	select one or more values from the **Limit by State** list box.
containing tasks assigned to one or more specific users	for **Limit by users with tasks**, select the user(s) whose workflow instances you want to analyze.
that were started after a particular date	specify a **Start date after**.
that ended before a particular date	specify an **End date before.**
that have been running for—or were completed within—more than a specified number of days	enter a value for **Limit by duration > (days)**.
that have been inactive for a specified number of days	enter a value for **Limit by inactivity for > (days).**

Now you can either:

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

OR

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

OR

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

The top level of results show all of the site collections within the scope of your analysis where workflows have been defined, followed by a list of all sites for which workflows have been enabled.

When a site collection is expanded, a summary of workflows that are defined for each site collection displays.

NOTE: This information will be reported only if workflows are enabled on at least one site within the collection.

Web Application: SharePoint - 80

Site Collection: Alpha Snack Foods

Workflow	Status	Associations	In Progress
Approval	Active	101	0
Collect Feedback	Active	101	0
Collect Signatures	Active	99	0
Disposition Approval	Active	1	1
Schedule Web Analytics Alerts	Active	1	0
Schedule Web Analytics Reports	Active	0	0
Three-state	Active	0	0
Translation Management	Active	0	0
Collect Signatures - SharePoint 2010	Active	2	0
Approval - SharePoint 2010	Active	2	1

When a site is expanded, all of the lists with which workflows have been associated display.

Web Application: SharePoint - 80

Site Collection: Alpha Snack Foods

Workflow	Status	Associations	In Progress
Three-state	Active	4	8

Web Site: Alpha Snack Foods

Alpha Documents

Workflow	Last Modified	History List	Task List	In Progress
Workflow	9/5/2013 1:06:15 PM	Workflow History	Tasks	2

Web Site: Skunkworks Project

Tasks

Workflow	Last Modified	History List	Task List	In Progress
Three State Workflow	5/6/2013 10:40:05 AM	Workflow History	Tasks	2

If you chose to **Show Instances**, the following additional detail displays for each workflow instance:

- the **Item** with which the instance is associated
- the name of the **Workflow** instance and the workflow **Template** on which it is based
- the user the workflow instance was Created By
- a link to the **Workflow History** and **Task List** for the workflow instance (if applicable)
- the date when the workflow instance was **Started** and **Last Run**
- the workflow instance's current **State** as well as the instance's **duration** (in days) and number of days it has been **inactive.**

Analyzing Broken Links in SharePoint Linked Lists

The Broken Links Analysis enables you to identify broken links in SharePoint linked lists. Included in the analysis is the reason why the link is considered "broken," as well as a link to the SharePoint Links Edit form, providing you with the opportunity to "fix" the link.

To generate a Broken Links Analysis:

1 Select the object(s) for which you want to analyze broken links.

2 Choose Content > Broken Links Analysis.

Now you can either:

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

OR

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

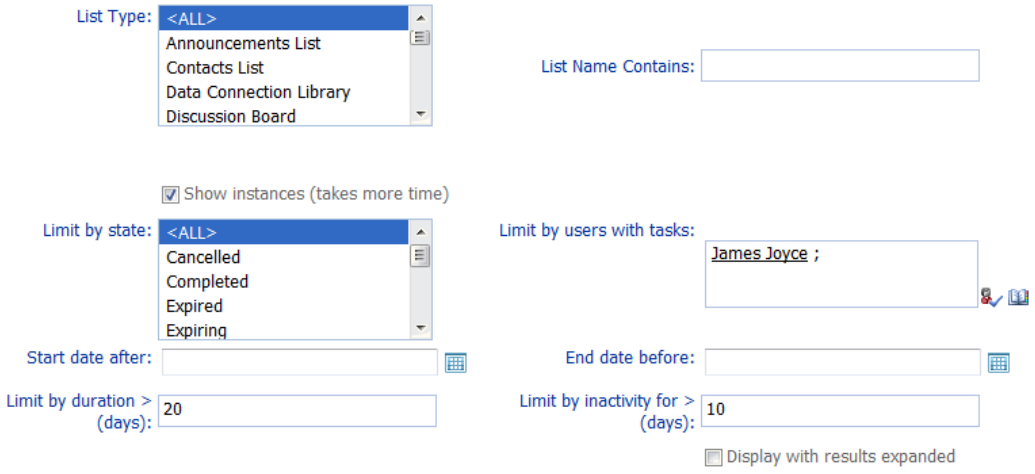
OR

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

The top level of the analysis lists all of the Web applications within the scope of your analysis.

When expanded, the following information displays for each broken link:

- the name of the **Site** and **List** where the broken link is located
- the **Web Address** of the broken link
- the **Reason for reported failure**.



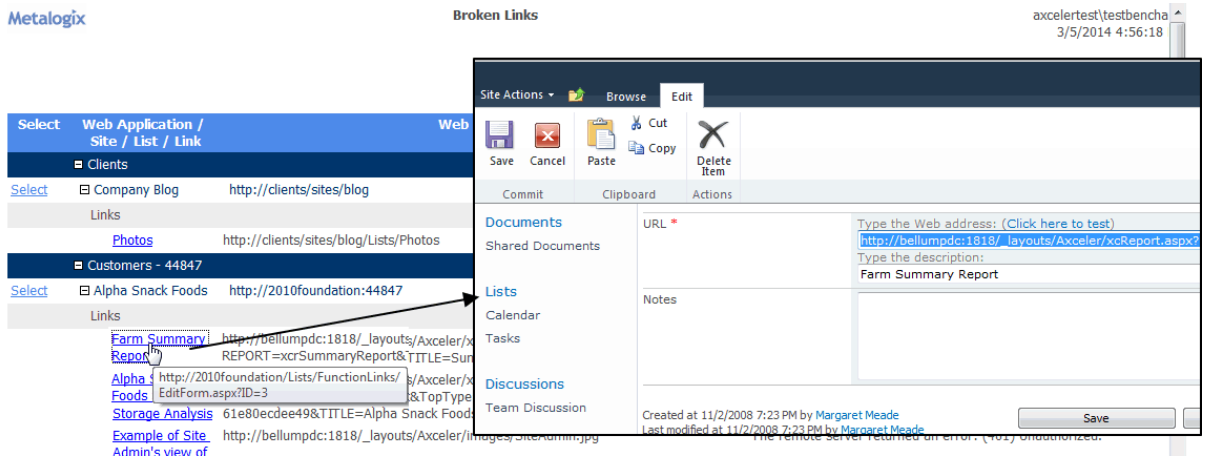
Some Reasons Why Links May Be Considered "Broken"

The following table describes some of the common reasons why a link on a SharePoint Linked List may be considered "broken."

Reason	Description
The operation has timed out	The request timed out before the page could be accessed.
The remote name could not be resolved	The url may be invalid.
The remote server returned an error: (401). Unauthorized	The ControlPoint Service Account does not have permissions to access the page.
The remote server returned an error: (404) Not Found	The page may not exist (or may no longer exist).

To view/edit the broken link:

Click the **Link** hyperlink to open the SharePoint Links Edit page



Generating a Solution Summary Analysis

The ControlPoint Solution Summary analysis lets you view details about solutions deployed within or across SharePoint farms:

- if you are a Farm Administrator, all deployed Farm Solutions

AND/OR

- for SharePoint 2010 and 2013 farms, sandboxed solutions deployed to site collections within your selected scope.

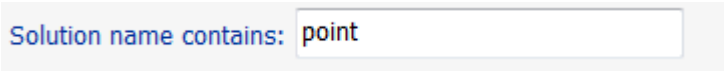
To generate a Solution Summary analysis:

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

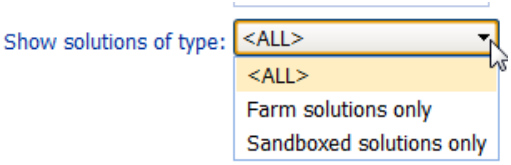
2 Choose Content > Solution Summary.

3 Specify the parameters of your analysis:

- If you want your results to include only solutions whose name matches a specific text string, enter the string in the **Solution name contains:** field.



- If you want results to include ONLY Farm solutions OR Sandboxed solutions, select the appropriate option from the drop-down.



REMINDER: Farm solutions will be included only if you are a Farm Administrator. Sandboxed solutions are *not* applicable for SharePoint 2007 farms.

Now you can either:

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

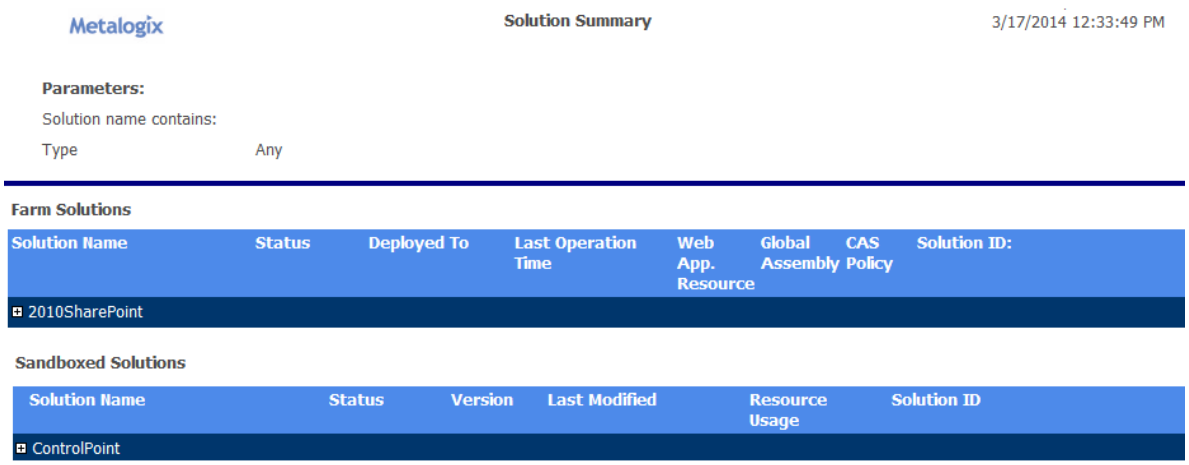
OR

- 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.

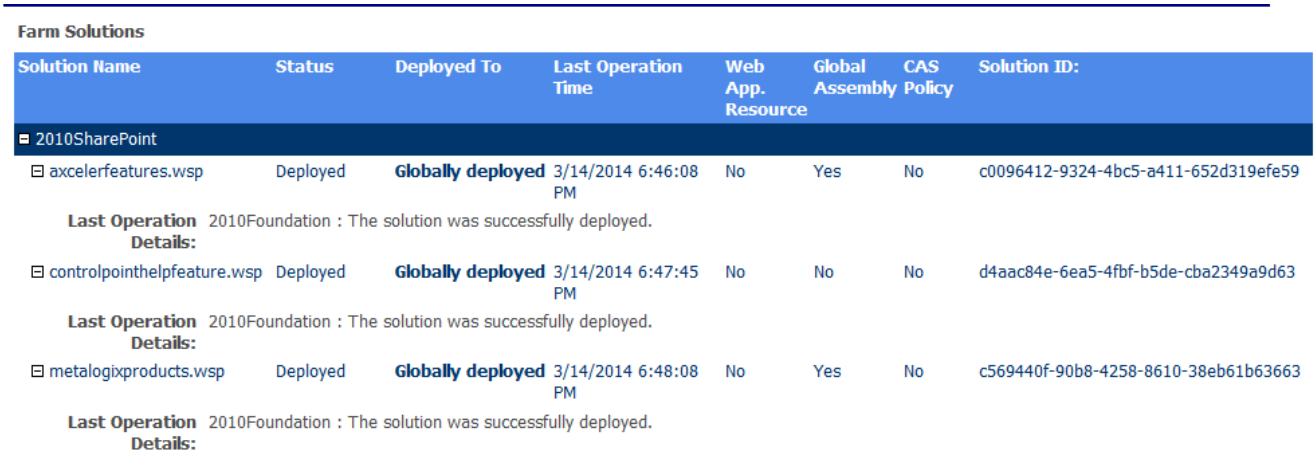
For each solution type you chose to include, the farm(s) within the selected scope display.



Farm Solutions section

If you are a Farm Administrator, the Farm Solutions section lists all of the solutions deployed to the entire farm (regardless of the selected scope), along with the following information:

- the **Solution Name**
- its current deployment **Status**
- where the solution is **Deployed To**
- the **Last Operation Time** that an action was taken
- whether the solution contains a **Web Application Resource**, **Global Assembly**, and/or Code Access Security (**CAS**) **Policy**:
- the **Solution ID**, and
- upon further drill-down, the **Last Operation Detail**.



Sandboxed Solutions section

If any sandboxed solutions have been installed in site collections within your selected scope, the Sandbox Solutions section lists each of these site collections, along with the following information about the installed solution(s):

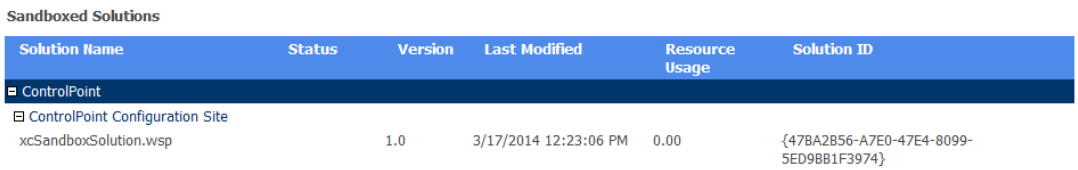
- the **Solution Name**
- the solution's deployment **Status**

NOTE: A blank Status indicates that the solution is installed but has never been activated.

- the installed **Version** of the solution
- the solution's **Last Modified** date and time
- the solution's **Resource Usage**

NOTE: For information on the concept of Resource Usage, consult your SharePoint documentation.

- the **Solution ID**



Analyzing Web Parts

The following analysis tools provide detailed statistics about Web Parts used in your SharePoint environment:

- **Web Parts by Part** lists all of the sites within the scope of your analysis that use a particular Web Part. (You can also choose whether to include or exclude Web Parts that are not currently in use.)
- **Web Part by Sites** lists all of the Web Parts used by each site within the scope of your analysis.

Statistics include:

- the page(s) on which the Web Part appears
- the user account that the Web part was both created by and last modified by
- the dates when the Web Part was both created and last updated, and
- the size of the Web Part (in KB).

Analyzing Web Parts by Part

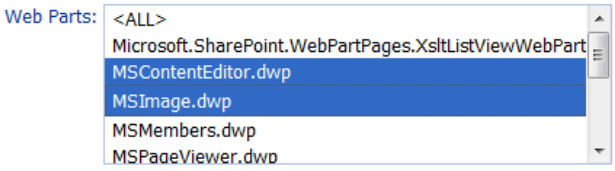
To generate a Web Parts by Part analysis:

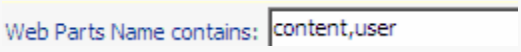
1 Select the object(s) on which you want to perform the analysis.

2 Choose Change Management > Web Parts by Part.

3 Specify the parameters for your analysis.

In addition to the "standard" parameters, you can limit results to Web Parts that meet one or more specific criteria, specify one or more of the parameters described in the following table.

If you want results to include ...	Then ...
one or more specific Web Parts	select from the **Web Parts** list box .
	NOTE: If you do not select specific Web Parts, all Web Parts will be returned.
	
	EXCEPTION: If the ControlPoint Application Administrator has chosen to exclude Web Parts from the Discovery process, the message *No Values Available* will display in the list box.

If you want results to include ...	Then ...
Web Parts whose name contains a specific text string	enter the text string in the **Web Part Name contains** field. NOTE: You can enter multiple text strings as a comma-separated list. 
only Web Parts that are currently in use	check the **Show only parts used in pages** box. NOTE: If you leave this box unchecked and you do not select a specific Web Part, analysis results will also include Web Parts that are *not* currently in use.
only Web Parts that are closed and hidden	check the **Show only Closed and Hidden** box.

Note that the option to **Use cached data** will be disabled if Web Parts have been excluded from the ControlPoint Discovery job. The inclusion or exclusion of Web Parts can be managed by the ControlPoint Application Administrators. Details can be found in the *ControlPoint Administration Guide*.



Now you can either:

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

OR

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

OR

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

The top level of the report lists the Web Part(s) within the scope of your analysis, as well as the total number of pages in which each is used..

Metalogix

Web Parts by Part

axcelertest\testbenchaxceler
3/4/2014 12:46:14 PM

Parameters:

Cached: False Show only Closed and Hidden: False

Select Web Part / Site	Title	Page	Created By	Last Mod. by	Created	Last Upd.	Size (KB)
⊞ Microsoft.SharePoint.WebPartPages.BlogAdminWebPart				Used in pages: 3			
⊞ Microsoft.SharePoint.WebPartPages.BlogMonthQuickLaunch				Used in pages: 3			
⊞ Microsoft.SharePoint.WebPartPages.ListViewWebPart				Used in pages: 48			
⊞ Microsoft.SharePoint.WebPartPages.XsltListViewWebPart				Used in pages: 71			
⊞ MSContentEditor.dwp				Used in pages: 3			1.47
⊞ MSImage.dwp				Used in pages: 49			22.79
⊞ MSMembers.dwp				Used in pages: 6			2.86
⊞ MSPageViewer.dwp				Used in pages: 2			1.12
⊞ whatsnew.dwp				Used in pages: 3			1.32
⊞ Whereabouts.dwp				Used in pages: 3			1.29

When expanded, the following additional information displays for each Web Part name:

- the name and url for each applicable **Site** that uses the Web Part, and
- within the context of each site:
  - the **Title** of the Web Part—that is, the name assigned to that instance of the Web Part

NOTE: If the same Web Part is used more than once on a page, the title of each instance is listed in a comma-separated list. Web Parts that are hidden or closed are annotated.



  - the **Page** on which the Web Part is used
  - the following values, which are the same as those reported in the SharePoint Web Gallery:
    - the user account that the Web Part was **Created by**, well as the user account it was **Last Modified by**
    - the dates when the Web Part was both **Created** and **Last Updated**

NOTE: The Created by, Last Modified by, Created, and Last Updated values refers to the Web Part itself, not its instance on a specific page. Often, the Created date is the date that the Web Part was installed on the system.

- the **Size** of the Web Part in kilobytes (**KB**).

Select	Web Part / Site	Title	Page	Created By	Last Mod. by	Created	Last Upd.	Size (KB)
Select	....Herbs and Spices (http://2010foundation/sites/alpha/spices)			SharePoint - 80				**0.56**
		Page Viewer Web Part	default.aspx	System Account	Testbench Install Display	11/1/2008	7/26/2010	0.56
	⊟ whatsnew.dwp				Used in pages: 3			1.32
Select	Help Desk (http://clients/sites/Help)			Clients				**0.44**
		What's New	default.aspx	System Account	System Account	3/14/2012	3/14/2012	0.44
Select	Diogenes Patent Attorneys (http://extranet:28733/sites/diogenes)			Extranet				**0.44**
		What's New	default.aspx	System Account	System Account	9/14/2010	9/14/2010	0.44
Select	Help Desk (http://2010foundation:40042/sites/Help)			Intranet				**0.44**
		What's New	default.aspx	System Account	System Account	3/14/2012	3/14/2012	0.44
	⊟ Whereabouts.dwp				Used in pages: 3			1.29
Select	Help Desk (http://clients/sites/Help)			Clients				**0.43**
		Whereabouts	default.aspx	System Account	System Account	3/14/2012	3/14/2012	0.43
Select	Diogenes Patent Attorneys (http://extranet:28733/sites/diogenes)			Extranet				**0.43**
		Whereabouts	default.aspx	System Account	System Account	9/14/2010	9/14/2010	0.43
Select	Help Desk (http://2010foundation:40042/sites/Help)			Intranet				**0.43**
		Whereabouts	default.aspx	System Account	System Account	3/14/2012	3/14/2012	0.43

Note that some commonly-built Web Parts that display in analysis results (such as the List View Web Part) are not listed in the Web Parts Gallery and are not associated with a specific creator or created by/modified by dates. Often, such Web Parts have names that begin with "Microsoft SharePoint."



Analyzing Web Parts by Site

To generate a Web Parts by Site analysis:

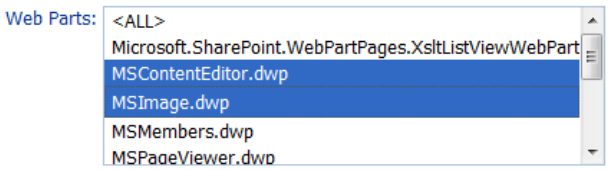
1 Select the object(s) on which you want to perform the analysis.

2 Choose Change Management > Web Parts by Site.

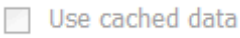
3 Specify the parameters for your analysis.

In addition to the "standard" parameters, you can limit results to Web Parts that meet one or more specific criteria, specify one or more of the parameters described in the following table.

If you want results to include ...	Then ...
one or more specific Web Parts	select from the **Web Parts** list box .
	NOTE: If you do not select specific Web Parts, all Web Parts will be returned.

If you want results to include ...	Then ...
	 EXCEPTION: If the ControlPoint Application Administrator has chosen to exclude Web Parts from the Discovery process, the message *No Values Available* will display in the list box.
Web Parts whose name contains a specific text string	enter the text string in the **Web Part Name contains** field. NOTE: You can enter multiple text strings as a comma-separated list. 
only Web Parts that are currently in use	check the **Show only parts used in pages** box. NOTE: If you leave this box unchecked and you do not select a specific Web Part, analysis results will also include Web Parts that are *not* currently in use.
only Web Parts that are closed and hidden	check the **Show only Closed and Hidden** box.

Note that the option to **Use cached data** will be disabled if Web Parts have been excluded from the ControlPoint Discovery job. The inclusion or exclusion of Web Parts can be managed by the ControlPoint Application Administrators. Details can be found in the *ControlPoint Administration Guide*.



Now you can either:

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

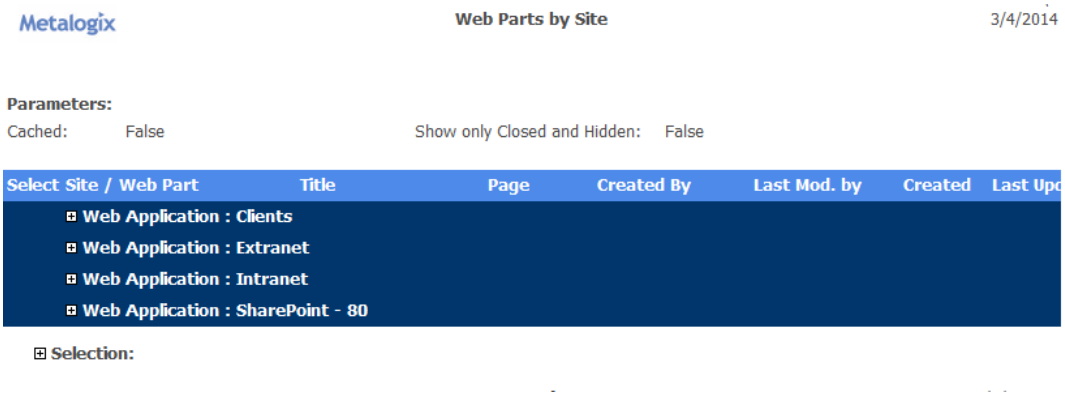
OR

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

OR

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

The top level of the analysis lists all of the Web applications within the scope of your analysis.



When expanded, the following additional information displays for each Web application:

- the name and url for each site collection and site in which the Web Part is used
- the **Title** of the Web Part—that is, the name assigned to that instance of the Web Part on a page

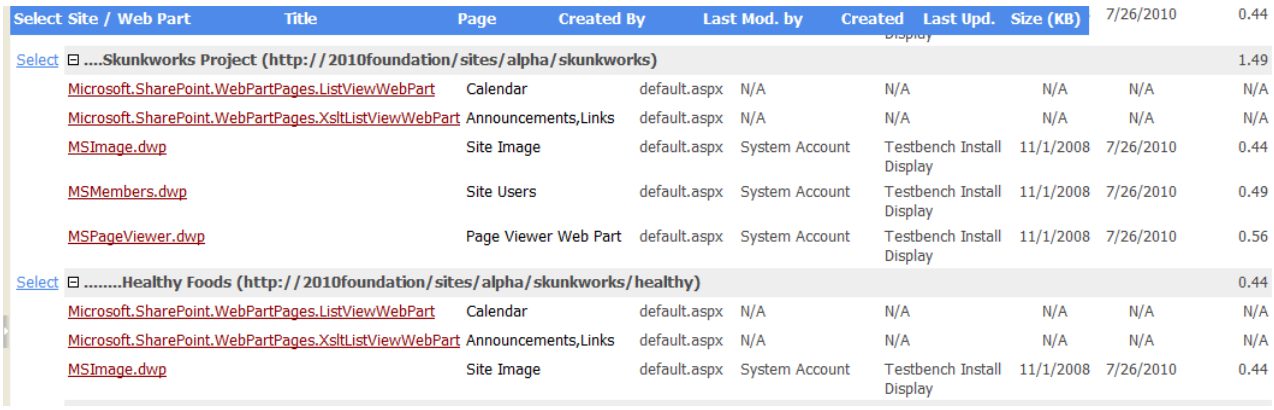
NOTE: If the same Web Part is used more than once on a page, the title of each instance is listed in a comma-separated list. Web Parts that are hidden or closed are annotated.



- the **Page** on which the Web Part is used
- the following values, which are the same as those reported in the SharePoint Web Gallery:
  - the user account that the Web Part was **Created by**, well as the user account it was **Last Modified by**
  - the dates when the Web Part was both **Created** and **Last Updated**

NOTE: The Created by, Last Modified by, Created, and Last Updated values refers to the Web Part itself, not its instance on a specific page. Often, the Created date is the date that the Web Part was installed on the system.

- the **Size** of the Web Part in kilobytes (**KB**).



Select	Site / Web Part	Title	Page	Created By	Last Mod. by	Created	Last Upd.	Size (KB)	7/26/2010	0.44
Select	⊟ ....Skunkworks Project (http://2010foundation/sites/alpha/skunkworks)									1.49
	Microsoft.SharePoint.WebPartPages.ListViewWebPart	Calendar	default.aspx	N/A	N/A	N/A	N/A	N/A		N/A
	Microsoft.SharePoint.WebPartPages.XsltListViewWebPart	Announcements,Links	default.aspx	N/A	N/A	N/A	N/A	N/A		N/A
	MSImage.dwp	Site Image	default.aspx	System Account	Testbench Install Display	11/1/2008	7/26/2010	0.44		
	MSMembers.dwp	Site Users	default.aspx	System Account	Testbench Install Display	11/1/2008	7/26/2010	0.49		
	MSPageViewer.dwp	Page Viewer Web Part	default.aspx	System Account	Testbench Install Display	11/1/2008	7/26/2010	0.56		
Select	⊟ .....Healthy Foods (http://2010foundation/sites/alpha/skunkworks/healthy)									0.44
	Microsoft.SharePoint.WebPartPages.ListViewWebPart	Calendar	default.aspx	N/A	N/A	N/A	N/A	N/A		N/A
	Microsoft.SharePoint.WebPartPages.XsltListViewWebPart	Announcements,Links	default.aspx	N/A	N/A	N/A	N/A	N/A		N/A
	MSImage.dwp	Site Image	default.aspx	System Account	Testbench Install Display	11/1/2008	7/26/2010	0.44		

Note that some commonly-built Web Parts that display in analysis results (such as the List View Web Part) are not listed in the Web Parts Gallery and are not associated with a specific creator or created by/modified by dates. Often, such Web Parts have names that begin with "Microsoft SharePoint."



Microsoft.SharePoint.WebPartPages.XsltListViewWebPart	Announcements,Links	default.aspx	N/A	N/A	N/A	N/A	N/A

Generating a SharePoint Hierarchy Report

The SharePoint Hierarchy Report lets you view and print the hierarchy of Web applications,site collections, sites—and optionally, lists—within a SharePoint farm. You can generate this report for the entire farm or for selected objects within the Hierarchy.

Information in this report is current as of the last Discovery.

EXCEPTION: If you ran the report at the site level and Include Children is checked, the report will be run on real-time data.

In a multi-farm environment, this analysis can only be run on the home farm.

To generate a SharePoint Hierarchy Report:

1 Select the object(s) that you want to include in the report.

2 Choose Configuration > SharePoint Hierarchy.

3 Specify one or more parameters for your analysis:

If you want results to ...	Then ...
include lists and libraries within sites	check the **Include Lists** box.

If you want results to ...	Then ...
	NOTE: If you check this box, ControlPoint must iterate through all lists. Depending on the scope of your analysis and the number of lists within that scope, processing time may increase noticeably.
include folders and items within sites	check the **Include Folders and Items** box.
	NOTE: If you check this box, ControlPoint must iterate through all list items. Depending on the scope of your analysis and the number of items within that scope, processing time may increase noticeably.
display the url for each site collection and site to the right of each site name	check the **Display URLs** box.
	NOTE: If you leave this box unchecked, only the names of the site collections and sites will display.
include objects whose permissions are unique (not inherited)	check the **Unique permissions only** box.
	NOTE: If you check this box, objects will be shown within the context of the hierarchy, even if the parent object has inherited permissions.

Now you can either:

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

OR

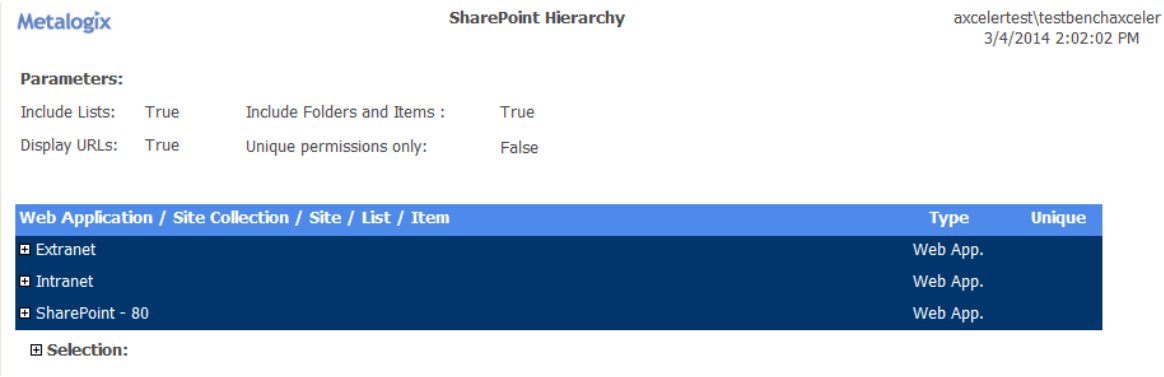
- schedule the operation to run at a later time or on a recurring basis.

OR

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

.

The top level displays all Web applications within the scope of your analysis.

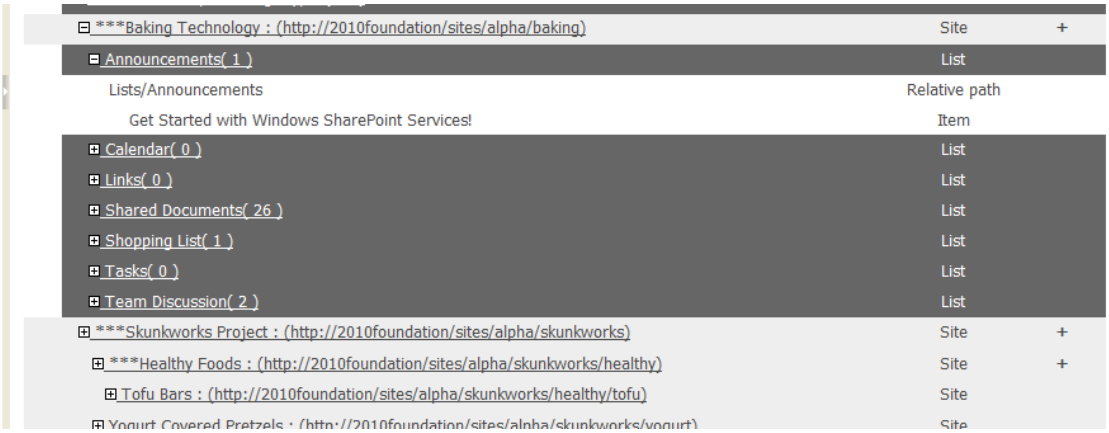


When expanded:

- the name of the object and its **Type** (site collection, site, list, item, and so on) displays

  NOTE: If you chose to Display URLs, the url for each site collection and site displays in parentheses to the right of its name.

- a plus sign (+) identifies each object whose permissions are unique (that is, not inherited from the parent objects).



Analyzing Trends

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

- activity*
- site count, and/or
- storage.

* Trend reporting for *activity* is not available for SharePoint 2007 WSS-only farms.

To generate a Trends analysis:

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

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

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

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

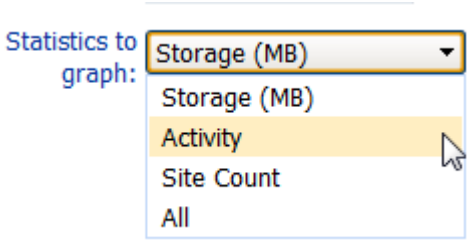
Specify the following parameters for your analysis:

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

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

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

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



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

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

Now you can either:

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

OR

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

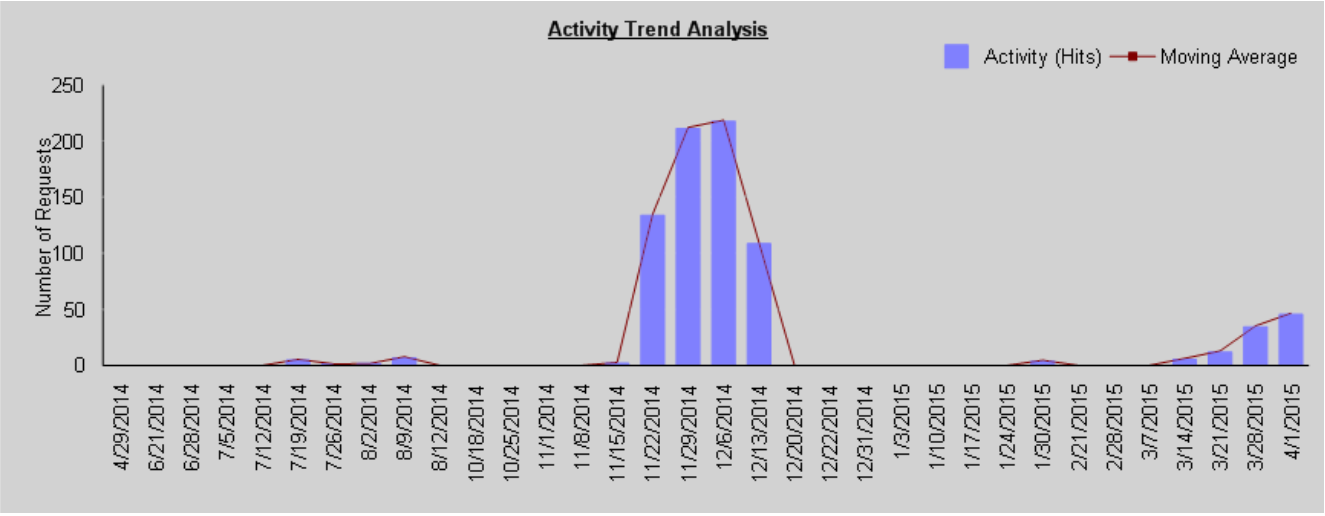
OR

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

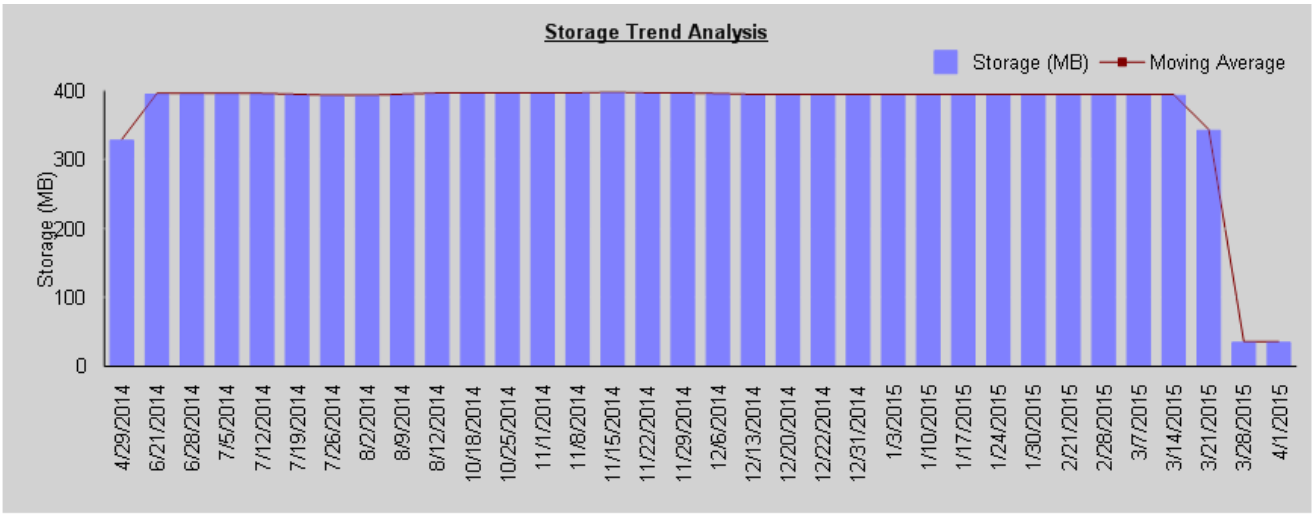
Trend Analysis results consist of two graphs:

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

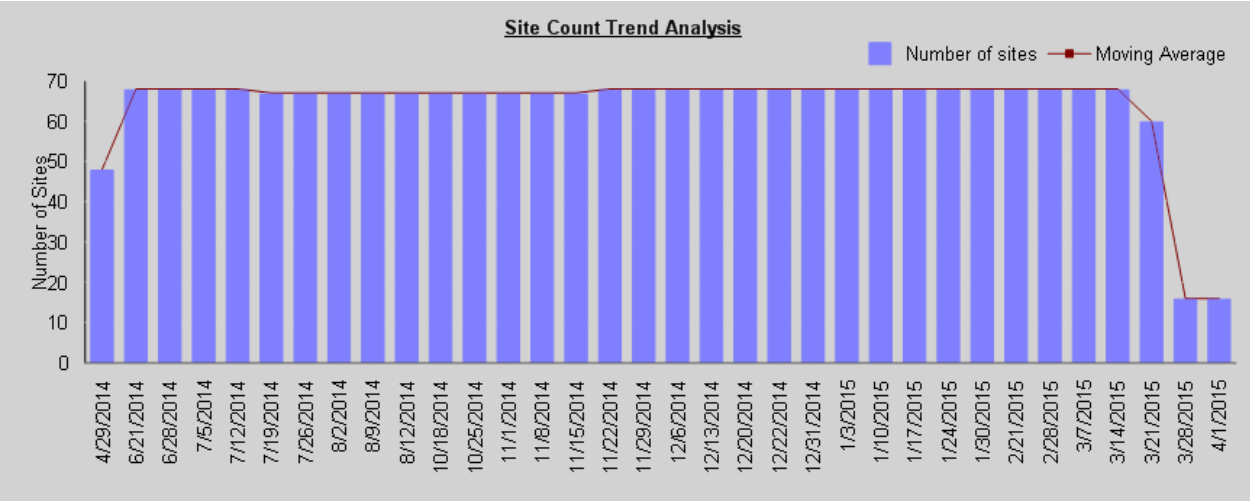
Activity Trend Analysis



Storage Trend Analysis



Site Count Trend Analysis



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

Auditing Activities and Changes in Your SharePoint Environment

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

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

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

Events Captured in SharePoint Logs

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

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

Add/Delete Site Collections, Sites, Libraries and Lists

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

Add/Delete Document and List Items

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

Other Actions on Document and List Items

Event	Where Recorded (ControlPoint Event Type)
• Document opened/downloaded • List item viewed • List item properties viewed	Audit Log (**View**)
• Document or list item edited • Document or list item properties edited	• Audit Log (**Update**) • Change Log (**Update**)

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

Add/Delete/Change Users and Permissions

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

Event	Where Recorded (ControlPoint Event Type) (*SharePoint Event Code*)
Member added to SharePoint group	• Audit Log (**Add Member to Group**) (*SecGroupMemberAdd*) • Change Log (**Add Member**) (*MemberAdd*)
Member deleted from SharePoint group	• Audit Log (**Delete Member from Group**) (*SecGroupemberDelete*) • Change Log (**Delete Member**) (*MemberDelete*)

Add Content Types and Columns

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

SharePoint Search Activity

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

Audit Settings

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

Analyzing Audit Log Contents

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

Audit logging must be enabled for each site collection whose events you want to log. You can enable audit logging for multiple site collections at a time via the ControlPoint Manage Audit Settings action or Set Site Collection Properties action.

To generate an Audit Log analysis:

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

NOTES:

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

2 Choose Audit and Alerts > Audit Log.

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

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

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

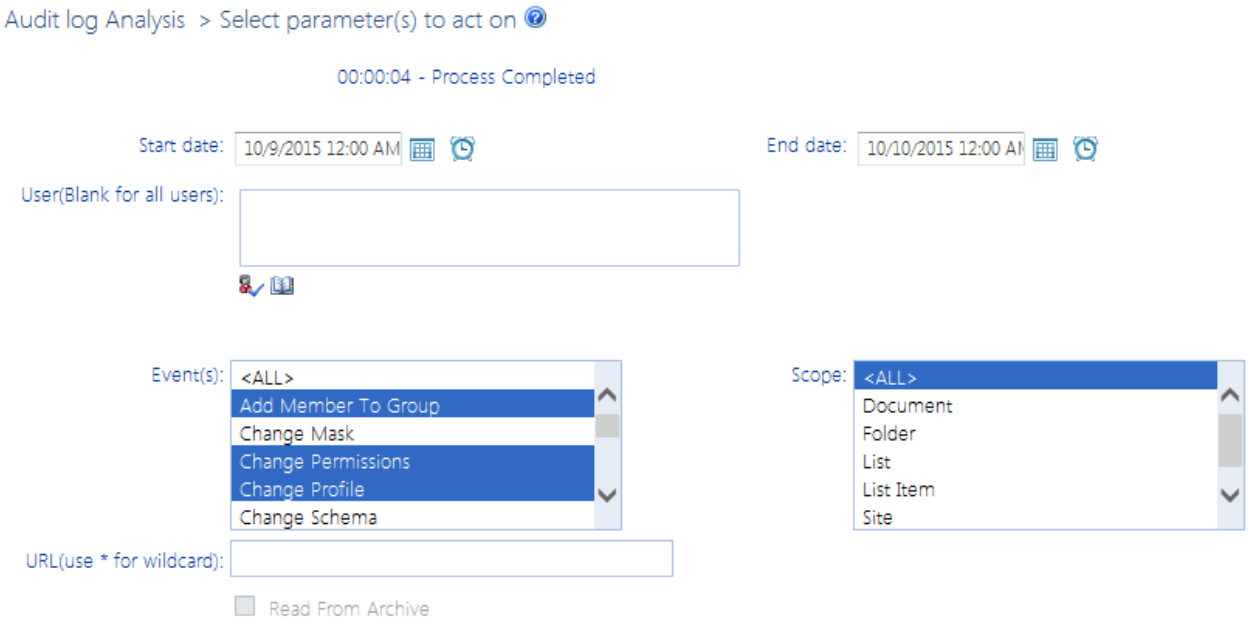
- select the **User**(s) whose actions you want to audit (or leave blank for all users)
- enter a *relative* **URL** (note that you can enter a url down to the item level; you can also use an asterisk (*) at the beginning and end of a url as wildcards)

  EXAMPLES

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

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

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



- If you use ControlPoint to archive SharePoint audit log data and want to **Read from Archive**, check this box.

  NOTE: If a ControlPoint audit log archive has not been set up for your farm, this option will be disabled.

Now you can either:

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

OR

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

OR

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

Information in the Audit Log analysis

The Audit Log analysis contains the following information:

- the **Date** and time that the event occurred
- the **User** responsible for the event
- the **Event** type
- the **Scope** of the event, which may be:
- site collection (Site)
- site (Web)
- List
- Folder, Document, or List Item
- the name of the **Site Collection** and **Site** on/within which the event occurred.
- the relative **URL** for the list or document/item.

NOTE: If auditing has been enabled at the site collection level, the URL for the document or item will display. If auditing has been enabled at the site level or below, the URL for the list itself (but not the document or item within the list) will display.



Metalogix

Audit Log (10/9/2015 12:00 AM to 10/10/2015 12:00 AM)

bellum\administrator
10/9/2015 12:19:06 PM

Parameters:

User: List:
URL:
Event: Add Member To Group,Change Permissions,Change Profile
Scope: <ALL>
Read From Archive: No

Total : 18

Date	User	Event	Scope	Site Collection	Site	URL
10/9/2015 12:07:41 PM	System Account	Add Member To Group	Site	Alpha Snack Foods		sites/alpha
Group: Marketing userid: 87 | User name: bellum\jamesjoyce						WAP: SharePoint - 80
10/9/2015 12:07:42 PM	System Account	Add Member To Group	Web	Alpha Snack Foods	Alpha Snack Foods	sites/alpha
Source: ControlPoint | Action: ADDUSERS2GROUP | Administrator: bellum\administrator | Details: Alpha Snack Foods: Added user bellum\jamesjoyce to the group Marketing |						WAP: SharePoint - 80
10/9/2015 12:07:43 PM	System Account	Add Member To Group	Site	Alpha Snack Foods		sites/alpha
Group: Marketing userid: 90 | User name: bellum\washingtonirving						WAP: SharePoint - 80
10/9/2015 12:07:43 PM	System Account	Add Member To Group	Web	Alpha Snack Foods	Alpha Snack Foods	sites/alpha
Source: ControlPoint | Action: ADDUSERS2GROUP | Administrator: bellum\administrator | Details: Alpha Snack Foods: Added user bellum\washingtonirving to the group Marketing |						WAP: SharePoint - 80
10/9/2015 12:07:43 PM	System Account	Add Member To Group	Web	Beta Aquatics	Beta Aquatics	sites/beta

Depending on the event type, additional detail may display beneath each line item.

Analyzing Change Log Contents

The ControlPoint Change Log lets you view the contents of SharePoint change logs for one or more selected event types.

To generate a Change Log analysis:

1 Select the object(s) for which you want to view change log entries.

2 Choose Audit & Alerts > Change Log Analysis.

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

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

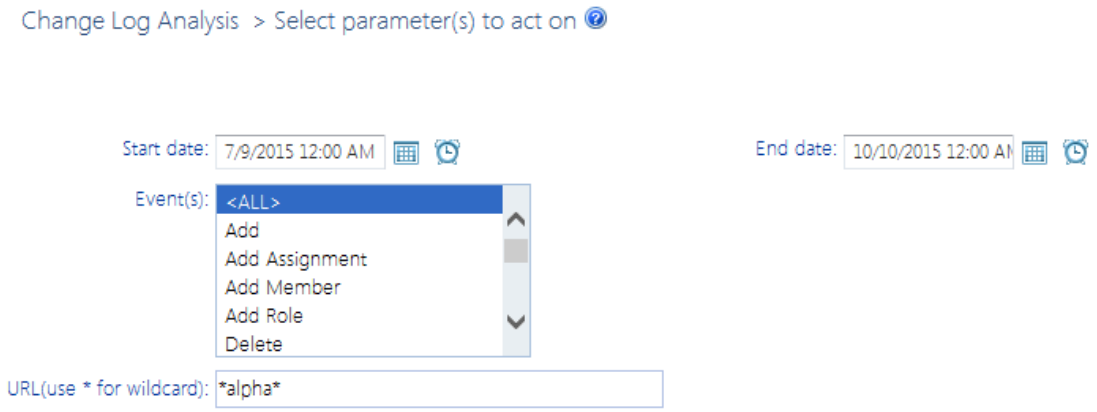
  The time period for which you can generate a change log analysis depends on how many days change log data is retained. ControlPoint relies on the history maintained by SharePoint. SharePoint for Office 365 retains Change Log data for 60 days.

- enter a *relative* **URL** (note that you can enter a url down to the item level; you can also use an asterisk (*) at the beginning and end of a url as wildcards)

  EXAMPLES

  - sites/al*
  - sites/alpha/shared documents/SharePointPlanning.docx

- select one or more **Event** types from the list box. Refer to the topic Events Captured in SharePoint Logs for guidance in selecting the appropriate event type(s).



Now you can either:

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

OR

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

OR

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

Information in the Change Log Analysis



The ControlPoint Change Log Analysis contains the following information:

- the **Date** and time that the event occurred
- the **Scope** of the event
- the **Event** type
- the individual the event was **Performed By**

NOTE: For many event types, SharePoint change logging does not record the user who performed the event. In such cases, the value "None" will appear in the Performed By column.

- the name of the **Site Collection** and **Site** on/within which the event occurred.
- the **URL** for the item (if applicable).

Analyzing SharePoint Alerts

The following analysis tools provides information about SharePoint alerts that have been created for users in your SharePoint farm:

- **SharePoint Alerts by Site** lets you review alerts that have been created within one or more selected sites.
- **SharePoint Alerts by User** lets you review alerts that have been created for one or more specific users.

Analyzing SharePoint Alerts by Site

The SharePoint Alerts by Site analysis provides the following information about SharePoint alerts that have been set within one or more selected sites:

- the user for whom the alert was set
- the list or item on which the alert was set
- alert properties (including event type and frequency), and
- the date and time of the next alert.

To generate a SharePoint Alerts by Site analysis:

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

2 Choose Audits and Alerts > SharePoint Alerts by Site.

3 Specify the parameters for your analysis.

Now you can either:

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

OR

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

OR

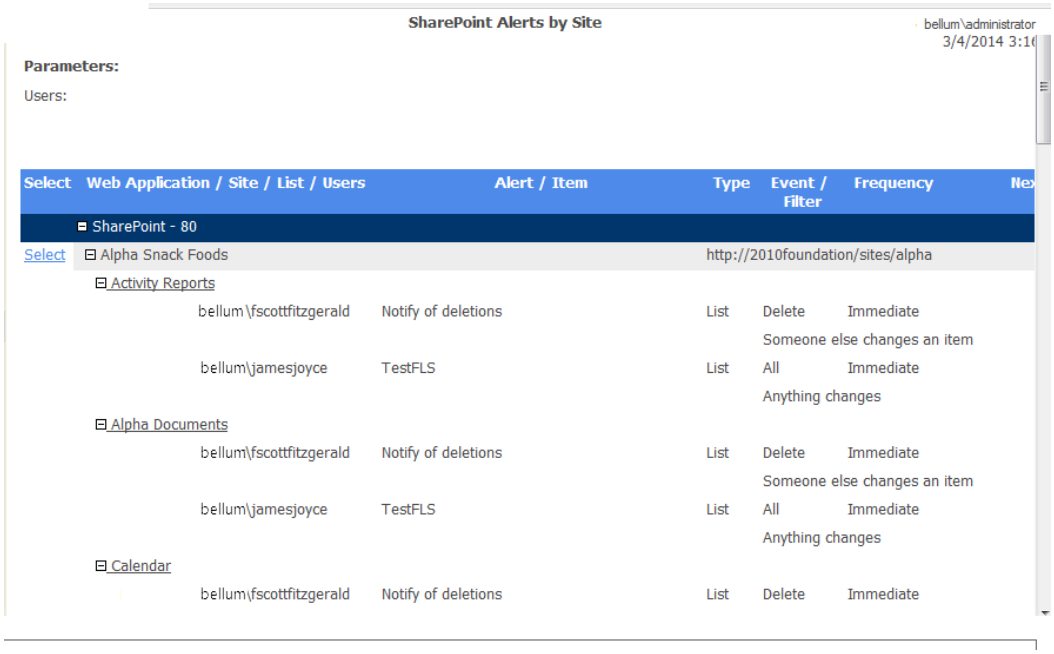
- save the operation as XML Instructions that can be executed at a later time.

.

The top level of analysis results lists all of the Web applications within the scope of your analysis.

When expanded, a list of sites on which alerts have been set displays, along with the following detail about each alert:

- the **Site** for which the alert was created
- the Titles of the **list**, and if applicable, **item**, for which the alert was set
- each of the **Users** for whom the alert was set, along with:
  - the title of the **Alert**
  - the alert **Type** (List or Item)
  - the **Event** that triggers the alert and, if the alert was created for an item, the **Filter** (that is, the option selected for "Send Alerts for These Changes")
  - the **Next Alert** date and time



Analyzing SharePoint Alerts by User

he SharePoint Alerts by User analysis provides the following information about SharePoint alerts that have been set for one or more users:

- the site within which the alert was set
- the list or item on which the alert was set
- alert properties (including event type and frequency), and
- the date and time of the next alert.

To generate an Alerts by User analysis:

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

2 Choose Audits and Alerts > SharePoint Alerts by User.

3 Specify the parameters for your analysis .

Now you can either:

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

OR

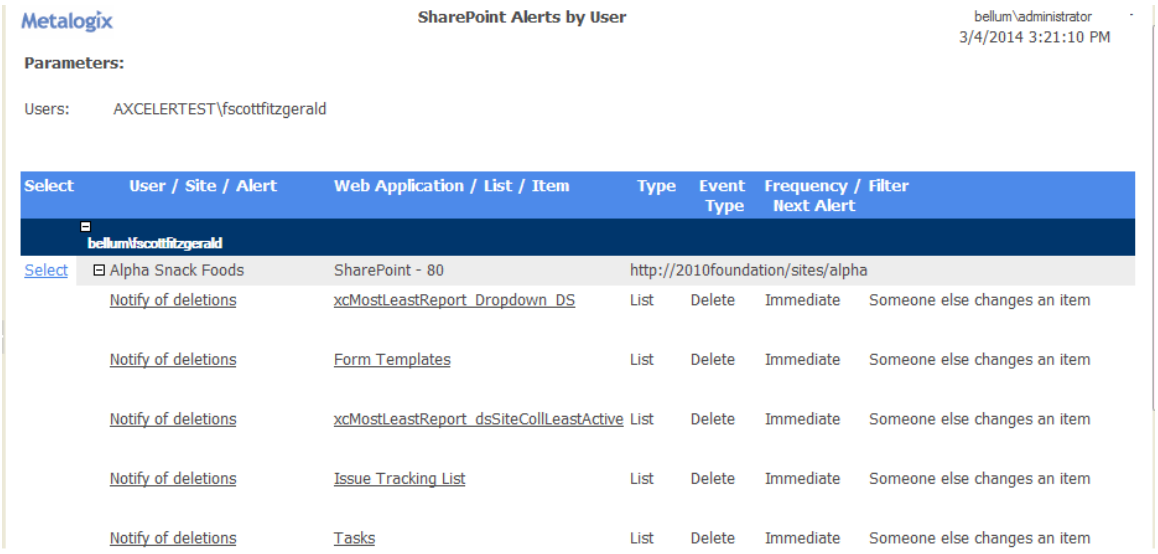
- schedule the operation to run at a later time or on a recurring basis.

OR

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

When expanded, each **Site** for which alerts have been created displays, along with the following detail about each alert:

- the title of the **Alert**
- the **List** and (if applicable) **Item** on which the alert was created
- the alert **Type** (List or Item)
- the **Event Type** that triggers the alert
- the **Frequency** of the alert as well as the **Next Alert** date and time
- if the alert was set for an *item*, the **Filter** used (that is, the option selected for "Send Alerts for These Changes")



Metalogix — SharePoint Alerts by User — bellum\administrator 3/4/2014 3:21:10 PM

Parameters:

Users: AXCELERTEST\fscottfitzgerald

Select	User / Site / Alert	Web Application / List / Item	Type	Event Type	Frequency / Next Alert	Filter
	bellum\fscottfitzgerald					
Select	Alpha Snack Foods	SharePoint - 80	http://2010foundation/sites/alpha			
	Notify of deletions	xcMostLeastReport_Dropdown_DS	List	Delete	Immediate	Someone else changes an item
	Notify of deletions	Form Templates	List	Delete	Immediate	Someone else changes an item
	Notify of deletions	xcMostLeastReport_dsSiteCollLeastActive	List	Delete	Immediate	Someone else changes an item
	Notify of deletions	Issue Tracking List	List	Delete	Immediate	Someone else changes an item
	Notify of deletions	Tasks	List	Delete	Immediate	Someone else changes an item

Analyzing ControlPoint Policies

The ControlPoint Policies analysis lets you analyze the following information about ControlPoint polices that have been created for your farm:

- the name of the policy and its owner (that is, the person who created the policy)
- the date and time when the policy was created
- the scope of the policy
- the policy rule
- when and by whom the policy was last updated.

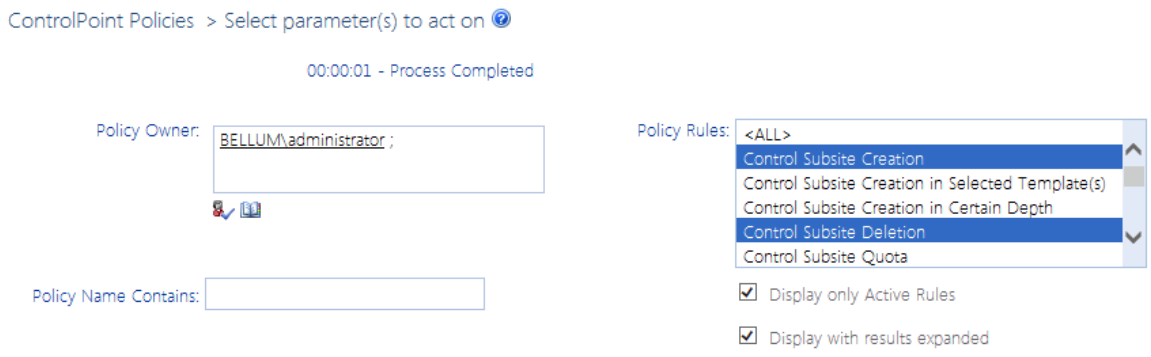
To generate a ControlPoint Policies Report:

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

2 Chose Automation > ControlPoint Policies.

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

If you want results to include ...	Then ...
policies created by one or more specific users (and you are a farm administrator)	select each Policy Owner you want to include in your analysis. NOTE: If you are not a farm administrator, you can only include policies that you created.
policies whose name contains a specific text string	enter that string in the **Policy Name Contains** field.
policies that contain one or more specific rules	select from the **Policy Rules** list (you can select multiple rules using the [**CTRL**] and [**SHIFT**] key in the conventional manner).
both active and inactive policies	uncheck the **Display only Active Rules** box.



Now you can either:

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

OR

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

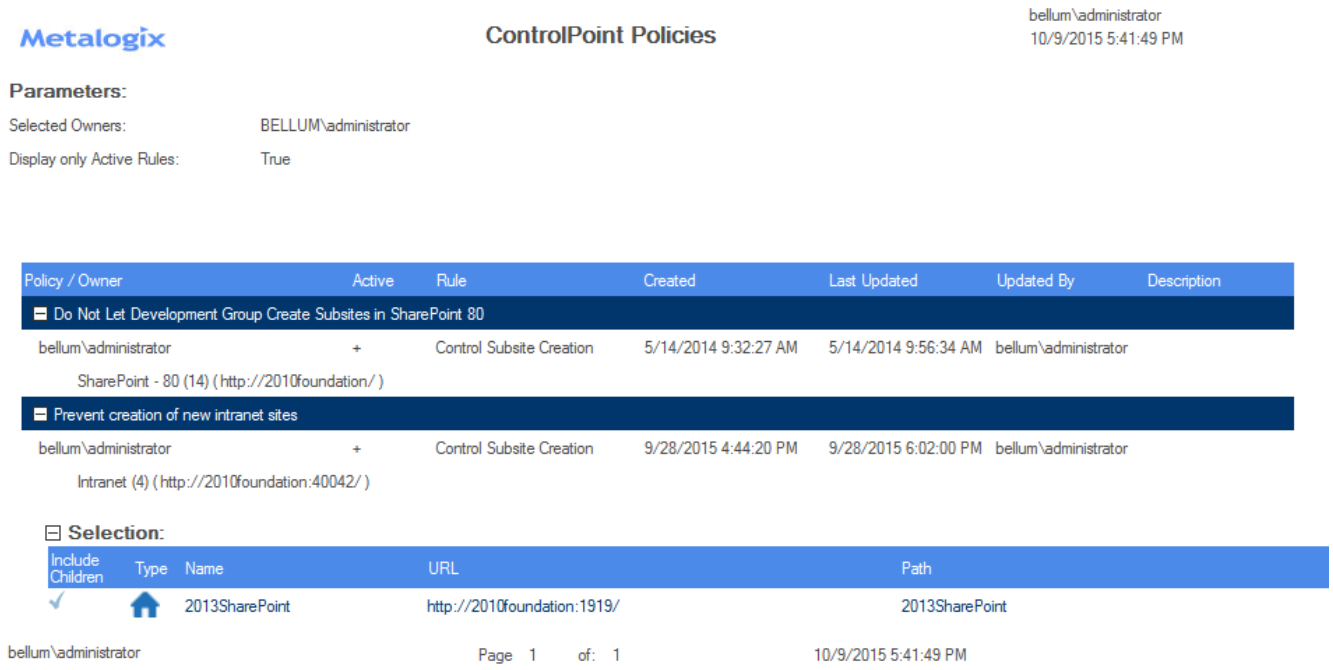
OR

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

The top level of analysis results list all of the policies within the selected scope

When expanded, the following information displays for each policy:

- the policy **Owner**
- an indication of whether or not the policy is **Active**
- the policy **Rule**
- the date and time when the policy was **Created** and **Last Updated**
- the user that the policy was last **Updated By**
- the policy **Description**
- the scope of the policy, including url and the number of immediate children covered by the policy.



Analyzing Users and Permissions

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

- **Site Permissions** shows the permissions of users for selected sites

- **Site List Permissions** shows user permissions for individual lists and list items within a site.

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

NOTE: In addition to showing user permissions at the individual site level, all Site Permissions analyses include any Web application policy permissions users may have.

You can also:

- find Orphaned Domain Users (that is, users who are no longer listed in the Active Directory but still have permissions in SharePoint).
- analyze **Comprehensive User Information** about a single user, which in addition to the user's permissions, includes
  - workflows created by the user
  - documents created by, last modified by, and checked out to the user
  - SharePoint alerts that have been created for the user
  - open tasks assigned to the user, including workflow tasks
  - membership in both SharePoint and Active Directory groups.
- analyze the membership and permissions of **SharePoint Groups**.

IMPORTANT: Permissions Reporting for Claims-Based Users

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 a claims-based user for a limited time after the user logs in.

Finding Orphaned Domain Users

If you are using Active Directory as the authentication method for your SharePoint environment, the Orphaned Domain Users analysis lists users who currently have permissions in SharePoint but are no longer valid in the Active Directory.

NOTE: The results of an Orphaned Domain User analysis are security-trimmed. An orphaned user's individual permissions for sites to which the administrator running the analysis does not have access will not be reflected in results. If all of the sites in which a SharePoint user has permissions are not accessible to the administrator running the analysis, that user will not be included in analysis results. Therefore, the analysis will be most complete when run by an administrator with full permissions to the entire farm.

Users Evaluated as Potential Orphans

ControlPoint evaluates users as potential orphans if they are disabled in and/or deleted from Active Directory but are found in:

- a SharePoint permission entry at any level (site, subsite, list, library, folder, or item)
- a site collection's All People list, and/or
- a Site Collection Administrator's list.

ControlPoint does not evaluate names in Web application policies, the Farm Administrator list, or any custom SharePoint list that may contain user names.

Users That Are Not Reported as Orphans

ControlPoint does not report a user as being orphaned if it is considered valid by SharePoint (that is, if a user who is not in the All People list can still be validated by the SharePoint People Picker). Active Directory entries that are considered valid by SharePoint (and therefore are not reported as orphaned by ControlPoint) include:

- expired accounts, and
- locked accounts (i.e., accounts for which the allowable threshold for failed login attempts has been exceeded).

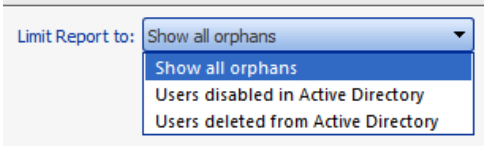
To generate an Orphaned Domain Users analysis:

1 Select the object(s) you want to include in your analysis.

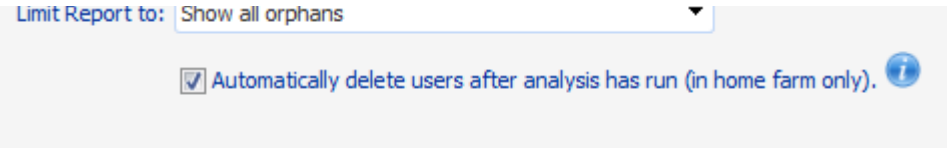
2 Choose Users and Security > Orphaned Domain Users.

3 Specify the parameters for your analysis.

Note that you have the option of limiting your results only to users who are either disabled in or have been deleted from Active Directory. If you accept the default option, **Show all orphans**, both types of users will be included.



4 If you want ControlPoint to automatically delete all users returned by the analysis on the home farm, check the **Automatically delete users after analysis has run** (in home farm only). Note that, in a multi-farm environment, this action cannot be carried out on a remote farm.



CAUTION: If you check this box, ControlPoint will automatically submit one or more Delete User jobs to the ControlPoint scheduler. The number of jobs submitted depends on the number of users to be deleted, and the number of users processed in a job is determined by the ControlPoint Setting OrphanDeleteBatchSize. The first job will be scheduled to run 30 minutes after the analysis has finished processing. Because this action cannot be undone, you may want to back up user permissions before executing the operation. (You also have the option of deleting jobs before they have run via the Schedule Monitor.)

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.



Metalogix

Orphaned Domain Users

axcelertest\testbenchaxceler
3/4/2014 3:38:38 PM

Parameters:
Show all orphaned users

Delete all orphans (in home farm only)

User Rights

*** - site security not inherited

Select	User	Display Name/Group	Admin	Full Control	Design	Contribute	Read	Limited	Other
	axcelertest\bettygroup2	<axcelertest\bettygroup2>							
	axcelertest\sales	<axcelertest\sales>							
	axcelertest\sneumann (DISABLED)	Stan Neumann							
	bellum\administrator	<bellum\administrator>							
	bellum\fscottfitzgerald	FScott Fitzgerald							
	bellum\haroldpotter	Harold Potter							
	bellum\isaacasimov	Isaac Asimov							
	bellum\jamesjoyce	James Joyce							
	bellum\margaretmeade	Margaret Meade							
	bellum\marktwain	Mark Twain							
	bellum\olivertwist	Oliver Twist							
	bellum\patentattorneys	<bellum\patentattorneys>							

When expanded, a list of rights for each orphaned user displays the same information as the User Rights section of the Site Permissions analysis.

Metalogix **Orphaned Domain Users** axcelertest\testbenchaxceler 3/4/2014 3:28:47 PM

Parameters:
Show all orphaned users

Delete all orphans (in home farm only)

User Rights *** - site security not inherited

Select	User	Display Name/Group	Admin	Full Control	Design	Contribute	Read	Limited	Other
	axcelertest\bettygroup2	<axcelertest\bettygroup2>							
Select	Alpha Snack Foods		SharePoint - 80 (Anonymous Access Enabled)			http://2010foundation/sites/alpha			
		<Summary>							
		<Direct>							
Select	....Stay Fresh Packaging***		SharePoint - 80 (Anonymous Access Enabled)			http://2010foundation/sites/alpha/stayfresh			
		<Summary>		+					
		<Direct>		+					
	axcelertest\sales	<axcelertest\sales>							
Select	Alpha Snack Foods		Customers - 44847			http://2010foundation:44847			
		<Summary>						+	
		<Direct>						+	
		Alpha Snack Foods Members						+	
		Alpha Snack Foods Visitors						+	
	axcelertest\sneumann	Stan Neumann							

Disabled Accounts as Orphans

Users whose accounts have been disabled (or disabled and renamed) in the Active Directory are normally considered orphans by both SharePoint and ControlPoint and are annotated as such in analysis results. This annotation is intended to help you in evaluating whether or not such users really should be considered orphans in accordance with you organization's policies.



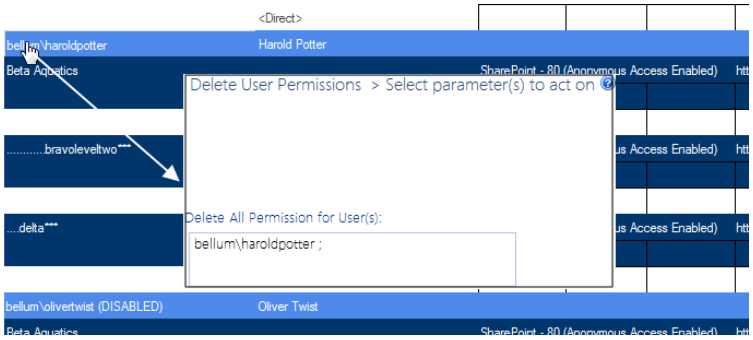
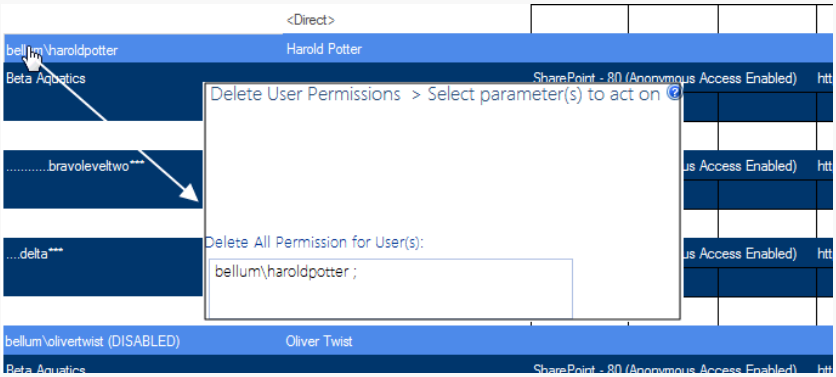
If an account has been both disabled and renamed, the annotation will include the original name, followed by the string DISABLED, RENAMED; and the new name. (ControlPoint will not consider a renamed account orphaned if it is also active, expired, or locked.)

NOTE: Although it is not a common practice, it is possible for restricted reads and other permissions to be placed on entries in the Active Directory. This can affect ControlPoint's ability to detect disabled accounts. Specifically, if an account has been disabled AND cannot be read by the ControlPoint Service Account, then both SharePoint and ControlPoint will treat that account as valid (not an orphan).

To delete orphaned user permissions from analysis results:

Use the information in the following table to determine the appropriate action to take.

CAUTION: If you have any doubt as whether a user is truly orphaned, it is recommended that before you delete permissions, you verify his/her existence and status in the Active Directory.

If you want to delete permissions for ...	Then ...
a specific orphaned user	click a **User** hyperlink to initiate a ControlPoint Delete User Permissions action.  The Delete User Permissions page opens in a separate browser window, with the **Delete Users** field pre-filled with the selected user(s). Note that you need to run the action without validating the user, as the account now longer exists in Active Directory.
all orphaned users as an interactive tasks	click the **Delete All** hyperlink at the top of the analysis results section. 

Analyzing Site Permissions

The Site Permissions analysis lets you examine the permissions that one or more users have for selected sites.

To generate a Site Permission analysis:

1 Select the object(s) you want to include in your analysis.

2 Choose Users and Security > Site Permissions.

3 Specify the parameters for your analysis.

Note that, In addition to the "standard" parameters, you have the option to **Group by** Sites (the default) or Users.



Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

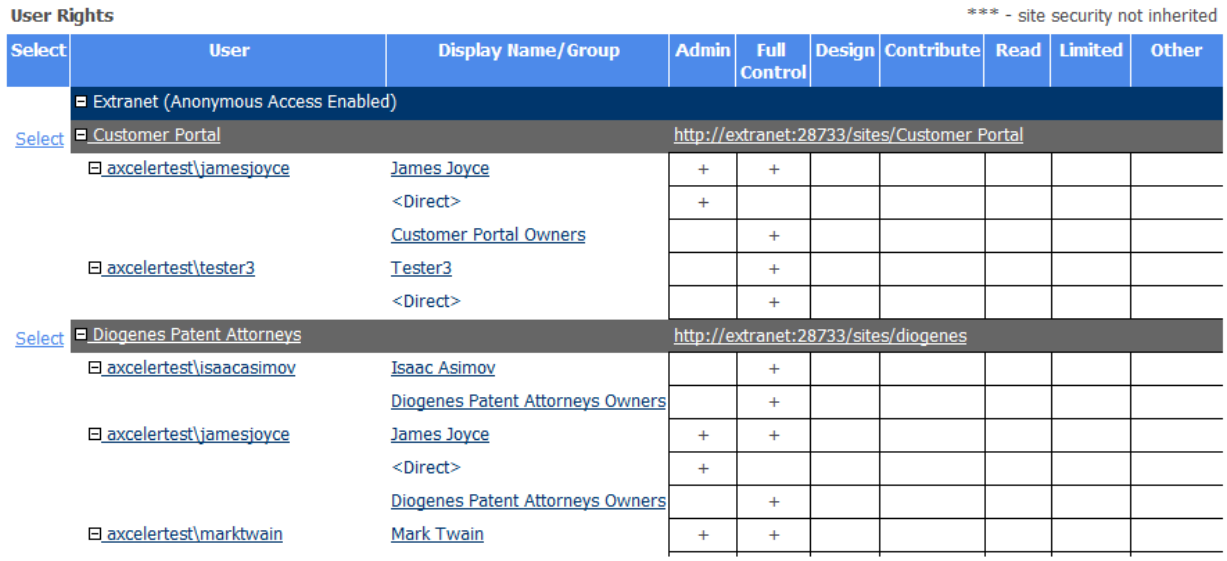
- save the operation as XML Instructions that can be executed at a later time.

Site Permissions analysis results contain the following sections:

- Web Application Policies
- User Rights
- Active Directory group members (if you chose to **Include AD Group Members table**.)

Web Application Policies Section

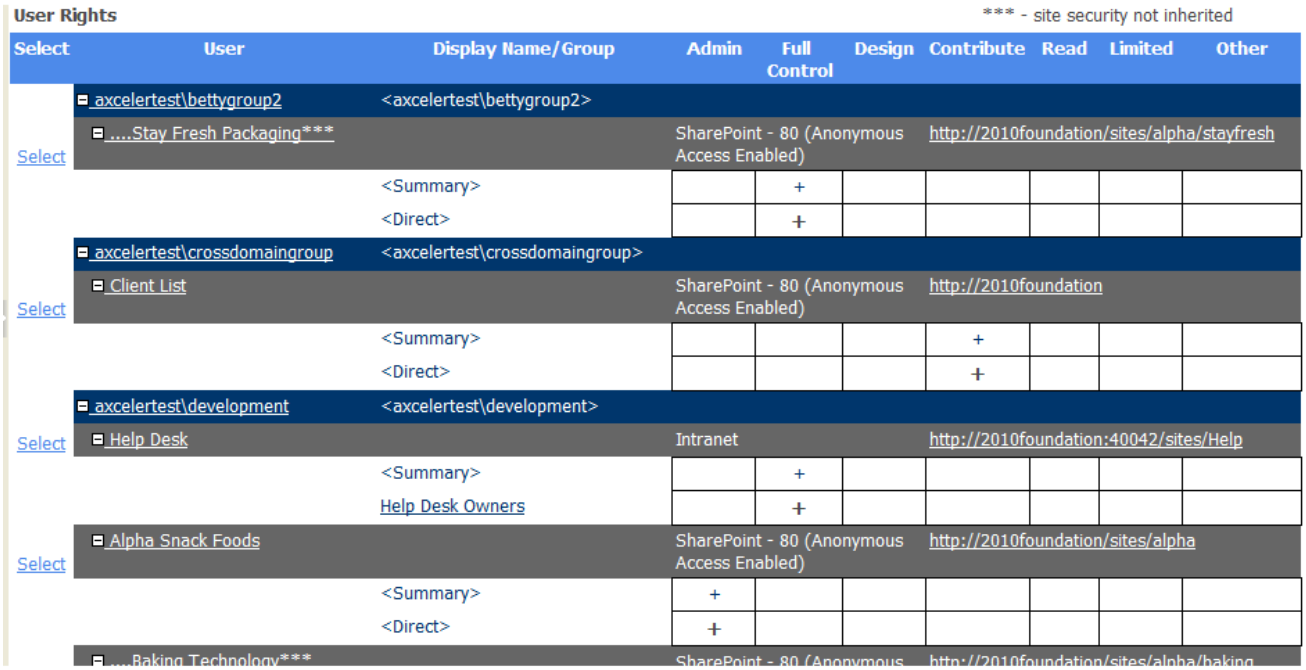
Depending on how you chose to group results, the top level of the Web Application Policies section lists either the Web application(s) or the users within the scope of your analysis. If grouped by sites, a plus sign (+) in any of the permission columns at the Web application level indicates that at least one user has that permission. If grouped by user, the plus sign indicates that the user has that permission for at least one Web application.



User Rights

*** - site security not inherited

Select	User	Display Name/Group	Admin	Full Control	Design	Contribute	Read	Limited	Other
	Extranet (Anonymous Access Enabled)								
Select	Customer Portal		http://extranet:28733/sites/Customer Portal						
	axcelertest\jamesjoyce	James Joyce	+	+					
		<Direct>	+						
		Customer Portal Owners		+					
	axcelertest\tester3	Tester3		+					
		<Direct>		+					
Select	Diogenes Patent Attorneys		http://extranet:28733/sites/diogenes						
	axcelertest\isaacasimov	Isaac Asimov		+					
		Diogenes Patent Attorneys Owners		+					
	axcelertest\jamesjoyce	James Joyce	+	+					
		<Direct>	+						
		Diogenes Patent Attorneys Owners		+					
	axcelertest\marktwain	Mark Twain	+	+					



User Rights

*** - site security not inherited

Select	User	Display Name/Group	Admin	Full Control	Design	Contribute	Read	Limited	Other
	axcelertest\bettygroup2	<axcelertest\bettygroup2>							
Select	....Stay Fresh Packaging***		SharePoint - 80 (Anonymous Access Enabled)			http://2010foundation/sites/alpha/stayfresh			
		<Summary>		+					
		<Direct>		+					
	axcelertest\crossdomaingroup	<axcelertest\crossdomaingroup>							
Select	Client List		SharePoint - 80 (Anonymous Access Enabled)			http://2010foundation			
		<Summary>				+			
		<Direct>				+			
	axcelertest\development	<axcelertest\development>							
Select	Help Desk		Intranet			http://2010foundation:40042/sites/Help			
		<Summary>		+					
		Help Desk Owners		+					
Select	Alpha Snack Foods		SharePoint - 80 (Anonymous Access Enabled)			http://2010foundation/sites/alpha			
		<Summary>	+						
		<Direct>	+						
	...Baking Technology***		SharePoint - 80 (Anonymous			http://2010foundation/sites/alpha/baking			

When expanded, the policy permissions within individual Web applications/for individual users (depending on how results are grouped) of for users within the Web application (including any that are zone-specific) displays. A plus sign (+) displays in the applicable column(s), which may include:

- the following policy-level site collection permissions (which indicates that one of the specified policy permission levels has enabled the site collection permissions):
  - **Administrator**
  - **Auditor**
  - **System** settings (for accounts that operates as a system account)

    NOTE: Administrator and Auditor are site collection level permissions that a policy level can have. They are set for the Web application via the SharePoint Manage Permission Policy Levels > Edit Permission Policy Level page.
- the four built-in SharePoint policy permission levels:
  - **Full Control**
  - **Full Read**
  - **Deny Write**
  - **Deny All**

NOTE: If a user has a custom policy permission level, it is recorded in the **Other** column.

Note that the account in which the Web application's application pool runs is listed with the zone identified as (System Account).

User Rights Section

Depending on how you chose to group results, the top level of the User Rights section lists the Web application(s) or users within the scope of your analysis.

NOTE: If Anonymous Access has been enabled for the Web application, it will be indicated in parentheses following the Web application name.

For each Web application, a list of sites within the Web application displays.

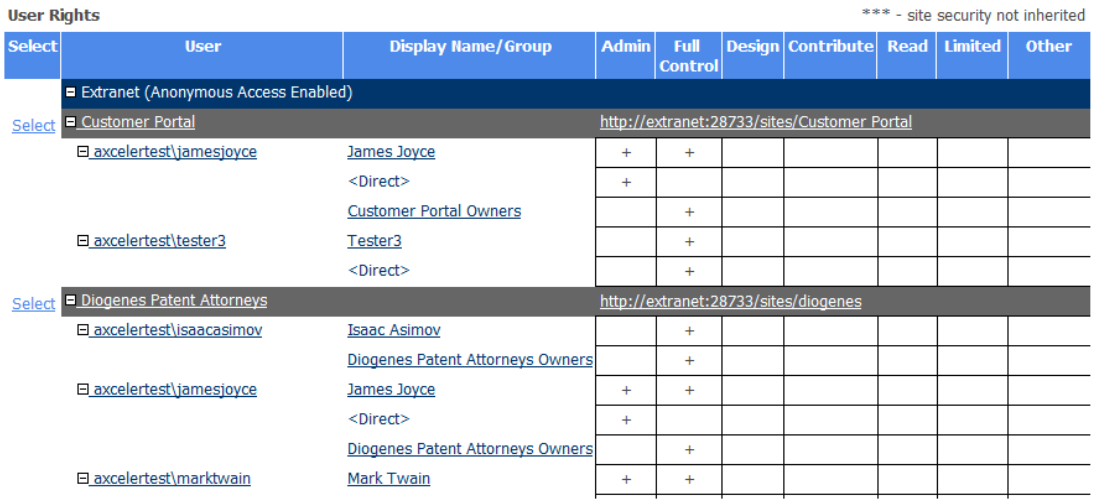
When expanded, a list of users and/or Active Directory groups with permissions for the site collection or site displays, along with the following information:

- the login name of the SharePoint **User**

  NOTE: If Anonymous Access has been enabled for the site, **<Anonymous Access>** appears as the first user name
- the user's permission level(s), as indicated by a plus sign (+) in the applicable column(s), which may include:
  - the site collection's **Admin** group
  - the five default SharePoint permission levels:
    - **Full Control**
    - **Design**
    - **Contribute**

- **Read**
- **Limited**.

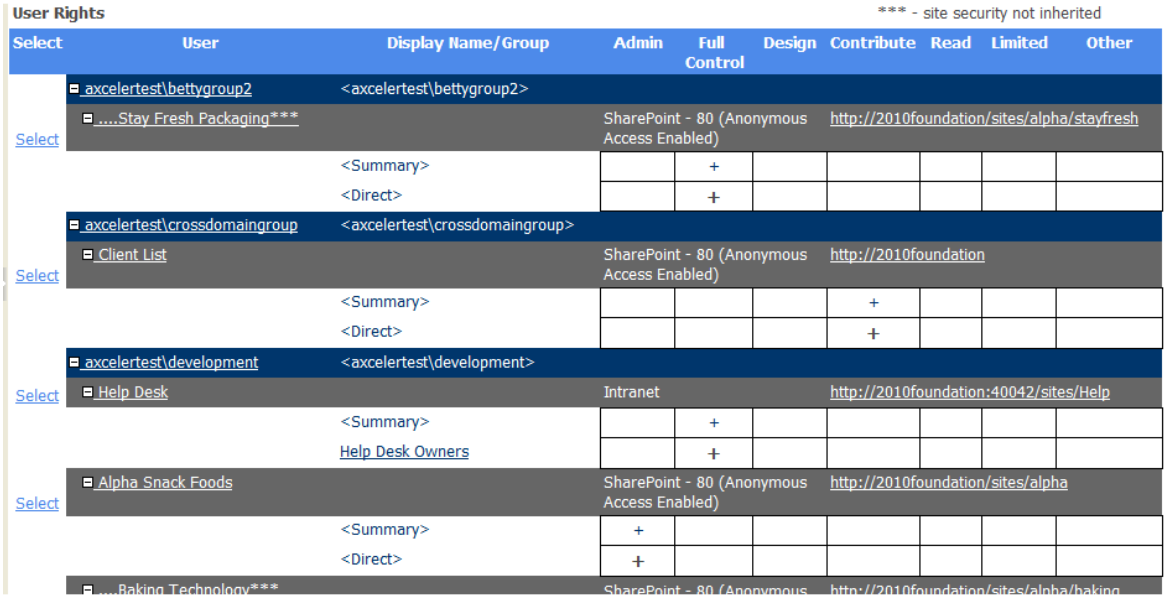
NOTE: If a user has a template-specific or custom permission level, it is recorded in the **Other** column. If Anonymous Access has been enabled for the site, the level of access (**Entire Website**, **Lists and Libraries**, or **None**) is recorded in the **Other** column.



User Rights

*** - site security not inherited

Select	User	Display Name/Group	Admin	Full Control	Design	Contribute	Read	Limited	Other
	Extranet (Anonymous Access Enabled)								
Select	Customer Portal		http://extranet:28733/sites/Customer Portal						
	axcelertest\jamesjoyce	James Joyce	+	+					
		<Direct>	+						
		Customer Portal Owners		+					
	axcelertest\tester3	Tester3		+					
		<Direct>		+					
Select	Diogenes Patent Attorneys		http://extranet:28733/sites/diogenes						
	axcelertest\isaacasimov	Isaac Asimov		+					
		Diogenes Patent Attorneys Owners		+					
	axcelertest\jamesjoyce	James Joyce	+	+					
		<Direct>	+						
		Diogenes Patent Attorneys Owners		+					
	axcelertest\marktwain	Mark Twain	+	+					



User Rights

*** - site security not inherited

Select	User	Display Name/Group	Admin	Full Control	Design	Contribute	Read	Limited	Other
	axcelertest\bettygroup2	<axcelertest\bettygroup2>							
Select	....Stay Fresh Packaging***		SharePoint - 80 (Anonymous Access Enabled)			http://2010foundation/sites/alpha/stayfresh			
		<Summary>		+					
		<Direct>		+					
	axcelertest\crossdomaingroup	<axcelertest\crossdomaingroup>							
Select	Client List		SharePoint - 80 (Anonymous Access Enabled)			http://2010foundation			
		<Summary>				+			
		<Direct>				+			
	axcelertest\development	<axcelertest\development>							
Select	Help Desk		Intranet			http://2010foundation:40042/sites/Help			
		<Summary>		+					
		Help Desk Owners		+					
Select	Alpha Snack Foods		SharePoint - 80 (Anonymous Access Enabled)			http://2010foundation/sites/alpha			
		<Summary>	+						
		<Direct>	+						
	....Baking Technology***		SharePoint - 80 (Anonymous			http://2010foundation/sites/alpha/baking			

By default, the report lists:

- users with direct permissions
- users with membership through SharePoint groups, and
- Active Directory groups that either have direct permissions or have been placed into SharePoint groups.

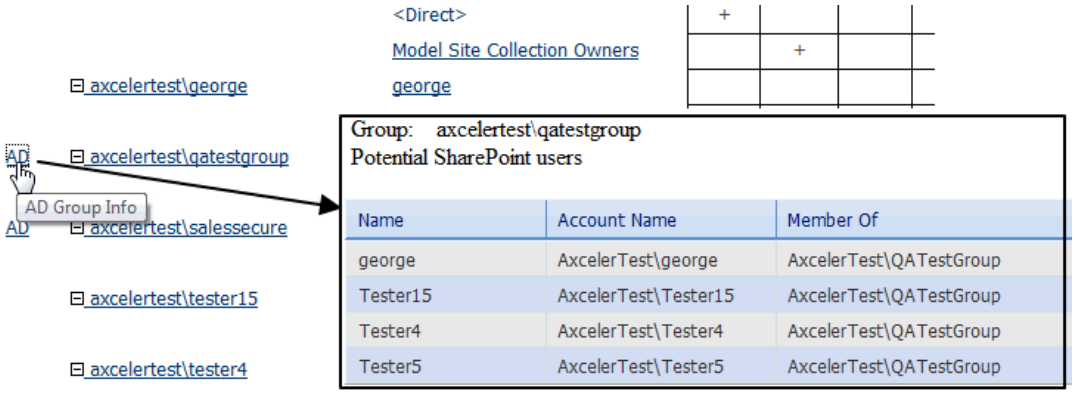
The **Display Name/Group** column shows the display name of each user whose permissions are direct or through membership in a SharePoint group. This name is taken from the Preferred Name field of the SharePoint User

Profile, which is typically populated with the Active Directory Display Name. If a display name does not exist for the user, the user's login name will display in brackets < >.

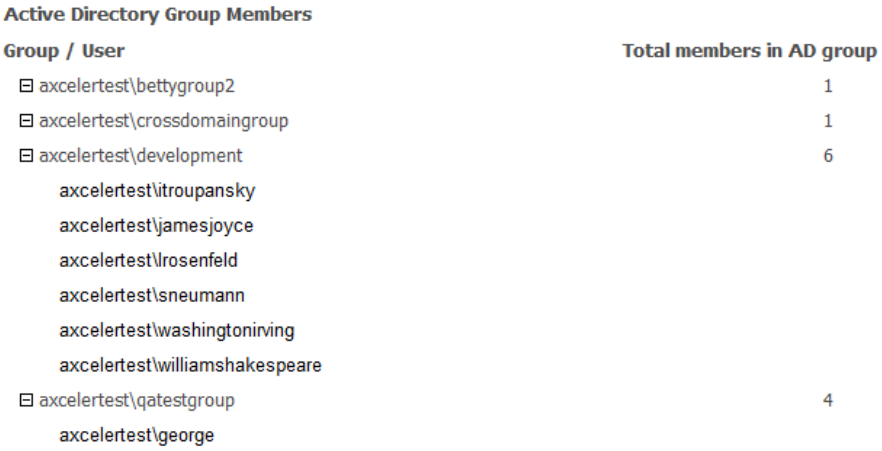
If you chose to **Include Users with AD Group Membership**, users who have permissions through Active Directory groups are listed as separate line items, with name of the Active Directory group displayed in the **Display Name/Group** column.



If you chose to group by Sites, you can click the **AD** hyperlink to the left of an AD group in the User Rights section to view Active Directory group members.



If you chose to **Include AD Group Members table**, an **Active Directory members** section, which lists each Active Directory group with permissions and all of its members, displays at the end of analysis results.



Analyzing Site Lists Permissions

The Site Lists Permissions analysis lets you examine user permissions for individual lists within a selected site.

NOTE: List permissions are also included as part of the Comprehensive Permissions analysis. You can also view permissions for items within a selected list by running a Permissions by List Item analysis.

To generate a Site Lists Permissions analysis:

1 Select the site whose list permissions you want to analyze.

NOTE: You can only analyze list permissions for one site at a time. If you multi-select, only the site on which you right-clicked will apply.

2 Choose Users and Security > Site Lists Permissions. Use the information in the following table to determine the appropriate action to take.

3 Specify the parameters for your analysis.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

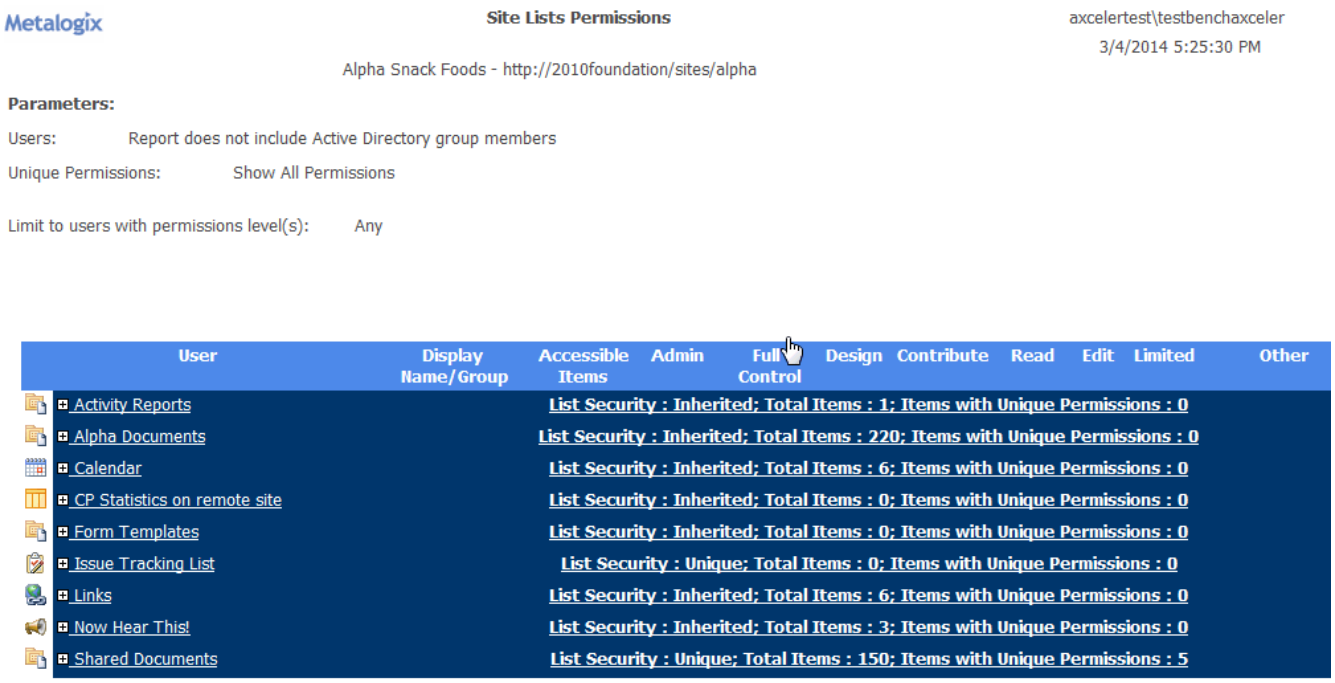
OR

- save the operation as XML Instructions that can be executed at a later time.

The top level of the Site Lists Permissions analysis shows all of the lists used on the site, along with the following information:

- the **Security** type (Inherited or Unique)
- the number of **Items** in the list
- the number of **Items with Unique Permissions**.

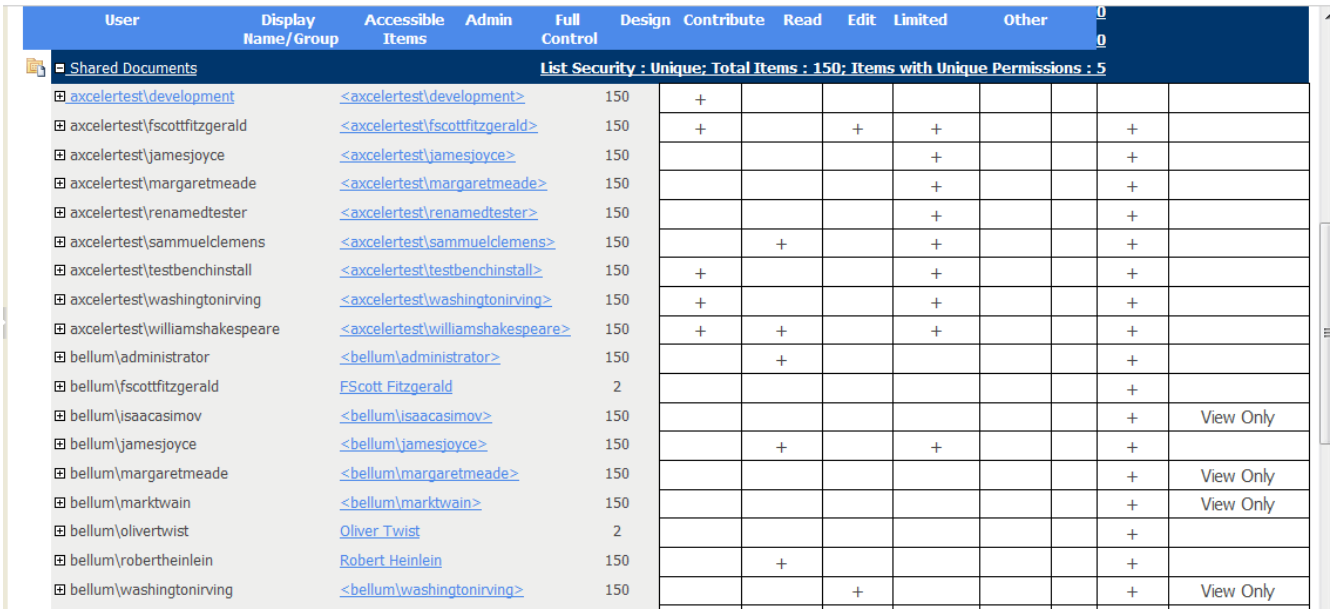
NOTE: If you chose to **Show unique permissions only**, results will include any list that contains *items* with unique permissions (even if the list itself has inherited permissions).



When expanded, the following information displays for each list:

- each **User** or Active Directory group with permissions to the List item(s)
- if applicable, the SharePoint **Group** via which the user has permissions (users who have direct access are appropriately identified)
- the number of **Accessible Items** for that user, and
- the user's permission level(s). A plus sign (+) displays in the applicable column(s), which may include any of the five default SharePoint permission levels:
  - **Full Control**
  - **Design**
  - **Contribute**
  - **Read**
  - **Limited**.

NOTE: If a user has a template-specific or custom permission level, it is recorded in the **Other** column.

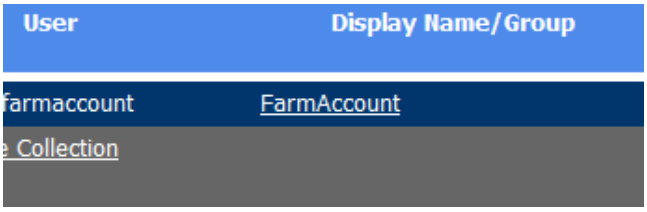


User	Display Name/Group	Accessible Items	Admin	Full Control	Design	Contribute	Read	Edit	Limited	Other			
Shared Documents					List Security : Unique; Total Items : 150; Items with Unique Permissions : 5								
axcelertest\development		<axcelertest\development>			150	+							
axcelertest\fscottfitzgerald		<axcelertest\fscottfitzgerald>			150	+		+	+			+	
axcelertest\jamesjoyce		<axcelertest\jamesjoyce>			150				+			+	
axcelertest\margaretmeade		<axcelertest\margaretmeade>			150				+			+	
axcelertest\renamedtester		<axcelertest\renamedtester>			150				+			+	
axcelertest\sammuelclemens		<axcelertest\sammuelclemens>			150		+		+			+	
axcelertest\testbenchinstall		<axcelertest\testbenchinstall>			150	+			+			+	
axcelertest\washingtonirving		<axcelertest\washingtonirving>			150	+			+			+	
axcelertest\williamshakespeare		<axcelertest\williamshakespeare>			150	+	+		+			+	
bellum\administrator		<bellum\administrator>			150		+					+	
bellum\fscottfitzgerald		FScott Fitzgerald			2							+	
bellum\isaacasimov		<bellum\isaacasimov>			150							+	View Only
bellum\jamesjoyce		<bellum\jamesjoyce>			150		+		+			+	
bellum\margaretmeade		<bellum\margaretmeade>			150							+	View Only
bellum\marktwain		<bellum\marktwain>			150							+	View Only
bellum\olivertwist		Oliver Twist			2							+	
bellum\robertheinlein		Robert Heinlein			150		+					+	
bellum\washingtonirving		<bellum\washingtonirving>			150			+				+	View Only

By default, the report lists:

- users with direct permissions
- users placed into SharePoint groups, and
- Active Directory groups that either have direct permissions or have been placed into SharePoint groups.

The **Display Name/Group** column shows the display name of each user whose permissions are direct or through membership in a SharePoint group. This name is taken from the Preferred Name field of the SharePoint User Profile, which is typically populated with the Active Directory Display Name. If a display name does not exist for the user, the user's login name will display in brackets < >.



User	Display Name/Group
farmaccount	FarmAccount
e Collection	

If you chose to **Expand Active Directory Groups:**

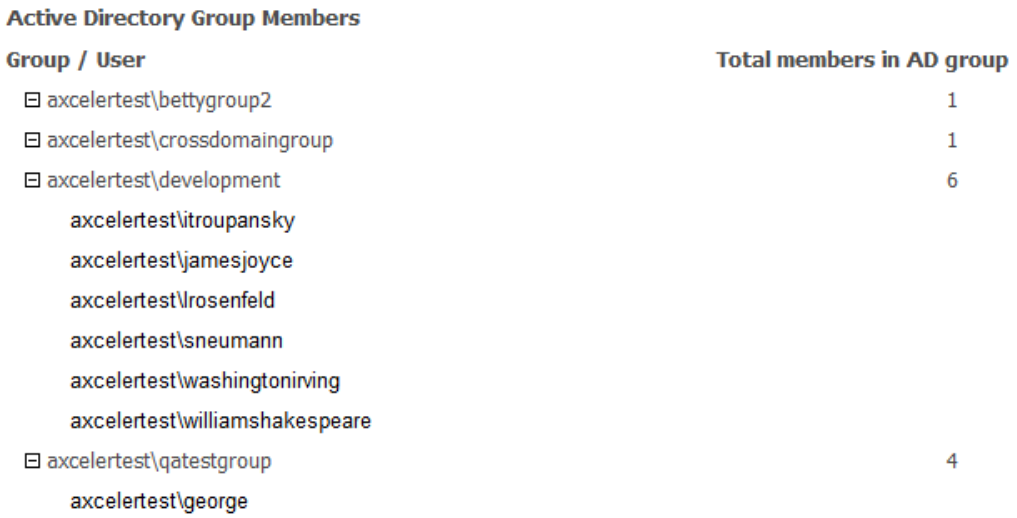
- users who have permissions through Active Directory groups are listed as separate line items, with name of the Active Directory group displayed in the **Display Name/Group** column.



Select	User	Display Name/Group	Admi
		Help Desk Members	
		Help Desk Owners	
	axcelertest\itroupansky	Irene Troupansky	
		axcelertest\development	
	axcelertest\jamesjoyce	James Joyce	

AND

- an **Active Directory members** section, which lists each Active Directory group with permissions and all of its members, displays at the end of analysis results.



Active Directory Group Members	
Group / User	**Total members in AD group**
⊟ axcelertest\bettygroup2	1
⊟ axcelertest\crossdomaingroup	1
⊟ axcelertest\development	6
axcelertest\itroupansky	
axcelertest\jamesjoyce	
axcelertest\lrosenfeld	
axcelertest\sneumann	
axcelertest\washingtonirving	
axcelertest\williamshakespeare	
⊟ axcelertest\qatestgroup	4
axcelertest\george	

Analyzing Permissions by List Item

The Permissions by List Item analysis lets you examine user permissions for folders and items within selected lists.

NOTE: List item permissions are also included as part of Comprehensive Permissions analysis.

To generate a Permissions by List Item analysis:

1 Select the list(s) whose item permissions you want to analyze.

2 Choose Users and Security > Permissions by List Item.

3 If you want to analyze only specific items within the selected scope, select the items you want to analyze.

4 Specify the parameters for your analysis.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

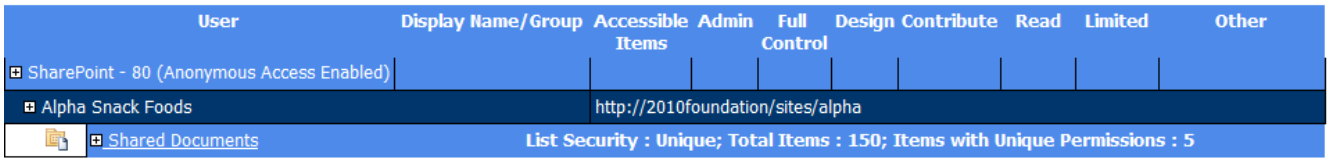
- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

The first row of the result set includes the following information about the list itself:

- an icon that identifies the list type (document library, calendar, task list, etc.).
- the name of the list
- the **List Security** type (Inherited or Unique)
- the number of **Items** in the list
- the number of **Items with Unique Permissions**.



When the first row is expanded, each user with permissions for the list is displayed, along with the following information:

- the name of the SharePoint **User**
- the number of **Accessible Items** (that is, the number of items within the list for which the user has permissions)
- the user's permission level(s) for the list itself, as indicated by a plus sign (+) in the applicable column(s), which may include:
  - the site collection's **Admin** group
  - the five default SharePoint permission levels:
    - **Full Control**
    - **Design**
    - **Contribute**
    - **Read**
    - **Limited**.

NOTE: If a user has a template-specific or custom permission level, it is recorded in the **Other** column.

User	Display Name/Group	Accessible Items	Admin	Full Control	Design	Contribute	Read	Edit	Limited	Other
SharePoint - 80 (Anonymous Acce Enabled)										
Alpha Snack Foods	http://2010foundation/sites/alpha									
Shared Documents	List Security : Unique; Total Items : 151; Items with Unique Permissions : 5									
bellum\administrator	<bellum\administrator>			+		+			+	
	<Direct>								+	
bellum\agathachristie	Agatha Christie					+			+	
	Alpha Snack Foods Members					+			+	
bellum\fscottfitzgerald	FScott Fitzgerald					+			+	
	Viewers								+	
bellum\hmiller	Henry Miller			+	+	+			+	
	Alpha Snack Foods Members					+			+	
bellum\isaacasimov	Isaac Asimov					+			+	View Only
	<Direct>								+	
bellum\jamesjoyce	James Joyce			+		+			+	
	<Direct>								+	
bellum\margaretmeade	Margaret Meade					+			+	View Only
	<Direct>								+	
bellum\marktwain	Mark Twain			+		+			+	
	<Direct>								+	

The remaining rows contain detailed permissions information for each folder and item within the list.

Click a list, folder, or item name to open the SharePoint Permissions page.

Note that in the following example, the external user is identified by his external email address.

Analyzing Comprehensive Permissions

The Comprehensive Permissions analysis shows the permissions that users have to selected sites as well as lists (and optionally, list items) within those sites.

If you want to analyze site-level permissions only (with the option of drilling down to list permissions for each user individually), you can run a Site Permissions analysis instead.

NOTE: The Comprehensive Permissions analysis always uses real-time (not cached) data.

To generate a Comprehensive Permissions analysis:

1 Select the object(s) on which you want to perform the analysis).

2 Choose Users and Security > Comprehensive Permissions.

3 Specify the parameters for your analysis.

Note that, In addition to the "standard" parameters, you have the option to **Group by** Sites (the default) or Users.



NOTE: By default, permissions for list items are excluded from the analysis. You can, however, chose to Include **List Items**. Be aware however, that processing time may increase significantly.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

Comprehensive Permissions analysis results consist of the following sections:

- Web Application Policies
- User Rights.

Web Application Policies Section

The information in the Web Application Polices section is the same as that found in the Site Permissions analysis.

User Rights Section

In addition to the same site-level permissions (Site Security) shown in the Site Permissions analysis, the User Rights section also shows the same list-level and optionally, item-level permissions (List Security) shown in the Site Lists Permissions analysis.

Analyzing Comprehensive Information About SharePoint Users

The Comprehensive User Report contains the following information about one or more SharePoint users:

- permissions that the user has for sites, lists, and list items
- workflows created by the user
- documents created by, last modified by, and checked out to the user
- SharePoint alerts that have been created for the user
- open tasks assigned to the user, including workflow tasks
- membership in both SharePoint and Active Directory groups.

To generate a Comprehensive User Report:

1 Select the object(s) for which you want to view comprehensive user information

2 Choose Users and Security > Comprehensive User Report.

3 Select the user(s) whose comprehensive information you want to analyze.

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.

Comprehensive User Information Report results consist of the following sections:

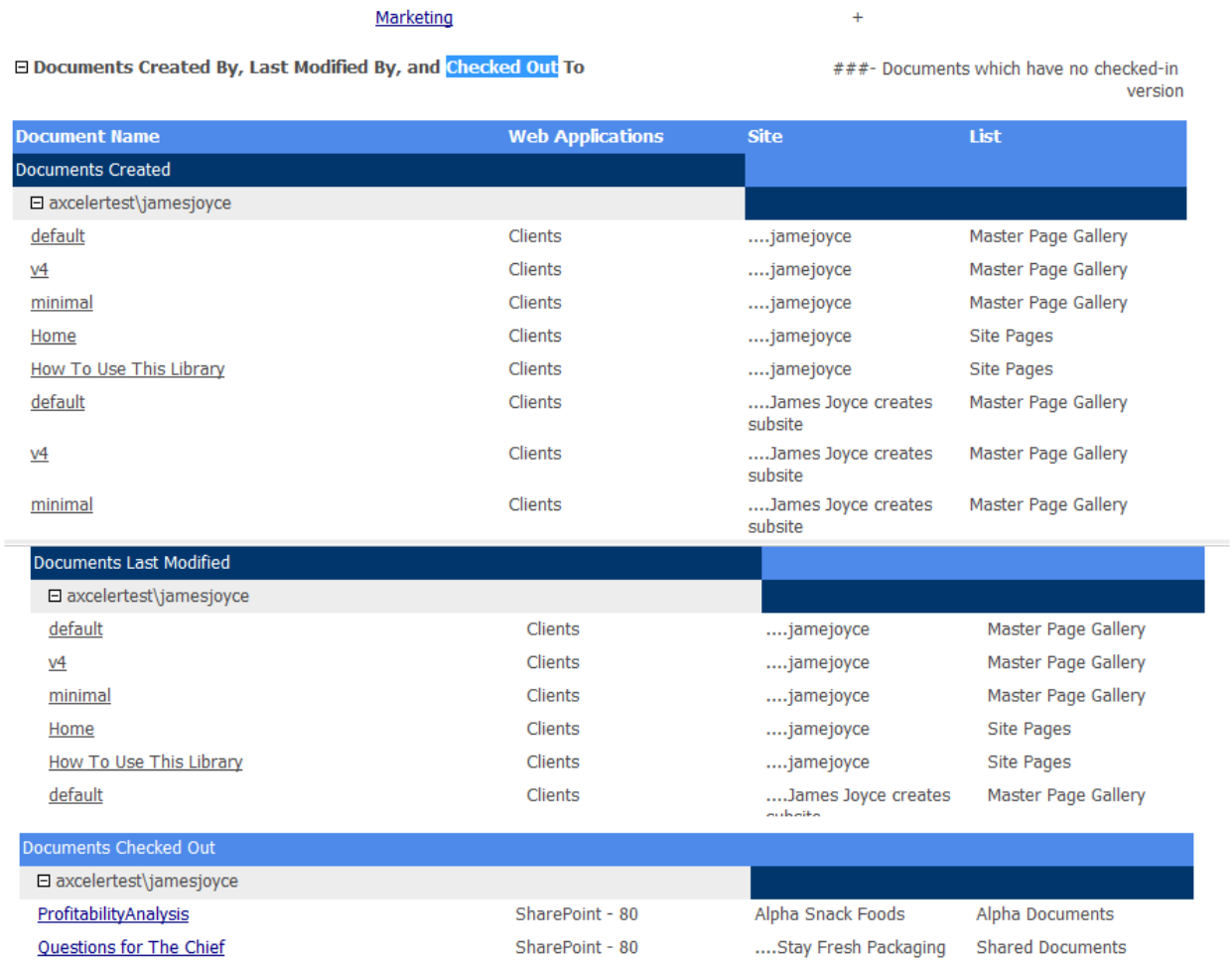
- Web Application Policies
- User Rights
- Documents Created By, Last Modified By, and Checked Out to User
- SharePoint Alerts by Site
- Workflows Created
- Open Tasks
- User Groups

Web Application Polices and User Rights Sections

The information in the Web Application Polices and User Rights sections is the same as that found in the Comprehensive Permissions analysis.

Documents Created By, Last Modified By, and Checked Out to User Section

This section lists each of the documents created by, last modified by, and checked out to the user and includes the name of the **Web Application**, **Site**, and **List** where the document is located.



SharePoint Alerts by Site Section

This section lists SharePoint alerts that have been created for the user for each site within the scope of your analysis, including the **Web Application**, **Site.** and url for which the alert is set.

When expanded, the following additional information displays:

- alert **Type** (List or Item)
- **Event Filter** that triggers the alert
- **Frequency** of the alert
- if the frequency is other than immediate, the date and time of the **Next Alert**

- the alert **Filter**

⊟ SharePoint Alerts by User

Select	User / Site / Alert	Web Application / List / Item	Type	Event Type	Frequency / Filter Next Alert	
	⊟ i:0#.w|axcelertest\jamesjoyce					
	⊟ Help Desk	Clients	http://clients/sites/Help			
	New Document Added	Circulations	List	Add	Daily	Anything changes
					3/19/2014 7:00:00 AM	
	New Document Added	Tasks	List	Add	Daily	
					3/19/2014 7:00:00 AM	
	New Document Added	Team Discussion	List	Add	Daily	Anything changes
					3/19/2014 7:00:00 AM	
	New Document Added	Group Calendar	List	Add	Daily	Anything changes
					3/19/2014 7:00:00 AM	
	New Document Added	Shared Documents	List	Add	Daily	Anything changes
					3/19/2014 7:00:00 AM	

Running Workflows Created Section

The Running Workflows Created section lists all of the workflows created by the user that have at least one instance currently running. Information about the workflow includes:

- **Workflow** name
- the number of **Running Instances**
- A **Description** of the workflow.

When expanded, the following additional information about the workflow displays:

- the workflow's **Associated Item**
- a link to a **Summary** of all workflows associated with the **Document**
- the **List** for which the workflow was created
- the **Site** and **Web Application** where the list is located.

⊟ Running Workflows Created

Workflow / Associated Item	Document	Running Instantces / List	Description / Site	Web Applications
⊟ i:0#.w|axcelertest\jamesjoyce				
⊞ Workflow		2	Use this workflow to track items in a list.	
RiskAsssessment.doc	Summary	Alpha Documents	Alpha Snack Foods	SharePoint - 80
Content_Matrix_Release_Notes.pdf	Summary	Alpha Documents	Alpha Snack Foods	SharePoint - 80
⊞ Compliance Review		3	Use this workflow to track items in a list.	
SharePointPlanning.doc	Summary	Alpha Documents	Alpha Snack Foods	SharePoint - 80
⊞ Alpha Documents Workflow		1	Use this workflow to track items in a list.	
Content_Matrix_Release_Notes.pdf	Summary	Alpha Documents	Alpha Snack Foods	SharePoint - 80

Open Tasks Section

The Open Tasks section lists all of the workflow-associated open tasks that have been assigned to the user, including:

- the **Task Name** and **Status**
- the **Task Created Date** and time
- the **Task Type**
- the **Associated Workflow** for the task
- the **Task Description**

User Groups Section

The User Groups section lists the **Active Directory Groups** and **SharePoint Groups** of which the user is a member.



⊟ SharePoint Groups and Active Directory Groups

SharePoint Groups	Site
⊟ AXCELERTEST\jamesjoyce	
Alpha Snack Foods Members	Alpha Snack Foods
Alpha Snack Foods Owners	Alpha Snack Foods
Compliance	Alpha Snack Foods
Sales	Alpha Snack Foods
Stay fresh	Alpha Snack Foods
Viewers	Alpha Snack Foods
Customer Portal Owners	Customer Portal
Diogenes Patent Attorneys Owners	Diogenes Patent Attorneys
Help Desk Members	Help Desk
Operations Owners	Operations

Analyzing SharePoint Groups

The SharePoint Groups Analysis provides details about membership and permissions of SharePoint groups within one or more site collections and/or sites.

To generate a SharePoint Groups analysis:

1 Select the object(s) for which you want to analyze SharePoint groups.

2 Choose Users and Security > SharePoint Group Analysis.

3 Specify the parameters for your analysis.

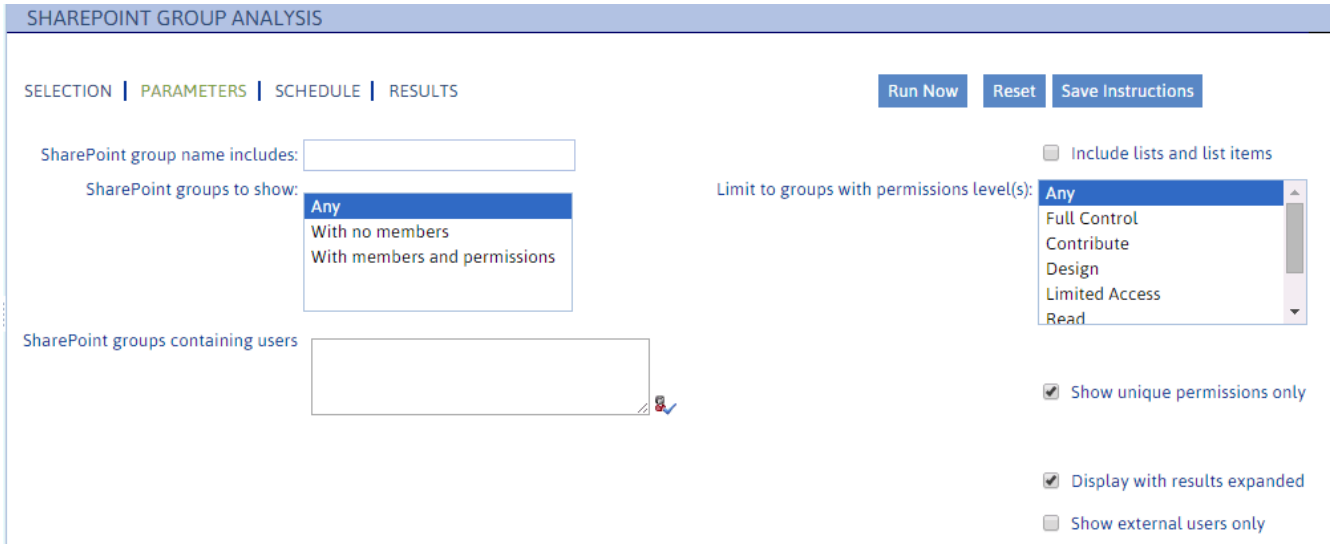
In addition to the "standard" parameters for permissions analyses, you can limit results to:

- SharePoint groups whose name include a specific text string
- groups **with no members** and/or **with no permissions** or only groups with both **members and permissions**

NOTE: Currently, you can only report on groups with no permissions if the ControlPoint Configuration Setting "Show SharePoint Groups with No Permissions in Hierarchy" is set to *true*. (See the *ControlPoint Administration Guide* for details.)

You can also choose whether to **Include lists and list items** in results.

CAUTION: If you chose to include lists and list items, the analysis may take significantly longer to run and may generate a much larger set of results.



Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

The SharePoint Group Analysis consists of the following sections:

- Membership
- Permissions

Membership Section

The Membership section lists each site collection within the scope or your analysis.

When expanded the following information displays:

- each **SharePoint Group** within the site collection
- the **No of users** in the group.

- a plus sign (+) identifying each group that **Has Permissions**.

Membership

SharePoint Group	Member	Display Name	No of Users	Has Permissions
⊟ SharePoint - 80 (Anonymous Access Enabled)				
⊟ Alpha Snack Foods				
⊞ Alpha Snack Foods Members			5	+
⊞ Alpha Snack Foods Owners			6	+
⊟ Alpha Snack Foods Visitors			4	+
	bellum\isaacasimov	<bellum\isaacasimov>		
	bellum\margaretmeade	<bellum\margaretmeade>		
	bellum\marktwain	<bellum\marktwain>		
	bellum\washingtonirving	Washington Irving		
⊞ Baking Technology - Full Control			2	
⊟ Compliance			2	
	BELLUM\isaacasimov	Isaac Asimov		
	BELLUM\robertheinlein	Robert Heinlein		

When expanded, each **Member** login name and **Display Name** is listed.

Membership

SharePoint Group	Member	Display Name	No of Users	Has Permissions
⊟ SharePoint - 80 (Anonymous Access Enabled)				
⊟ Alpha Snack Foods				
⊞ Alpha Snack Foods Members			5	+
⊞ Alpha Snack Foods Owners			6	+
⊟ Alpha Snack Foods Visitors			4	+
	bellum\isaacasimov	<bellum\isaacasimov>		
	bellum\margaretmeade	<bellum\margaretmeade>		
	bellum\marktwain	<bellum\marktwain>		
	bellum\washingtonirving	Washington Irving		
⊞ Baking Technology - Full Control			2	
⊟ Compliance			2	
	BELLUM\isaacasimov	Isaac Asimov		
	BELLUM\robertheinlein	Robert Heinlein		

Note that an Active Directory group is counted as a single user.

Permissions

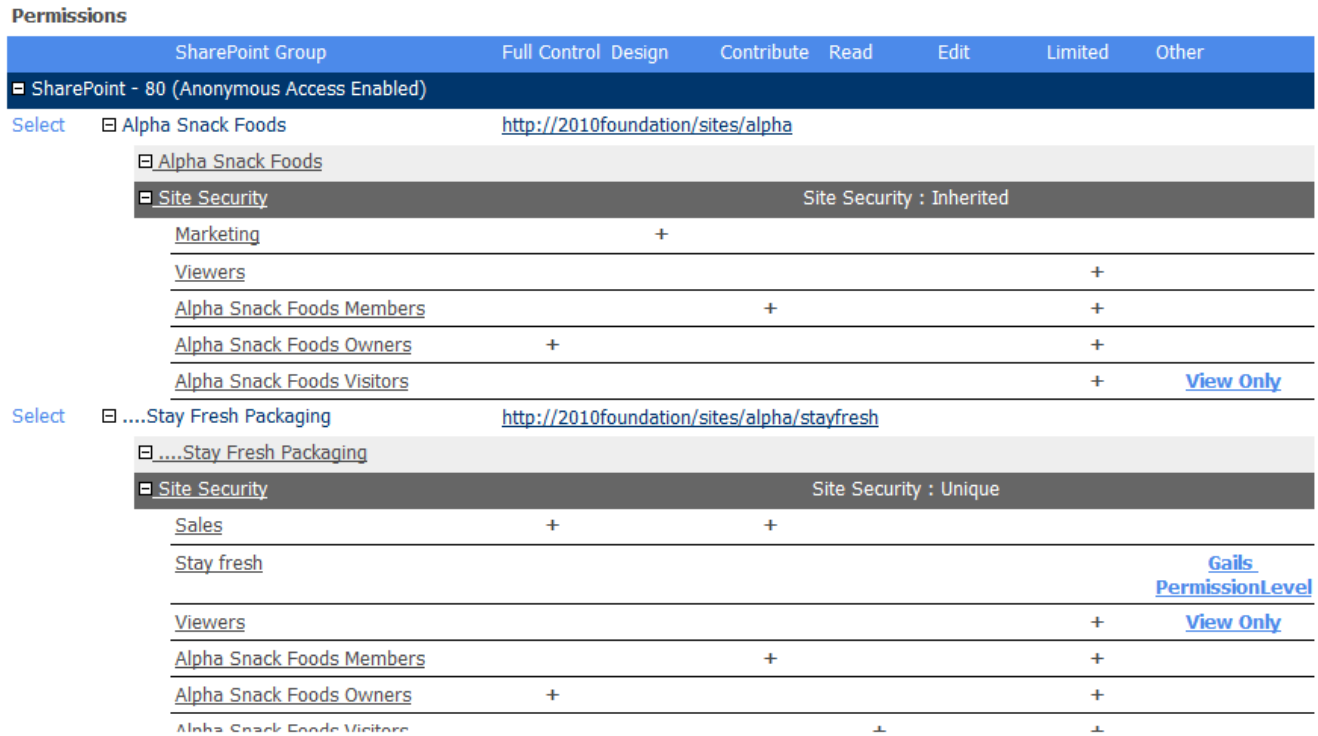
	SharePoint Group	Full Control	Design	Contribute	Read	Edit
⊟ SharePoint - 80 (Anonymous Access Enabled)						
Select	⊞ Alpha Snack Foods	http://2010foundation/sites/alpha				
Select	⊞ ....Stay Fresh Packaging	http://2010foundation/sites/alpha/stayfresh				

Permissions Section

The Permissions section lists each site within the scope of your analysis.



When expanded, a Site Security summary row indicates whether site security is Inherited or Unique. Each SharePoint Group within the site is listed, along with a plus sign (+) identifying each of its permissions. Any custom permissions levels are recorded in the **Other** column.



Note that in the following example, the external user is identified by his external email address.

Analyzing Permissions Changes

If you use ControlPoint to back up site permissions, you can compare permission changes within a single site, either between current permissions and a backup created at a specific date and time or from two backups created at different dates and times.

The analysis shows changes to:

- individual user permissions that have been granted directly
- permissions granted to SharePoint and Active Directory groups.

NOTE: Currently, this analysis does not identify changes to "effective permissions" (which, in SharePoint, refers to permissions granted as a side-effect of a granted permission). That is, changes to an individual's permissions based solely on addition to or deletion from a SharePoint or Active Directory group will not be reflected in analysis results.

To analyze permissions changes:

1 Select the site whose permissions changes you want to analyze.

2 Choose one of the following options (depending on how you want results to be grouped):

- Users and Security > Permissions Changes by Site.

OR

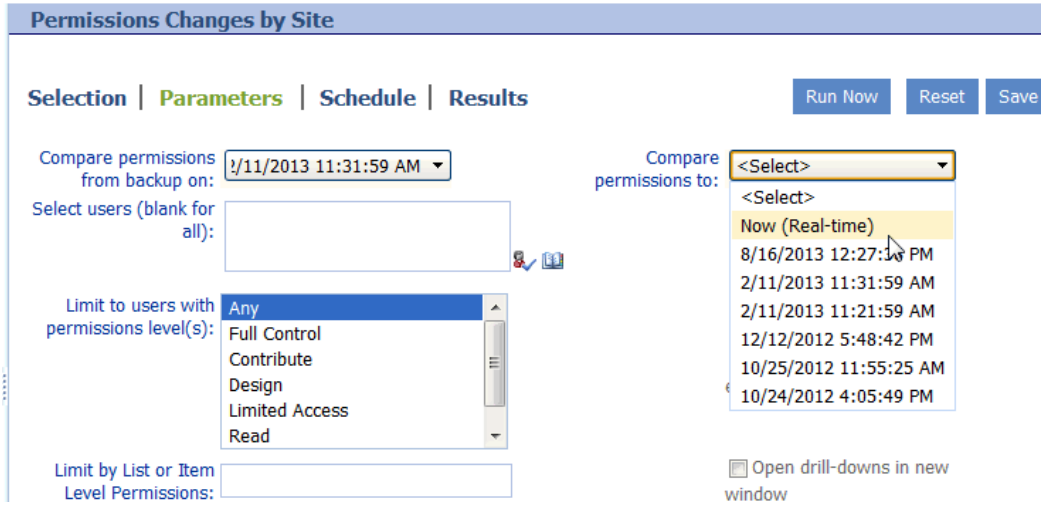
- Users and Security > Permissions Changes by User.

3 Specify the parameters for your analysis.

In addition to "standard" parameters:

- You must select a **Compare permissions from** and **Compare permissions to** date and time.

NOTE: You can only select backups that were created in ControlPoint version 4.6 or later.



- If you want to view only users whose permissions have changed, check the **Show only users with permissions changes** box.

NOTE: If you leave this box unchecked, all users will be included in the analysis, regardless of whether their permissions have changed.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

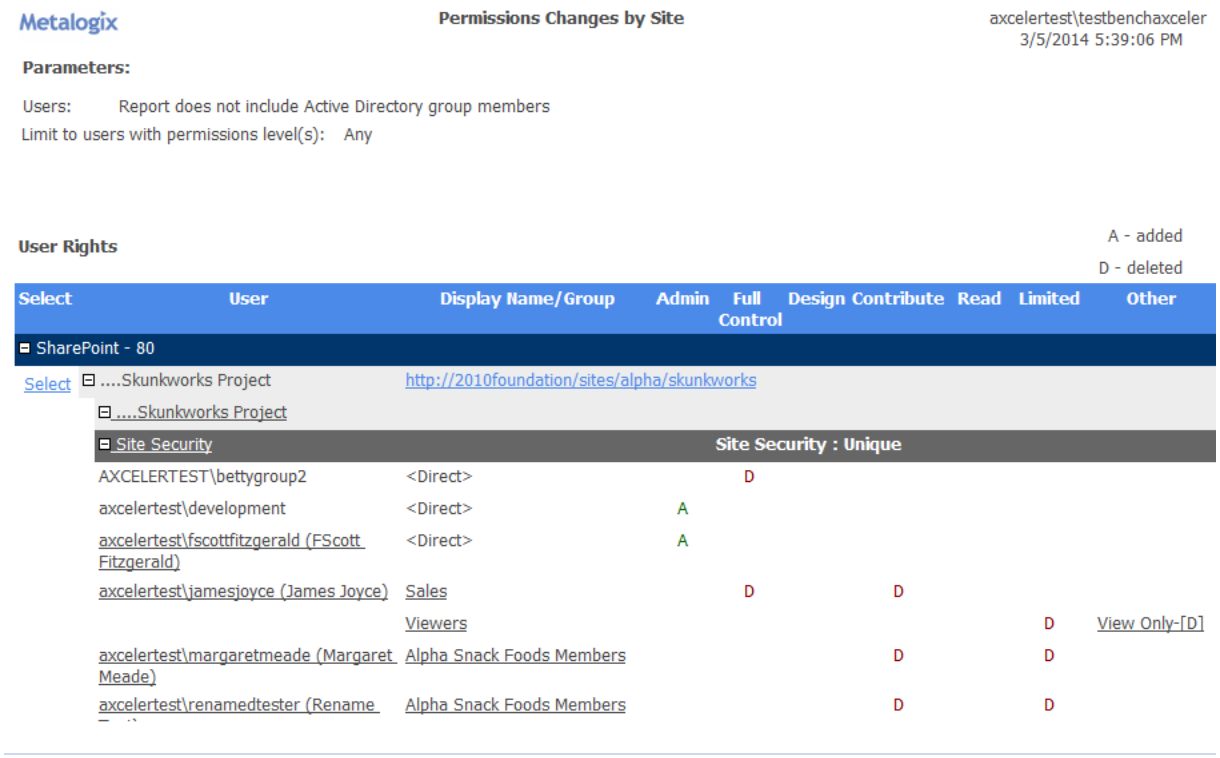
- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

Analysis results contain the same information as the User Rights section of the Comprehensive Permissions analysis, except that, for the time period covered by the analysis:

- permissions that have been deleted are identified by a red **D**, and
- permissions that have been added are identified by a green **A**.



Metalogix

Permissions Changes by Site

axcelertest\testbenchaxceler
3/5/2014 5:39:06 PM

Parameters:

Users: Report does not include Active Directory group members
Limit to users with permissions level(s): Any

User Rights

A - added
D - deleted

Select	User	Display Name/Group	Admin	Full Control	Design	Contribute	Read	Limited	Other
SharePoint - 80									
Select	....Skunkworks Project	http://2010foundation/sites/alpha/skunkworks							
	....Skunkworks Project								
	Site Security	Site Security : Unique							
	AXCELERTEST\bettygroup2	<Direct>		D					
	axcelertest\development	<Direct>	A						
	axcelertest\fscottfitzgerald (FScott Fitzgerald)	<Direct>	A						
	axcelertest\jamesjoyce (James Joyce)	Sales		D		D			
		Viewers						D	View Only-[D]
	axcelertest\margaretmeade (Margaret Meade)	Alpha Snack Foods Members				D		D	
	axcelertest\renamedtester (Rename	Alpha Snack Foods Members				D		D	

Generating a User To Group Analysis

The ControlPoint User to Group Analysis lets you compare user direct permissions within one or more site collections with comparable SharePoint and/or Active Directory groups. You can use this analysis to identify users who should be moved into groups—as well as potential groups into which they can be moved (that is, groups that have the same permissions or fewer)—in accordance with SharePoint best practices via the Clean-up User Permissions action.

NOTE: This analysis is only available at the site collection level of the hierarchy. However, your selection may include more than one site collection.

To generate a User to Group Analysis:

1 Select the site collection(s) you want to include in your analysis.

2 Choose Automation > User to Group Analysis.

3 Select the user(s) whose permissions you want to analyze.

4 If different from the default (**Include SharePoint Group**s only), check/uncheck the appropriate option(s) to **Include Active Directory Groups** only or both **Include SharePoint** and **Include Active Directory Groups**.

NOTE: At least one of these options must be checked.



Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

The User to Group Analysis consists of the following sections:

- User Rights
- Group Permissions

User Rights Section

The User Rights section lists each Web application, site collection and user within the scope of your analysis, along with

- SharePoint groups that have permissions that correspond to the user's direct permissions, and
- the number of unique (non-inherited) direct permissions that the user has for objects within the site collection.

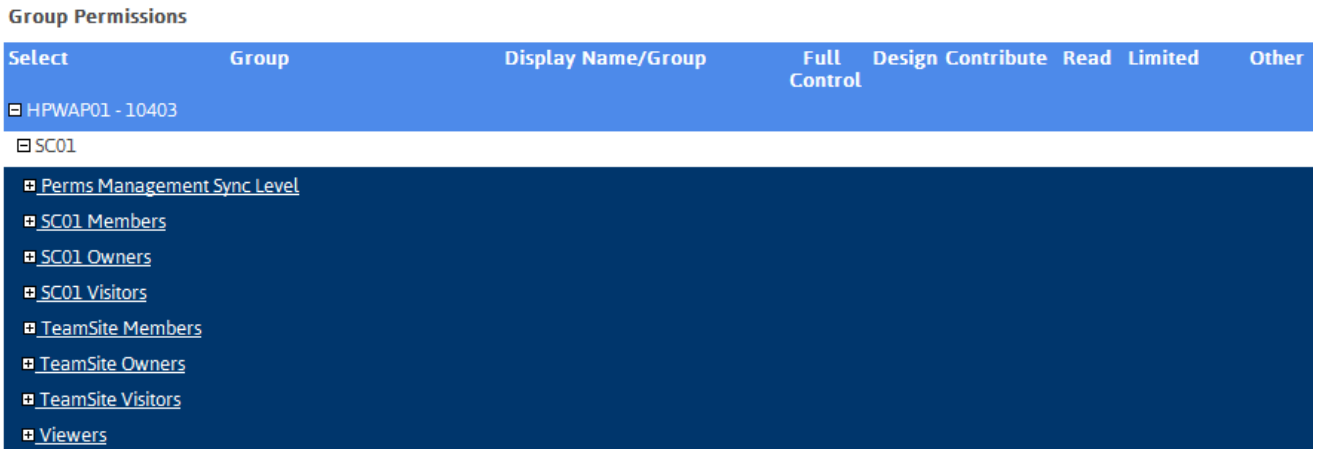


When expanded, each of the individual objects for which the user has unique direct permissions display, along with the corresponding Permissions Level(s).

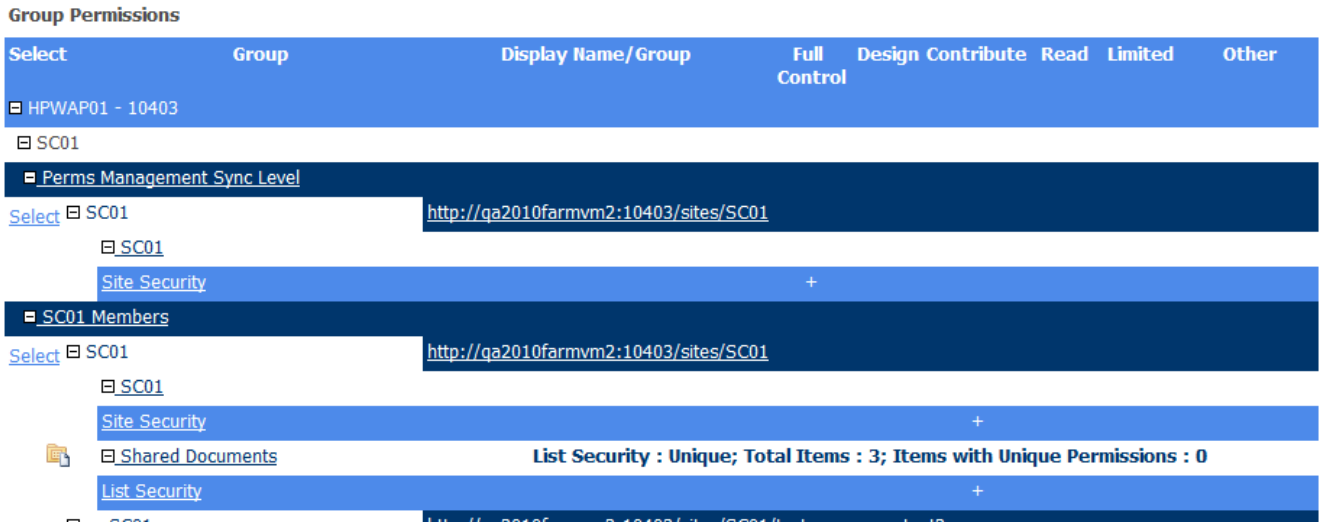


Group Permissions Section

The Group Permissions sections lists all of the SharePoint and/or Active Directory groups within each site collection.



When expanded, each of the objects (sites, lists, folders, and items) for which the user has unique direct permissions, along with the corresponding permissions level(s).



You can use the information in this analysis to help you with cleaning up user permissions.

The ControlPoint Task Audit

The ControlPoint Task Audit is an analysis tool that summarizes one or more of the ControlPoint actions that have been performed by administrators over a specified time period.

By default, the Task Audit report is accessible from the Manage ControlPoint panel. An action-specific Task Audit Report is also displayed automatically after a ControlPoint action is carried out.

NOTE: In a multi-farm installation, the Task Audit includes actions performed on both home and remote farms.

To generate a Task Audit:

1 From the Manage ControlPoint panel, choose Schedule Management and Logging > ControlPoint Task Audit.

2 Specify the following parameters for your analysis:

- Either
  - Enter the **StartDate** and **EndDate**, or
  - click the Calendar icon ( )and select the date(s).
- (Optional) If you want to search for a specific text string, complete the **Search for** field. You can enter a full or partial:
  - site name or url
  - action name, or

- action description

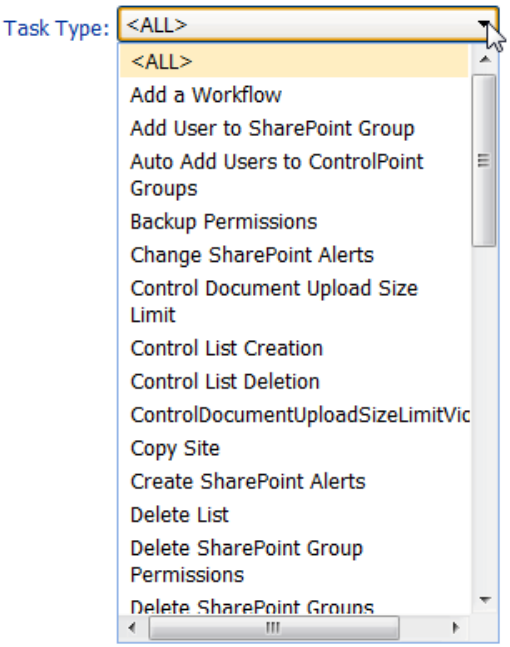
For example, by entering the words "Site Theme" in the **Search for** field, your results will be limited to tasks that involved modifying a site theme.



Select an **Administrator** from the drop-down. (If you want report results to include all administrators in the list, select <ALL>).

Note that the drop-down list includes only administrators who have performed a ControlPoint action within that farm.

- Select a **Task Type** from the drop-down.



NOTE: The Task Type list is populated with the types of actions that have actually been performed by administrators. For example, if a Delete User Permissions action has never been performed, it will not appear in the list. If you want to include all available options in the report results, select <ALL>.

If you chose the Run Now, option, after the operation has been processed:

- a confirmation message displays at the top of the page, and
- a ControlPoint Task Audit is generated for the operation and displays in the Results section.

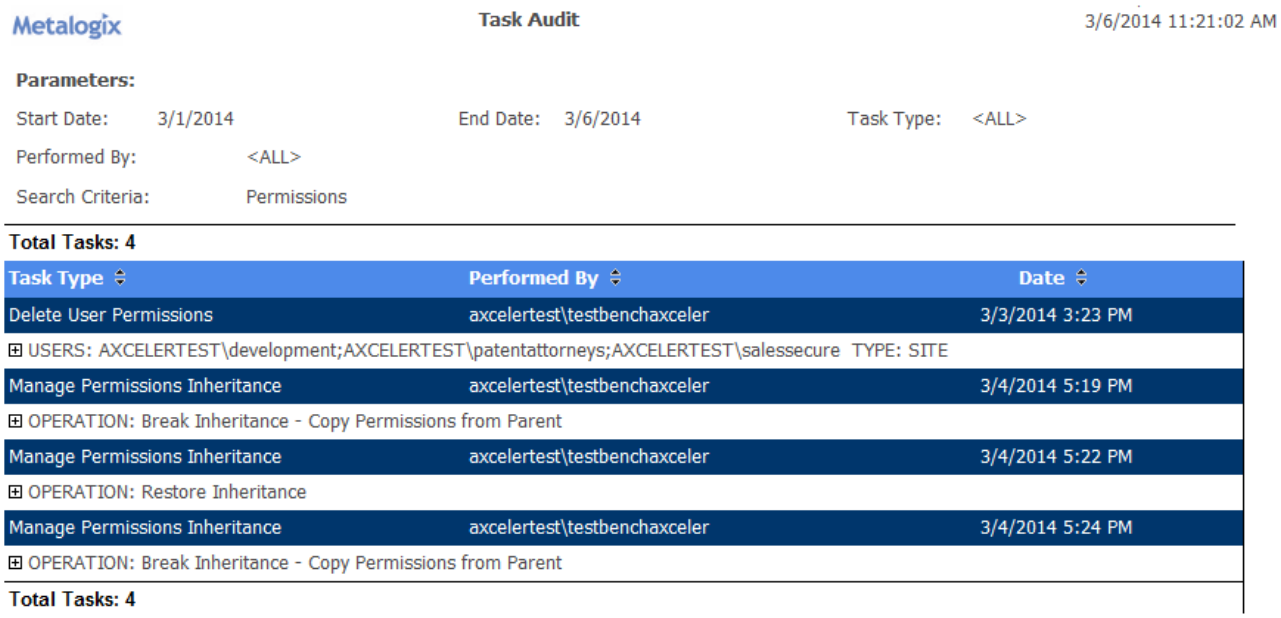
If you schedule the operation, a link to the Task Audit is included in the scheduled action notification email.

See also Auditing ControlPoint Administrator Tasks.

Information in the Task Audit Report

The Task Audit Report contains the following information for each task:

- the **Task Type**
- the username of the administrator that the task was **Performed by**
- the **Date** and time when the task was performed, and
- a summary of the parameters chosen for the action.



Metalogix **Task Audit** 3/6/2014 11:21:02 AM

Parameters:

Start Date: 3/1/2014 End Date: 3/6/2014 Task Type: <ALL>

Performed By: <ALL>

Search Criteria: Permissions

Total Tasks: 4

Task Type	Performed By	Date
Delete User Permissions	axcelertest\testbenchaxceler	3/3/2014 3:23 PM
⊞ USERS: AXCELERTEST\development;AXCELERTEST\patentattorneys;AXCELERTEST\salessecure TYPE: SITE		
Manage Permissions Inheritance	axcelertest\testbenchaxceler	3/4/2014 5:19 PM
⊞ OPERATION: Break Inheritance - Copy Permissions from Parent		
Manage Permissions Inheritance	axcelertest\testbenchaxceler	3/4/2014 5:22 PM
⊞ OPERATION: Restore Inheritance		
Manage Permissions Inheritance	axcelertest\testbenchaxceler	3/4/2014 5:24 PM
⊞ OPERATION: Break Inheritance - Copy Permissions from Parent		

Total Tasks: 4

When expanded, a more detailed description of a task displays, which lists:

- site collections or sites on which the action was carried out, and

- any special notes or errors (such as "*Security is inherited - no processing is done*").



Task Type	Performed By	Date
Delete User Permissions	axcelertest\testbenchaxceler	3/3/2014 3:23 PM
⊟ USERS: AXCELERTEST\development;AXCELERTEST\patentattorneys;AXCELERTEST\salessecure TYPE: SITE		
Performed On	**URL**	**Path**
Alpha Snack Foods	http://2010foundation/sites/alpha	2010SharePoint > SharePoint - 80 > Alpha Snack Foods > ....> Alpha Snack Foods
User AXCELERTEST\Development permissions have been removed from the Root Site Alpha Snack Foods		
User AXCELERTEST\patentattorneys permissions have been removed from the Root Site Alpha Snack Foods		
User AXCELERTEST\SalesSecure permissions have been removed from the Root Site Alpha Snack Foods		
Manage Permissions Inheritance	axcelertest\testbenchaxceler	3/4/2014 5:19 PM
⊟ OPERATION: Break Inheritance - Copy Permissions from Parent		
Performed On	**URL**	**Path**
***Issue Tracking List	http://2010foundation/sites/alpha	2010SharePoint > SharePoint - 80 > Alpha Snack Foods > ....> Alpha Snack Foods
Permissions inheritance has been broken and the parent's permissions have been copied for the list		
***Shared Documents	http://2010foundation/sites/alpha	2010SharePoint > SharePoint - 80 > Alpha Snack Foods > ....> Alpha Snack Foods
Permissions inheritance has been broken and the parent's permissions have been copied for the list		
Manage Permissions Inheritance	axcelertest\testbenchaxceler	3/4/2014 5:22 PM
⊟ OPERATION: Restore Inheritance		
Performed On	**URL**	**Path**
Issue Tracking List	http://2010foundation/sites/alpha	2010SharePoint > SharePoint - 80 > Alpha Snack Foods > ....> Alpha Snack Foods
Permissions inheritance has been restored for the list		

Note that:

- As with other ControlPoint analyses, only actions taken on sites you have permissions to manage within ControlPoint display in audit report results.
- Sites for which the administrator who performed the action does not have permissions to manage are not acted upon, and therefore are not captured in the audit report.

Viewing Logged Errors

The Logged Errors Report lets you view the contents of the ControlPoint Services (xcAdmin) database error log for a specified date range. You can use this detail with guidance from Metalogix Support to diagnose potential issues in your environment.

To view logged errors:

1 From the Manage ControlPoint panel, choose Schedule Management and Logging > Logged Errors Report.

2 Select a **Start date** and **End date** representing the time period for which you want to view logged errors.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

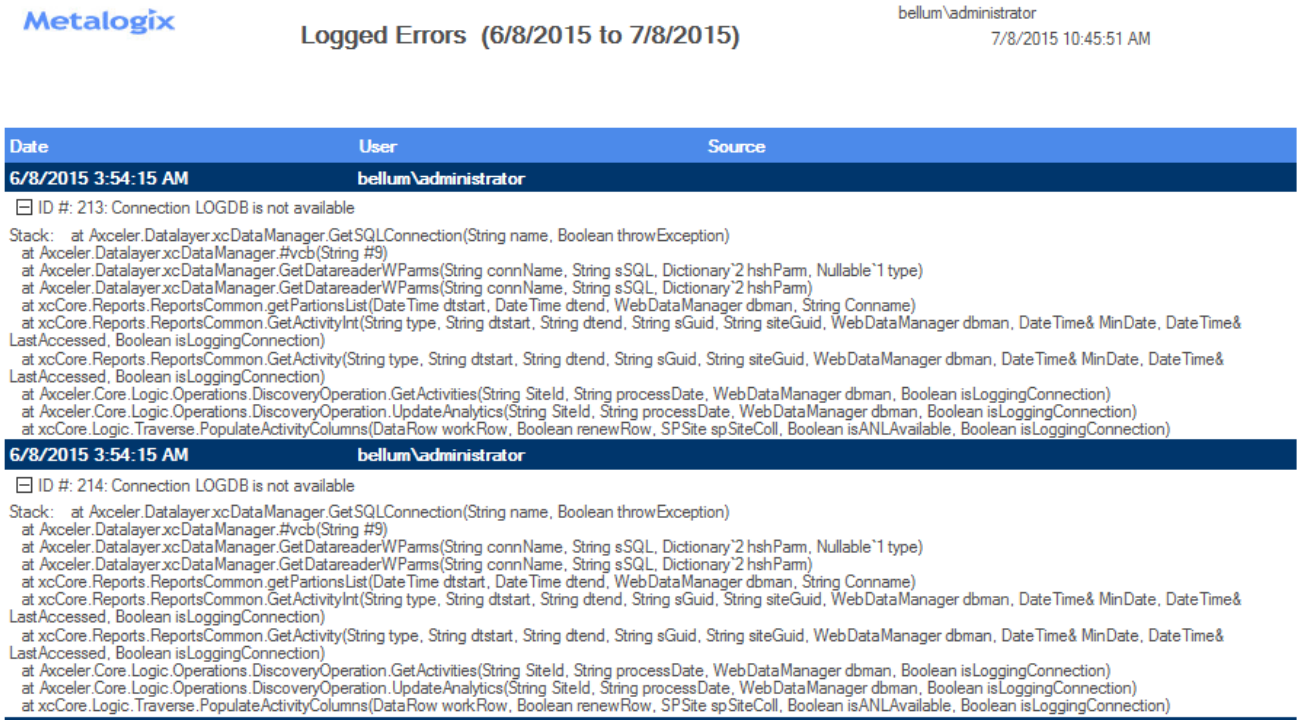
OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.

Logged Error Report results contain a time-stamped entry for each error logged within the specified date range, followed by detailed error text.



Metalogix

Logged Errors (6/8/2015 to 7/8/2015)

bellum\administrator
7/8/2015 10:45:51 AM

Date	User	Source
6/8/2015 3:54:15 AM	bellum\administrator	

ID #: 213: Connection LOGDB is not available

Stack: at Axceler.Datalayer.xcDataManager.GetSQLConnection(String name, Boolean throwException)
at Axceler.Datalayer.xcDataManager.#vcb(String #9)
at Axceler.Datalayer.xcDataManager.GetDatareaderWParms(String connName, String sSQL, Dictionary`2 hshParm, Nullable`1 type)
at Axceler.Datalayer.xcDataManager.GetDatareaderWParms(String connName, String sSQL, Dictionary`2 hshParm)
at xcCore.Reports.ReportsCommon.getPartionsList(DateTime dtstart, DateTime dtend, WebDataManager dbman, String Conname)
at xcCore.Reports.ReportsCommon.GetActivityInt(String type, String dtstart, String dtend, String sGuid, String siteGuid, WebDataManager dbman, DateTime& MinDate, DateTime& LastAccessed, Boolean isLoggingConnection)
at xcCore.Reports.ReportsCommon.GetActivity(String type, String dtstart, String dtend, String sGuid, String siteGuid, WebDataManager dbman, DateTime& MinDate, DateTime& LastAccessed, Boolean isLoggingConnection)
at Axceler.Core.Logic.Operations.DiscoveryOperation.GetActivities(String SiteId, String processDate, WebDataManager dbman, Boolean isLoggingConnection)
at Axceler.Core.Logic.Operations.DiscoveryOperation.UpdateAnalytics(String SiteId, String processDate, WebDataManager dbman, Boolean isLoggingConnection)
at xcCore.Logic.Traverse.PopulateActivityColumns(DataRow workRow, Boolean renewRow, SPSite spSiteColl, Boolean isANLAvailable, Boolean isLoggingConnection)

6/8/2015 3:54:15 AM	bellum\administrator	

ID #: 214: Connection LOGDB is not available

Stack: at Axceler.Datalayer.xcDataManager.GetSQLConnection(String name, Boolean throwException)
at Axceler.Datalayer.xcDataManager.#vcb(String #9)
at Axceler.Datalayer.xcDataManager.GetDatareaderWParms(String connName, String sSQL, Dictionary`2 hshParm, Nullable`1 type)
at Axceler.Datalayer.xcDataManager.GetDatareaderWParms(String connName, String sSQL, Dictionary`2 hshParm)
at xcCore.Reports.ReportsCommon.getPartionsList(DateTime dtstart, DateTime dtend, WebDataManager dbman, String Conname)
at xcCore.Reports.ReportsCommon.GetActivityInt(String type, String dtstart, String dtend, String sGuid, String siteGuid, WebDataManager dbman, DateTime& MinDate, DateTime& LastAccessed, Boolean isLoggingConnection)
at xcCore.Reports.ReportsCommon.GetActivity(String type, String dtstart, String dtend, String sGuid, String siteGuid, WebDataManager dbman, DateTime& MinDate, DateTime& LastAccessed, Boolean isLoggingConnection)
at Axceler.Core.Logic.Operations.DiscoveryOperation.GetActivities(String SiteId, String processDate, WebDataManager dbman, Boolean isLoggingConnection)
at Axceler.Core.Logic.Operations.DiscoveryOperation.UpdateAnalytics(String SiteId, String processDate, WebDataManager dbman, Boolean isLoggingConnection)
at xcCore.Logic.Traverse.PopulateActivityColumns(DataRow workRow, Boolean renewRow, SPSite spSiteColl, Boolean isANLAvailable, Boolean isLoggingConnection)

Scheduling a ControlPoint Operation

The ControlPoint scheduler lets you set up ControlPoint operations to run in the background at a specified date and time, such as when system resource usage is low. Depending on your ControlPoint permissions, you can schedule:

- an Advanced Search
- any ControlPoint analysis
- most ControlPoint actions
- a full or partial Discovery.

This feature is especially useful for:

- operations that might take a significant amount of time to complete (such as a an analysis run on a large farm)
- operations that you want to run during off-peak hours (such as moving an active site)
- enforcing corporate or regulatory policies (for example, by ensuring that user permissions are always set at the proper levels)
- analyses that you want to run and distribute on a regular basis (such as weekly site activity or storage usage).

Results of scheduled ControlPoint analyses can be sent to email distribution lists and/or posted to a SharePoint document library as a .pdf, an Excel formatted spreadsheet, or a csv file. Individual data sets within analyses can also be saved as SharePoint lists for use in creating dashboards.

ControlPoint uses a different (typically larger) limit on the number of line items that can be returned when an analysis is run on a scheduled basis than when run interactively. ControlPoint Application Administrators can, however, modify this limit.

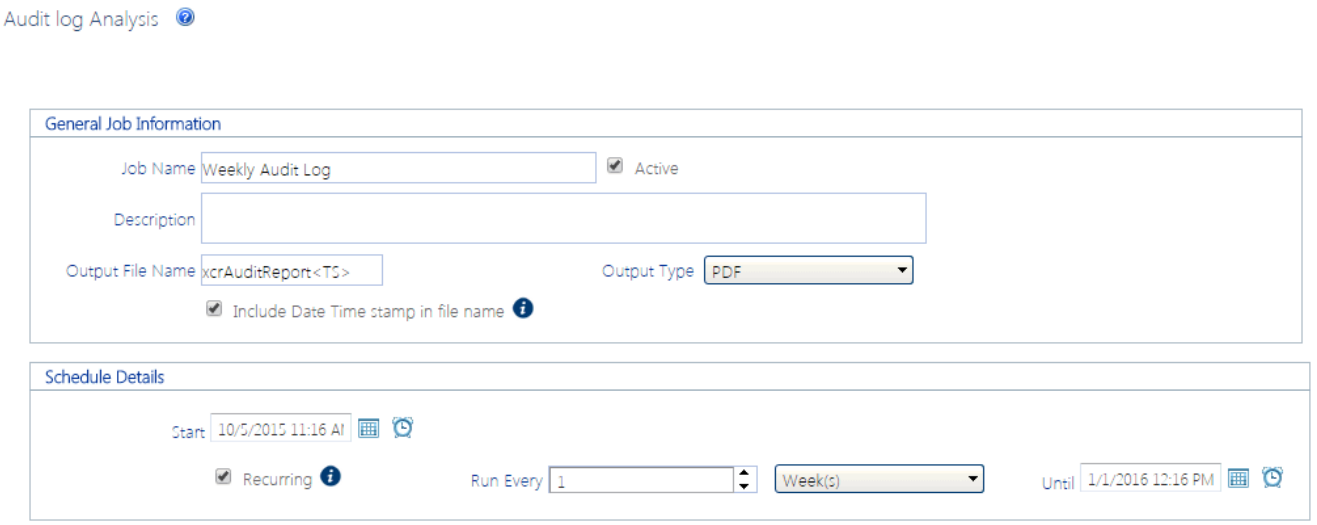
NOTE: In a multi-farm installation, operations can only be scheduled for the home farm.

Scheduling a Recurring Analysis for Which a Specific Date Range or Time Period was Selected

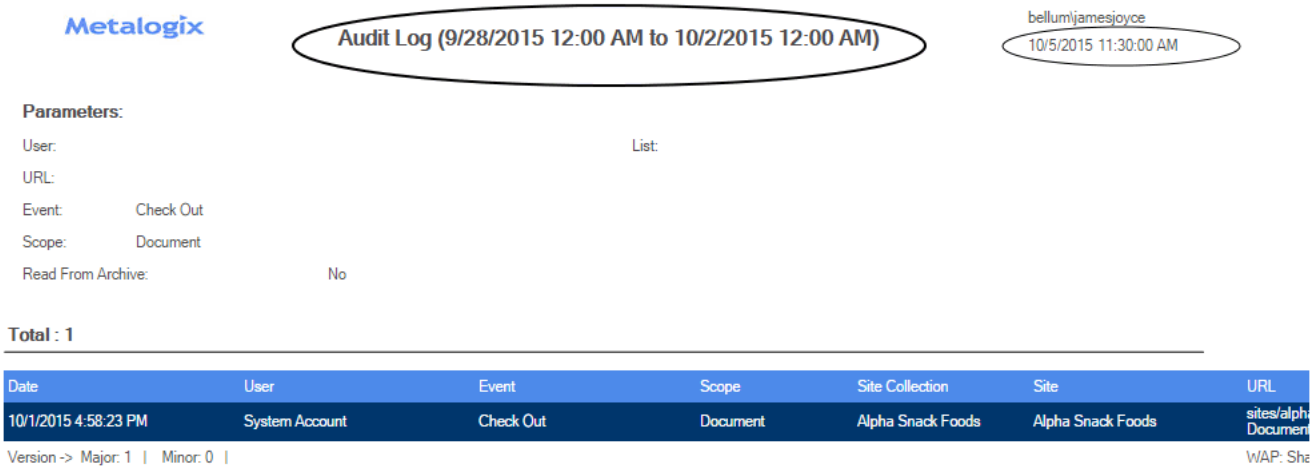
If a ControlPoint analysis is scheduled to run on a recurring basis and includes a date range or time period, the ControlPoint scheduler will interpret it as a relative date range or time period (that is, relative to the date when the scheduled job is run). The first time the scheduled job runs, the analysis will cover the date range specified in the Parameters section. For subsequent job runs, the date range will be updated accordingly.

EXAMPLES:

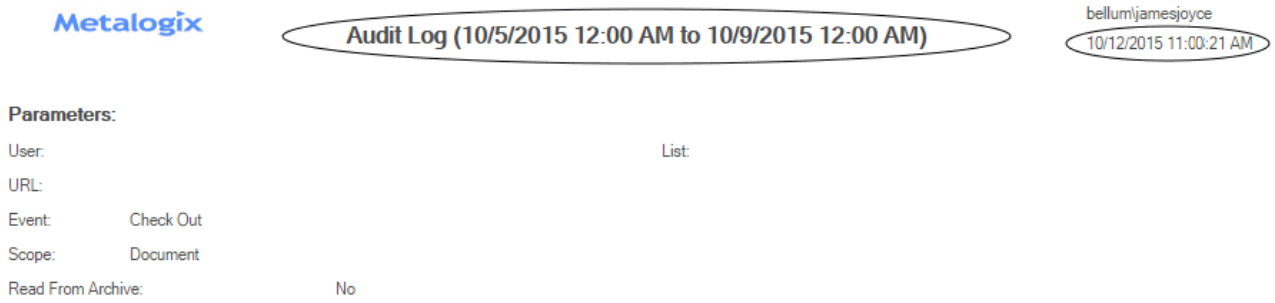
- If you initiate an Audit Log analysis on a Monday for a date range that covers the the previous week, then schedule it to run on a recurring basis:



  - the first time the scheduled job runs, the analysis will include data for the first week in January (that is, the week you specified)



  - the second time the scheduled job runs (at the end of the following week), the analysis will include data for the second week in January



  - and so on.

- If you schedule a SharePoint Summary Report to run every 30 days, the analysis will include activity that occurred 30 days ending on the date the scheduled job runs, regardless of the date on which the report was initiated.

How Scheduled Jobs are Handled

- The ControlPoint scheduler is driven by a SharePoint timer task, called the ControlPoint Scheduled Job Review. This task both checks for and initiates the execution of scheduled jobs. By default, the timer task performs these activities every time it runs (by default, every 10 minutes). ControlPoint Application Administrators can, however, override this default so that the execution of scheduled jobs is performed at less frequent intervals. See "Number of Minutes Scheduler Will Wait Before Next Group of Jobs (OVERIDESCHEDULETIMERMINUTES)" in the *ControlPoint Administration Guide*.
- By default, up to five scheduled jobs can be running at any given time. ControlPoint Application administrators can, however, change this default value to allow more—or fewer—jobs to run concurrently See "Maximum Number of Scheduled Jobs to Submit at One Time (MAXSUBMIT)" in the *ControlPoint Administration Guide*.

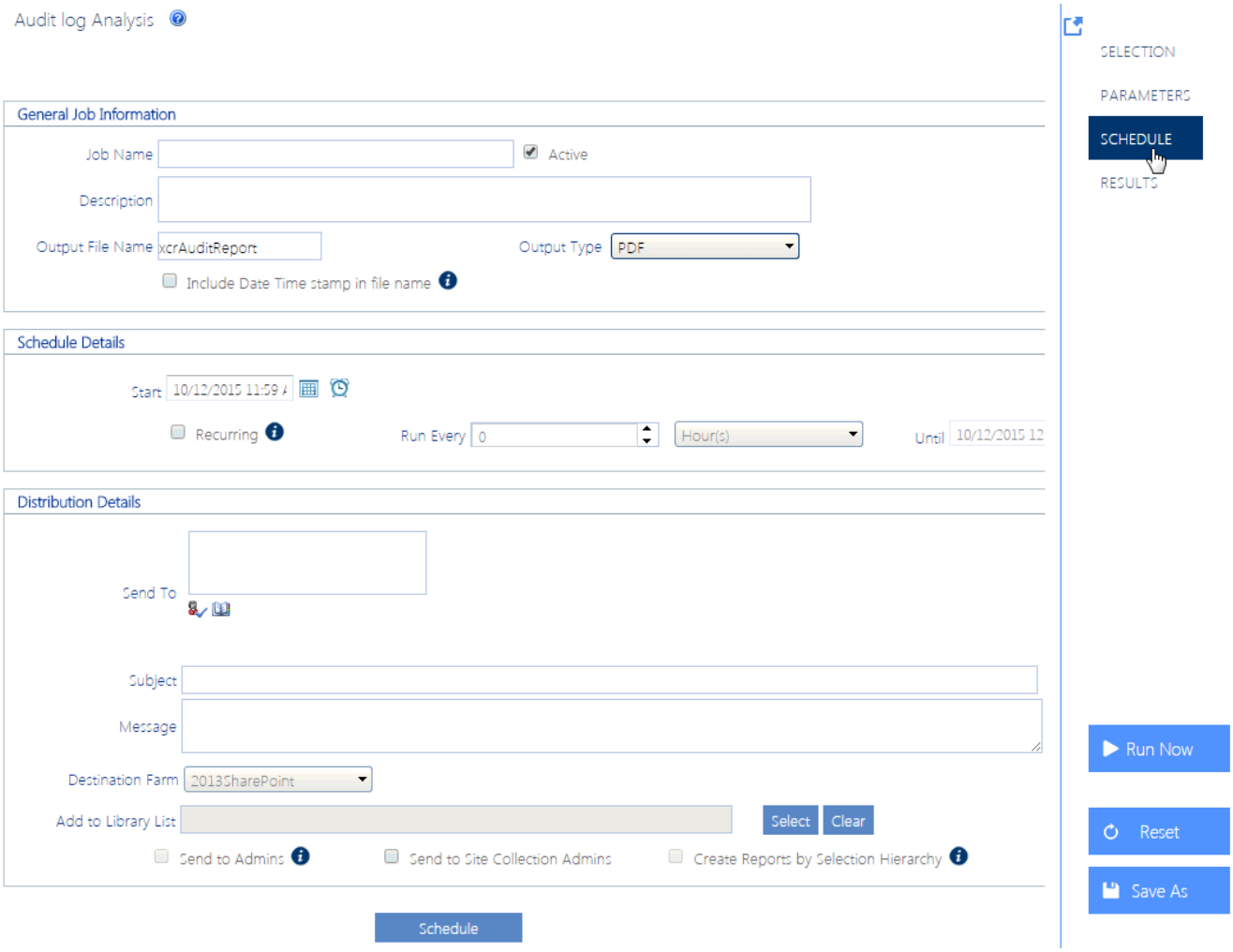
EXCEPTIONS:

- If one of the jobs in the queue is a scheduled Discovery, it is the *only* job that will be submitted, regardless of the MAXSUBMIT value.
- While any kind of a Discovery is running, no additional scheduled jobs will be submitted for execution.

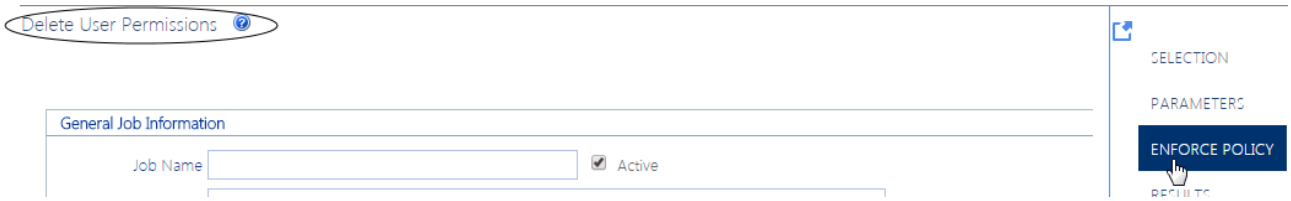
Creating a Scheduled Job

To schedule a ControlPoint operation:

1 After initiating and specifying the parameters for a ControlPoint operation, open the **Schedule** section.



Note that, for some ControlPoint operations that are likely to be scheduled for purposes of compliance with corporate or regulatory policy, this section is labeled **Enforce Policy**.



2 Enter a **Job Name** and **Description**.

TIP: Choose a brief but descriptive name that uniquely identifies the job. This will make it easier for you to identify it in the Schedule Monitor and Scheduled Jobs Report. If you choose to have the output posted to a SharePoint document library, the Job Name will also be used as the document Title.

3 If you want the job to be active, make sure the **Active** box is checked.

NOTE: Once a scheduled job has been added, it can be activated or deactivated as needed.

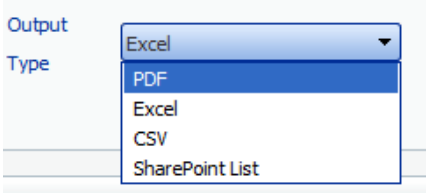
4 If you want to change the **Output File Name**, overwrite the default name.

CAUTION: The same *default* Output File Name is used for every action or analysis of a particular type. For example, whenever you schedule a Site Storage analysis, the default output file name is `xcrSiteStorageReport`, regardless of its scope, or who requested it. It is possible to have more than one job with the same output file name. Keep in mind, however, if more than one job with exactly the same output file name is posted to the same document library, an existing document will be overwritten with a more recent document with the same name.

5 For ControlPoint *analyses* only:

a) If you want the date and time that the job is run to be appended to the file name, click the **Include Date Time stamp in the file name** box. (This will enable you to retain a historical record of analysis results that may be used as a record of compliance with policies or regulations.)

b) If different than the default, select an **Output Type** from the drop-down.



NOTES:

- If you choose **CSV**, output will be in the form of raw analysis data that can be imported into another program for further examination.
- If you choose **SharePoint List**, each individual data set within the analysis will be saved as a separate list. (The number of data sets depends on the complexity of the analysis.) You can also choose to **Keep Previous Version** as an alternative to Include Date Time stamp. If you check the **Keep Previous Version** box, ControlPoint will append a date and time stamp to all but the current version of the file name.

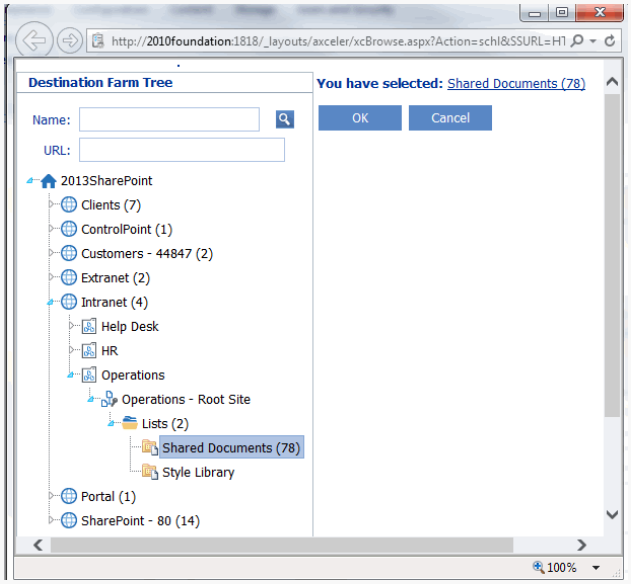
6 Complete the **Schedule Details** as follows:

If you want to ...	Then ...
run an operation one time only	Enter or select a **Start** date ( ) and time ( ).
run an operation at regular intervals	a. For **Start**, enter the *first* date ( ) and time ( ) that you want the job to run. b. Click the **Recurring** box. c. For **Run every:** • enter the interval (as a positive integer) at which you want the job to run • select an interval type (Hour, Day, or Month)

If you want to ...	Then ...
	d. For **Until**, enter or select the *last* date ( ) and time ( ) that you want the job to run.

NOTE: Dates and times correspond to those of the server on which the ControlPoint scheduler is running.

7 Complete the **Distribution Details** as follows:

If you want to ...	Then ...
have a notification email sent to one or more recipients when the job completes* (and, in the case of an *analysis*, have output included in the email as an attachment)	complete the **Send to:**, **Subject**, and **Message** fields. (The From field will automatically be populated with the email address stored as that of the primary Site Collection Administrator for the ControlPoint Configuration site.) NOTE: You can either use the SharePoint People Picker as you would when selecting users on which to perform a ControlPoint action or analysis, or enter one or more email addresses (separated by semicolons), in the **Send to** field.
have analysis results posted to a SharePoint document library	Complete the **Add to Library or List** field as follows: • Click [Select] to display the Destination Selection Page pop-up dialog, and select a document library from the Destination Farm Tree. (Note that only lists and libraries within the current farm for which you have Full Control access display). • Select a library from the tree (You can also enter a full or partial **Name** or **URL** to narrow your selection). 

If you want to ...	Then ...
	• Click [**OK**] to dismiss the dialog and populate the field with the full url path to the selected library. NOTE: When a document is placed into a SharePoint document library, the Output Filename becomes the document Name, and the Job Name becomes the document Title.
have data sets within analysis results saved as SharePoint lists	Complete the **Distribution Site** field as follows: • Click [**Select**] to display the Destination Selection Page pop-up dialog, and select a site from the Destination Farm Tree. (You can also enter a full or partial **Name** or **URL** to narrow your selection). • Click [**OK**] to dismiss the dialog and populate the field with the full url path to the selected site. CAUTION: If you are scheduling an analysis to run on a recurring basis and choose to save previous versions, be aware that a large number of lists may accumulate on the selected site (especially if analyses with multiple data sets are run frequently).
have analysis results emailed to administrators responsible for sites within the selected scope	check either or both of the following boxes: • **Send to Admins** - Results will be emailed to recipients who meet the criteria for admins that the ControlPoint Application Administrator has defined for the ControlPoint Configuration Setting SiteAdminCriteria • **Send to Site Collection Admins** - Results will be emailed to members of the Site Collection Administrators group. NOTE: Currently, ControlPoint does not evaluate membership in Active Directory groups. Therefore, emails will not be sent out to users whose permissions have been granted solely through membership in one or more Active Directory groups.
have a separate result set generated at each level of the hierarchy and email only the relevant result set(s) to the responsible administrator	• check the **Create Reports by Selection Hierarchy** box. NOTES: • This option is available only if **Send to Admins** has been checked • This option is not available for all analysis types. • Result sets will be generated at the lowest level of the hierarchy at which the report can normally be run. • When this option is checked and an analysis is scheduled to run on a recurring basis, ControlPoint will re-evaluate the list of recipients every time the job is run.

8 To save the job, click [**Schedule**].

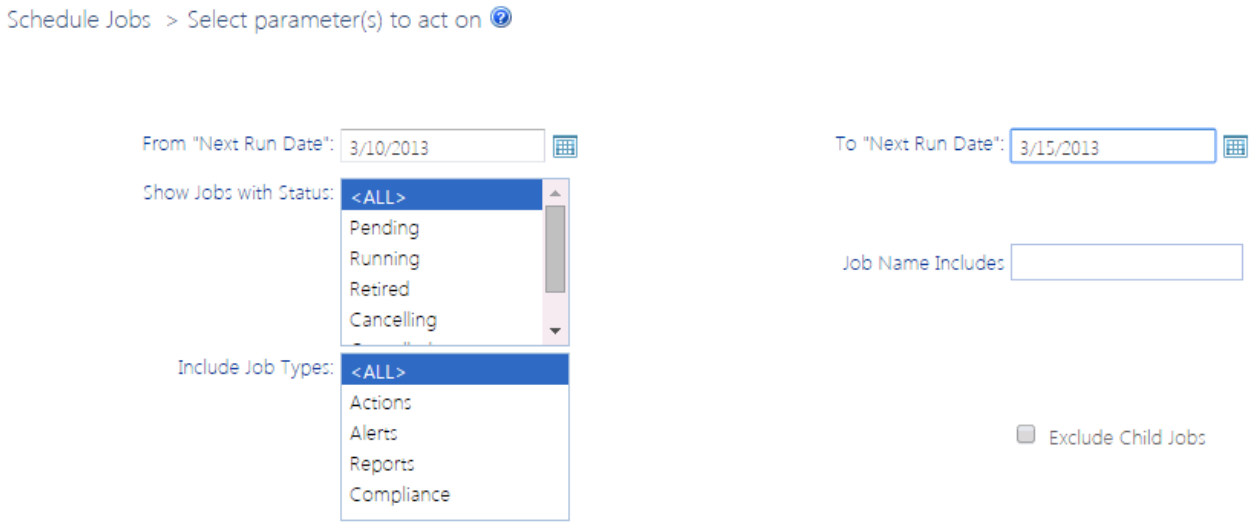
Once a scheduled job has been created, it can be accessed via the Schedule Monitor.

Generating a Scheduled Jobs Report

The Scheduled Jobs Report provides the same information as the Schedule Monitor.

To generate a Scheduled Jobs Report:

1 From the Manage ControlPoint panel, choose Schedule Management and Logging > Scheduled Jobs Report.



If you want to change the default date range, enter or select a **From "Next Run Date"** and **To "Next Run Date"**

NOTE: **Next Run Date** identifies:

- the next date/time a Pending job is scheduled to run
- the last date/time a Retired or Inactive job ran
- the start date/time that an in-process job started running.

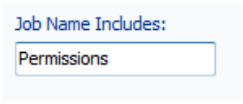
2 Select one or more **Status** values from the list box. Use the information in the table below for guidance.

NOTE: You can select multiple status values using the [**CTRL**] or [**SHIFT**] in the conventional manner. If you want to view all scheduled jobs for the specified date range, select **All**.

Status	Description
Pending	All jobs that are scheduled to run within the specified date range. Pending jobs include: • one-time jobs that have not yet run AND • recurring jobs that have not yet reached their End Date.

Status	Description
Running	All scheduled jobs that are currently running (as long as the specified date range includes the current date).
Cancelling	All running jobs for which the current instance is in the process of being cancelled.
Cancelled	All jobs for which the last running instance was cancelled.
Inactive	Jobs that are not currently active but were created or last ran during the specified date range.
Retired	Jobs that finished running within the specified date range. Retired jobs include: • one-time jobs that have already run AND • recurring jobs that have reached their End Date.

3 If you want to further filter your results, use the information in the table below for guidance.

If you want to ...	Then ...
exclude site admin-specific "sub-jobs" that are created when a scheduled job is created with the **Create Reports by Selection Hierarchy** box checked 	check the **Exclude Child Jobs** box..
include only jobs of one or more specific types (**Actions**, **Alerts**, and/or **Reports**) (all job types are included by default)	highlight the job type(s) you want to include in the **Include Job Type(s)** list box.
display only jobs whose name includes a specified text string	complete the **Job Name Includes:** field with a full or partial job name. 

Now you can either:

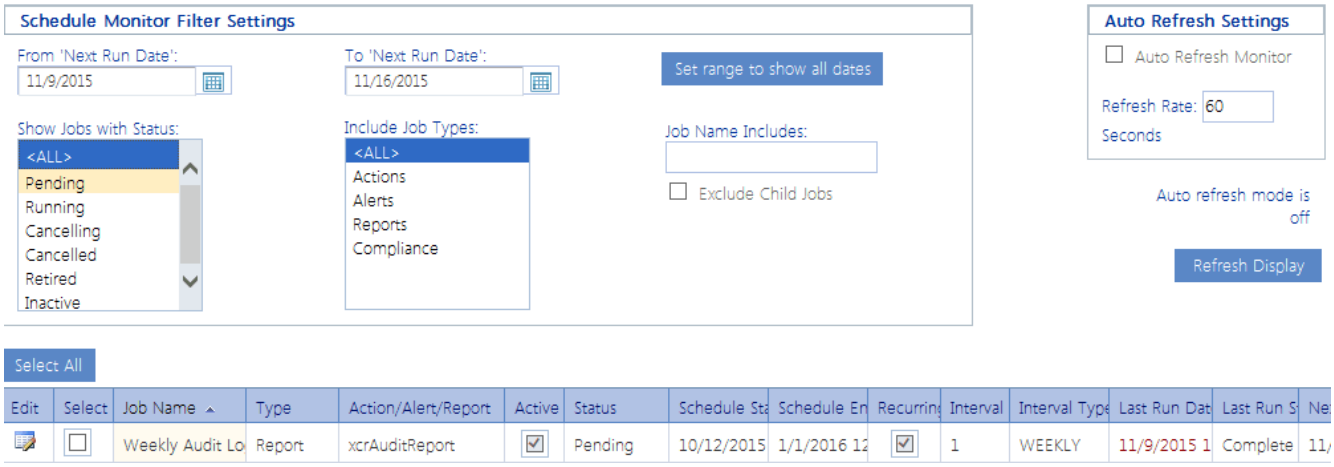
- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time or on a recurring basis.

OR

- save the operation as XML Instructions that can be executed at a later time.



From Scheduled Jobs Report results you can view a job's run history.

Monitoring Scheduled Jobs

The Schedule Monitor lets you view the status of scheduled jobs over a specified date range. From the Schedule Monitor you can link to pages that let you:

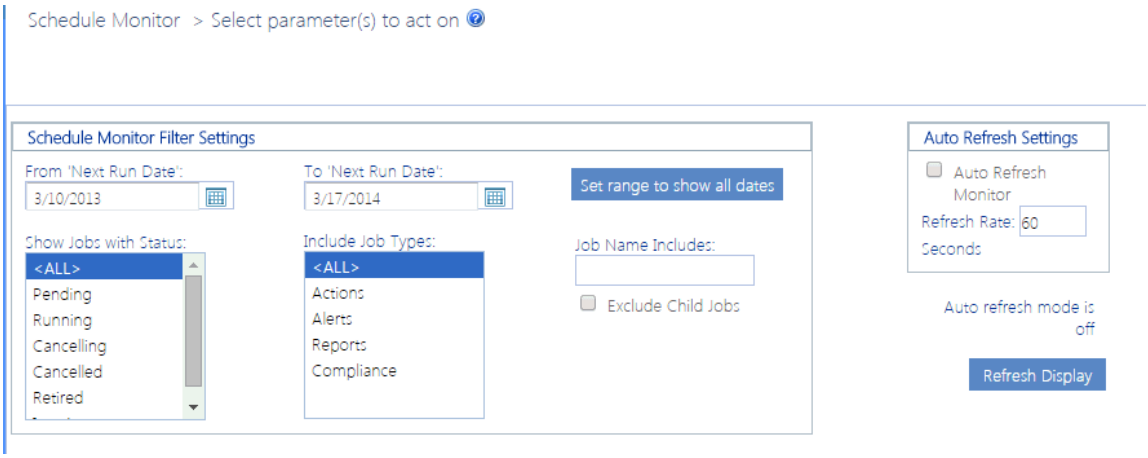
- view/edit the details of a scheduled job
- delete scheduled jobs
- link to detailed run history of a job

NOTE: If you are a Farm Administrator, you will be able to view all scheduled jobs; otherwise, you will only be able to view jobs that you submitted.

To access the Schedule Monitor:

1 From the Manage ControlPoint panel, choose Scheduled Management and Logging > Schedule Monitor.

By default, the Schedule Monitor grid displays jobs that are scheduled to run within the next seven days.



2 If you want to change the default date range, do one of the following:

- To include jobs within a specified date range:
  a) Enter or select a From "Next Run Date" and To "Next Run Date"
  b) Click [**Refresh Display**].
- To include *all* jobs regardless of the run date, click **[Set range to show all dates]**.

  NOTE: **Next Run Date** identifies:
  - the *next* date/time a Pending job is scheduled to run
  - the *last* date/time a Retired or Inactive job ran
  - the *start* date/time that an in-process job started running.

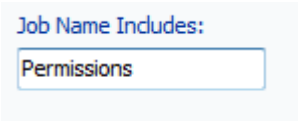
3 Select one or more **Status** values from the list box. Use the information in the table below for guidance.

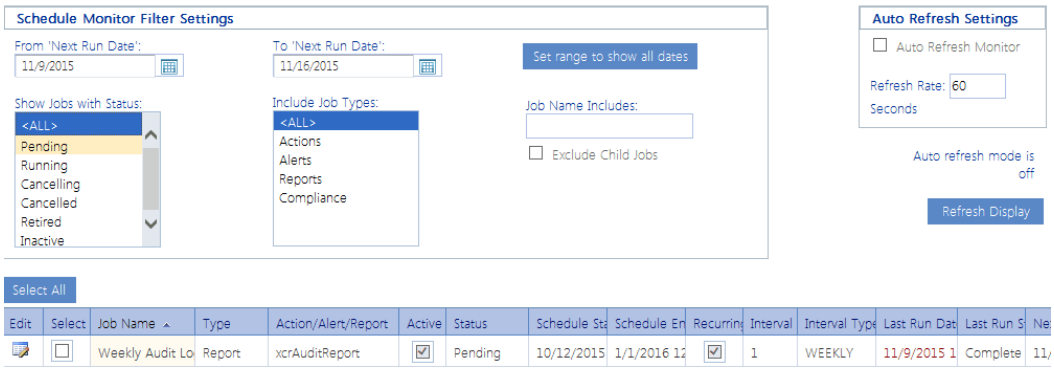
NOTE: You can select multiple status values using the [**CTRL**] or [**SHIFT**] in the conventional manner. If you want to view all scheduled jobs for the specified date range, select **All**.

Status	Description
Pending	All jobs that are scheduled to run within the specified date range. Pending jobs include: • one-time jobs that have not yet run AND • recurring jobs that have not yet reached their End Date.
Running	All scheduled jobs that are currently running (as long as the specified date range includes the current date).
Cancelling	All running jobs for which the current instance is in the process of being cancelled.

Status	Description
Cancelled	All jobs for which the last running instance was cancelled.
Inactive	Jobs that are not currently active but were created or last ran during the specified date range.
Retired	Jobs that finished running within the specified date range. Retired jobs include: • one-time jobs that have already run AND • recurring jobs that have reached their End Date.

4 If you want to further filter your results, use the information in the following below for guidance.

If you want to ...	Then ...
exclude site admin-specific "sub-jobs" that are created when a scheduled job is created with the **Create Reports by Selection Hierarchy** box checked 	check the **Exclude Child Jobs** box.
include only jobs of one or more specific types (**Actions**, **Alerts**, and/or **Reports**) (all job types are included by default)	highlight the job type(s) you want to include in the list box.
display only jobs whose name includes a specified text string	complete the **Job Name Includes:** field with a full or partial job name. 



The Schedule Monitor displays the following information:

- **Job Name**
- **Job Type**
- an indication of whether the job is **Active** (checked) or inactive (unchecked)
- **Schedule Status** (Pending, Running, Retired, or Inactive)
- **Scheduled Start** date and time
- the **Schedule End** date and time which, for recurring jobs, displays the last date and time that the job is scheduled to run.

  NOTE: For one-time jobs, the Schedule End date and time (which displays as an hour later than the Schedule Start) has no significance.
- a checkbox indicating whether the job is one-time (unchecked) or **Recurring** (checked)
- for recurring jobs, the **Interval** and **Interval Type** (Hour, Day, Week or Month)
- **Last Run Date** and time
- **Last Run Status** (Complete, Failed, Started, Cancelling, or Cancelled)
- **Next Run Date**, which identifies:
  - the *next* date/time a Pending job is scheduled to run
  - the *last* date/time a Retired or Inactive job ran
  - the *start* date/time that an in-process job started running.
- the **User** who scheduled the job.
- an indication of whether or not the scheduled job was created with the **Run by hierarchy** option
- if the job is an instance of a ControlPoint Governance Policy, the name of the Policy Instance.

You can:

- sort by clicking on a column header
- change the order of columns by dragging and dropping.

From the Schedule Monitor you can:

- set the Schedule Monitor grid to Auto Refresh
- open a job for viewing/editing
- view a job's run history
- cancel or delete one or more jobs

Viewing/Editing a Scheduled Job

From the Schedule Monitor, you can access a scheduled job whose details you want to view or edit.

To access a scheduled job's details:

From the Schedule Monitor, click the job's **Edit** link.

The job opens in a separate browser window.

To edit the job:

1 Modify the appropriate fields within the Schedule or Enforce Policy section.

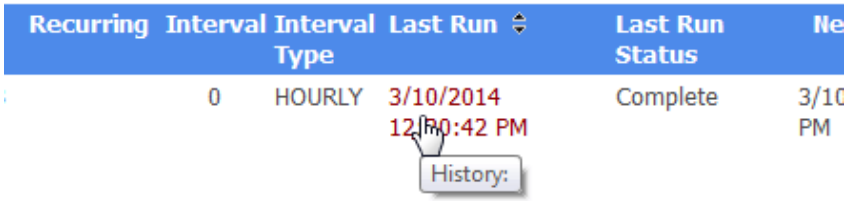
2 To save changes, click [**Update**].

Viewing a Scheduled Job's History

From the Schedule Monitor, you can view the run history of a scheduled job. In the case of scheduled actions (including alerts), you can generate a ControlPoint Task Audit to view more detail about the job.

To view the history of a scheduled job:

- From the Schedule Monitor or Scheduled Jobs Report, click the job's **Last Run** link.



- From a scheduled job's detail page, click the [**View History**] button.

The Schedule History includes the following information:

- **Run Start** date and time
- **Run End** date and time
- process **Status** (Started, Completed, or Failed)
- in the case of a Failed job, a **Message** citing the reason for the failure.

As shown in the example below, a separate entry exists for each run of a recurring job. You can sort by either Run Start or Run End date by clicking the up/down arrows in the column header.



Metalogix

History: Recurring Farm Summary Report

axcelertest\testbenchaxceler
3/6/2014 1:06:16 PM

Parameters:

Start Date: 2/1/2014 End Date: 2/2/2014

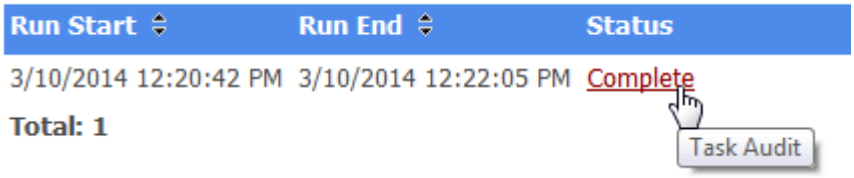
Run Start	Run End	Status	Message
2/2/2014 4:40:37 PM	2/2/2014 4:41:07 PM	Cancelling	Job Cancelled via Schedule Monitor by: axcelertest\testbenchaxceler
2/2/2014 5:40:37 PM	2/2/2014 5:41:03 PM	Complete	

Total: 2

axcelertest\testbenchaxceler Page 1 of: 1 3/6/2014 1:06:16 PM

To view a ControlPoint Task Audit for a completed action:

Click the link (Completed or Failed) in the Status column.



See also Auditing ControlPoint Administrator Tasks.

NOTE: This link is valid for actions only (not Discovery or analysis jobs)

Canceling or Deleting a Scheduled Job

From the Schedule Monitor you can:

- cancel a running instance of a scheduled job

OR

- completely delete one or more scheduled jobs.

  NOTE: If you delete a job that has already run, any history associated with the job will also be deleted.

REMINDER: Delete and Cancel options are disabled if Auto Refresh is enabled.

To stop a running instance of a scheduled job:

NOTE: You can only stop instances of jobs that are currently running, and this action does not delete either the job itself or any future instances of a recurring job.

1 In the In the **Select** column, check the box beside each running job instance you want to stop.*

2 Click **[Stop Selected]**.

To delete one or more scheduled jobs:

1 In the **Select** column, check the box beside each job you want to delete.*

2 Click [**Delete Selected**].

You will be prompted to confirm the deletion before the operation is carried out.

To delete all scheduled jobs:

1 Click [**Select All**].

2 Click [**Delete Selected**].

You will be prompted to confirm the deletion before the operation is carried out.

*NOTE: If you want to de-select currently selected jobs, click [**Reset**].

Saving, Modifying and Executing Instructions for a ControlPoint Operation

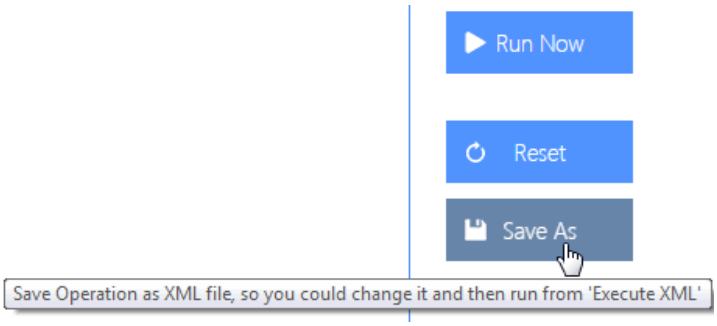
All schedulable ControlPoint operations can be saved in an XML file as "instructions" and executed at a later time. If an operation has parameters that are modifiable, you can modify them in the XML file before execution.

NOTE: Currently you cannot run instructions for multi-farm operations.

Saving Instructions

To save Instructions for a ControlPoint operation:

1 After specifying the parameters for the operation, click [**Save As**].



2 Click [**Download**] to display the File Download dialog.

3 Click [**Save**] then save the file to the local machine— that is, the machine where the browser is running— or network location of your choice.

TIP: You may want to change the default file name to one that is more unique and descriptive.

4 When the file has finished saving, click [**Close**] to dismiss the open dialogs.

Modifying Instructions

Depending on the operation, you may be able to modify some or all of the parameters of XML Instructions with valid values. For example, while the Migrate User action only permits one user to be migrated via the ControlPoint application interface, you can run the operation on multiple users by adding them to the XML instructions.

You should not attempt to change any part of the instructions apart from modifiable parameters. It is strongly recommended that you make a copy of the XML file before editing it, as it is possible that unintended changes can be made to tags or unmodifiable portions of the file.

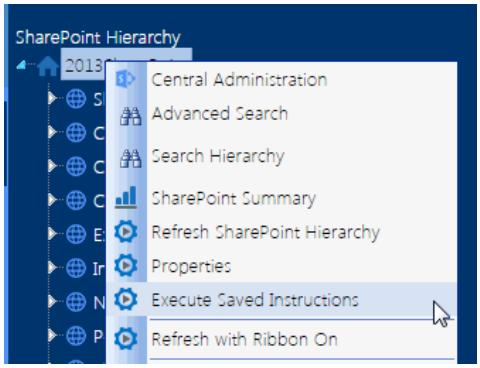
```
- <Operation Type="Action" Code="MigrateUser">
  - <selection>
      <Item name="2007SHAREPOINT (Home Farm)" type="FARM" guid="efcecfa6-42d7-4f44-b503-7e83ff6b9b29" id="0" parentid="-1" AllChildren="True"
        action="nonsense" URL="http://2008sharepoint:1919/" image="images/Farm.gif" aux="FARMGUID@efcecfa6-42d7-4f44-b503-
        7e83ff6b9b29,FARMNAME@SharePoint_Config,FARMTOOLTIP@" />
    </selection>
  - <xcMigrateUserData xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
      <sWarnings />
      <blnPropagate2Lists>false</blnPropagate2Lists>
      <blnPropagate2Items>false</blnPropagate2Items>
      <sScheduledCurrentUser />
    - <migrateUsers>
      - <item>
        - <key>
            <string>AXCELERTEST\sammuelclemens</string>
          </key>
        - <value>
            <string>AXCELERTEST\marktwain</string>
          </value>
        </item>
      - <item>
        - <key>
            <string>AXCELERTEST\stephendedalus</string>
          </key>
        - <value>
            <string>AXCELERTEST\jamesjoyce</string>
          </value>
        </item>
      - <item>
        - <key>
            <string>AXCELERTEST\marysmith</string>
          </key>
        - <value>
            <string>AXCELERTEST\maryjones</string>
          </value>
        </item>
      </migrateUsers>
      <blnVerifySid>false</blnVerifySid>
      <blnProcessADGrps>false</blnProcessADGrps>
```

Executing Instructions

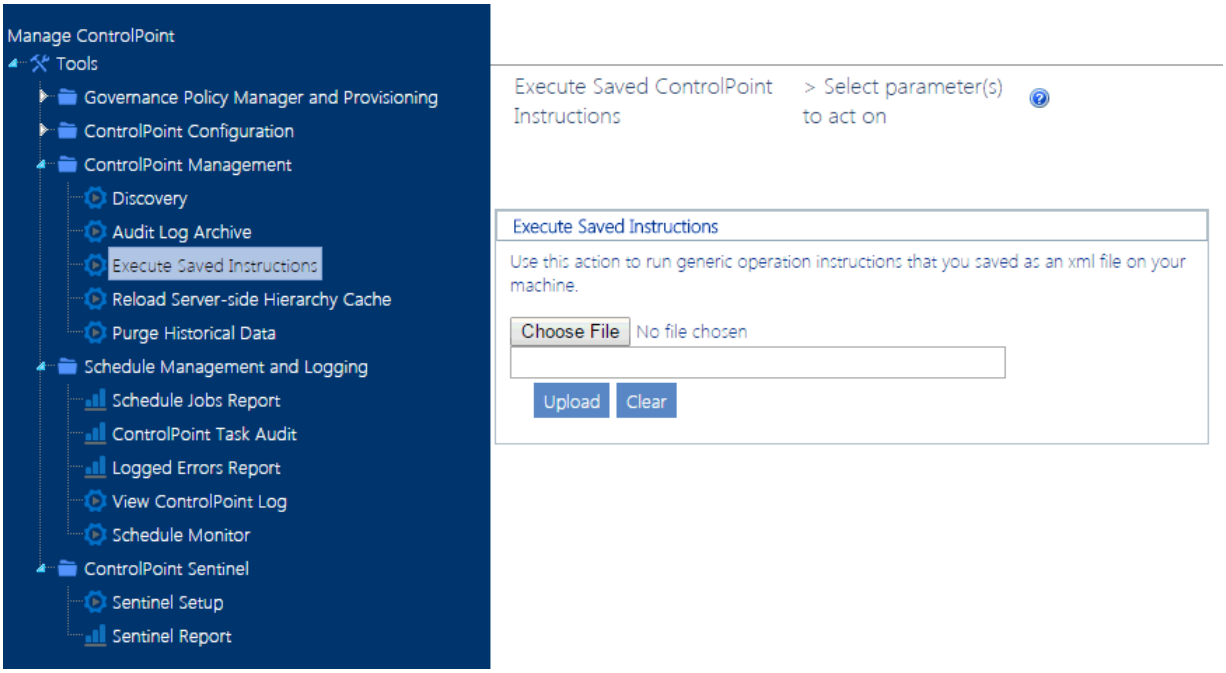
To execute Instructions for a ControlPoint operation:

1 Use one of the following options:

- From the SharePoint Hierarchy select the farm node, then from the context menu or ribbon Home tab choose Execute Saved Instructions.



- From the Manage ControlPoint panel, choose Execute Saved Instructions.



2 Click [**Browse...**] and locate the **XML File** with the instructions you want to execute.

3 Click [**Upload**].

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

OR

- schedule the operation to run at a later time.

Configuring a URL for Executing Saved Instructions from Outside ControlPoint

You can create a url from which you can invoke the execution of saved ControlPoint instructions from outside the ControlPoint application. This technique makes it possible for ControlPoint users to run a ControlPoint operation from anywhere a URL can be placed, including:

- an electronic document
- a Links Web Part on a SharePoint site
- within an email to another ControlPoint user.

The instructions can be saved to a file share or posted to a document library that has been created within the ControlPoint Configuration site.

When the URL is launched, the Execute Saved ControlPoint Instructions page opens in a standalone window and the instructions begin executing automatically.

User Account Requirements

In order to execute saved instructions from a URL:

- the ControlPoint user must have permissions to perform a ControlPoint operation on the SharePoint object(s) within the scope of the saved instructions, and
- the ControlPoint Service Account must have access to the file share or document library to which the instructions have been saved.

NOTE: One of the advantages of posting to the ControlPoint Configuration site is that the appropriate permissions to the document library are automatically granted (through inheritance from the parent site) by default.

Parts of the URL

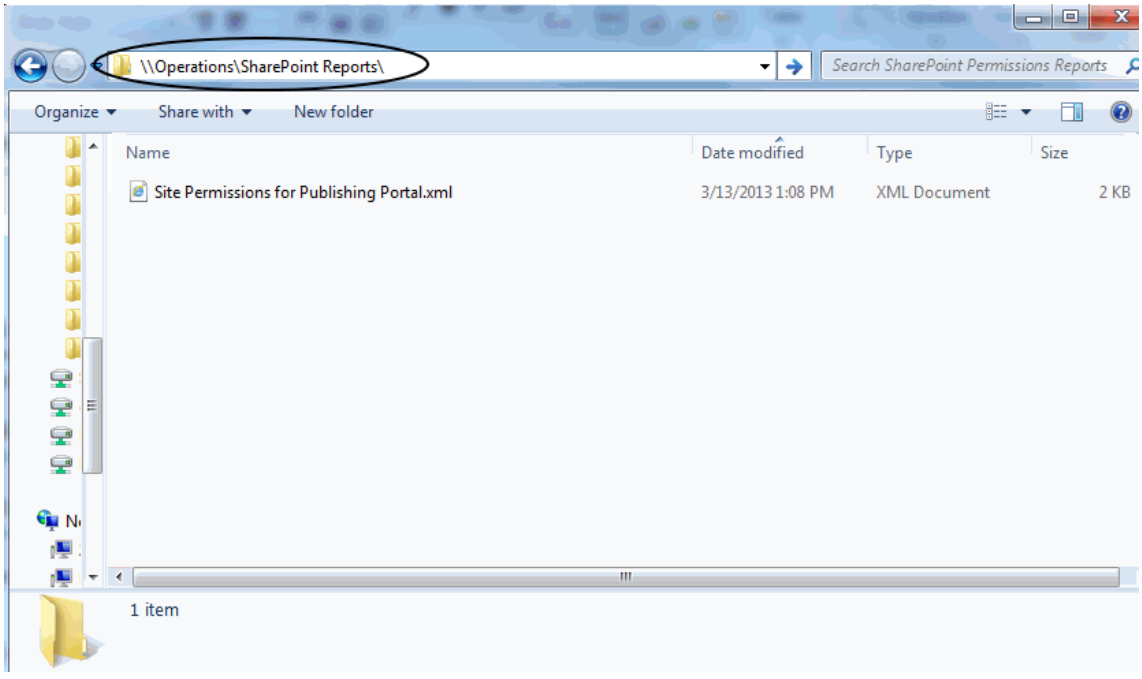
- `http://<server_name>:<port_number>/_layouts/axceler/xcexecutexml.aspx`
  The path to the ControlPoint application Execute Saved ControlPoint Instructions page
- Either
  - `XMLFILEURL=[directory]\[file_name.xml]`
    The path to the saved instructions on the file share.

    NOTE: If you specify a local drive (for example, C:\), ControlPoint assumes that the drive is *local to the server on which ControlPoint is installed* (*not* the current user's machine).

  OR

  - `XMLLISTNAME=[library_name]&XMLFILENAME=[file_name]`
    The path to the saved instructions in the document library on the ControlPoint Configuration site.

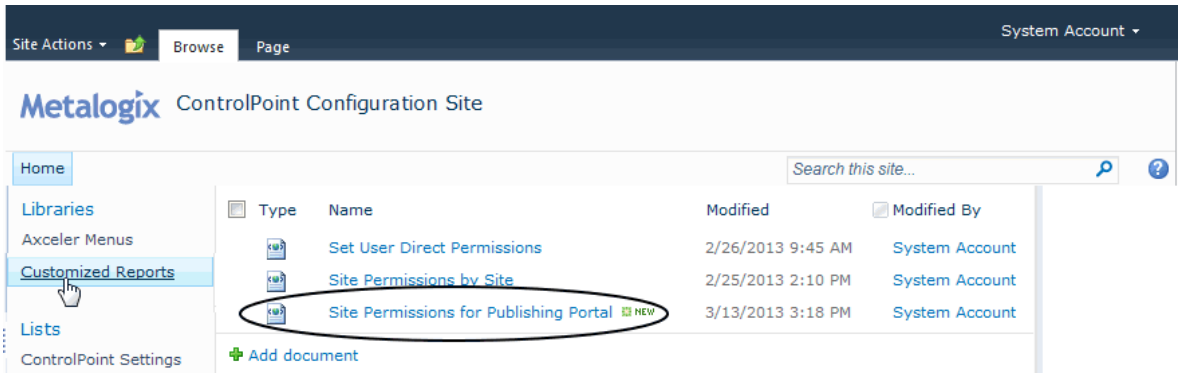
Example: Instructions saved to a file share



URL = `http://qa2010farmvm1:1818/_layouts/axceler/xcexecutexml.aspx?XMLFILEURL=\\Operations\SharePoint Reports\Site Permissions for Publishing Portal.xml`

Example: Instructions Saved to a ControlPoint Configuration Site Document Library

Note that the document library to which you post the saved instructions must have been created within the ControlPoint Configuration site.



URL=`http://qa2010farmvm1:1818/_layouts/axceler/xcexecutexml.aspx?XMLLISTNAME=Customized Reports&MLFILENAME=Site Permissions for Publishing Portal.xml`

Using the ControlPoint Governance Policy Manager (SharePoint 2010 and Later)

The ControlPoint Governance Policy Manager allows you to define standard governance polices or best practices consisting of one or more ControlPoint operations, each scheduled to run at a specified time or interval, and applied to a selected scope.

NOTE: Governance Policies cannot be applied to the scope of an entire farm.

For example, you may want to both **monitor and enforce security** for some of your most mission-critical SharePoint sites. You could create a Governance Policy that will enable you to:

- generate a weekly Site Permissions report and have it sent to each of the site owners.
- back up site permissions on a regular basis
- create ControlPoint Policies to control the types of permissions changes that can be made to sites within the selected scope

To **manage the size of site collections** within your environment, you could create a Governance Policy that will enable you to:

- create ControlPoint Policies to control:
  - the size of files uploaded to lists and libraries within the selected scope
  - the creation of subsites at a specified depth
- use the Set Site Collection Properties action to set and enforce the same quota across all site collections within the scope
- run a weekly Most/Least Storage analysis to identify and monitor the site collections and sites within the scope using the most storage

You can also apply Governance Policies to Site Provisioning templates.

This feature is *not* available for farms that are running SharePoint 2007.

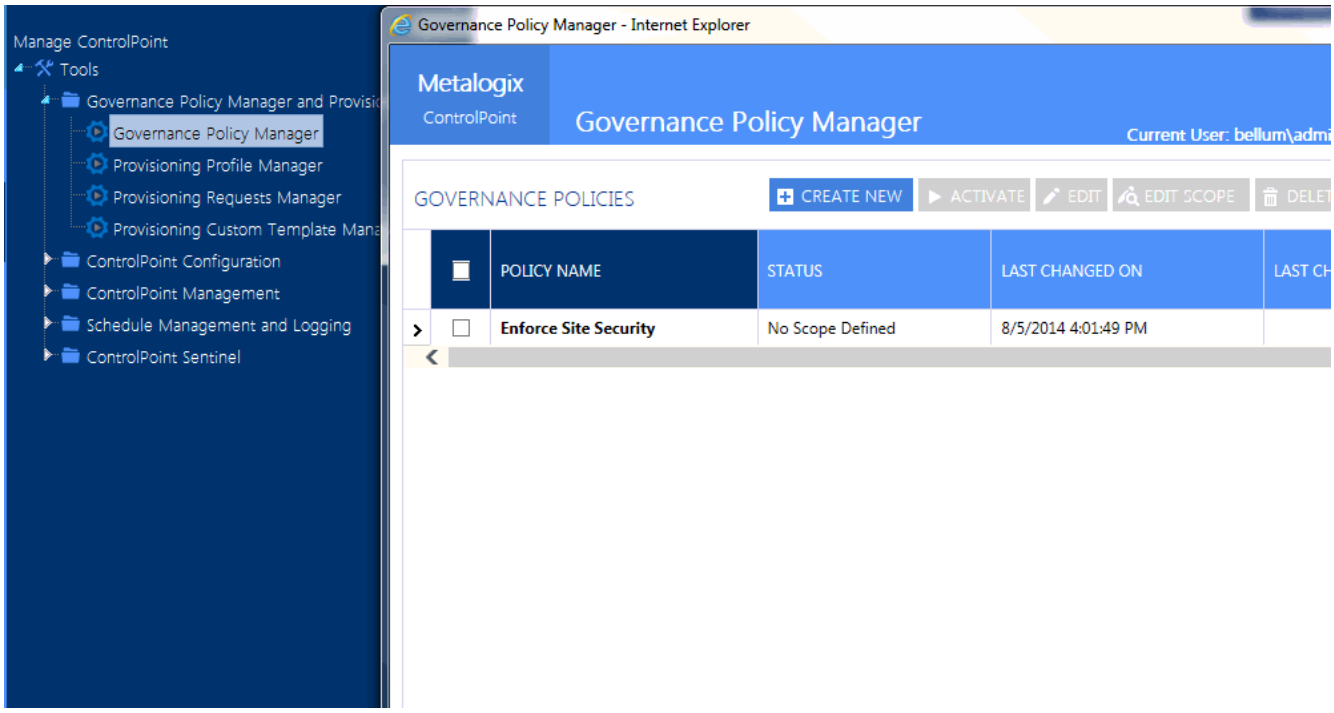
Launching the ControlPoint Governance Policy Manager

To launch the ControlPoint Governance Policy Manager:

- From the SharePoint Hierarchy Farm node, choose Automation > Governance Policy Manager.

OR

- From the Manage ControlPoint panel choose Governance Policy Manager and Provisioning > Governance Policy Manager.



NOTE: All Governance Policies can be viewed/edited by all ControlPoint users (for example, other ControlPoint users can add sites that they manage to the scope of an existing policy).

Converting Governance Policies Created Prior to Version 5.4

Prior to version 5.4, a ControlPoint Governance Policy could have multiple "instances," each with its own schedule. If you have Governance Policies that were created prior to version 5.4, they will display in the Governance Policy Manager with the option to **[Convert Pre-5.4 Policies]**. Note that you only run this conversion once, and the operation will convert *all* pre-5.4. policies.

NOTE: You must convert pre-5.4 Governance Policies before you can edit or delete them.

Once policies are converted:

- all existing Instances will be combined into a single Scope
- the schedule for each instance will be removed
- the **Type** column will be removed from the grid
- the **[Convert Pre-5.4 Policies]** button will no longer be visible,

After completing the conversion, you will need to create a new schedule for the Governance Policy rule(s).

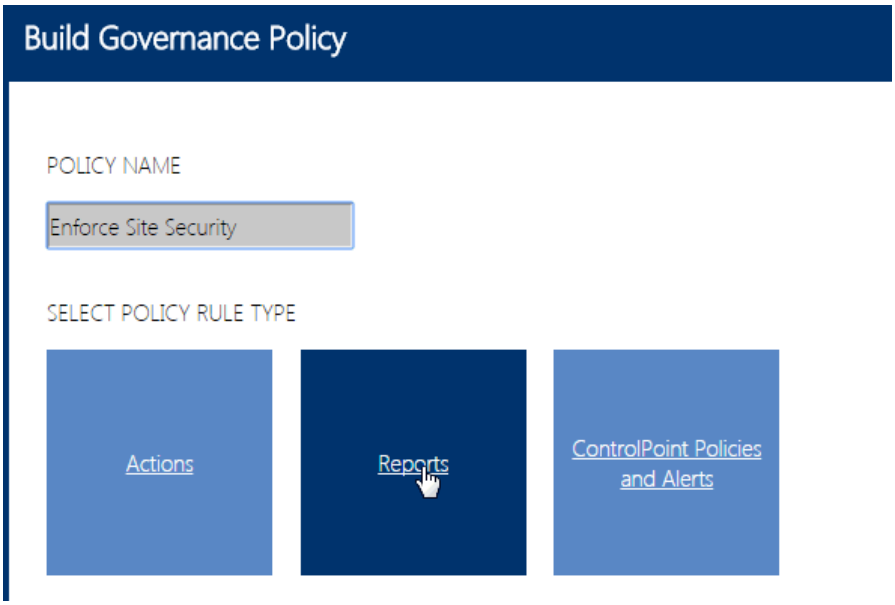
Creating a Governance Policy

To create a governance policy:

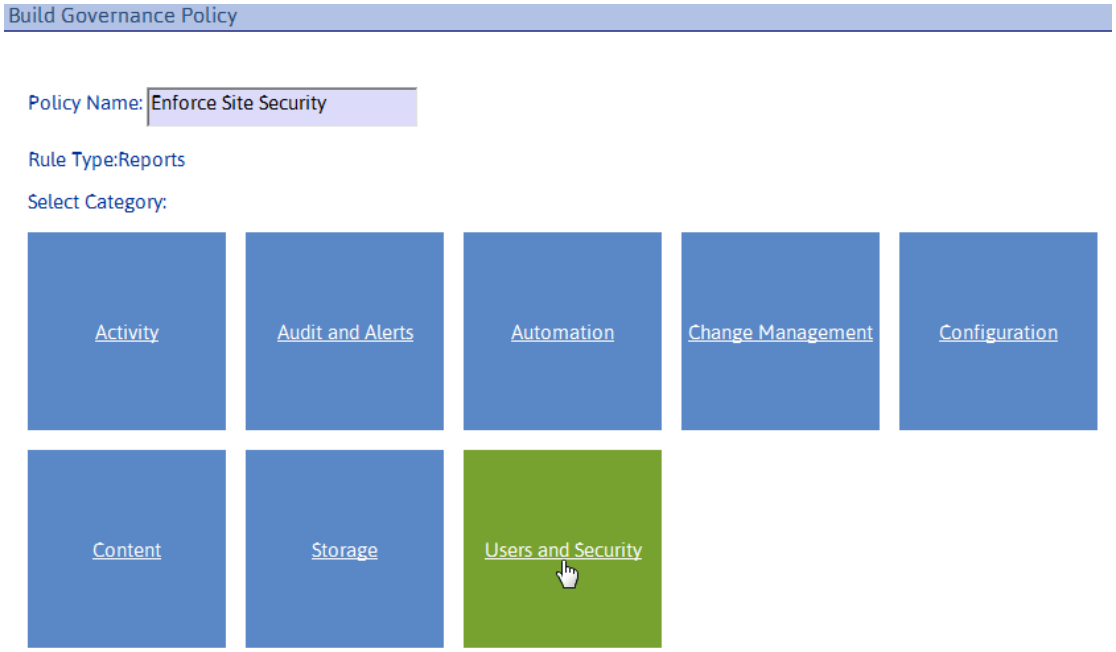
From the Governance Policy Manager main page, click **[Create New]**.

1 Enter a **Governance Policy Name**.

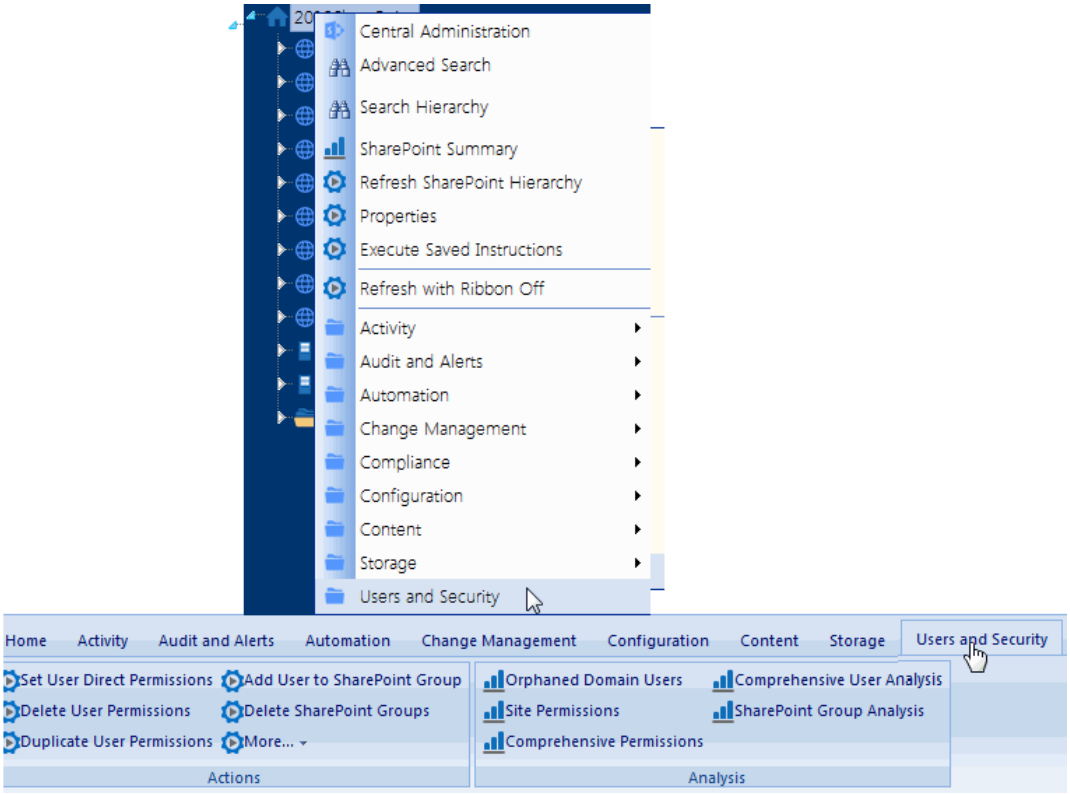
2 **Select** the **Policy Rule Type** (**Actions**, **Reports**, or **ControlPoint Policies and Alerts**).



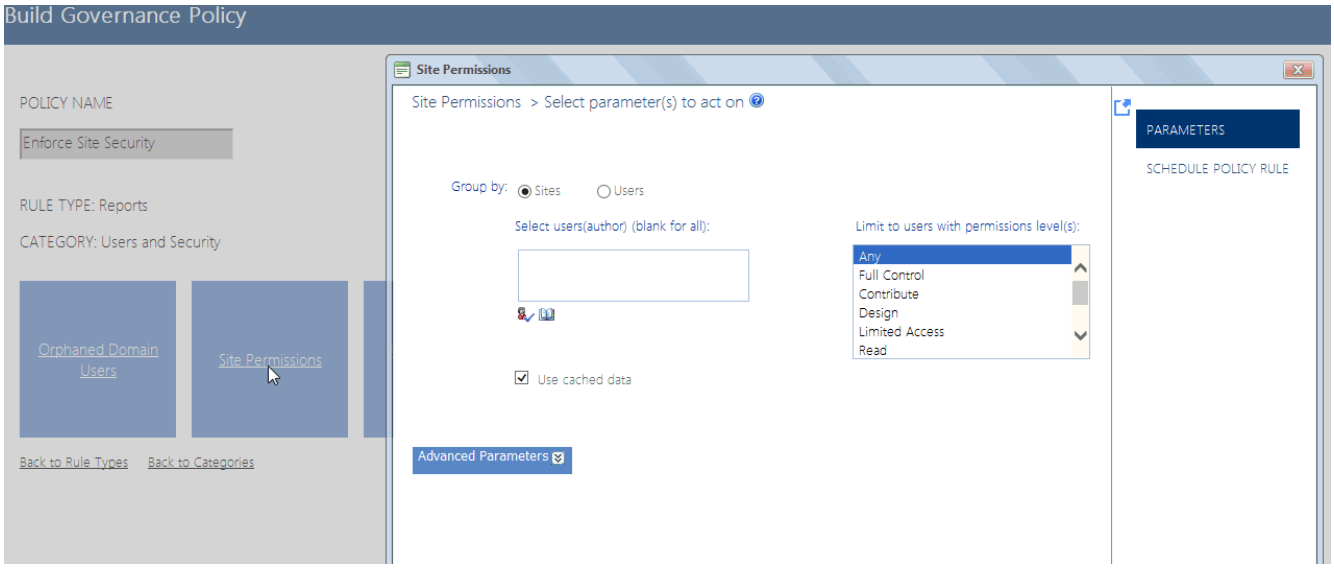
3 **Select** a Governance Policy **Category.**



Note that the categories correspond to the folders in the SharePoint Hierarchy right click menus and the tabs on the ribbon.



4 Select the operation that you want to add to your Governance Policy.



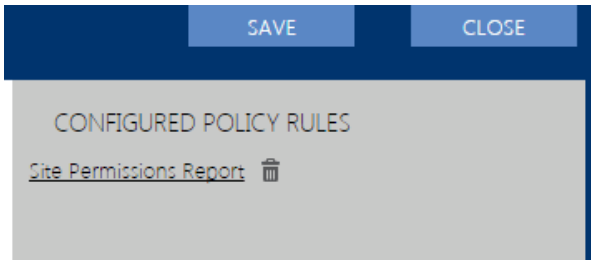
5 Specify the **Parameters** for the rule.

NOTE: To access instructions for completing the applicable ControlPoint operation, click the Help icon ( ) at the top right corner of the window or refer to the relevant section of the ControlPoint User Guide.

6 Click the **Schedule Policy Rule** tab, and follow the instructions for Scheduling a ControlPoint Operation.

7 To return to the Build Governance Policy window, click **[Save and Close]**.

Note that the name of the rule (which is the Schedule Job Name) displays under **Configured Rules**.



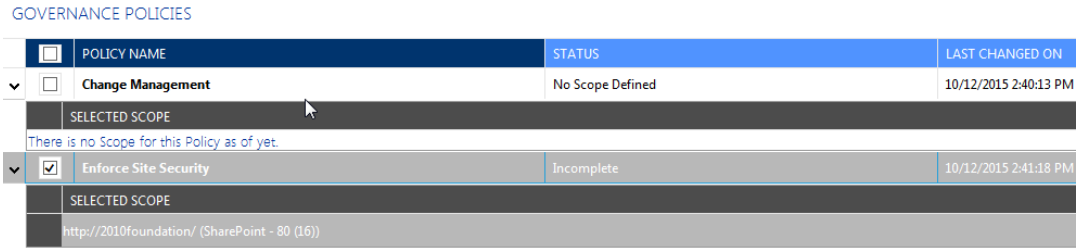
8 If you want to define another rule for the Governance Policy, use the information in the following table to determine the appropriate action to take.

If you want to configure a rule ..	Then ...
in the same category	select the next operation for which you want to create a rule, then repeat Steps 6-8.
of the same type in a different category	click the **Back to Categories** link, then repeat Steps 4-8.
of a different type	click the *Back to Rule Types* link, then repeat Steps 3-8.

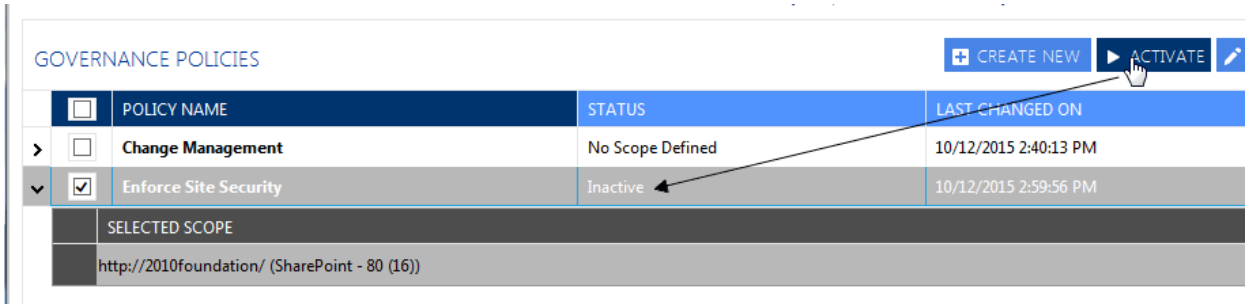
9 When you are finished configuring rules, click **[Save]**.

10 Click **[Close]** to return to the Governance Policy Manager main page.

Note that, if you chose to save the policy before it was completed or have not yet created a scope, it will display in the grid on the Governance Policy Manager main page with the applicable status.



A policy scope can be *created* for incomplete policies, but they cannot be *activated* until the policy has been completed.



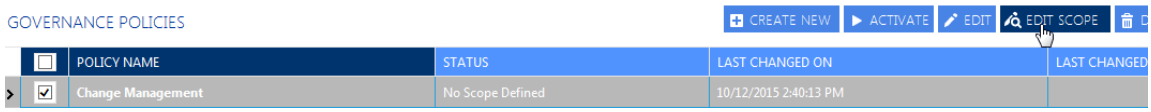
Creating a Governance Policy Scope and Activating the Governance Policy

Once a Governance Policy has been created, it must be applied to a specific scope (that is, one or more selected site collections or sites).

NOTE: If a Governance Policy is applied to a Site Provisioning Template, the scope will automatically be updated to include any newly created sites based on that template.

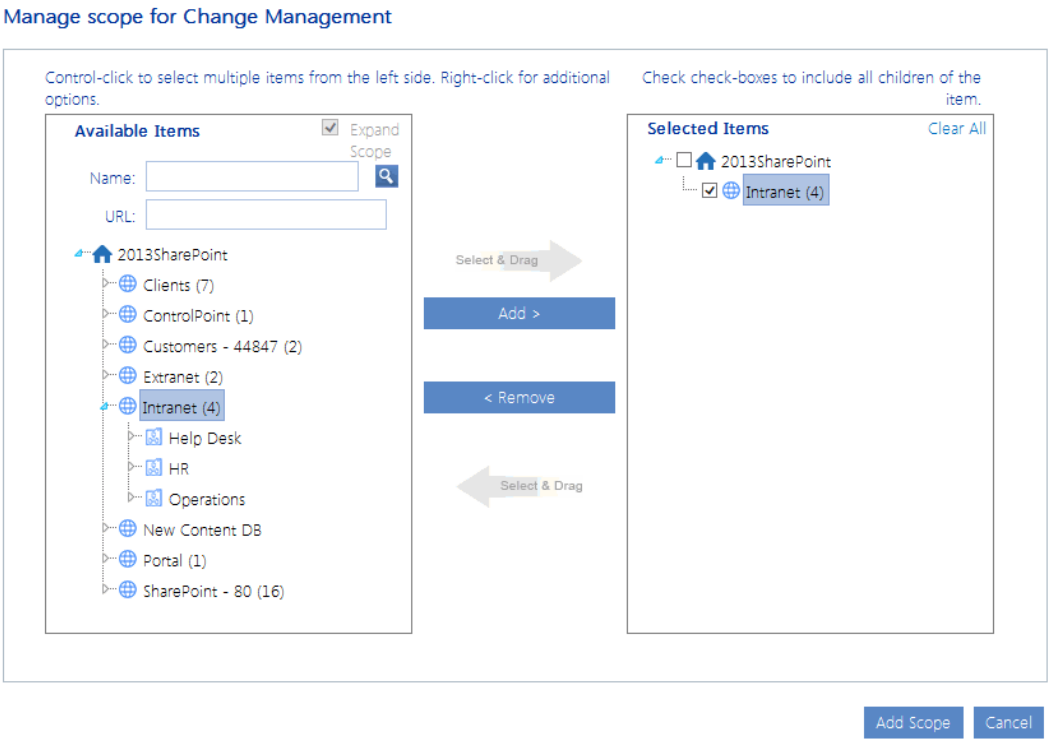
To create a Governance Policy Scope:

1 From the Governance Policy Manager main page, click the **Create Scope** icon for the applicable policy.



2 From the **Create scope for [Governance_Policy_Name]** dialog

a) Select the objects that you want to include in the scope.

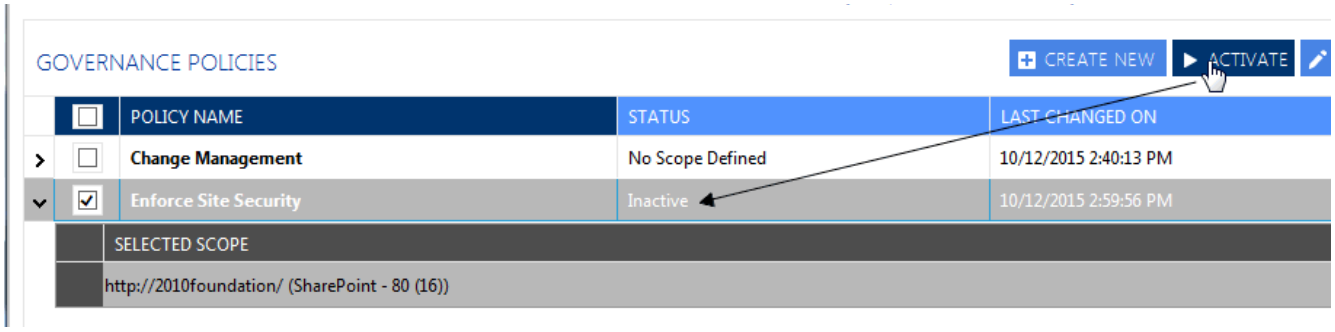


b) Click [**Add Scope**].

To activate a Governance Policy:

1 Click the arrow in the left-most column to expand the policy and display the scope.

2 Click the **Activate** icon.



Once a Governance Policy has been activated, you can view its status via the ControlPoint Schedule Monitor. Once a policy rule that performs an action has run, you can view a ControlPoint Task Audit for the action.

Editing and Deleting Governance Policies and Policy Scopes

To edit a Governance Policy:

1 From the Governance Policy Manager main page, check the box to the left of the Governance Policy you want to edit.

2 Click **[Edit]**.

3 Follow the instructions for Creating a Governance Policy.

To edit a Governance Policy Scope:

1 From the Governance Policy Manager main page, check the box to the left of the Governance Policy whose Scope you want to edit

2 Click **[EditScope]**.

3 Select the new scope.

To delete a Governance Policy:

1 From the Governance Policy Manager main page, check the box to the left of the Governance Policy(ies) you want to delete.

2 Click **[Delete]**.

To delete a Governance Policy Scope:

1 From the Governance Policy Manager main page, check the box to the left of the Governance Policy(ies) whose scope you want to delete.

2 Click **[Delete Scope]**.

Provisioning SharePoint Site Collections and Sites

ControlPoint Site Provisioning functionality automates the management of end user requests for new site collections and sites, which are based on "Provisioning Profiles" that you define. You can use ControlPoint's built-in functionality to associate specific site collection-, site-, and list-level properties with a particular Profile, and enforce their usage within the site collections or sites that use it. You can even attach one or more ControlPoint Governance Policies to a Profile.

NOTE: This feature is *not* available for SharePoint 2007 farms or Native installations.

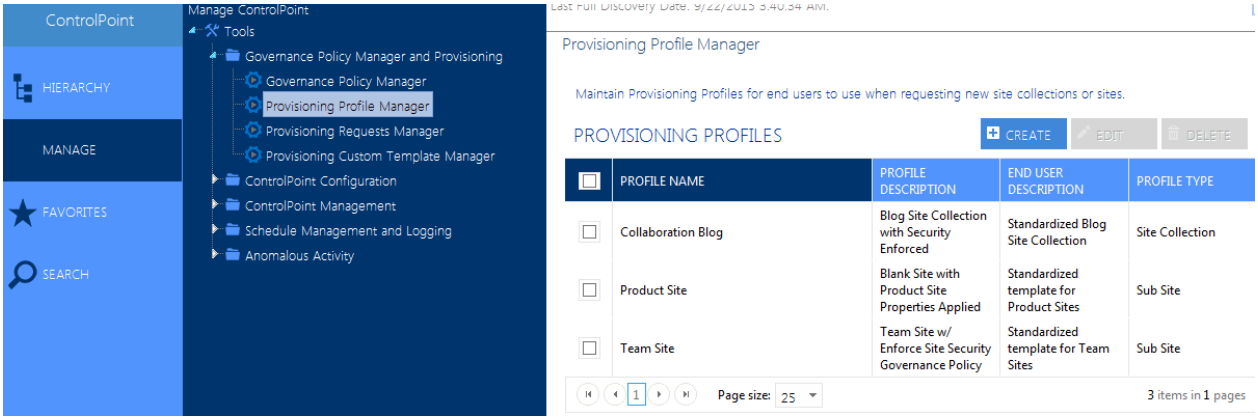
Managing Site Provisioning Profiles

Before an end user can request a new site collection or site, at least one Provisioning Profile must have been created. Once created, the Provisioning Profile becomes available to end users when a request for a new site collection or site is initiated.



To launch the ControlPoint Provisioning Profile Manager:

From the Manager ControlPoint panel, choose Governance Policy Manager and Provisioning > Provisioning Profile Manager.

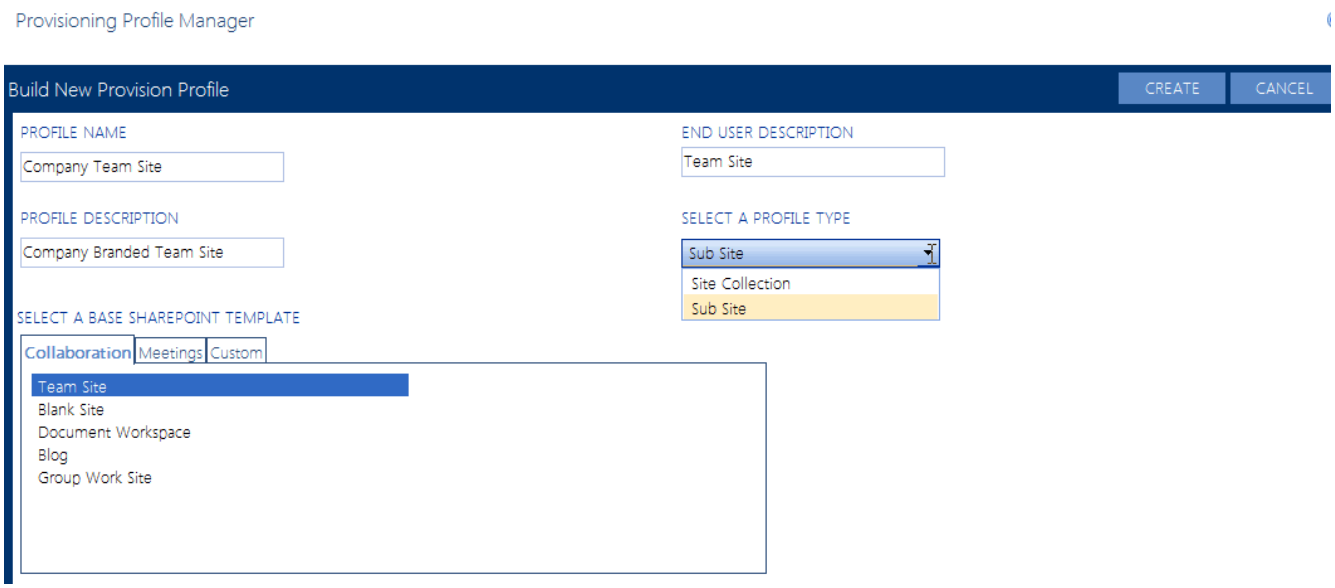


To create a Provisioning Profile:

1 From the Provisioning Profile Manager main page, choose **[Create]**.

2 Complete the fields on the Build New Provision Profile page as follows:

- Enter the **Profile Name** as you want it to display in the Provisioning Profile Manager list.
- Enter the **End User Description** as you want it to display in the Request a Site or Site Collection page.
- Enter the **Profile Description** as you want it to display in the Provisioning Profile Manager list.
- Select a **Profile Type** (Site Collection or Sub Site)
- Select a **Base SharePoint Template**.



NOTE: If you want to be able to select a template based on a site definition (such as a Publishing site or a custom site definition that has been deployed to the farm), the feature for that site definition must be activated on the ControlPoint Configuration Site collection.

3 If you want to **Attach Additional Profile Settings**:, you can

- Click the appropriate link—**Set Site Collection Properties** (if available), Set Site Properties, or Set List Properties—and complete the applicable window.

NOTE: If you select **Enforce Policy** and schedule the operation to run on a recurring basis, it will be enforced for any site collection or site created using that Profile.

- If you want to attach one or more *existing* ControlPoint Governance Policies to the Provisioning Profile, select from the available **Governance Polices**



NOTE: If the Governance Policy that you want to attach to the Profile does not appear in the list, click **[Governance Policy Manager]**, and create a new Governance Policy. When you return to the Build New Provision Profile page , click **[Create],** then edit the Profile see the new Governance Policy in the list.

NOTE: To access instructions for completing the applicable ControlPoint operation, click the Help icon ( ) at the top right corner of the window or refer to the relevant section of the ControlPoint User Guide.

4 Click **[Create]**.

To edit a Provisioning Profile:

1 From the Provisioning Profile Manager main page, check the box to the left of the Profile that you want to edit.

2 Click **[Edit]**.

3 Edit the fields on the Edit Provision Profile page as appropriate.

4 Click **[Update]**.

To delete one or more Provisioning Profiles:

1 From the Provisioning Profile Manager main page, check the box to the left of the Profile(s) that you want to delete.

2 Click **[Delete]**

You will be prompted to confirm your action before continuing.

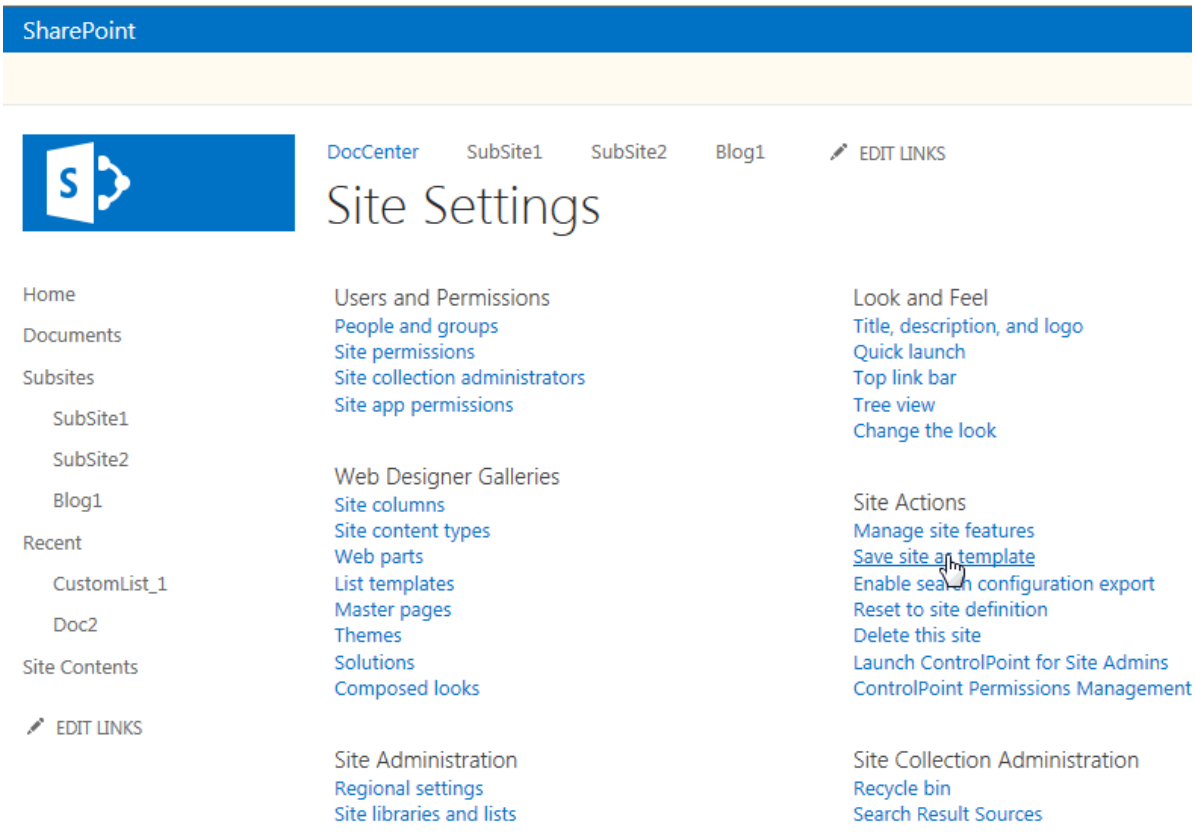
Using Custom Templates for Site Provisioning Profiles

You can create custom templates by selecting an existing site collection or site, saving it as a template (.wsp file) and attaching the wsp to the ControlPoint Custom Site Templates list.

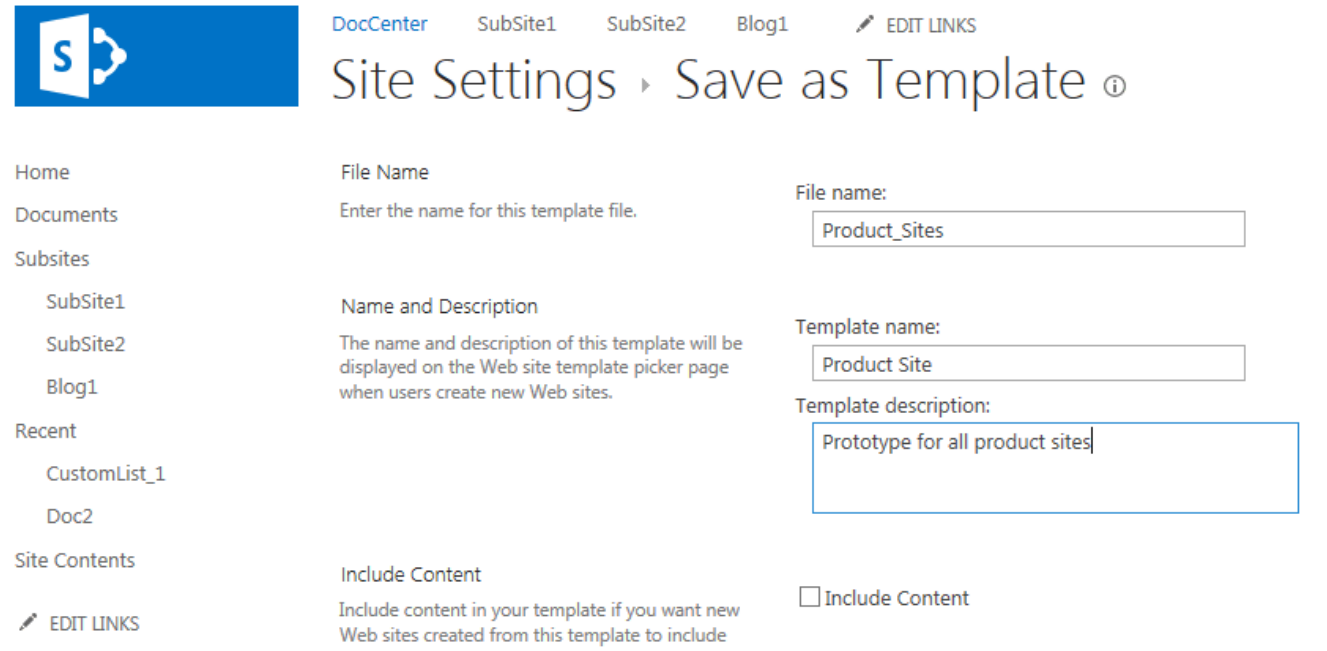
If you want to create a template from a site that uses a site definition (such as a Publishing site or a custom site definition that has been deployed to the farm), that site definition feature must be activated on the ControlPoint Configuration Site collection.

To create a custom template for site provisioning profiles:

1 Navigate to the Site Settings page of the site you want to save as a custom template, then click **Save site as Template**.



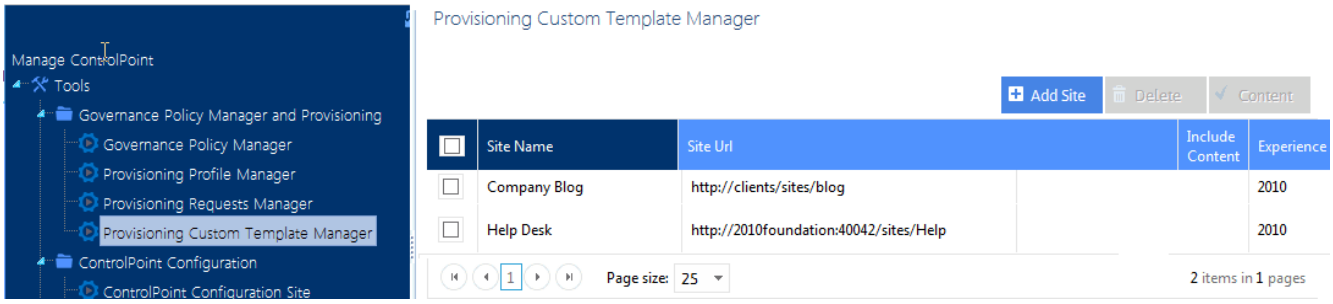
2 Complete the Save as Template form, including whether you want to **Include Content**, then click **[OK]**.



3 Open the site's Solution Gallery.

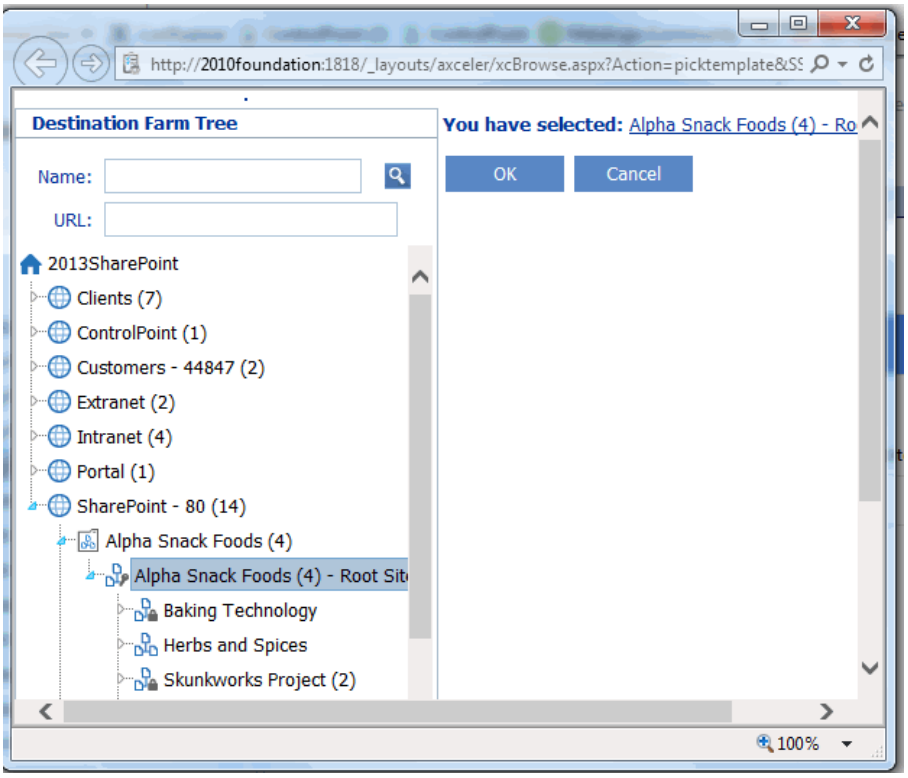
4 Select the template you just created and save it to the location of your choice.

5 From the Manage ControlPoint tree, choose Governance Policy Manager and Provisioning > Provisioning Custom Template Manager.



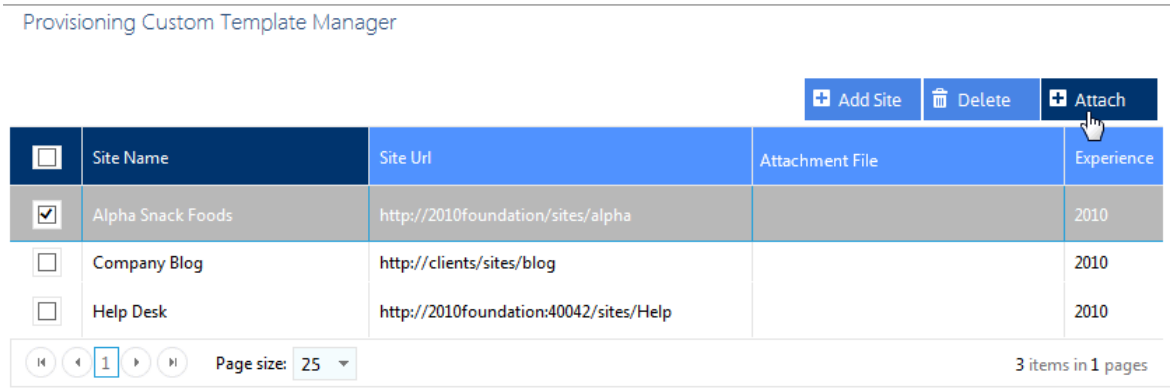
6 Click **[Add Site]**.

7 From the Destination Farm Tree, select the site collection or site from which you created the .wsp file.



8 Click **[OK]** to return to the Provisioning Custom Template Manager grid.

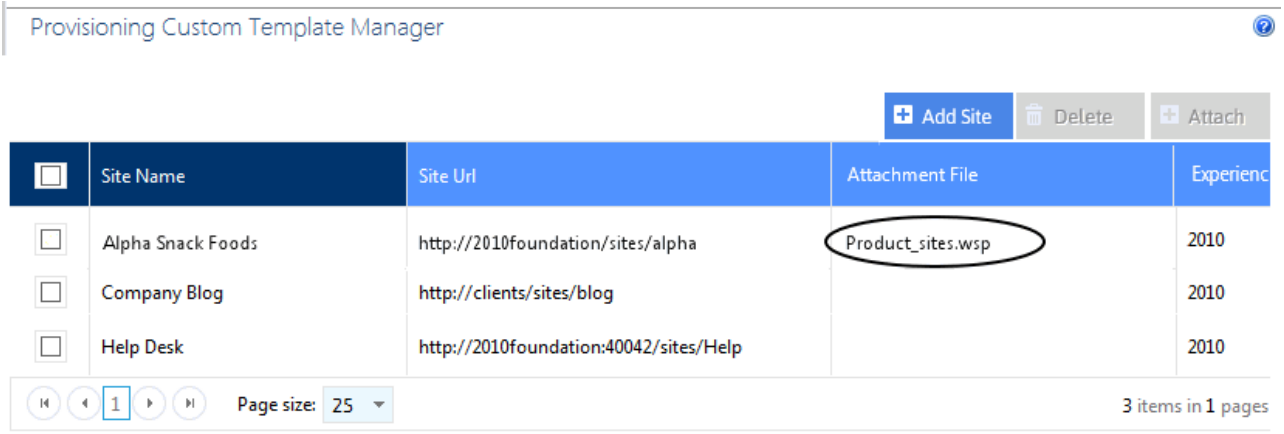
9 Check the box to the left of the site collection/site, then click **[Attach]**.



10 Click **[Browse]** and select the .wsp file associated with the site.

11 Click **[Upload]**.

The custom template will now be available for provisioning requests.



Making Provisioning Profiles Available to End Users

After at least one Provisioning Profile has been created, the next step is to activate the ControlPoint Site Provisioning feature so that end users can submit requests for new site collections and sites. This feature adds a new item—Request a New Site Collection or Site—to the SharePoint Site Actions menu.

The ControlPoint Site Provisioning feature can be activated for some or all sites in the farm via the ControlPoint Manage Site Features action.

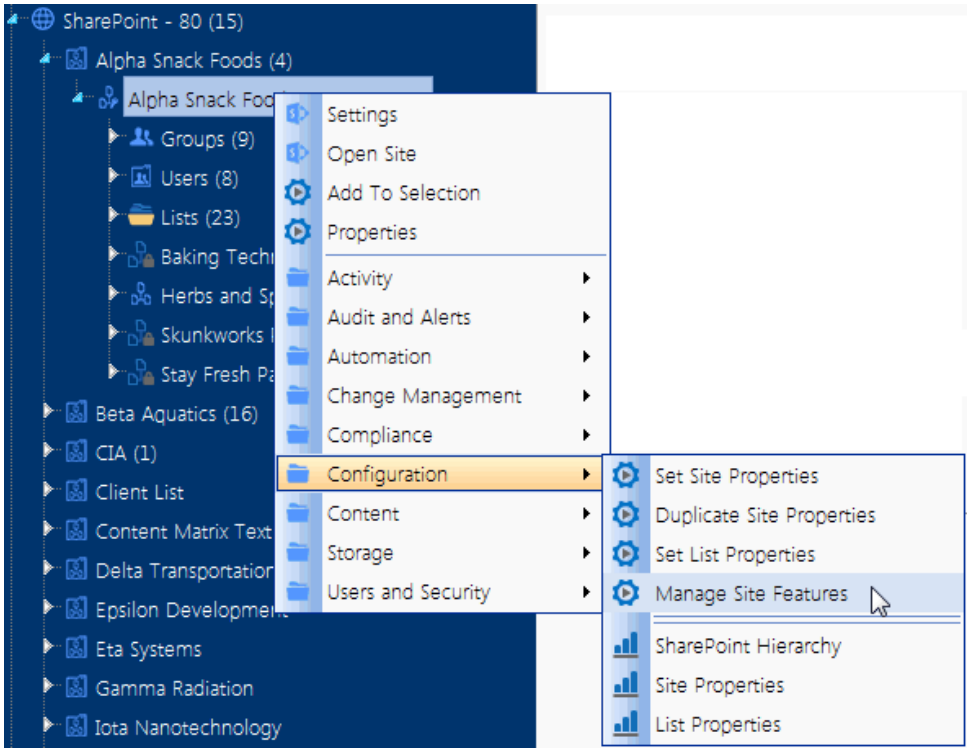
NOTE: Because it is a hidden feature, it cannot be activated via the SharePoint user interface.

To activate the ControlPoint Site Provisioning Feature:

1 From the SharePoint Hierarchy, select the objects(s) for which you want to make the ControlPoint Site Provisioning Feature available.

NOTE: Include in the scope of your selection the sites from which you want Request Forms to be *accessible,* not necessarily where the new site collection/site will actually be *created*.

2 Choose Configuration > Manage Site Features.

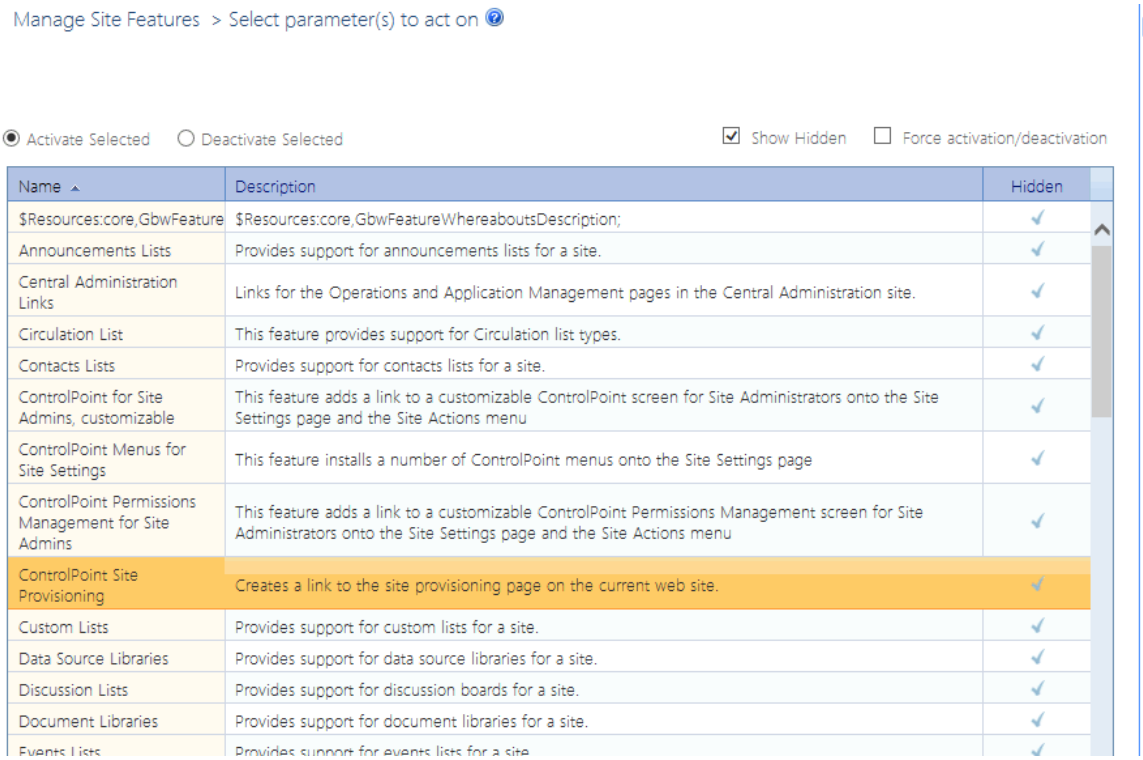


3 Select **Activate Selected** and click the **Show Hidden** box.

4 Click the **Name** header to sort the list of features alphabetically.



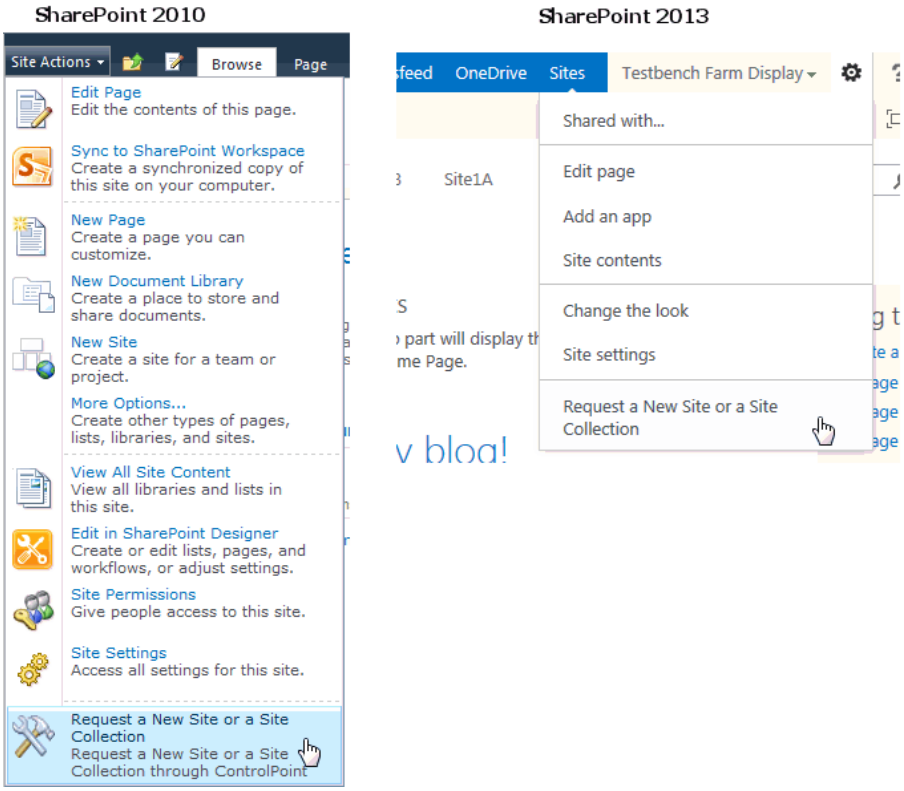
5 Select **ControlPoint Site Provisioning.**



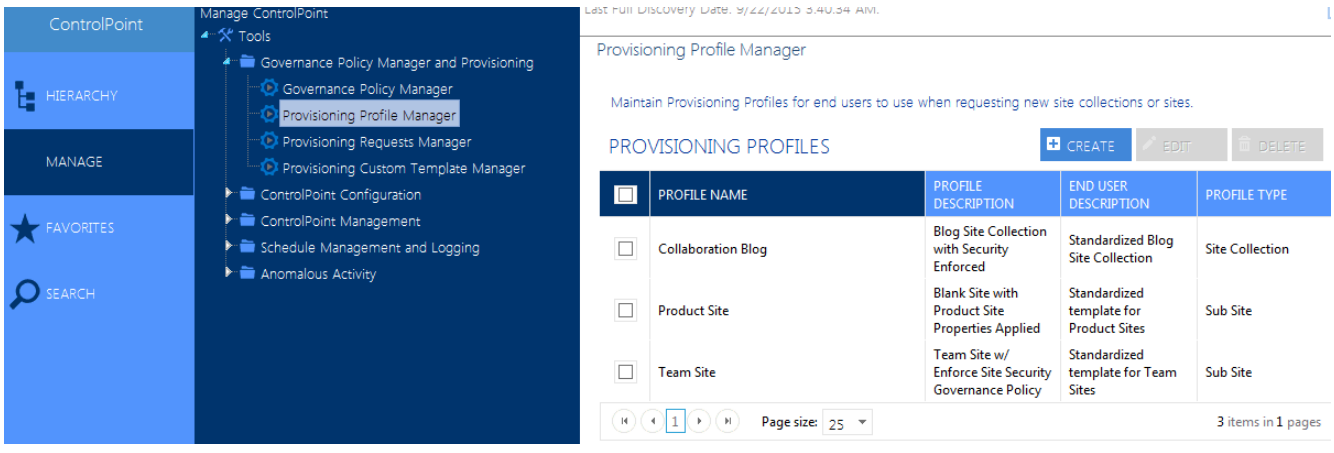
6 Click **[Run Now]**.

How New Sites and Site Collections Are Requested

An end user can request a new site or site collection from the SharePoint Site Actions menu as long as the ControlPoint Site Provisioning feature has been activated for that site.



When the user chooses Request a New Site Collection or Site, the Request Site or Site Collection page is launched, and the user can select from the available Profiles that were created via the ControlPoint Provisioning Profile Manager.



Upon selecting a Profile, the Create Site (or Site Collection) page displays, prompting the requester for the following information:

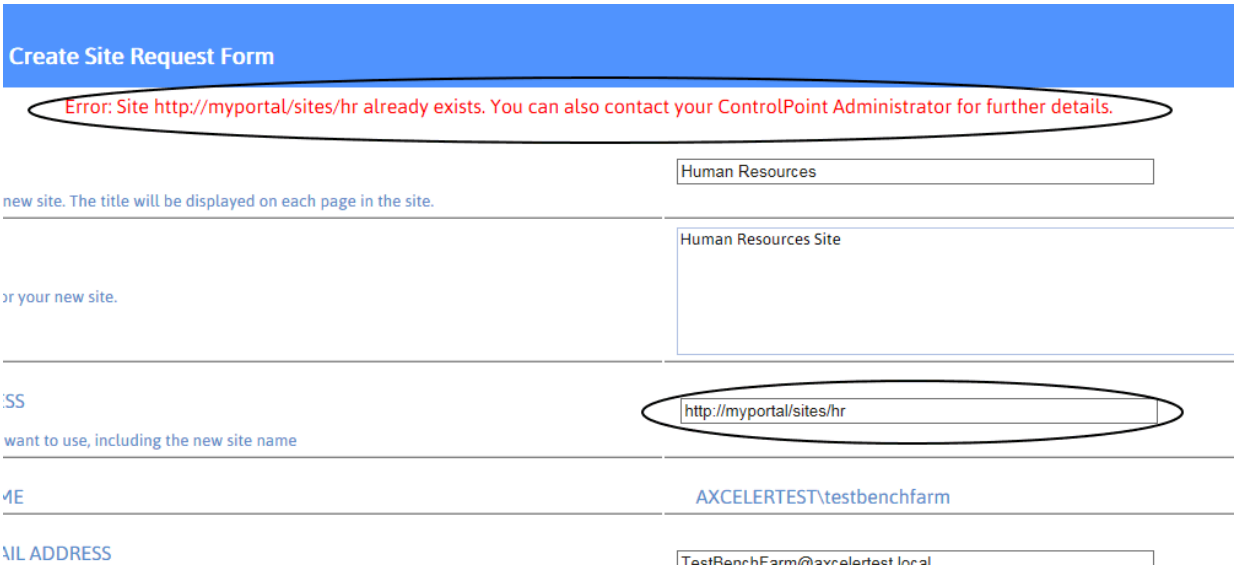
- a **Title** and **Description** for the new site

- the **Web Site Address** that the requester wants to use for the new site

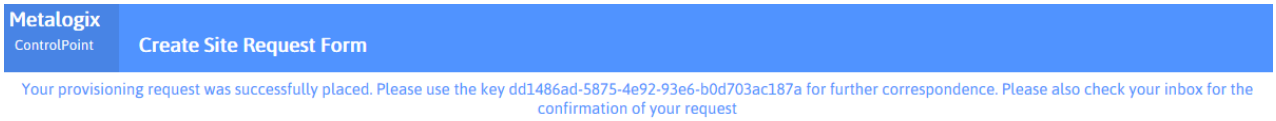
NOTE: The requester must enter a *full* URL, including the name of the new site. For example, if the requester wants to create a subsite called Employee Contact Information under myportal/sites/hr, a valid URL might be **http://myportal/sites/hr/employeecontacts**

The **Requester Name** and **Requester Email address** pre-populate with the login name and email address of the current user. The Requester Email Address can, however be changed. If the request is for a Site *Collection*, **Primary Site Collection Administrator** and **Primary Site Collection Email Address** fields are pre-populated with the current user's information, but they can also be changed.

- When the requester places the request, ControlPoint validates the information provided by the requester, including that the URL is valid and available. If the validation fails, any error messages display at the top of the form.



If the validation is successful, a confirmation number is generated and displays at the top of the form, and a confirmation email is automatically sent to the requester.



NOTE: Once a request is submitted, it is registered in the Site Creation Requests list on the ControlPoint Configuration Site.

Managing Site Provisioning Requests

From the Manage Site Provisioning Requests page, you can:

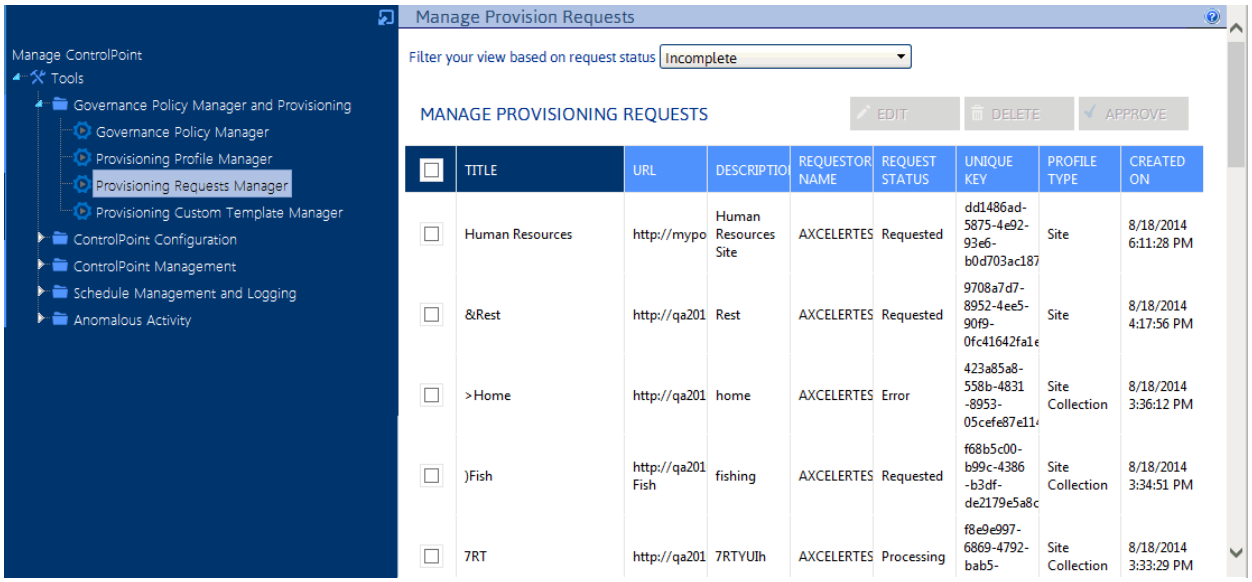
- monitor incoming requests for site collections and sites
- approve or reject the requests, and

- edit request details, such as title, description or url.

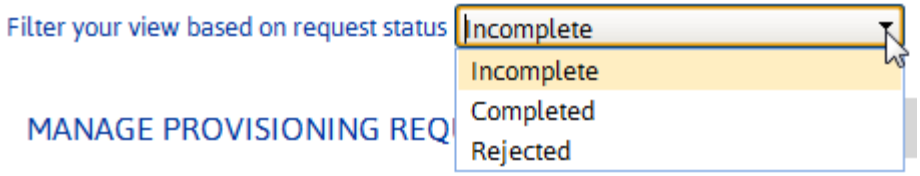
As an alternative to manually approving or rejecting requests, you can use a SharePoint workflow to handle the approval process. For details, refer to the topic "Configuring the Site Provisioning Workflow Settings" in the *ControlPoint Administration Guide*.

To launch the Provisioning Requests Manager:

From the Manage ControlPoint tree, choose Governance Policy Manager and Provisioning > Provisioning Requests Manager.



Note that you can filter your view based on the state of the request:



- The **Incomplete** view, includes requests with a status of:
  - Requested
  - Approved
  - In Process
  - Error
- The **Completed** view shows all requests which have been processed and for which site collections/sites have been created and all of the Additional Profile Settings (properties and Governance Policies) been applied.
- The **Rejected** view shows all Rejected requests.

If the approval process uses a workflow:

The grid displays an additional column, **Workflow Status**, so that you can monitor the progress of workflow instances. You can also view/update a workflow in SharePoint. (For example, if the Workflow Status is Failed on Start, you may want to start in manually.

To view/update a workflow instance, check the box to the left of the applicable request, then click **[Workflow]**.

If you are using a SharePoint 2010 out-of-the-box workflow, instances may continually fail to start, even if the workflow is configured to start automatically.

To edit/view details of a Provisioning Profile:

1 In the Manage Provision Requests grid, check the box to the left of the request that you want to view/edit.

2 Click **[Edit]**.

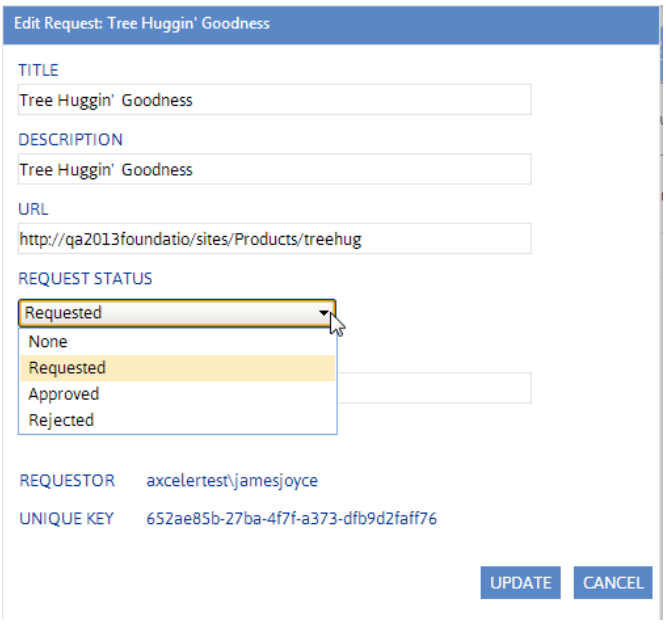
Note that you can edit the **Title**, **Description**, and **URL** of the request. You can also approve or reject the request by changing the **Request Status**.

If a request is **Rejected**, an email is automatically sent to the requester. If a request is **Approved**, it automatically starts Processing and is **Completed** when the site collection or site is created. Once the site or site collection is created, an email is automatically sent to the requester.

Note that you can edit the **Title**, **Description**, and **URL** of the request. You can also approve or reject the request by changing the **Request Status**.

If a request is **Rejected**, an email is automatically sent to the requester. If a request is **Approved**, it automatically starts Processing and is Completed when the site collection or site is created and all of the Additional Profile Settings (properties and Governance Policies) been applied per the new site collection or site. Once the site or site collection is created, an email is automatically sent to the requester.

NOTE: Additional Profile Settings are applied the next time the scheduled job that has been defined for the operation has run.



1 Click **[Update]**.

To approve one or more requests without viewing or editing details:

1 From the Provisioning Request Manager main page, check the box to the left of each request you want to approve.

2 Click **[Approve]**.

To delete one or more requests:

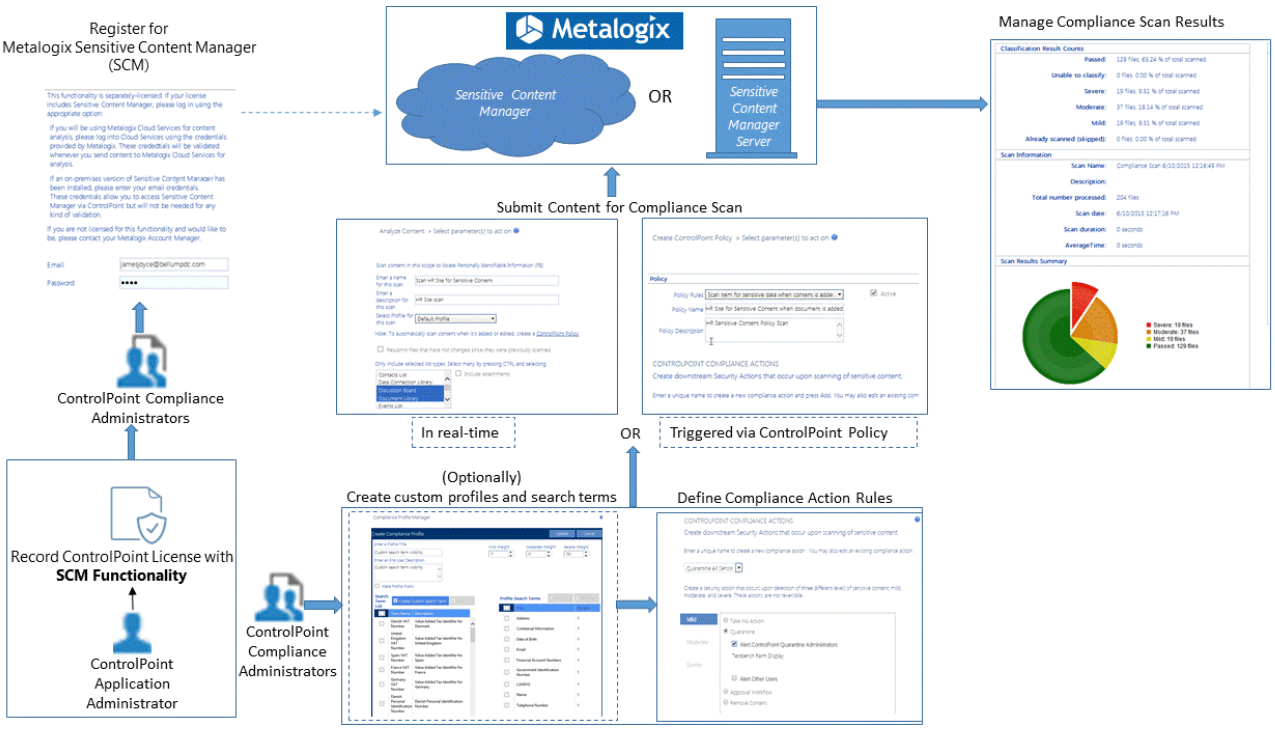
1 From the Provisioning Requests Manager main page, check the box to the left of the request(s) that you want to delete.

2 Click **[Delete]**

You will be prompted to confirm your action before continuing.

Using Sensitive Content Manager to Analyze SharePoint Content for Compliance

If your ControlPoint license includes Compliance functionality, you can use the Metalogix Sensitive Content Manager (SCM) to scan content for sensitive content, then specify an action to take based on the type/severity of the information found.



NOTE: If your ControlPoint license does *not* include Sensitive Content Manager, this funcitonality will be hidden.

Compliance Functionality Process Overview

The process for using Metalogix Sensitive Content Manager to implement ControlPoint Compliance functionality is described below.

A. ControlPoint Compliance Administrators register for Sensitive Content Manager.

B. ControlPoint Compliance Administrators define Compliance Action Rules.

C. ControlPoint Compliance Administrators submit content to Metalogix Sensitive Content Manager for analysis.

D. ControlPoint Compliance Administrators manage Compliance Actions.

Installing and Configuring Sensitive Content Manager Server

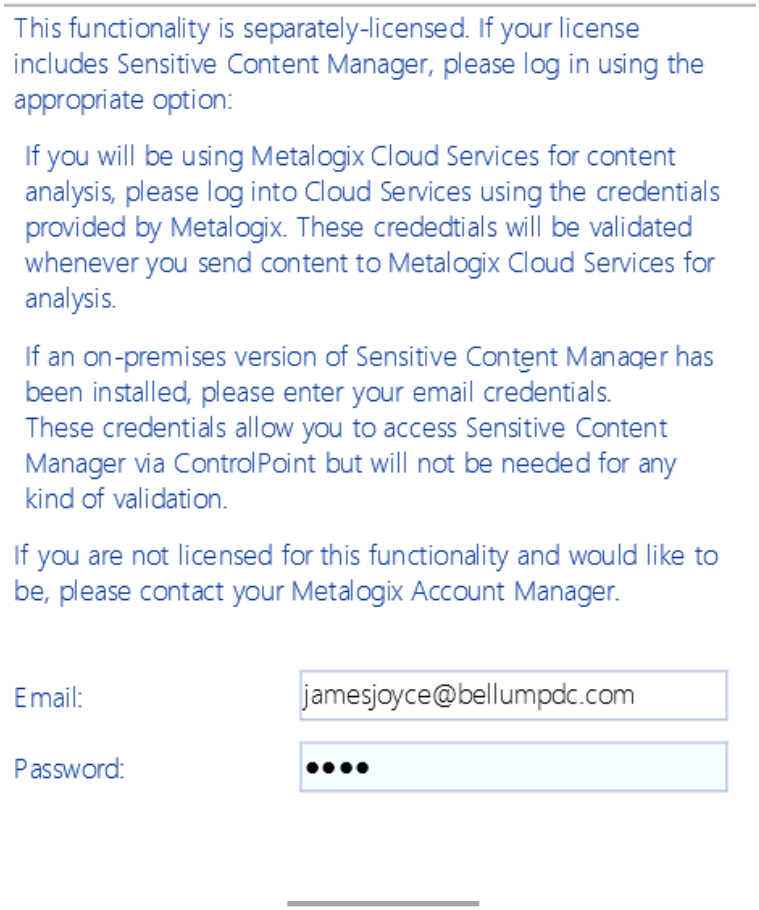
If you are using Sensitive Content Manager Server (the on-premises edition of Sensitive Content Manager) as an alternative to Sensitive Content Manager (Cloud edition), refer to the Sensitive Content Manager Server Installation Guide, which is also provided with your Sensitive Content Manager installation kit, for complete instructions.

Before using Sensitive Content Manager Server via ControlPoint, the ControlPoint Application Administrator must change the Compliance Endpoints, which by default are configured for Metalogix Cloud Services. Details can be found in the *ControlPoint Administration Guide*.

Registering for Metalogix Sensitive Content Manager

The first time a member of the ControlPoint Compliance Administrators group invokes ControlPoint Compliance functionality, that user will be prompted to register with Sensitive Content Manager. The credentials you use depend on the installation:

- If you will be using Sensitive Content Manager (Cloud edition) to analyze content, Metalogix will provide this information.
- If you will be using Sensitive Content Manager Server edition to analyze content, enter your email address and a password of your choice.



Once registration has been completed, members of the ControlPoint Compliance Administrators group can begin to use ControlPoint with Sensitive Content Manager.

Compliance Administrators and Quarantine Administrators Groups

If your organization is licensed for Metalogix Sensitive Content Manager, only individuals who have been added to the following group(s) in the ControlPoint Configuration Site will be permitted to perform Compliance actions:

- **ControlPoint Compliance Administrators** - Individuals permitted to access ControlPoint Compliance functionality.
- **ControlPoint Quarantine Administrators** - Individuals permitted to manage quarantined content.

  Currently, members of the Quarantine Administators group must

  - be a Site Collection Administrator for each site collection containing quarantined content (in order to invoke the Manage Quarantine Documents page from the SharePoint Hierarchy)

  OR

  - also be a member of the Compliance Administrators Group.

It is important to note that Sensitive Content Manager functionality is not available to users who are *also* member*s* of the Business Administrators group.

Managing Sensitive Content Manager Users

Sensitive Content User Maintenance functionality can be used by members of the ControlPoint Compliance Administrators group to register or delete other Sensitive Content Manager users, as an alternative to having users self-register.

To launch the Sensitive Content Manager User Maintenance page:

From the Manage panel, choose Compliance > User Maintenance.

The Sensitive Content User Maintenance page uses Auth Tokens to connect to Sensitive Content Manager, as well as Refresh tokens to prevent Auth tokens from expiring. Under normal circumstances, Auth tokens are auto-refreshed hourly and should never expire. Therefore, the **[Refresh]** option should only be only with guidance from Metalogix Support.

Sensitive Content User Maintenance

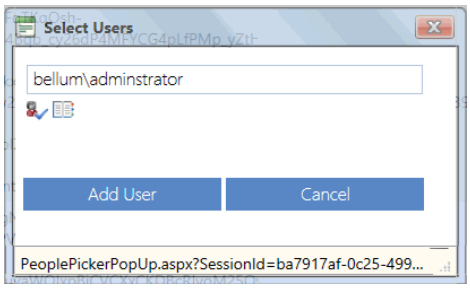
Register | Delete | Refresh

	User Id	User Name	Auth Token	Refresh Token	Compliance Expiry
☐	3	axcelertest\fls001	-Aq3J5M6GdqOjU7ub65381so-1cB77KI5JMYJdv9uynd_Dx6diOajRe-PBC2bvEq-M3YE3maDji8XGwYkC0spUoo9qoyxJbwKm6fiGgg7r5gfCxQXPE6XFGzM6IW DUKZWDnZAyK7kW8FyTAkEk8Pi3Q-azUz3SSXiZd7IEvqZLXuTzTw4_xzOhop_gzG099S-miUqcbMbFJgQqgCm_ZOhc3kUZaNCBC8rdyxXMNP9N7u5JLhinERvzCHW L4zlwRy6eLdiumyc4kT7iSIDbxkG9F6AAAmhBxbgnKJCDMJBUOSESHiy56Po epekv8crJzvaRRPQ5poAoelp_tfgrlxzIckJsx-pycbMyJHU98zDTt78eTCZnj4E2r125hl3CayTo9MNOWqgmZR5XUNG6luR1 2gvFhzqPVpBa8tfz94ON76YmeszX6y_iehvFWNnoqipNvzoSP1Vkcjxaq5YY1 YnpVGLgeKwfjYpgvpPzSP2JhfAw4S3tx3mYn5BEQI	a6c2de18522949d3a4129b4e367ec583	3/27/2018 11:50:46 AM
☐	20	axcelertest\qaserviceacct	xvRcCZ8I7fWoHfPTADFqTKqOsh-QW2uKHmSx1iv42fBH4Bqb_cy26dP4MFYCG4pLfPMp_yZtHVrxXDzuMu3mz sqo_BwTI6-wnI7WDp2B35Dif9ZYIkxgF5KjWbvyLTZi60bW0xwC_uE_8aqRh_HPMQoMml Uf6MjPyCXJMTI22oCw2mf47sy4WycYc0mGuj6hYZ9BM75mgteF-Qeo3w6sfeUBs1-tnblsvg5Qch4p7rSKmpIZjC7qnaiKgO2wkyZjXjF1iVTf_PitvKNyFTUb_CFlc-OSpOoZkPn-bePJGaotzWSLHW6WntNpJgGzwloGWP4oyLUiPukPOjCKkRY6oY5jz_RaOgr	90cec0a5c52444d784ab543975a42c06	2/14/2018 5:34:12 PM
☐	21	axcelertest\testbenchfarm	ue2GYyeubYhqtaVlgqOqsnQD_O7_BZZKoZL_IR-3j46cgPjHOobmWjy66tcMrWBjAVT8a7OOnG7FJm_cA0l42PbPI2FB_JMjy8ge huR6xE_0qph95CC9J9Q1t8ccS9uMBB4rSLMb1GY0ekhJTBZHFR_-pIUBJfR01 Yi9IUJJFCW3crUUYrHuS907-NuAexgYlcCV-uCVNP1HYSdknIb670-iG-nxchi_nrio8XYjmDfzPSScqB4yH1EJnMddfjOw9qf_orevmYo0J8fezvA2JQGdC	2fc43721ffcb43e5b59a55e227f6616f	3/27/2018 12:30:46 PM

To register Sensitive Content Manger users:

1 Click **[Register]** to display the **Select Users** dialog.

2 Enter the user account that you want to register.



NOTE: You can only register one user at a time, and the user you want to register must have a valid email address.

3 Click **[Add]** to add the user and display the **Metalogix Sensitive Content Manager Registration** dialog.

4 Register the user for Sensitive Content Manager.

5 Complete Steps 1-4 for each user you want to register.

NOTE: Make sure that all registered users are also members of the ControlPoint Compliance Administrators group but are *not* also members of the Business Administrators group.

To "unregister" Sensitive Content Manager users:

1 Use the check box(es) to select the user(s) you want to unregister.

2 Click **[Delete]**.

NOTE: Unless you remove the unregistered users from the ControlPoint Compliance Administrators group, they will continue to be prompted to register whenever Sensitive Content Manager functionality is invoked

Managing Sensitive Content Manager Profiles

A Sensitive Content Manager Profile is a named collection of content search and analysis guidelines. SCM includes a number of "Standard" Profiles for detecting Sensitive Content, which include:

- Personally Identifiable Information (PII)
- Protected Health Information (PHI)
- Payment Card Industry (PCI)
- General Data Protection Regulation (GDPR) compliance.

NOTE: Metalogix continually adds new Standard Profiles, which cannot be modified or deleted.

Members of the ControlPoint Compliance Administrators group can also create and manage custom Profiles by defining content search and analysis guidelines to use, as an organization's file analysis criteria may differ from those used in Standard Profiles. For example, you may want to create a custom Profile to group and weight a different subset of the predefined Search Terms, add custom Search Terms for sensitive data types, or analyze data that falls outside "standard" Profile definitions.

Sensitive Content Manager Profile Components

Sensitive Content Manager Profiles consist of the components described in the following table.

Profile Component	Description
Search Term	A word or any simple or complex alphanumeric pattern that represents sensitive information in a document. For example, in the PII Profile, these Search Terms are the personal identifiable information like a person's name, date of birth, financial account numbers, address, email address, etc. Each content search uses a set of Search Terms in a Profile.
Regular Expression (Regex)	The search syntax for a Search Term. The analysis engine matches the file contents with a Search Term based on the regex syntax specified in the Profile. You can define new Profiles that use the Standard Search Terms, or create Search Terms based on custom expressions.
	NOTE: Regular expressions for the predefined search terms are internally defined in the Search Term, and cannot be modified because they are not standalone regular expressions.

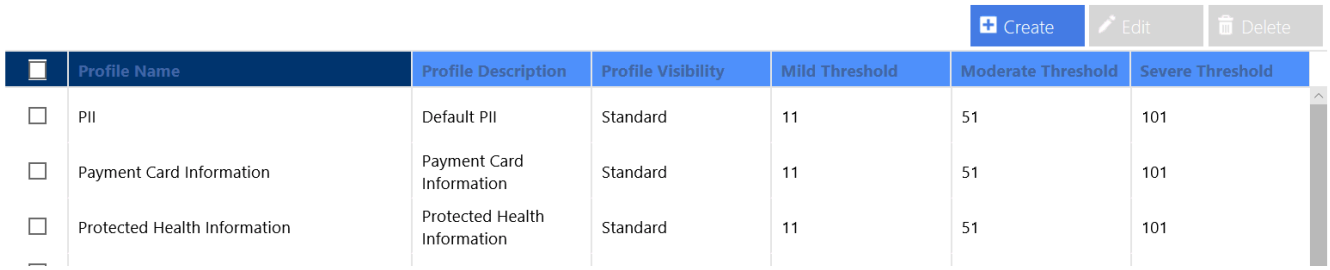
Profile Component	Description
Weight	The degree of severity of a possible content match for a specific Profile.
File Score	That weight factor combined with the number of content matches encountered during an analysis job. File scores are calculated during a file analysis to determine the overall severity level of a document

Creating Sensitive Content Manager Profiles

To create a Sensitive Content Manager Profile:

1. From the Manage panel, choose Compliance > Profile Maintenance.

Compliance Profile Manager

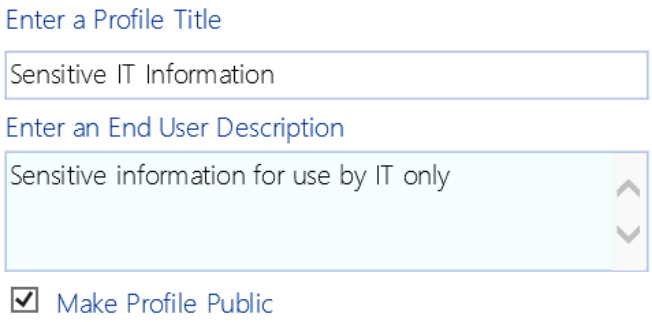


2 Click **[Create]**.

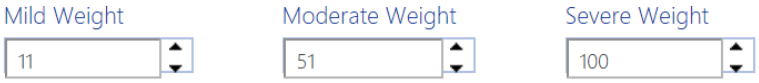
3 Enter a unique title for the Profile, as well as a description that will be visible to end users.

4 If you want to make the Profile private, uncheck the **Make Profile Public** box.

IMPORTANT NOTE: A Private profile is available to the person who created the profile, as well as all users in the Operators role in Sensitive Content Manager. For Sensitive Content Manager Server, communication with ControlPoint is performed in the context of the Service Account, and all Profiles belong to that account. Therefore, Private Profiles are available to all members of the ControlPoint Compliance Administrators group. For Sensitive Content Manager (Cloud edition), Private Profiles are available for use by the person who created them, as well as users in the Operators role in Sensitive Content Manager (Cloud edition).

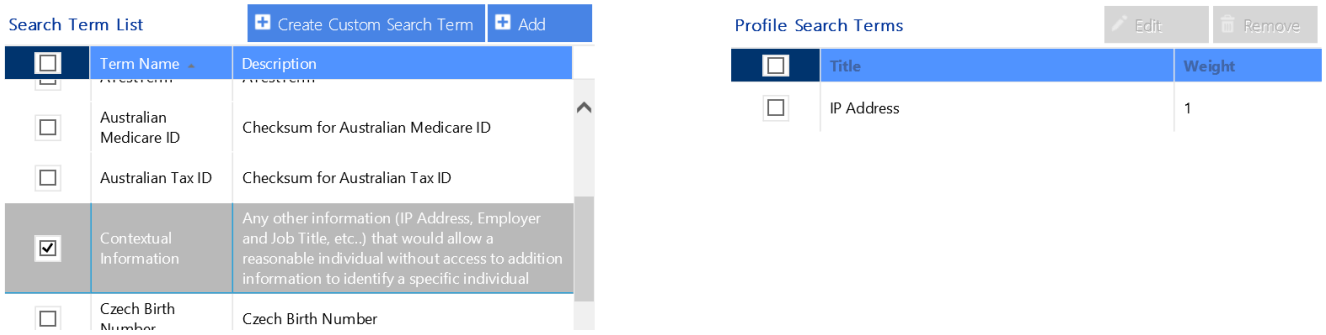


5. If different than the defaults, adjust the relative weights (that is, the degree of severity of a possible content match) for each threat level (Mild, Moderate, and Severe).



NOTE: While default weight values are recommended guidelines, you can increase or decrease the relative weights between severity levels, and there is no upper limit to the range that can be entered.

6. From the **Search Term List**, select the Search Term(s) that you want to add to the Profile, then click **[Add]** to move the term(s) to the **Profile Search Terms** list.



NOTE: If you want to include a Search Term that does not display in the list, you can create a custom Search Term.

7 Click **[Create]**.

8 **To edit a custom Profle:**

1 In the Compliance Search Terms Manager page, select the Public or Private Profile you want to edit, then click **[Edit]**.

2 Update fields as needed, then click **[Update]**.

Note that Standard Profile is provided by Metalogix acannot be edited or deleted.

Managing Compliance Search Terms

Sensitive Content Manager includes a number of out-of-the-box "standard" Search Terms for use in creating Profiles. These include terms related to:

- Personal Identification Information (PII)
- Payment Card Information (PCI)
- Protected Health Information (PHI)
- General Data Protection Regulation (GDPR) compliance.

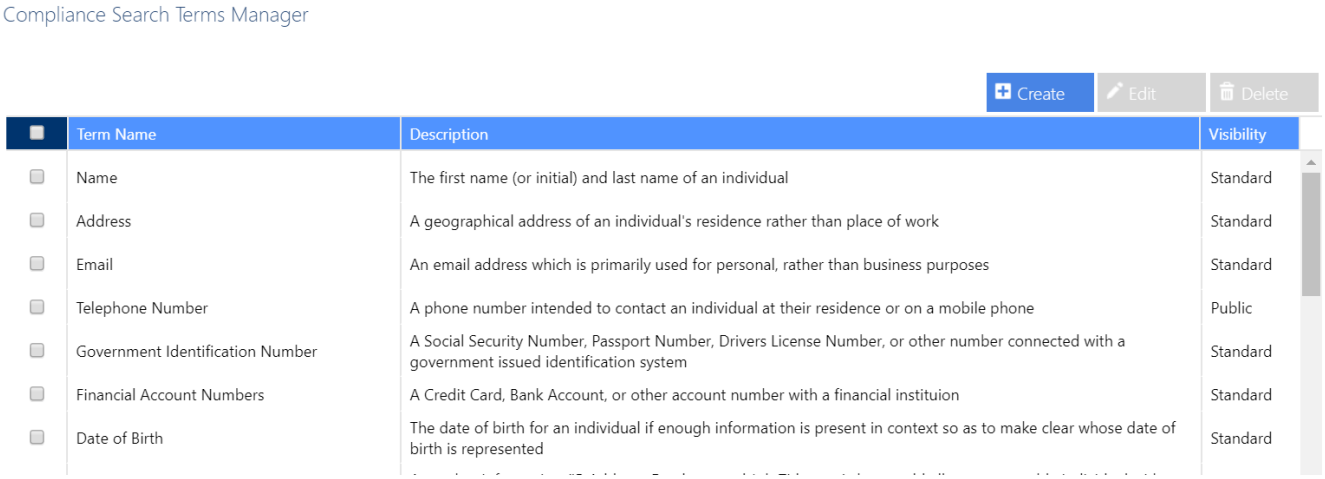
NOTE: Note that Metalogix continually adds Standard Search Terms, which cannot be edited or deleted.

Members of the Compliance Administrators can also create and maintain custom Search Terms to meet the organization's unique compliance needs.

To access the Compliance Search Terms Manager page:

From the Manage panel, choose Compliance > Search Terms Maintenance.

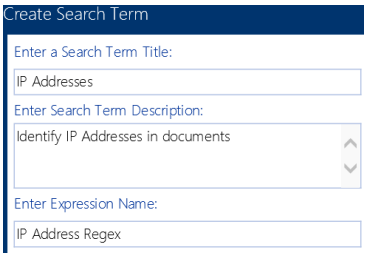
NOTE: You can also access this page from the Compliance Profile Manager page by clicking **[Create Custom Search Term]**.



To create custom Search Terms:

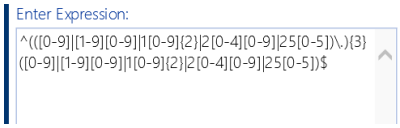
1 Click **[Create]**.

3 Enter a **Search Term Title** and **Search Term Description** as well as an **Expression Name** for the regex.



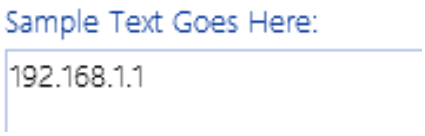
4. Enter a valid regex expression.

NOTE: Do not enter any leading or ending slashes (/)



5. To test the validity of the expression:

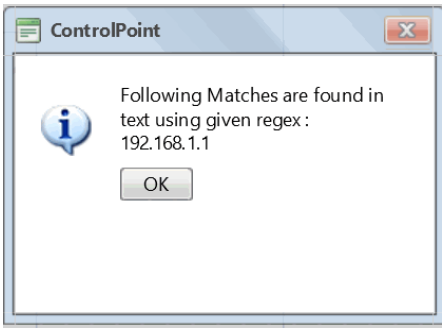
   a) enter representative text in the **Sample Text Goes Here:** field.



   b) Click the **[Test Expression]** at the bottom of the dialog.

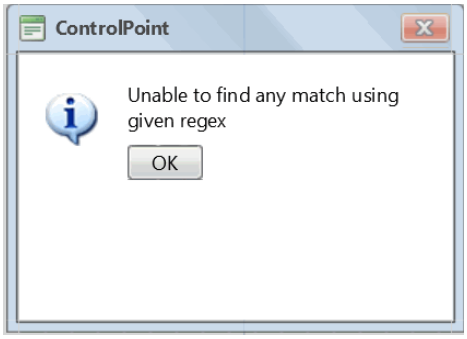
   A pop-up will display informing you that either:

   - a match can be found for the text using the given regex



   OR

   - a match cannot be found for the text using the give regex.



2 If you want to make the Search Term Private, uncheck the **Make Search Term Public** box.

IMPORTANT NOTES:

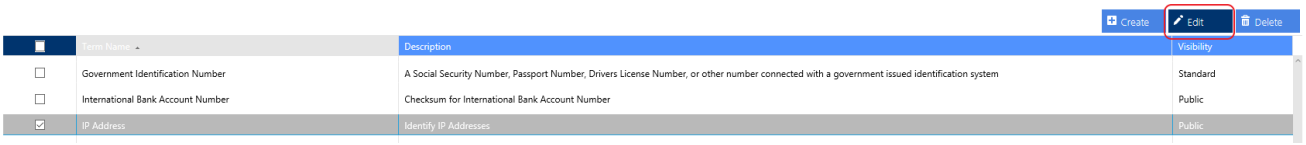
- A Private Search Term is available to the person who created it, as well as all users in the Operators role in Sensitive Content Manager. For Sensitive Content Manager Server, communication with ControlPoint is performed in the context of the Service Account, and all Search Terms belong to that account. Therefore, Private Search Terms are available to all members of the ControlPoint Compliance Administrators group. For Sensitive Content Manager (Cloud edition), Private Search

Terms are available for use by the person who created them, as well as users in the Operators role in Sensitive Content (Cloud edition).

- If a Private search Term is added to a public Profile, that search term will be visible publicly.

To edit a custom Search Term:

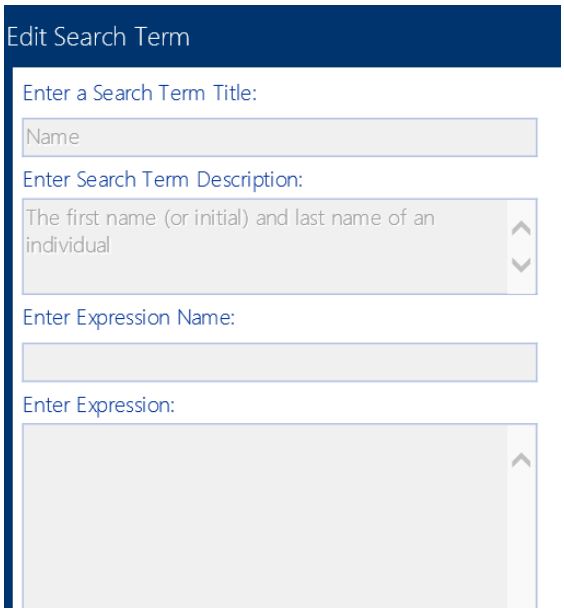
1 In the Compliance Search Terms Manager page, select the term that you want to edit, then click **[Edit]**.



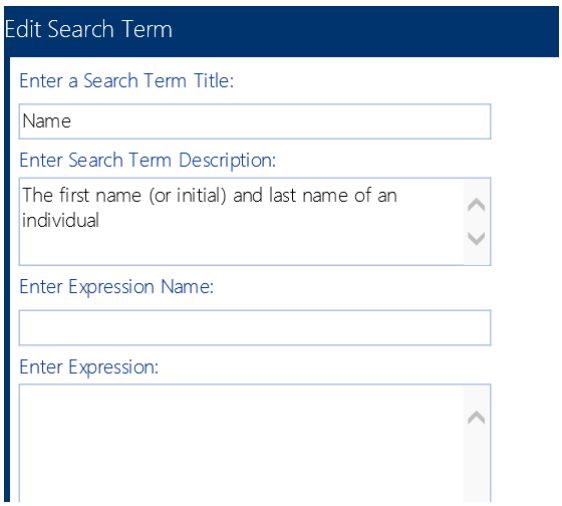
2 Update fields as needed, then click **[Update]**.

Note that any Search Term for which the regex is not visible is a Standard Search Term provided by Metalogix that cannot be edited.

- For Sensitive Content Manager (Cloud edition), all fields on the dialog of an uneditable search term will be disabled.



- For Sensitive Content Manager Server, some fields on the dialog may appear enabled, but any changes you attempt to make will not be saved.



Submitting Content to Sensitive Content Manager

Members of the ControlPoint Compliance Administrators group can use the ControlPoint Analyze Content action to submit content to the Metalogix Sensitive Content Manager where it will be scanned for potentially sensitive content. ControlPoint submits the following types of content for scanning:

- files within Document Libraries with the following extensions:
  - .doc
  - .docx
  - .eml
  - .msg
  - .pdf
  - .pps
  - .ppt
  - .pptx
  - .xls
  - .xlsx
  - .txt
- items within most types of lists (with or without attachments that have any of the file extensions listed above).

NOTE: If a ControlPoint Policy has been created to "**Scan item for sensitive data...**" content will automatically be submitted when the policy is triggered.

To submit content to Metalogix Cloud Services for analysis:

1 Select the object(s) containing the items that you want to submit for analysis.

2 Choose Compliance > Analyze Content.

REMINDER: You must be registered for Sensitive Content Manager and a member of the ControlPoint Compliance Administrators group to use this functionality.

3 Enter a name and description for the scan.

4 If different from the default (PII - Personal Identification Information), select a **Profile for this scan** from the drop-down.

See also Managing SCM Profiles.

5 If you want to **Resubmit files that have not changed since they were previously scanned**, check this box.

NOTE: If you leave this box unchecked, previously-scanned files that have not changed will be excluded.

6 Include one or more list types from the list box. (If you also want to **Include attachments**, check this box.)

7 Now you can:

- run the operation immediately (by clicking **[Analyze]**)

OR

- schedule the operation to run at a later time or on a recurring schedule

OR

- save the operation as XML Instructions that can be executed at a later time.

A ControlPoint Task Audit is generated for the submission. You can monitor the progress of the submission via the Sensitive Content Manager Submission Maintenance page.

Compliance Action Severity Levels

When content is analyzed by the Metalogix Sensitive Content Manager, it is evaluated against the following three severity levels, as defined in the Sensitive Content Manager Profile used for the content analysis.

- Severe
- Moderate
- Mild

Compliance Administrators specify the appropriate action to take for each severity level via the ControlPoint Compliance Actions page.

Managing Sensitive Content Manager Submissions

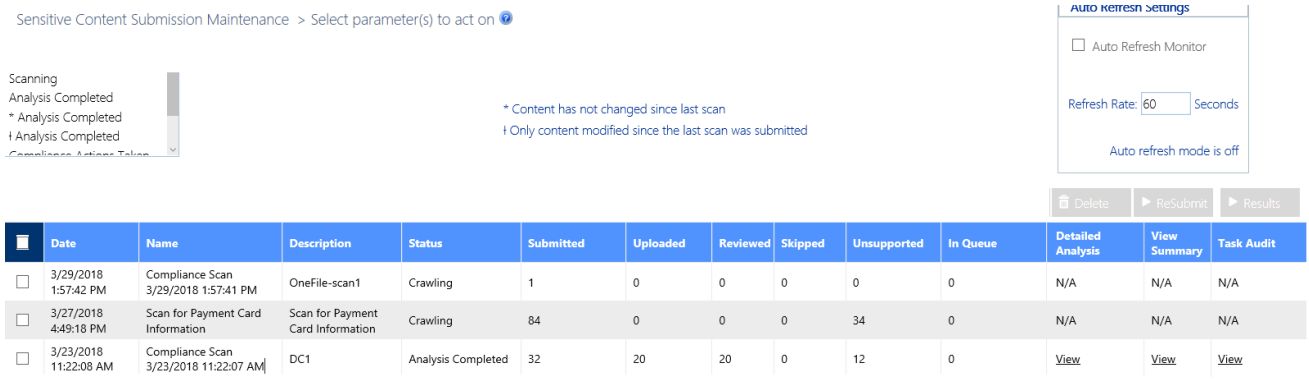
From the Sensitive Content Submission Maintenance page, ControlPoint Compliance Administrators can:

- monitor the progress of jobs that have been submitted to Metalogix Sensitive Content Manager for compliance scanning
- delete one or more Sensitive Content Manager jobs
- resubmit previously scanned jobs

- view a detailed analysis of compliance scan results
- manage compliance actions

To launch the Sensitive Content Submission Maintenance page:

From the Manage pane, choose Compliance > Sensitive Content Submission Maintenance.



In addition the current **Status** of each job (e.g., Crawling, Submitted, Analysis Completed), ControlPoint displays the number of items within each job that have been:

- **Submitted** by ControlPoint to the Sensitive Content Manger service for scanning
- **Uploaded** to Sensitive Content Manager
- **Reviewed** (scanned)
- **Skipped** (omitted from the scan; for example, if Sensitive Content Manager was unable to read an item's contents)
- are **Unsupported** by Sensitive Content Manager

  NOTE: For a list of supported file types, see Submitting Content to Sensitive Content Manager.

- are **In Queue** (waiting to be scanned).

Now you can:

- **Delete** selected jobs (as long as they are not currently being crawled or scanned)
- **Resubmit** selected jobs

  NOTES:

  - When you resubmit a job from this page, it will be submitted exactly as originally defined. (For example, it will not include any files that have been added to a SharePoint list or library since the last scan.) However, any items that have been quarantined since the last scan or have already been flagged "Unsupported" will not be included in the submission.
  - Jobs with a status of "Compliance Actions Taken" cannot be resubmitted. If you want a set of files for which actions have been taken to be rescanned, create and submit a new job for the same scope.

- link to:
  - a Detailed Analysis of compliance scan results
  - the Compliance Summary page, where you can manage compliance scan results

- the ControlPoint Task Audit for the job.

Managing Compliance Action Scan Results

Members of the ControlPoint Compliance Administrators group can view and take action on Content Analysis scan job results returned by the Metalogix Sensitive Content Manager via the Compliance Summary page. You can:

- view the details of a Compliance Action job
- apply Compliance Actions
- view detailed information about scan results for individual items (and reclassify items that returned from Metalogix Sensitive Content Manager with a status of "Unable to Classify")
- if you are also a member of the ControlPoint Quarantine Administrators group, manage quarantined items
- save items of a particular severity level as a selection that can be used to perform ControlPoint operations.

To manage Compliance Action scan results:

1 Select the object(s) containing the scan jobs you want to view/edit.

2 Choose Compliance > Compliance Summary.

NOTE: You can also access this page for a specific job from the Analyze Content page, via the **Page View** link

3 If you want to view jobs for a different date range, change the **Start** and/or **End** dates and click **[Find Scan Jobs]**.

4 Select the type of scan jobs you want to view/edit. Use the information in the following table for guidance.

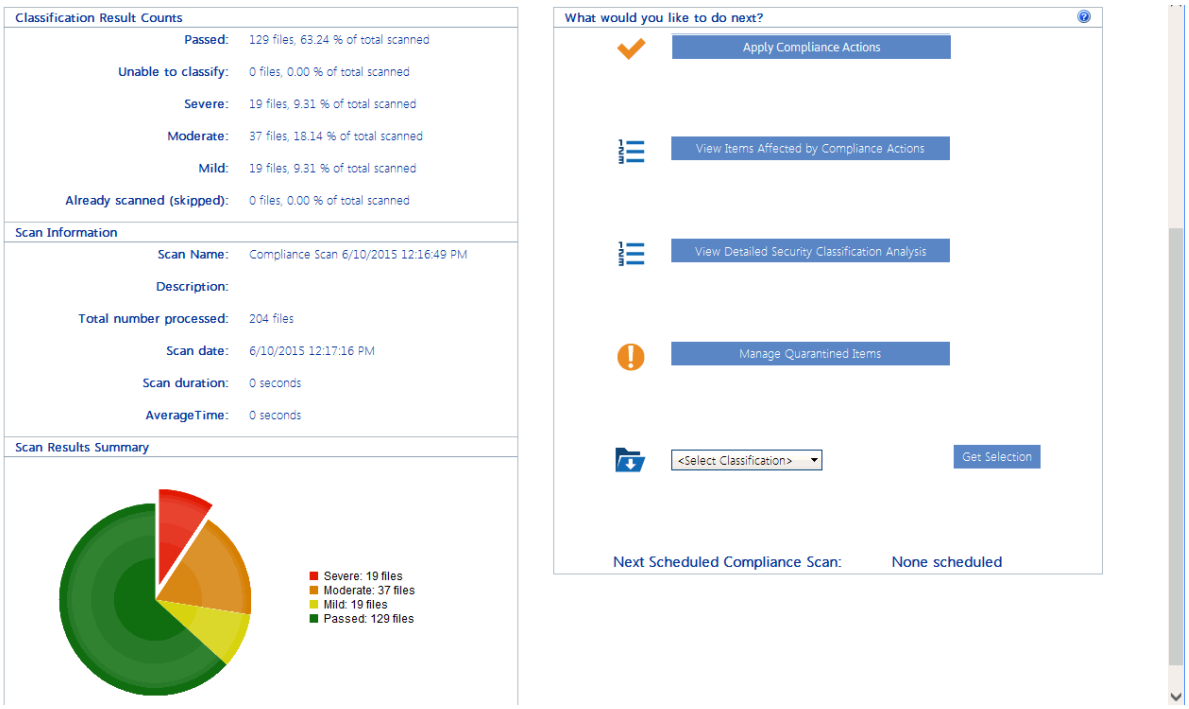
If you want to view ...	Select ...
all jobs submitted to Metalogix Sensitive Content Manager via the ControlPoint Analyze Content action, regardless of whether Compliance Actions were applied	**Real time scans.**
all items submitted to Metalogix Sensitive content Manager as a result of the enforcement of a ControlPoint Policy	**ControlPoint Policy scans.**
all jobs for which Compliance Actions have been applied.	**Compliance Action jobs.**

Click **[Find scan jobs]**.

5 Select the job whose details you want to view.

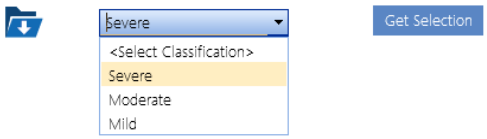
The following details about the selected job display beneath the grid:

- **Classification Result Counts** - The number of items that fall into each classification
- **Scan information** - Description of and metrics associated with the job itself
- **Scan Results Summary** - A pie chart that shows the distribution of items among classifications.



To save items of a selected severity as a ControlPoint selection:

1. Select a classification from the drop-down then click **[Get Selection]**.

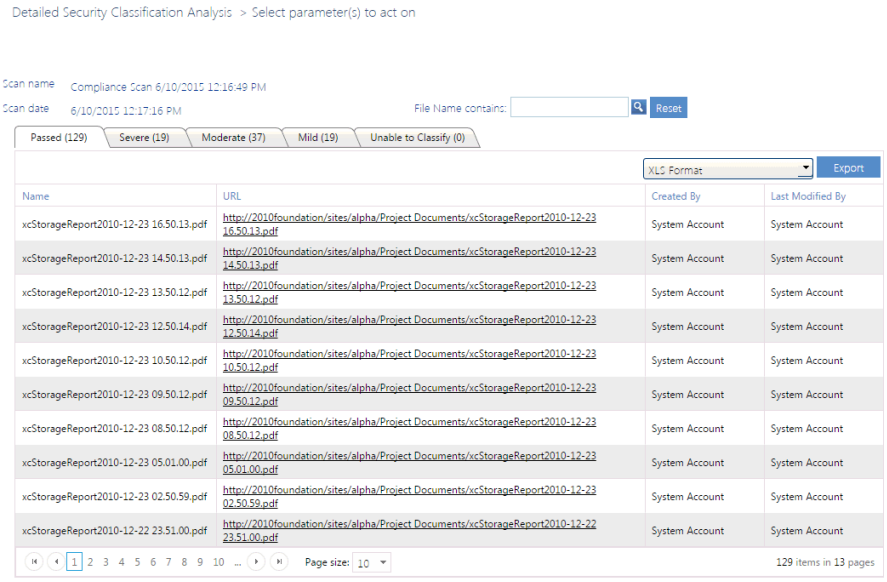


2 Follow the procedure for Saving and Re-Using a SharePoint Object Selection.

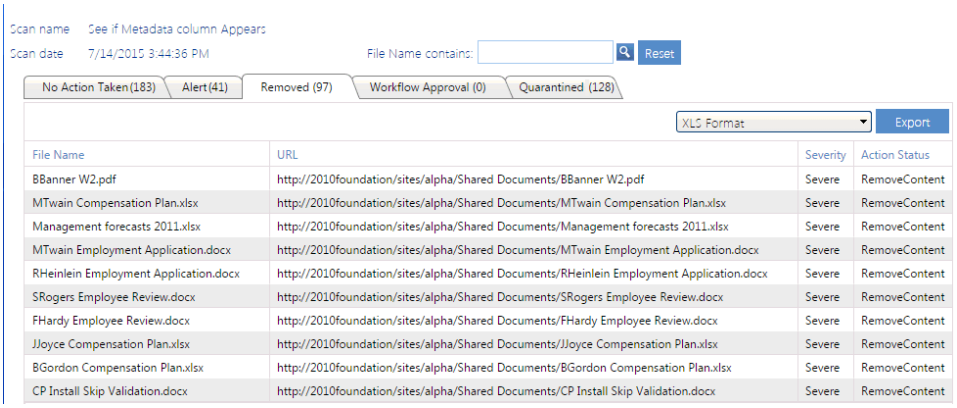
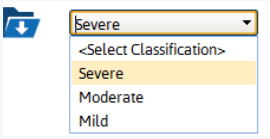
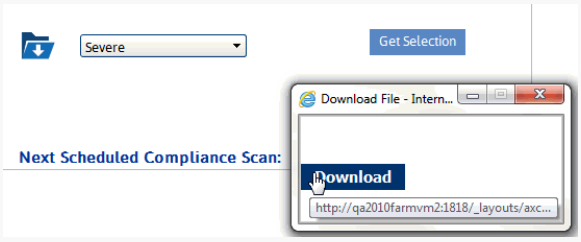
Acting on Compliance Analysis Results

From the Compliance Summary page, you can take a number of compliance actions on returned SCM scans. Use the information in the following table to determine the appropriate action to take.

NOTE: Any option that is not valid for the result set is not available for selection. For example, if you are viewing Compliance Action jobs, the option to Apply Compliance Actions will be disabled.

If you want to ...	Then ...
view more detailed information about scan results for individual items (and, optionally, export results for closer analysis)	• from the Sensitive Content Submission Maintenance page,select the applicable **Detailed Analysis** View link. OR • from the Compliance Summary page, click **[View Detailed Classification Analysis]**.  Note that there is a separate tab for each classification, with detail about each item for which scan results were returned. If you want to download a tabs-worth of results: a) Choose one of the following export formats: ▪ XLS format (for opening in a pre-2007 version of Excel) ▪ Excel XML format (for opening in Excel 2007 or later) ▪ PDF formal b) Click **[Export]**.
re-classify an item that returned "Unable to Classify"	see Reclassifying Items Returned as Unable to Classify. If you want an action to be taken on any items that were returned by Metalogix Sensitive Content Manager as 'Unable to Classify,' you must reclassify them *before* applying Compliance Actions to the scan job.
manage quarantined items (and you are a member of the ControlPoint Quarantine Administrators group)	see Managing Quarantined Items.

If you want to ...	Then ...
apply Compliance Actions to the selected job	a) From the Compliance Summary page, click **[Apply Compliance Actions]**. NOTE: This option is not available if you filtered results by **Compliance Action Jobs**. b) Either: ▪ select a previously-defined Compliance Action from the drop-down OR ▪ define a new Compliance Action. WARNING: If you choose to **Update Existing Compliance Actions**, the changes will be applied to all scan jobs that use it going forward. This is especially noteworthy in the case of ControlPoint Policies, because once the policy is created the most current definition of the Compliance Actions is applied automatically based on scan results.  c) When finished, click **[Apply actions to current scan]**.
view items for which Compliance Actions have been taken	from the Compliance Summary page,, click **[View Items Affected by Compliance Actions]**.

If you want to ...	Then ...
	 Scan name See if Metadata column Appears Scan date 7/14/2015 3:44:36 PM File Name contains: Reset No Action Taken (183) Alert (41) Removed (97) Workflow Approval (0) Quarantined (128) XLS Format Export File Name URL Severity Action Status BBanner W2.pdf http://2010foundation/sites/alpha/Shared Documents/BBanner W2.pdf Severe RemoveContent MTwain Compensation Plan.xlsx http://2010foundation/sites/alpha/Shared Documents/MTwain Compensation Plan.xlsx Severe RemoveContent Management forecasts 2011.xlsx http://2010foundation/sites/alpha/Shared Documents/Management forecasts 2011.xlsx Severe RemoveContent MTwain Employment Application.docx http://2010foundation/sites/alpha/Shared Documents/MTwain Employment Application.docx Severe RemoveContent RHeinlein Employment Application.docx http://2010foundation/sites/alpha/Shared Documents/RHeinlein Employment Application.docx Severe RemoveContent SRogers Employee Review.docx http://2010foundation/sites/alpha/Shared Documents/SRogers Employee Review.docx Severe RemoveContent FHardy Employee Review.docx http://2010foundation/sites/alpha/Shared Documents/FHardy Employee Review.docx Severe RemoveContent JJoyce Compensation Plan.xlsx http://2010foundation/sites/alpha/Shared Documents/JJoyce Compensation Plan.xlsx Severe RemoveContent BGordon Compensation Plan.xlsx http://2010foundation/sites/alpha/Shared Documents/BGordon Compensation Plan.xlsx Severe RemoveContent CP Install Skip Validation.docx http://2010foundation/sites/alpha/Shared Documents/CP Install Skip Validation.docx Severe RemoveContent Note that there is a separate tab for each action taken, with a list of items and the associated classifications returned by Metalogix Sensitive Content Manager. If you want to download a tabs-worth of results: a) Choose one of the following export formats: ▪ XLS format (for opening in a pre-2007 version of Excel) ▪ Excel XML format (for opening in Excel 2007 or later) ▪ PDF formal b) Click **[Export]**.
download items of a particular severity level (Mild, Moderate. or Severe) as a reusable selection on which you can perform ControlPoint operations	a) from the Compliance Summary page drop-down to the right of the icon, select a Classification (Severity Level).  b) Click **[Get Selection]**.  You can now download and save the file, then upload it as a selection when performing a ControlPoint operation that involves list items. See Saving and Re-Using a SharePoint Object Selection.

Reclassifying Items Returned as Unable to Classify

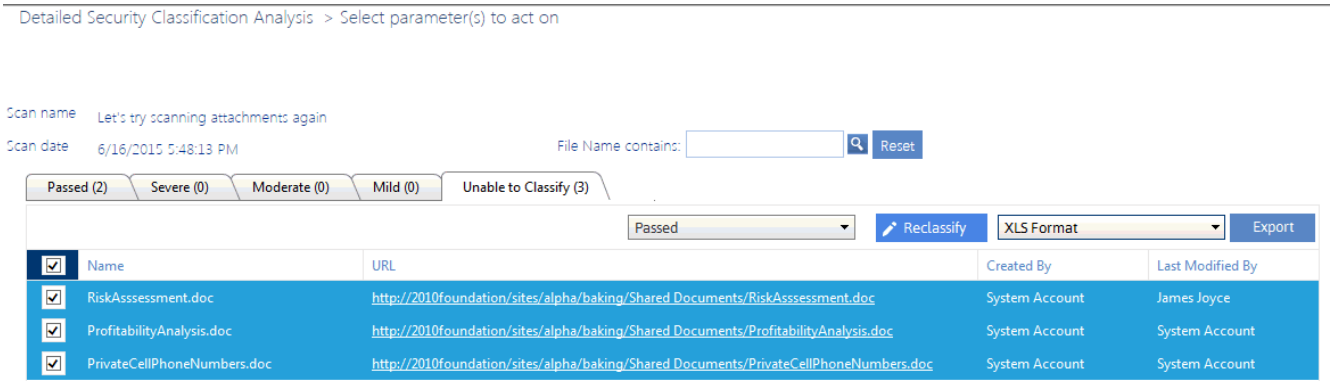
If an item is returned from Metalogix Sensitive Content Manager with a Classification of 'Unable to Classify,' it means that the service detected "probable" sensitive content but was unable to classify it *definitively* as sensitive content. You can, however, review the file and apply a classification manually before applying a Compliance Action to the scan job.

If you want an action to be taken on any items that were returned by Metalogix Sensitive Content Manager as 'Unable to Classify,' you must reclassify them *before* applying Compliance Actions to the scan job.

To reclassify items returned as 'Unable to Classify':

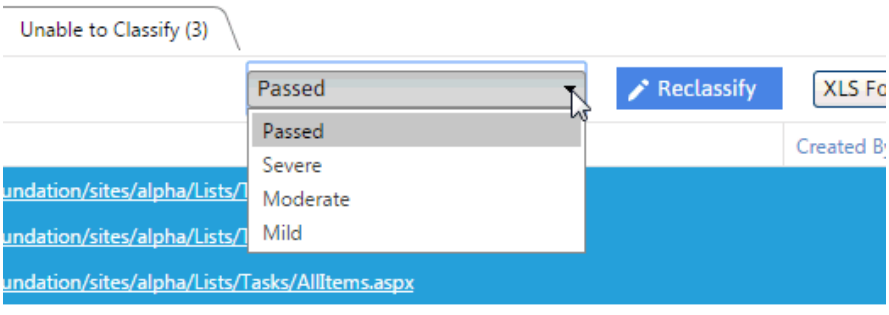
1 From the Detailed Security Classification Analysis page, select the **Unable to Classify** tab.

2 Select the item(s) to which you want to apply a a particular classification.



NOTE: If you want to review the contents of an item before assigning a classification, click the URL link to open the item.

3 Select a classification from the drop-down, then click **[Reclassify]**.



You will be prompted to confirm the action before continuing.

CAUTION: Once you reclassify an item, the drop-down becomes disabled and the item cannot be reclassified again. If Compliance Actions have already been applied to the scan job containing the item(s), the Reclassify option will no longer appear on the page.

Once an item has been reclassified:

- it will be moved to the appropriate tab for the classification

AND

- the classification change(s) will be reflected on the Compliance Summary page.

Managing Quarantined Items

If you are a member of the ControlPoint Quarantine Administrators group, you can manage items that have been quarantined as a result of a Compliance Action. When an item is quarantined, it remains in the same location in the SharePoint list, but all permissions—except those of ControlPoint Quarantine Administrators—are removed.

Currently, members of the Quarantine Administators group must

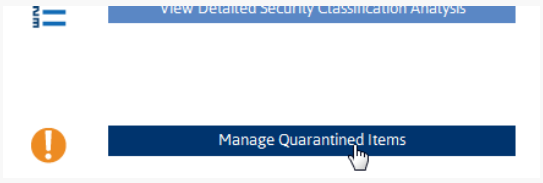
- be a Site Collection Administrator for each site collection containing quarantined content (in order to invoke the Manage Quarantine Documents page from the SharePoint Hierarchy)

OR

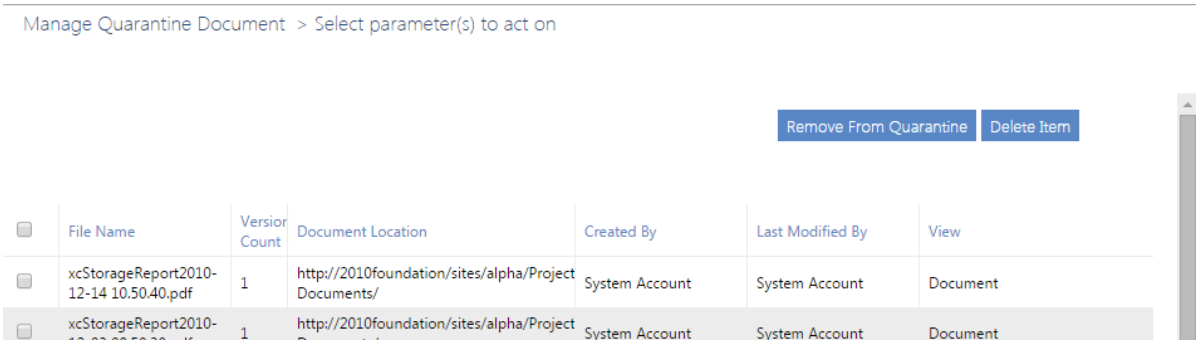
- also be a member of the Compliance Administrators Group.

To manage quarantined items:

1 Use the information in the following table to determine the appropriate action to take.

If you are starting from ...	Then ...
the SharePoint Hierarchy	a) Select the object(s) containing the quarantined items you want to manage. b) Choose Compliance > Manage Quarantined Items.
the Compliance Summary page	a) Make sure the Compliance Action jobs radio button is selected. b) Select the Scan job containing the quarantined items you want to manage. c) Click **[Manage Quarantined Items]**. 

2 Select the quarantined item(s) you want to act on.



3 If you want to review the content of a quarantined item before taking an action, click the **Document** link in the **View** column.

Now you can either:

- remove the item from quarantine

NOTE: When you remove an item from quarantine, it is restored in its original location with the same permissions it had before it was quarantined.

OR

- permanently delete the file(s).

Reporting on Sensitive Content Activity

If you are a member of the ControlPoint Compliance Administrators group, you can use the ControlPoint Sensitive Document Activity report to view detailed information about documents analyzed by Sensitive Content Manager that:

- have been identified as "sensitive content" (that is, have been assigned a Severity Level)

AND

- have been accessed by at least one SharePoint user.

NOTE: This report includes sensitive content identified both from realtime scans and as a result of the enforcement of ControlPoint Policies.

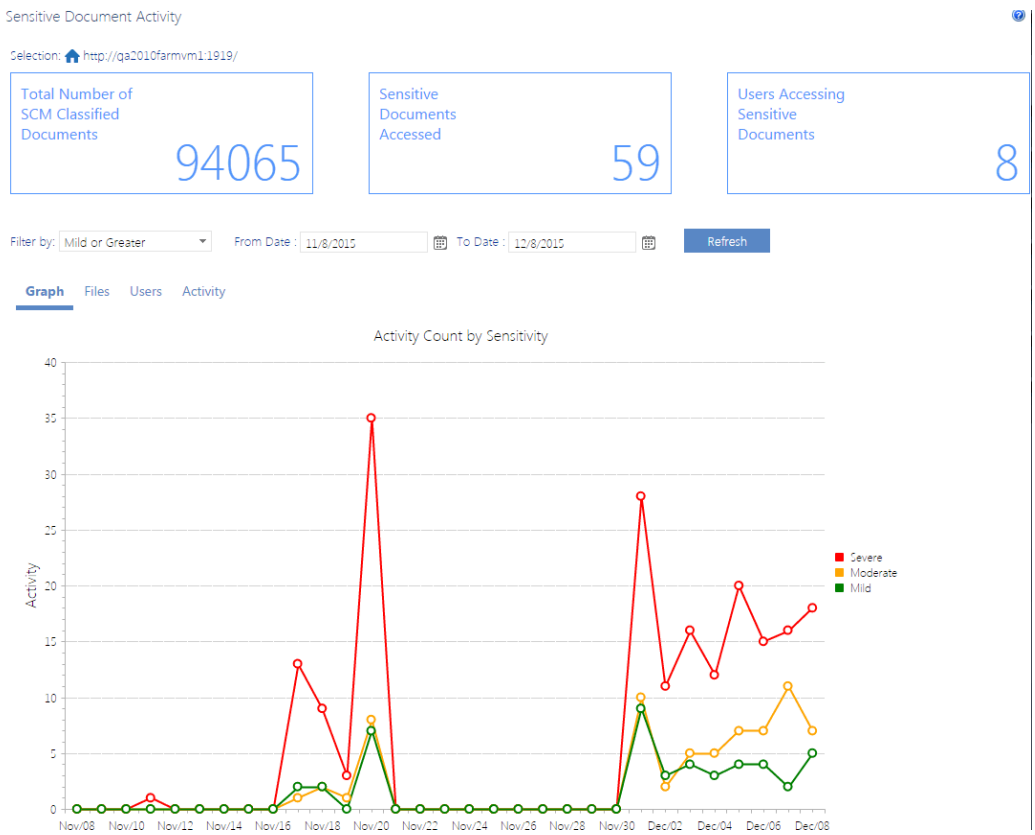
Before you can report sensitive document activity:

- Auditing must be enabled for each list or library for which you want to report sensitive document activity. You can enable these settings for individual site collections from within SharePoint or, for a larger scope, using the ControlPoint Manage Audit Settings action.
- At least one Compliance scan must have been returned by Sensitive Content Manager with items that have been assigned a Severity Level.

To report sensitive document activity:

1 Select the object(s) for which you want to report sensitive document activity.

2 Choose Compliance > Sensitive Document Activity.



The tiles at the top of the report highlight the following statistics for the selected time period (by default, the past month):

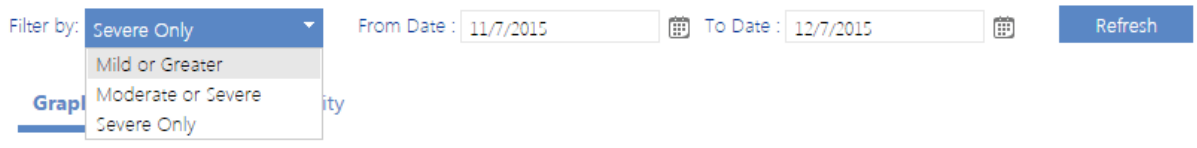
- **Total Number of SCM (Sensitive Content Manager) Classified Documents**
- **Sensitive Documents Accessed** (that is, the *number of times* a document identified as having sensitive content has been accessed by a SharePoint user)

NOTE: The number of times the System Account has modified the Scan Results field for the item on the SharePoint list will be included in this value unless the ControlPoint Configuration Setting **Add Scan Results Column to Scanned SharePoint List** is set to false. Details can be found in the *ControlPoint Administration Guide*.

- **Users Accessing Sensitive Documents** (that is, the *number of unique SharePoint users* who have accessed documents identified as containing sensitive content)
- **Realtime Scanning** (that is, the number of days since the last realtime scan was performed)

To filter results that display in the body of the report:

1. Choose a different severity level from the **Filter** drop-down and/or modify the default date range.

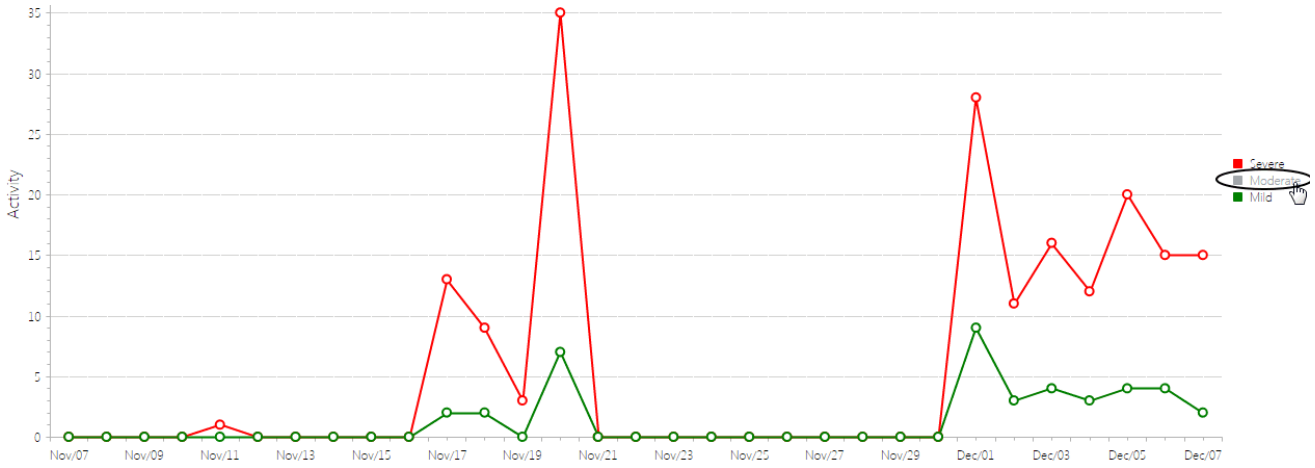


2. Click [**Refresh**].

Graph Tab

The Sensitive Document Activity report **Graph** tab illustrates the Activity Count by Sensitivity for the selected Severity Level(s) and date range.

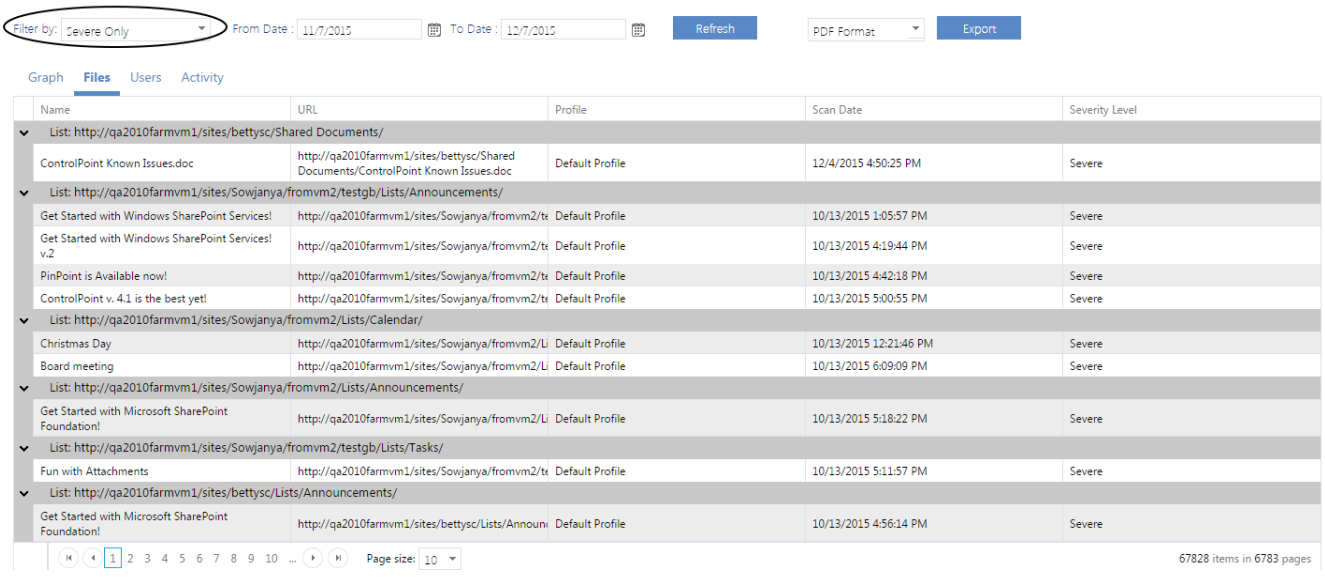
Note that you can click a Severity Level in the legend at the right side of the page to hide/display it.



Files Tab

The Sensitive Document Activity report **Files** tab lists all of the documents the Content Sensitive Manager identified as "sensitive content" for the selected Severity Level(s), grouped by list or library.

Note that this tab displays *all* content sensitive classified documents for the selected Severity Level(s), regardless of whether they have been accessed, and the date range filter does *not* apply.



Users Tab

The Users tab lists the SharePoint users who have accessed documents with sensitive content within the specified time period, along with the **Number of Docs Accessed**.

Activity Tab

The Activity tab lists each individual instance of sensitive content activity, including the **User Name**. **Activity Type**, document **Severity Level** and **Activity Date**.

Analyzing Scanned Files

The **Scanned Files by Search Term** and **Scanned Files by Scope** analyses let you view all of the files that have been analyzed by SCM for sensitive content over a specified date range.

To generate a Scanned Files analysis:

1 Select the object(s) you want to include in your analysis.

2 Select the appropriate option, based on how you would like to have results grouped:

- Compliance > Scanned files by Scope

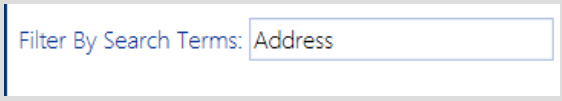
OR

- Compliance >Scanned files by Search terms.

3 Specify the parameters for your analysis.

IMPORTANT:

- Currently, you can only **Filter by Search Terms** if you enter enter one complete search term (that is, you cannot filter by multiple or partial search terms).



If you leave the **Filter by Search Terms** field blank, all search terms within the scope of your analysis will be included.

- If the **Use cached data** box is checked, results will include only files within the scope of your analysis that have been scanned. If this box is *not* checked (that is, the analysis is run on real-time data), results will also include items within the scope of your analysis that have *not* been scanned.

Now you can either:

- run the operation immediately (by clicking the [**Run Now**] button)

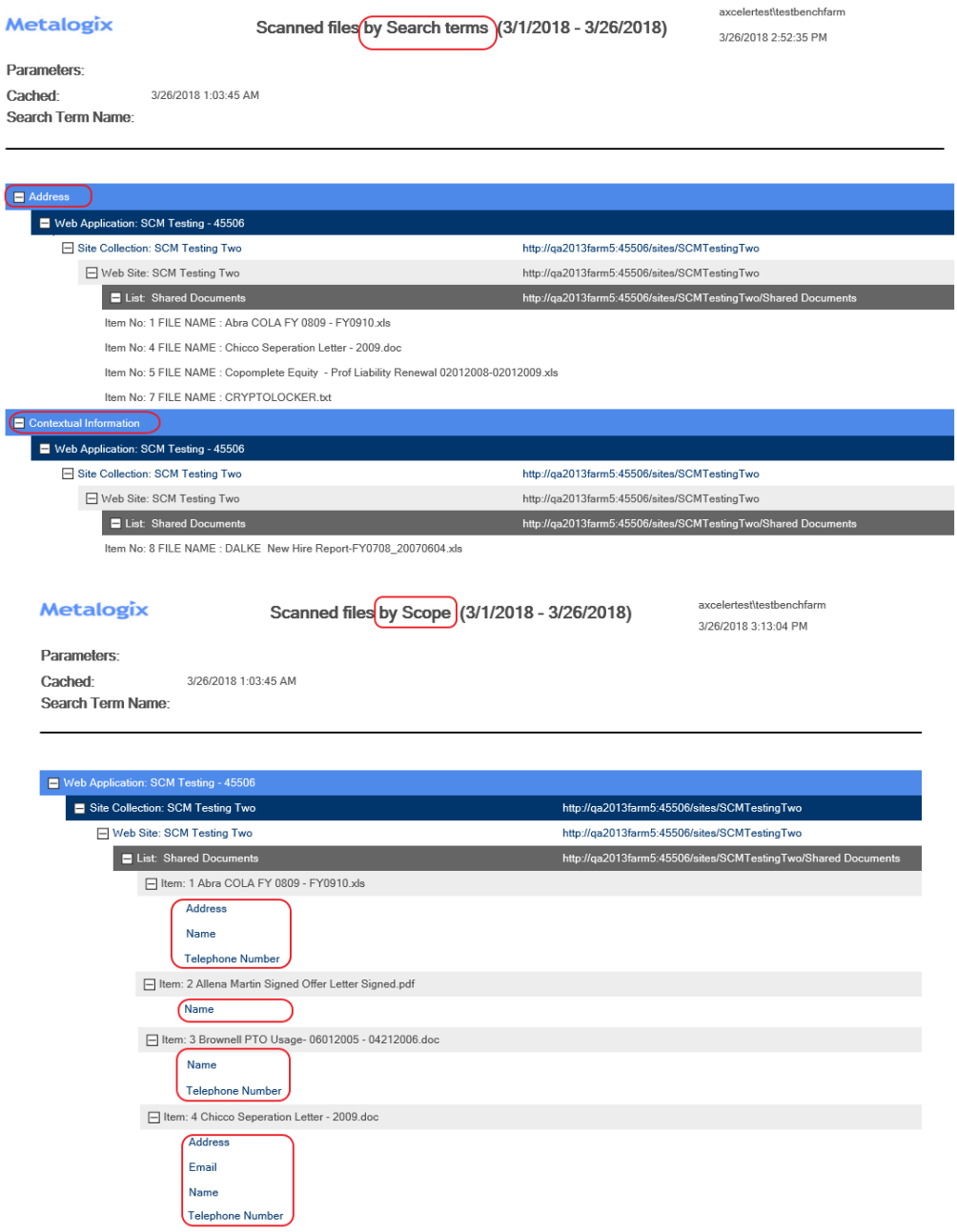
OR

- schedule the operation to run at a later time or on a recurring basis.

OR

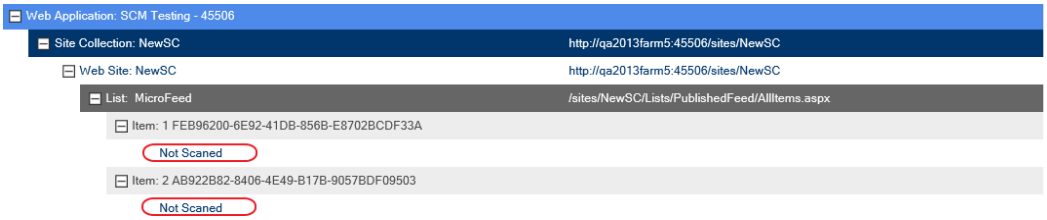
- save the operation as XML Instructions that can be executed at a later time.

If you chose to run the analysis on cached data, all of the files that have been scanned by Sensitive Content Manager within the specified date range are listed, grouped either by scope or search term (depending on the analysis selected).



If you ran the analysis on real-time data, results will also include items within the scope of your analysis that were **Not Scanned**.


Not Scaned
Web Application: SCM Testing - 45506
Site Collection: NewSC
http://qa2013farm5:45506/sites/NewSC
Web Site: NewSC
http://qa2013farm5:45506/sites/NewSC
List: MicroFeed
/sites/NewSC/Lists/PublishedFeed/AllItems.aspx
Item No: 1 FILE NAME : FEB96200-6E92-41DB-856B-E8702BCDF33A
Item No: 2 FILE NAME : AB922B82-8406-4E49-B17B-9057BDF09503
Site Collection: SCM Testing Two
http://qa2013farm5:45506/sites/SCMTestingTwo
Web Site: SCM Testing Two
http://qa2013farm5:45506/sites/SCMTestingTwo
List: MicroFeed
/sites/SCMTestingTwo/Lists/PublishedFeed/AllItems.aspx
Item No: 1 FILE NAME : FEB96200-6E92-41DB-856B-E8702BCDF33A
Item No: 2 FILE NAME : AB922B82-8406-4E49-B17B-9057BDF09503


Web Application: SCM Testing - 45506
Site Collection: NewSC
http://qa2013farm5:45506/sites/NewSC
Web Site: NewSC
http://qa2013farm5:45506/sites/NewSC
List: MicroFeed
/sites/NewSC/Lists/PublishedFeed/AllItems.aspx
Item: 1 FEB96200-6E92-41DB-856B-E8702BCDF33A
Not Scaned
Item: 2 AB922B82-8406-4E49-B17B-9057BDF09503
Not Scaned

Using ControlPoint Sentinel to Detect Anomalous Activity

ControlPoint Sentinel functionality enables you to detect deviations in document views and downloads from individual users' "typical" daily usage patterns. ControlPoint Sentinel uses the following components in its anomalous activity determinations:

- Business Hours: Daily start and end time for each day of the work week.
- The following Anomalous Activity Limits:
  - **Default daily activity limits**: The limits for each (measured in terms of document views and downloads) to apply to any user whose personal activity limits have not yet been characterized.
  - **Personal daily activity limits**: The deviation from "typical" daily usage patterns characterized for each individual user on a given day of the week.

ControlPoint Sentinel relies on SharePoint Audit Log events. Therefore, for this functionality to be effective, the auditing of Delete, Edit, and View/Download must be enabled for every site collection for which you want to collect activity data.

How Personal Daily Activity is Determined

Anomalous activity limits are set based on the statistical analysis of how often each user views and downloads documents. The personal daily activity limits used by ControlPoint Sentinel are defined in terms of standard deviations above the mean or average observed over a period of time (currently, 12 days worth of observations for each day of the week).

Standard deviation is a statistical measure of the variation within a set of data values. Two users may have the same average of document views and downloads per day, but their standard deviation or the variation in the number of documents they view and download in any given day can be very different. If a user consistently views and downloads roughly the same number of documents every day, then their standard deviation will be low. If a user is more erratic in the number of documents they view or download in a day (for example, sometimes viewing or downloading no documents, sometimes one or two, sometimes 30 or 40) then their standard deviation will be high. By using an individual user's standard deviation to define the limits for anomalous activity the limits are tailored to each user's usage pattern.

Using the user's standard deviation we can determine how likely it is that a user would view or download a particular number of documents in a day. When looking for anomalous activity we are looking at activity that is not very likely, that should happen much less than 1% of the time. For highly anomalous activity we are looking for activity that should happen a very small fraction of a percentage of the time.

Defining Business Hours for Anomalous Activity Detection

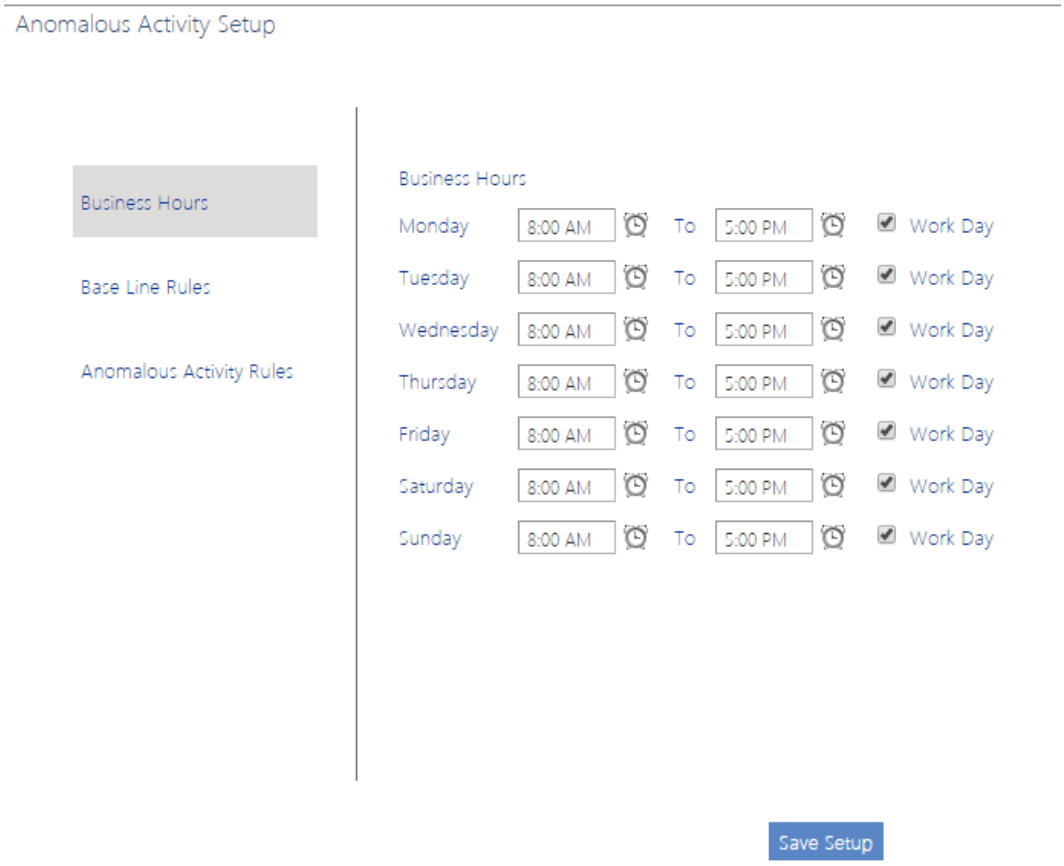
The first step in Sentinel Setup is to define Business Hours, so that Anomalous Activity Limits can be defined differently for both business and non-business hours. For example, you may want to specify a lower limit for non-business hours, when typical activity is *expected* to be lower.

Note that Business Hours reflect the local time of the server on which SharePoint is installed.

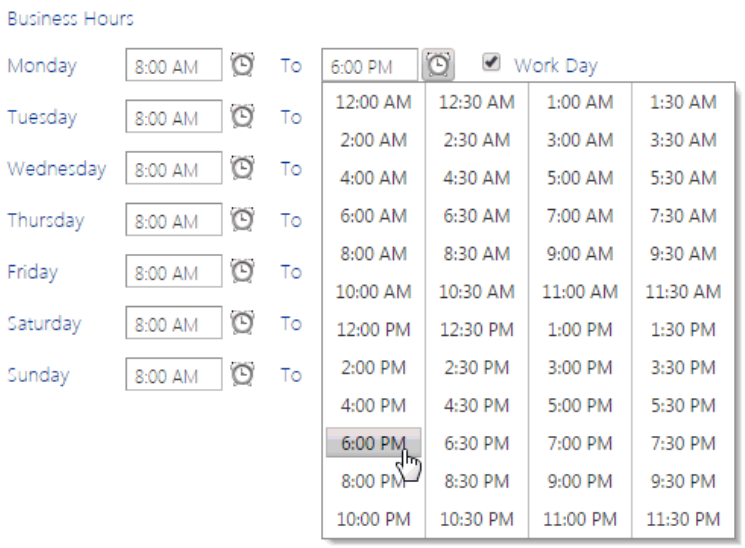
To define business and non-business hours for anomalous activity detection:

1 From the Manage ControlPoint tree choose ControlPoint Sentinel > Sentinel Setup.

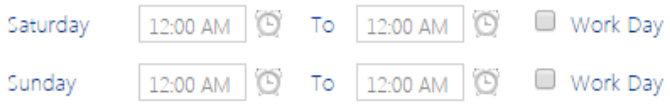
2 On the Sentinel Setup page, make sure the Business Hours tab is selected.



3 For each day that you want activity data to be collected, select the start and end time that represent the standard work hours for that particular day, and make sure the **Work Day** box is checked.



4 For each non-work day, uncheck the **Work Day** box.



NOTE: When the **Work Day** box is unchecked, activity data will not be collected for that day. Start and end times are irrelevant and will be cleared when you save the setup.

5 When you have finished defining business and non-business hours, click **[Save Setup]**.

Defining Anomalous Activity Limits

You can define two types of anomalous activity limits:

- Default daily activities, which are used for all users until personal user limits have been characterized.
- Personal daily activities, which are used as soon as a user's personal activity limits have been characterized.

NOTE: For each day of the week, personal user limits replace default daily limits after 12 days worth of observations by the Anomalous Activity Detection Job.

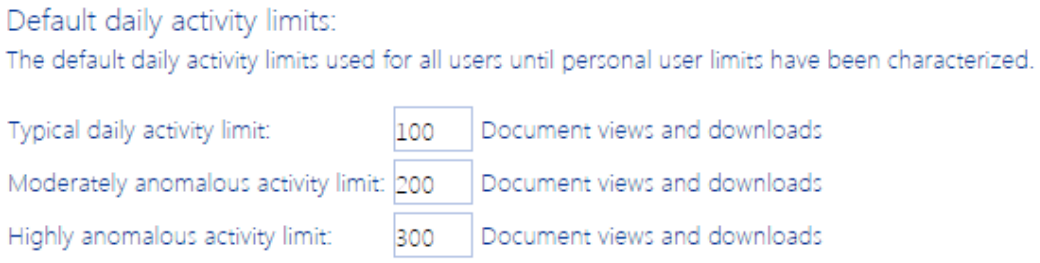
To access the Anomalous Activity Limits page:

From the Sentinel Setup page, select the **Anomalous Activity Limits** tab.

Defining Default Daily Activity Limits

Default Daily Activity Limits are expressed in terms of the number of "typical" views and downloads. Because they apply to *all* users until personal user limits have been characterized, it is recommended that you enter limits that would be considered typical and anomalous for *any* SharePoint user in your organization. For example, 100 document views and downloads per day may take into account "typical" daily activity for your

most active users without being an alarmingly high number for less active users. Double that number may be considered moderately anomalous, while triple that number may be considered highly anomalous.



NOTE: If you do not want ControlPoint Sentinel to track Default Daily Activity Limits, leave the limit fields set to 0.

Defining Personal Daily Activity Limits

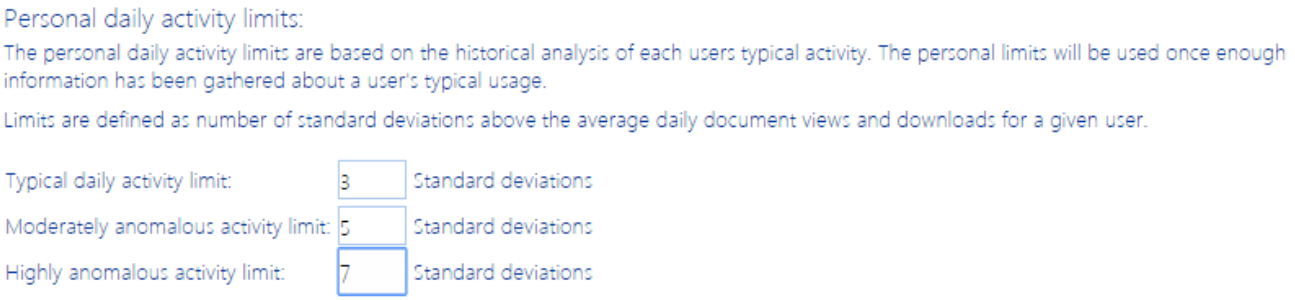
The following table shows the percentage of values that fall around or above the mean in terms of the standard deviation.

Standard Deviations (σ) Above the Mean	Percentage (%) of Values Above the Standard Deviations from the Mean
1σ	15.86553%
2σ	2.275013%
3σ	0.13499%
4σ	0.003167%
5σ	0.000028665%
6σ	0.00000009865%
7σ	0.000000000128%

It is recommended that you:

- Set the **Typical daily activity limit** to **3** standard deviations above the mean.
  A user could exceed this limit once every two years. This is not cause for concern but if it happens more frequently than that it may warrant investigation.
- Set the **Moderately anomalous activity limit** to **5** standard deviations above the mean.
  A user could exceed this limit once in about 10,000 years. This is an indication of anomalous activity that should be investigated immediately.
- Set the **Highly anomalous activity limit** to **7** standard deviations above the mean.

This level of activity is very very unlikely and should be acted upon immediately.



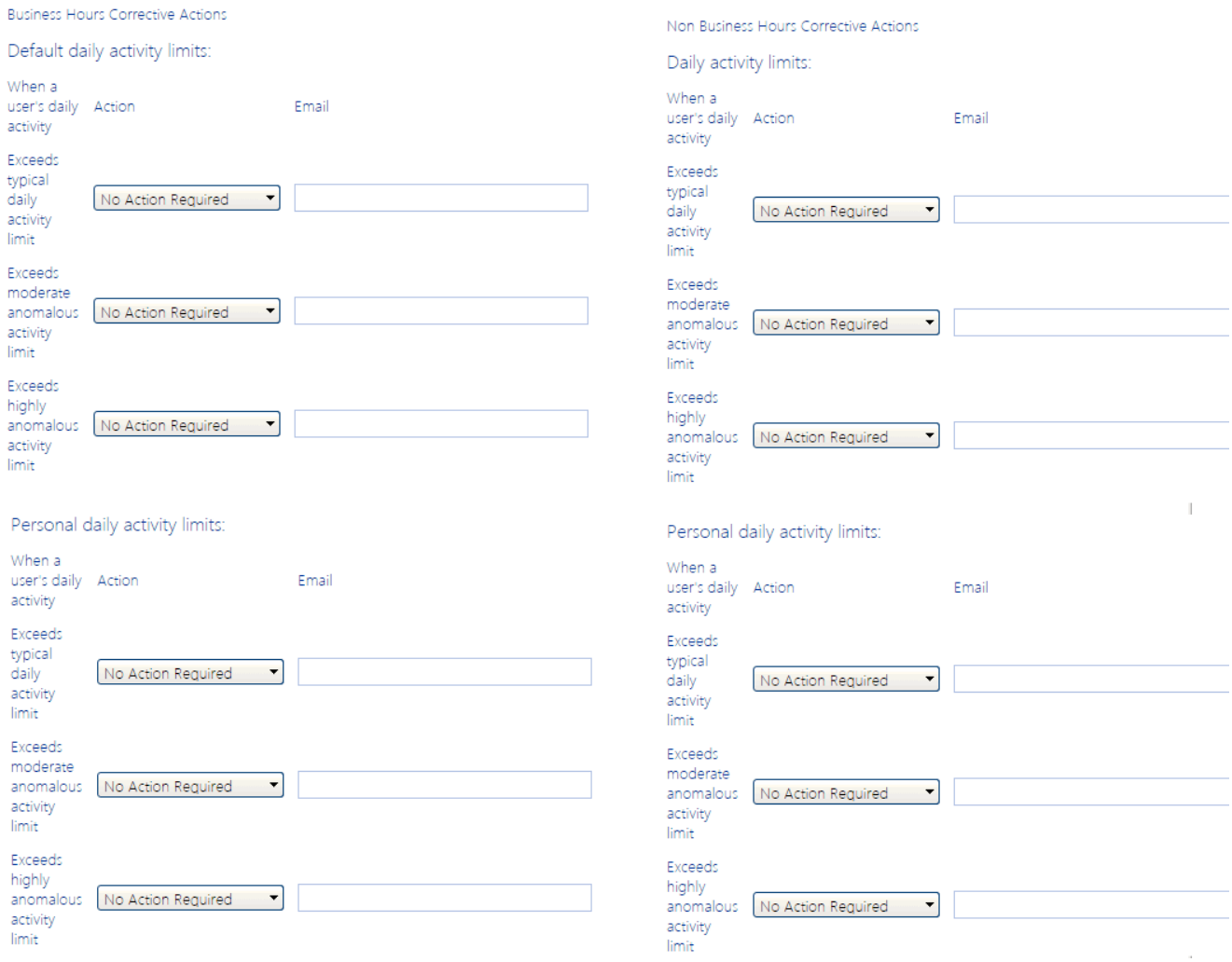
See also How Personal Daily Activity is Determined.

Defining Anomalous Activity Rules

After you have defined Business Hours and Activity Limits, the next step is to define Anomalous Activity Rules, or the action (if any) to take when a defined activity limit is exceeded, during both business hours and non-business hours.

To define Anomalous Activity Rules:

1. From the Sentinel Setup page, select the **Anomalous Activity Rules** tab.



2 If you want to have an alert generated whenever a limit is exceeded for a particular combination of criteria (Business Hours/Non-Business Hours; Default Daily Activity/Personal Activity; Activity Limit):

- Select **Alert** from the Action drop-down.
- If you want to have an email generated when the limit is exceeded, enter an **Email address**. (You can enter multiple email addresses, separated by commas (,).

NOTE: Only limits to which an Alert is applied will be subject to Sentinel reporting. Limits with No Action Required will not be reported.

Preparing Your Environment for Using ControlPoint Sentinel

Before ControlPoint Sentinel can begin collecting data for Anomalous Activity Detection:

A. SharePoint auditing must be enabled on all site collections for which Anomalous Activity detection will be performed.

B. Anomalous Activity Detection must be enabled to run:

- via the ControlPoint Anomalous Activity Detection job

OR

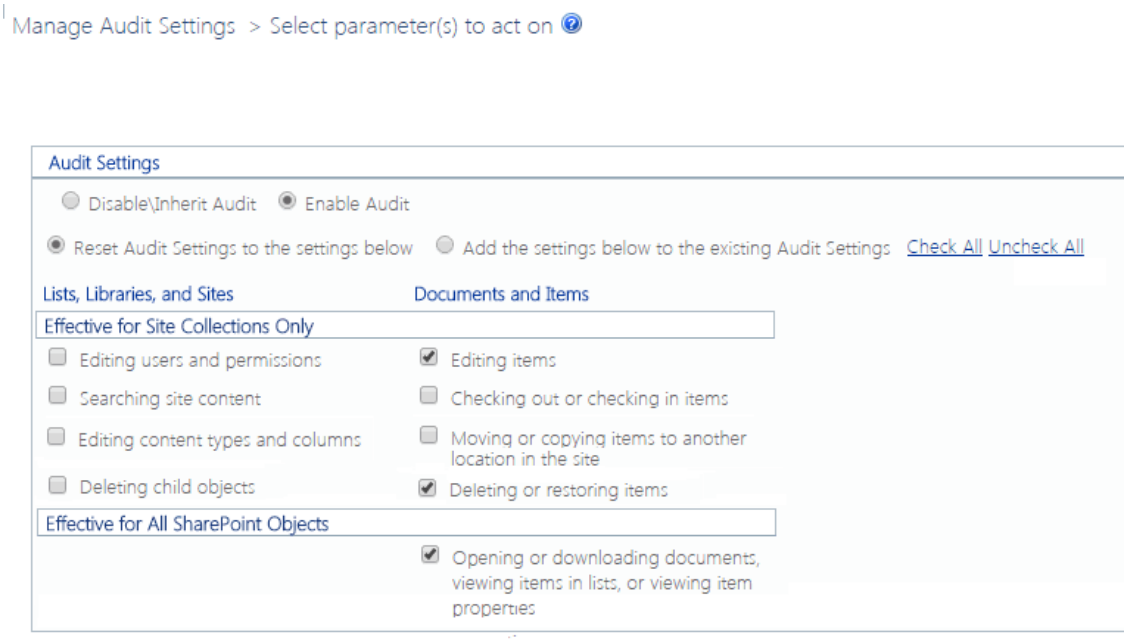
- as part of the ControlPoint Scheduled Job Review.

Enabling SharePoint Auditing

ControlPoint Sentinel analyzes the following SharePoint audit log events for Anomalous Activity Detection:

- Editing items
- Deleting or restoring items

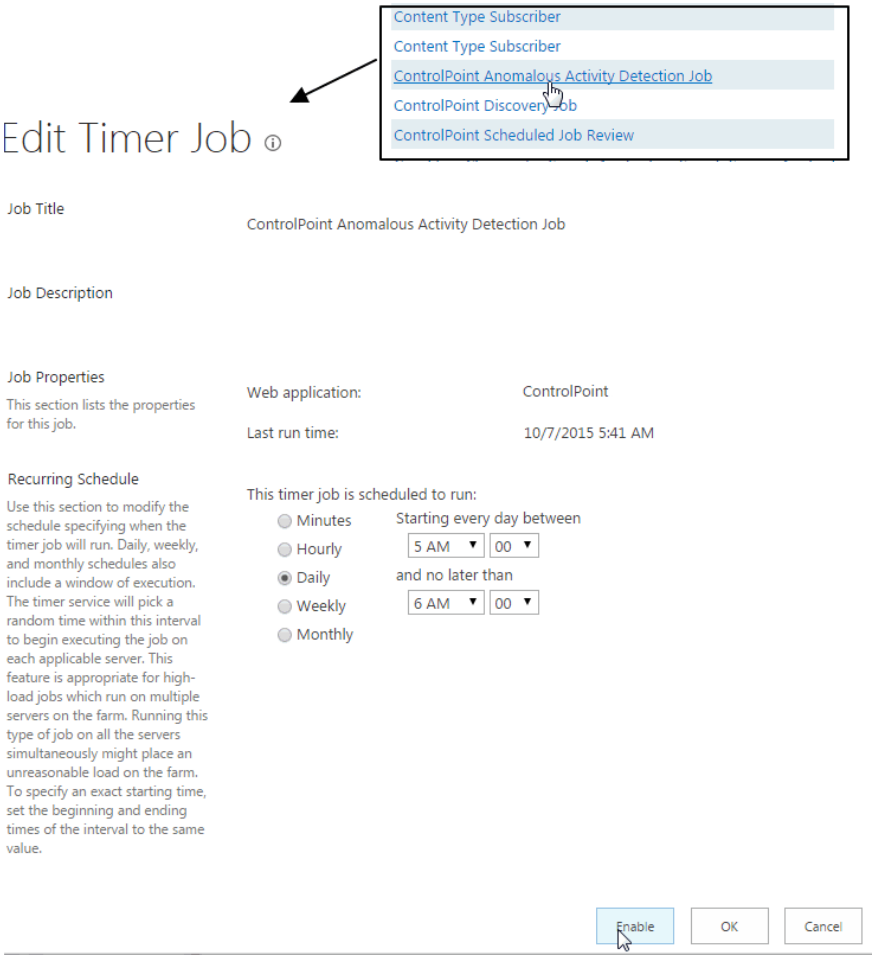
You can enable these settings for individual site collections from within SharePoint or, for a larger scope, using the ControlPoint Manage Audit Settings action.



Enabling the Anomalous Activity Detection Job

1 From SharePoint Central Administration, select **Monitoring**, then choose Timer Jobs > Review job definitions.

2 Select **ControlPoint Anomalous Activity Detection Job**.

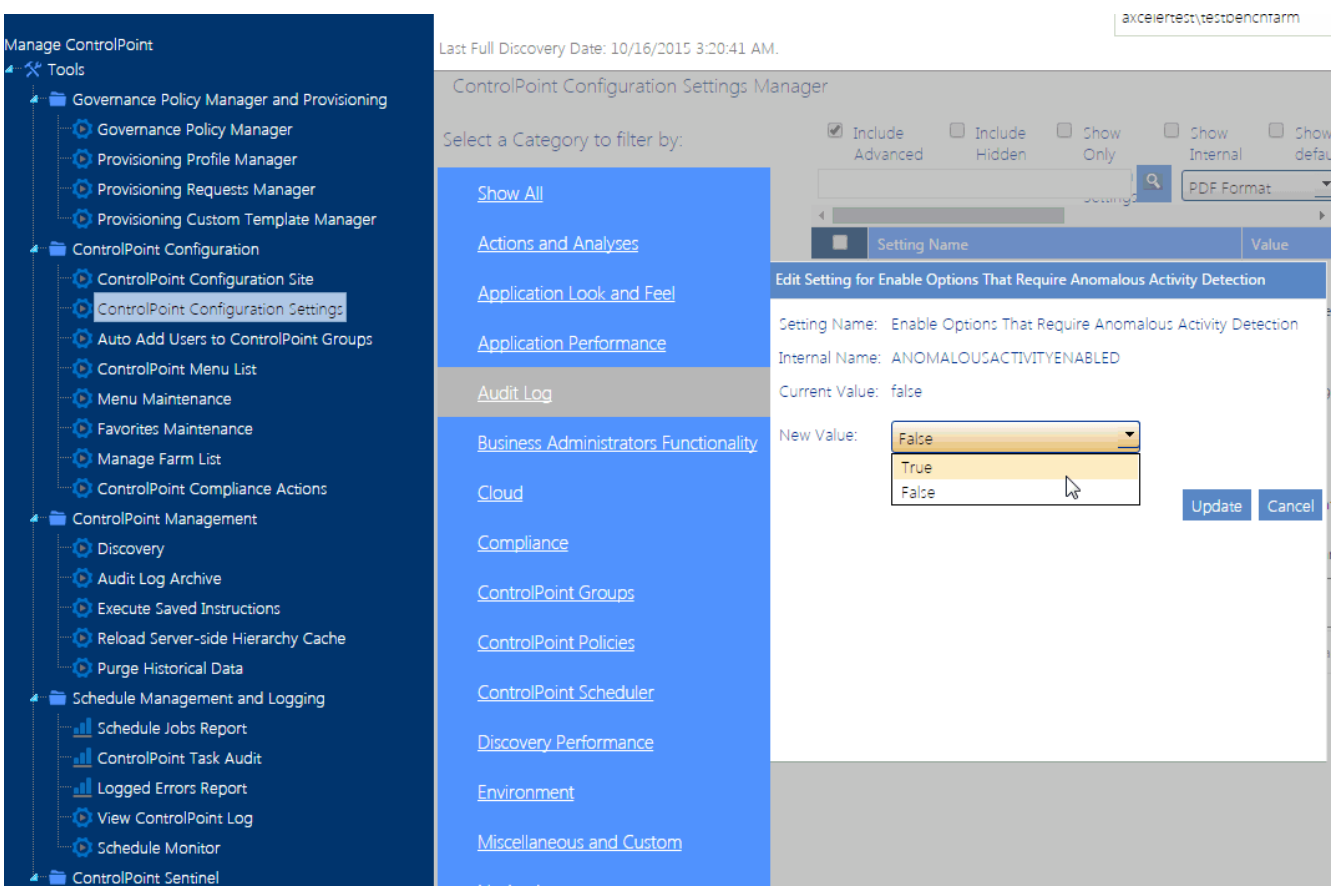


By default, the job is scheduled to run daily, at 5:00 am (local server time). You may however, change the schedule to run more frequently. Note that, the more frequently the job is run, the sooner an alert may be generated when an Anomalous Activity Limit is reached.

3 Click **[Enable]**.

Enabling Anomalous Activity Detection via the ControlPoint Scheduled Job Review

As an alternative to using the Anomalous Activity Detection Job, you can choose to have anomalous activity detection performed as part of the ControlPoint Scheduled Job Review (which, by default, runs every 10 minutes). ControlPoint Application Administrators can enable this option by changing the ControlPoint Configuration Setting **Enable Options That Require Anomalous Activity Detection** from *False* to *True*.



Refer to the *ControlPoint Administration Guide* for more detail on modifying ControlPoint Configuration Settings.

Reporting Anomalous Activity

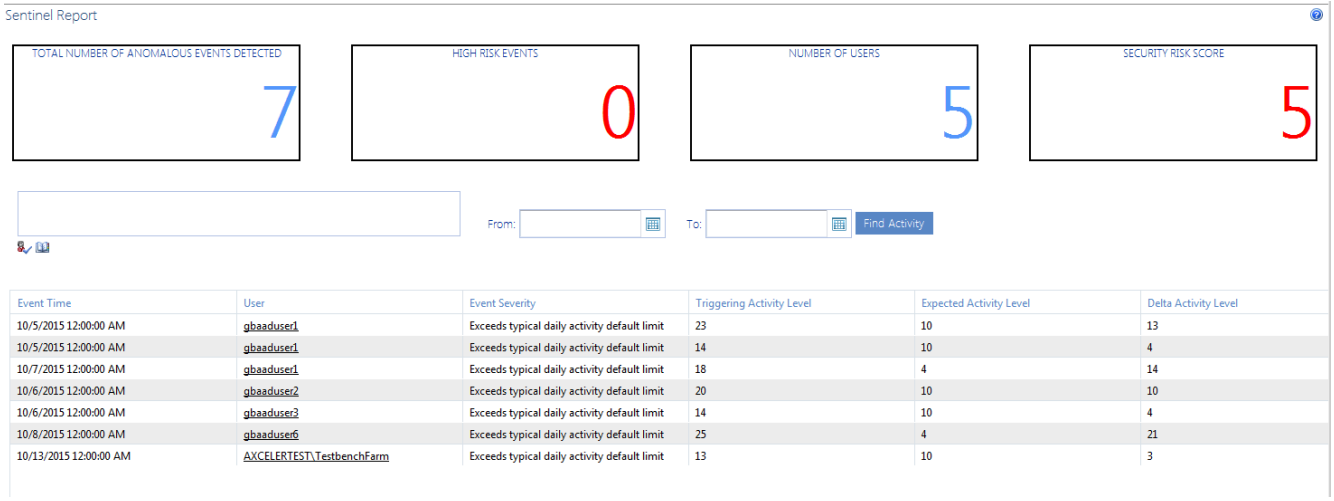
The ControlPoint Sentinel Report lets you view anomalous activity events for which an Alert has been specified on the Sentinel Setup - Anomalous Activity Rules page. You can also filter results by user and/or date range.

To report anomalous activity:

1 From the Manage ControlPoint tree choose ControlPoint Sentinel > Sentinel Report.

2 If you want to narrow your results, enter one or more user(s) in the People Picker and/or enter a date range.

NOTE: If you leave the **From** and **To** Dates blank, all available results will be returned.



Event Time	User	Event Severity	Triggering Activity Level	Expected Activity Level	Delta Activity Level
10/5/2015 12:00:00 AM	gbaaduser1	Exceeds typical daily activity default limit	23	10	13
10/5/2015 12:00:00 AM	gbaaduser1	Exceeds typical daily activity default limit	14	10	4
10/7/2015 12:00:00 AM	gbaaduser1	Exceeds typical daily activity default limit	18	4	14
10/6/2015 12:00:00 AM	gbaaduser2	Exceeds typical daily activity default limit	20	10	10
10/6/2015 12:00:00 AM	gbaaduser3	Exceeds typical daily activity default limit	14	10	4
10/8/2015 12:00:00 AM	gbaaduser6	Exceeds typical daily activity default limit	25	4	21
10/13/2015 12:00:00 AM	AXCELERTEST\TestbenchFarm	Exceeds typical daily activity default limit	13	10	3

The tiles at the top of the report highlight the following statistics:

- The **Total Number of Anomalous Activities Detected**
- The number of **High Risk Events** as characterized by ControlPoint Sentinel
- The **Number of Users** with anomalous activity
- The **Security Risk Score** (which is derived by the Severity of each activity within the date range covered by the report)

For each anomalous event detected, report detail displays:

- the **Event Time** (that is, the date and the time when the ControlPoint Anomalous Activity Detection Job captured the event)
- the **User** whose activity triggered the anomalous activity detection alert
- the **Event Severity** (as defined on the Sentinel Setup - Anomalous Activity Limits page)
- the **Triggering Activity Level** that resulted in the anomalous activity detection alert:
  - for **Default** daily activity, activity above the specified limit for the Event Severity
  - for **Personal** daily activity, the amount of activity for the Event Severity to which the specified deviations above from the user's "typical" usage pattern have been applied.
- the **Expected Activity Level**:
  - for **Default** daily activity, the specified limit for the Event Severity
  - for **Personal** daily activity, "typical" usage pattern as calculated by ControlPoint Sentinel
- the **Delta Activity Level** (that is, the difference between Triggering Activity Level and the Expected Activity Level).

To view detailed audit log data for a user:

Click the User link to generate a ControlPoint Audit Log analysis.

Default Menu Options for ControlPoint Users

The following tables identify ControlPoint default menu items at all levels of the SharePoint Hierarchy as well as the Manage ControlPoint panel.

The following terms are used to describe menu item behavior in a **Multi-farm** installation:

- **Home Only** - The operation can be performed on the home farm only.
- **Home or Remote** - The operation can be performed on a single farm; either home or remote
- **Multiple** - The operation can be performed on multiple farms.
- **Farm-Independent** - The operation is not farm-specific.

Farm-Level Default Menu Items

Farm-Level Item	Type	Multi-Farm
Central Administration Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Advanced Search	Search	Home or Remote
Search Hierarchy	Search	Home only
SharePoint Summary Not available to members of the Business Administrators group.	Analysis	Home only
Refresh SharePoint Hierarchy	Action	Home or Remote
Properties	Action	Home or Remote
Execute Saved Instructions Not available to members of the Business Administrators group.	Action	Home only
Refresh with Ribbon On/Off	Action	Farm-Independent
Activity folder:		
Most/Least Activity	Analysis	Home only

Farm-Level Item	Type	Multi-Farm
Not available for WSS-only farms.		
Site Collection Activity Analysis	Analysis	Multiple
Site Activity Analysis Not available for WSS-only farms.	Analysis	Multiple
Trend Analysis for Activity Not available for WSS-only farms.	Analysis	Home only
Activity by Profile Property Available for SharePoint 2010 and later Server farms.	Analysis	Home only
Activity by User Not available for WSS-only farms.	Analysis	Multiple
Activity by Document Not available for WSS-only farms.	Analysis	Multiple
Checked Out Documents	Analysis	Multiple
Blog Post Activity Available for SharePoint 2010 and later farms.	Analysis	Home only
Inactive Users Not available for WSS-only farms.	Analysis	Home only
Social Activity Analysis Available for SharePoint Server 2010 farms.	Analysis	Home only
Audits and Alerts folder:		

Farm-Level Item	Type	Multi-Farm
Manage Audit Settings	Action	Multiple
ControlPoint Alerts	Action	Home only
Create SharePoint Alerts	Action	Home only
Manage SharePoint Alerts	Action	Home only
Audit Log Analysis	Analysis	Multiple
Change Log Analysis	Analysis	Multiple
SharePoint Alerts by Site	Analysis	Multiple
SharePoint Alerts by User	Analysis	Multiple
Automation folder:		
Create ControlPoint Policy	Action	Home only
Manage ControlPoint Policies	Action	Home only
Governance Policy Manager Available for SharePoint 2010 and later farms. Not available to members of the Business Administrators group.	Action	Home only
Set Metadata Value Available for SharePoint Server 2010 and later farms.	Action	Home only
Create Managed Metadata Available for SharePoint Server 2010 and later farms.	Action	Home only
Manage SharePoint Groups	Action	Home or Remote
ControlPoint Policies	Analysis	Home only
Change Management folder:		

Farm-Level Item	Type	Multi-Farm
Content Types	Analysis	Multiple
Web Parts by Part	Analysis	Multiple
Web Parts by Site	Analysis	Multiple
Workflow Analysis	Analysis	Multiple
Compliance folder (visible only if license includes Sensitive Content Manager):		
Available for SharePoint 2010 and later farms, and not available to members of the Business Administrators group.		
Analyze Content	Action	Home only
Managing Quarantine Documents	Action	Home only
Compliance Summary	Analysis	Home only
Sensitive Content Activity	Analysis	Home only
Scanned files by Scope	Analysis	Home only
Scanned files by Search terms	Analysis	Home only
Configuration folder:		
Set Site Collection Properties	Action	Multiple
Set Site Properties	Action	Multiple
Set List Properties	Action	Multiple
Manage Site Collection Features	Action	Multiple
Manage Site Features	Action	Multiple
SharePoint Hierarchy	Analysis	Multiple
Site Collection Properties	Analysis	Home Only

Farm-Level Item	Type	Multi-Farm
Site Properties	Analysis	Home Only
List Properties	Analysis	Multiple
Content folder:		
Managed Metadata Usage Available for SharePoint Server 2010 and later farms.	Analysis	Multiple
Trend Analysis for Site Count	Analysis	Home only
Broken Links	Analysis	Multiple
Solution Summary Not available to members of the Business Administrators group.	Analysis	Multiple
Storage folder:		
Most/Least Storage Not available for WSS-only farms.	Analysis	Home Only
Site Collection Storage Analysis	Analysis	Multiple
Site Storage Analysis	Analysis	Multiple
Content Database Storage	Analysis	Multiple
Trend Analysis for Storage	Analysis	Home only
Duplicate Files	Analysis	Home only
Storage by File Type	Analysis	Home only
Recycle Bins	Analysis	Multiple
Users and Security folder:		

Farm-Level Item	Type	Multi-Farm
Set User Direct Permissions	Action	Multiple
Delete User Permissions	Action	Multiple
Duplicate User Permissions	Action	Multiple
Add User to SharePoint Group	Action	Home or Remote
Delete SharePoint Groups	Action	Home only
Backup Permissions	Action	Home only
Manage Permissions Backups	Action	Home only
Manage Permissions Inheritance	Action	Multiple
Migrate Users	Action	Home or Remote
Orphaned Domain Users	Analysis	Multiple
Site Permission	Analysis	Multiple
Comprehensive Permissions	Analysis	Multiple
Comprehensive User Analysis	Analysis	Home only
SharePoint Group Analysis	Analysis	Multiple

Web Application-Level Default Menu Items

Web Application-Level Item	Type	Multi-Farm
Advanced Search	Search	Home or Remote
Search Hierarchy	Search	Home Only
Add to Selection	Action	(Depends on operation)
Properties	Action	Home or Remote

Web Application-Level Item	Type	Multi-Farm
Activity folder:		
Most/Least Activity Not available for WSS-only farms.	Analysis	Home Only
Site Collection Activity Analysis	Analysis	Multiple
Site Activity Analysis Not available for WSS-only farms.	Analysis	Multiple
Trend Analysis for Activity Not available for WSS-only farms.	Analysis	Home Only
Activity by Profile Property Available for SharePoint 2010 and later Server farms.	Analysis	Home Only
Activity by User Not available for WSS-only farms.	Analysis	Multiple
Activity by Document Not available for WSS-only farms.	Analysis	Multiple
Checked Out Documents	Analysis	Multiple
Inactive Users Not available for WSS-only farms.	Analysis	Multiple
Blog Post Activity Available for SharePoint 2010 and later farms.	Analysis	Home Only
Social Activity Analysis	Analysis	Home Only

Web Application-Level Item	Type	Multi-Farm
Available for SharePoint Server 2010 farms.		
Audits and Alerts folder:		
Manage Audit Settings	Action	Multiple
ControlPoint Alerts	Action	Home Only
Create SharePoint Alerts	Action	Home Only
Manage SharePoint Alerts	Action	Home Only
Audit Log Analysis	Analysis	Multiple
Change Log Analysis	Analysis	Multiple
SharePoint Alerts by Site	Analysis	Multiple
SharePoint Alerts by User	Analysis	Multiple
Automation folder:		
Create ControlPoint Policy	Action	Home Only
Manage ControlPoint Policies	Action	Home Only
Set Metadata Value Available for SharePoint Server 2010 and later farms.	Action	Home Only
Create Managed Metadata Available for SharePoint Server 2010 and later farms.	Action	Home Only
Manage SharePoint Groups	Action	Home or Remote
ControlPoint Policies	Analysis	Home Only
Change Management folder:		

Web Application-Level Item	Type	Multi-Farm
Content Types	Analysis	Multiple
Web Parts by Part	Analysis	Multiple
Web Parts by Site	Analysis	Multiple
Workflow Analysis Not available to members of the Business Administrators group.	Analysis	Multiple
Compliance folder (visible only if license includes Sensitive Content Manager): Available for SharePoint 2010 and later farms, and not available to members of the Business Administrators group.		
Analyze Content	Action	Home Only
Managing Quarantine Documents	Action	Home Only
Compliance Summary	Analysis	Home Only
Sensitive Content Activity	Analysis	Home Only
Scanned files by Scope	Analysis	Home Only
Scanned files by Search terms	Analysis	Home Only
Configuration folder:		
Scanned files by Search terms	Action	Multiple
Set Site Properties	Action	Multiple
Set List Properties	Action	Multiple
Manage Site Collection Features	Action	Multiple
Manage Site Features	Action	Multiple

Web Application-Level Item	Type	Multi-Farm
Alternate Access Mappings Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Configure Document Conversions Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Define Managed Paths Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Delete Web Application Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Extend Web Application to Another IIS Website Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Information Management Policy Usage Reports Not available for WSS-only farms or to members of the Business Administrators group.	SharePoint	Home or Remote
Manage Content Databases Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Manage Web Application Features Not available to members of the Business Administrators group.	SharePoint	Home or Remote

Web Application-Level Item	Type	Multi-Farm
Remove SharePoint from IIS Web Site Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Web Application General Settings Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Web Application Outgoing E-Mail Settings Not available to members of the Business Administrators group.	SharePoint	Home or Remote
SharePoint Hierarchy	Analysis	Home Only
Site Collection Properties	Analysis	Home Only
Site Properties	Analysis	Multiple
List Properties	Analysis	Multiple
Content folder:		
Managed Metadata Usage Available for SharePoint Server 2010 and later farms.	Analysis	Multiple
Trend Analysis for Site Count	Analysis	Multiple
Broken Links	Analysis	Multiple
Solution Summary Not available to members of the Business Administrators group.	Analysis	Multiple
Site Management folder:		

Web Application-Level Item	Type	Multi-Farm
Create Site Collection Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Site Use Confirmation and Deletion Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Storage folder:		
Most/Least Storage Analysis Not available in a WSS-only farm.	Analysis	Home Only
Site Collection Storage Analysis	Analysis	Multiple
Site Storage Analysis	Analysis	Multiple
Content Database Storage	Analysis	Multiple
Trend Analysis for Storage	Analysis	Home Only
Duplicate Files	Analysis	Home Only
Storage by File Type	Analysis	Home Only
Recycle Bins	Analysis	Multiple
Users and Security folder:		
Set User Direct Permissions	Action	Multiple
Delete User Permissions	Action	Multiple
Duplicate User Permissions	Action	Multiple
Add User to SharePoint Group	Action	Home or Remote

Web Application-Level Item	Type	Multi-Farm
Delete SharePoint Groups	Action	Home Only
Backup Permissions	Action	Home Only
Manage Permissions Backups	Action	Home Only
Manage Permissions Inheritance	Action	Multiple
Authentication Providers Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Policy for Web Application Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Self-Service Site Management Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Security for Web Part Pages Not available to members of the Business Administrators group.	SharePoint	Home or Remote
User Permissions for Web Applications Not available to members of the Business Administrators group.	SharePoint	Home or Remote
Orphaned Domain Users	Analysis	Multiple
Site Permissions	Analysis	Multiple
Comprehensive Permissions	Analysis	Multiple
Comprehensive User Analysis	Analysis	Home Only

Web Application-Level Item	Type	Multi-Farm
SharePoint Group Analysis	Analysis	Multiple

Site Collection-Level Default Menu Items

Site Collection-Level Menu Item	Type	Multi Farm
Settings	SharePoint	Home or Remote
Advanced Search	Search	Home or Remote
Search Hierarchy	Search	Home Only
Add to Selection	Action	(Depends on operation)
Properties	Action	Home or Remote
Activity folder:		
Most/Least Activity Analysis Not available for WSS-only farms.	Analysis	Home Only
Site Collection Activity Analysis	Analysis	Multiple
Site Activity Analysis Not available for WSS-only farms.	Analysis	Multiple
Trend Analysis for Activity Not available for WSS-only farms.	Analysis	Home Only
Activity by User Not available for WSS-only farms.	Analysis	Multiple
Activity by Profile Property Available for SharePoint 2010 and later Server farms.	Analysis	Home Only

Site Collection-Level Menu Item	Type	Multi Farm
Activity by Document Not available for WSS-only farms.	Analysis	Multiple
Checked Out Documents	Analysis	Multiple
Blog Post Activity Available for SharePoint 2010 and later Server farms.	Analysis	Home Only
Inactive Users Not available for WSS-only farms.	Analysis	Multiple
Social Activity Analysis Available for SharePoint Server 2010 farms.	Analysis	Home Only
Audits and Alerts folder:		
Manage Audit Settings	Action	Multiple
ControlPoint Alerts	Action	Home Only
Create SharePoint Alerts	Action	Home Only
Manage SharePoint Alerts	Action	Home Only
Audit Log Analysis	Analysis	Home Only
Change Log Analysis	Analysis	Home Only
SharePoint Alerts by Site	Analysis	Home Only
SharePoint Alerts by User	Analysis	Home Only
Automation folder:		
Create ControlPoint Policy	Action	Home Only

Site Collection-Level Menu Item	Type	Multi Farm
Manage ControlPoint Policies	Action	Home Only
Set Metadata Value Available for SharePoint Server 2010 and later farms.	Action	Home Only
Create Managed Metadata Available for SharePoint Server 2010 and later farms.	Action	Home Only
Clean-Up User Permissions	Action	Home Only
ControlPoint Policies Report	Analysis	Home Only
User to Group Analysis	Analysis	Home Only
Change Management folder:		
Content Types	Analysis	Multiple
Web Parts by Part	Analysis	Multiple
Web Parts by Site	Analysis	Multiple
Workflow Analysis	Analysis	Multiple
Compliance folder (visible only if license includes Sensitive Content Manager): Available for SharePoint 2010 and later farms, and not available to members of the Business Administrators group..		
Analyze Content	Action	Home Only
Managing Quarantine Documents	Action	Home Only
Compliance Summary	Analysis	Home Only
Sensitive Content Activity	Analysis	Home Only
Scanned files by Scope	Analysis	Home Only

Site Collection-Level Menu Item	Type	Multi Farm
Scanned files by Search terms	Analysis	Home Only
Configuration folder:		
Set Site Collection Properties	Action	Home Only
Set Site Properties	Action	Multiple
Set List Properties	Action	Multiple
Manage Site Collection Features	Action	Multiple
Manage Site Features	Action	Multiple
Navigation Settings Not available for WSS-only or Foundation farms.	SharePoint	Home or Remote
Search Settings Not available for WSS-only or Foundation farms.	SharePoint	Home or Remote
Search Scopes Not available for WSS-only or Foundation farms.	SharePoint	Home or Remote
Site Collection Administrators	SharePoint	Home or Remote
Site Collection Quotas and Locks	SharePoint	Home or Remote
SharePoint Hierarchy	Analysis	Home Only
Site Collection Properties	Analysis	Home Only
Site Properties	Analysis	Multiple
List Properties	Analysis	Multiple
Content folder:		

Site Collection-Level Menu Item	Type	Multi Farm
Copy Site	Action	Home Only
Move Site	Action	Home Only
Move to Another Content DB	Action	Home Only
Create New Site	SharePoint	Home or Remote
Delete Site Collection	SharePoint	Home or Remote
Content and Structure Not available for WSS-only or Foundation farms.	SharePoint	Home or Remote
Managed Metadata Usage Available for SharePoint Server 2010 and later farms.	Analysis	Multiple
Trend Analysis for Site Count	Analysis	Home Only
Broken Links	Analysis	Multiple
Solution Summary Not available at the site collection level for 2007 farms.	Analysis	Multiple
Storage folder		
Most/Least Storage Analysis Not available for WSS-only farms.	Analysis	Home Only
Site Collection Storage Analysis	Analysis	Multiple
Site Storage Analysis	Analysis	Multiple
Content Database Storage	Analysis	Multiple
Trend Analysis for Storage	Analysis	Home Only

Site Collection-Level Menu Item	Type	Multi Farm
Duplicate Files	Analysis	Home Only
Storage by File Type	Analysis	Home Only
Recycle Bins	Analysis	Multiple
Users and Security Folder		
Set User Direct Permissions	Action	Multiple
Delete User Permissions	Action	Multiple
Duplicate User Permissions	Action	Multiple
Set SharePoint Group Permissions	Action	Home or Remote
Delete SharePoint Group Permissions	Action	Home or Remote
Add User to SharePoint Group	Action	Home Only
Delete SharePoint Groups	Action	Home Only
Duplicate Permission Levels	Action	Home Only
Backup Permissions	Action	Home Only
Manage Permissions Backups	Action	Home Only
Manage Permissions Inheritance	Action	Multiple
Orphaned Domain Users	Analysis	Multiple
Site Permissions	Analysis	Multiple
Comprehensive Permissions	Analysis	Multiple
Comprehensive User Analysis	Analysis	Home Only
SharePoint Group Analysis	Analysis	Multiple

Site-Level Default Menu Items

Site-Level Menu Item	Type	Multi-Farm
Settings	SharePoint	Home or Remote
Open Site	SharePoint	Home or Remote
Add to Selection	Action	(Depends on operation)
Properties	Action	Home or Remote
Activity folder:		
Most/Least Activity Analysis Not available for WSS-only farms.	Analysis	Home Only
Site Activity Analysis Not available for WSS-only farms.	Analysis	Multiple
Inactive Users Not available for WSS-only farms.	Analysis	Multiple
Activity by User Not available for WSS-only farms.	Analysis	Multiple
Activity by Document Not available for WSS-only farms.	Analysis	Multiple
Checked Out Documents	Analysis	Multiple
Blog Post Activity	Analysis	Home Only

Site-Level Menu Item	Type	Multi-Farm
Available for SharePoint 2010 and later farms.		
Social Activity Analysis Available for SharePoint Server 2010 farms.	Analysis	Home Only
Audits and Alerts folder:		
Manage Audit Settings	Action	Home Only
Create SharePoint Alerts	Action	Home Only
Manage SharePoint Alerts	Action	Home Only
Audit Log Analysis	Analysis	Multiple
Change Log Analysis	Analysis	Multiple
SharePoint Alerts by Site	Analysis	Multiple
SharePoint Alerts by User	Analysis	Multiple
Automation folder:		
Create ControlPoint Policy	Action	Home Only
Manage ControlPoint Policies	Action	Home Only
Set Metadata Value Available for SharePoint Server 2010 and later farms.	Action	Home Only
Create Managed Metadata Available for SharePoint Server 2010 and later farms.	Action	Home Only
ControlPoint Policies	Analysis	Multiple
Change Management folder:		

Site-Level Menu Item	Type	Multi-Farm
Duplicate a Workflow Definition	Action	Multiple
Content Types	Analysis	Multiple
Web Parts by Part	Analysis	Multiple
Web Parts by Site	Analysis	Multiple
Workflow Analysis	Analysis	Multiple
Compliance folder (visible only if license includes Sensitive Content Manager):		
Available for SharePoint 2010 and later farms, and not available to members of the Business Administrators group..		
Analyze Content	Action	Home Only
Managing Quarantine Documents	Action	Home Only
Compliance Summary	Analysis	Home Only
Sensitive Content Activity	Analysis	Home Only
Scanned files by Scope	Analysis	Home Only
Scanned files by Search terms	Analysis	Home Only
Configuration folder:		
Set Site Properties	Action	Multiple
Duplicate Site Properties	Action	Home Only
Set List Properties	Action	Multiple
Manage Site Features	Action	Multiple
Navigation Settings	SharePoint	Home Only
Not available for WSS-only or Foundation farms.		

Site-Level Menu Item	Type	Multi-Farm
SharePoint Hierarchy	Analysis	Home Only
Site Properties	Analysis	Multiple
List Properties	Analysis	Multiple
Content folder:		
Copy Site	Action	Home Only
Move Site	Action	Home Only
Delete Site	Action	Home Only
Create	SharePoint	Home or Remote
Create SubSite	SharePoint	Home or Remote
Content and Structure Not available for WSS-only or Foundation farms.	SharePoint	Home or Remote
Libraries and Lists	SharePoint	Home or Remote
Sites and Workspaces	SharePoint	Home or Remote
View All Site Content	SharePoint	Home or Remote
Managed Metadata Usage Available for SharePoint Server 2010 later farms.	Analysis	Multiple
Content Types	Analysis	Multiple
Web Parts by Part	Analysis	Multiple
Web Parts by Site	Analysis	Multiple

Site-Level Menu Item	Type	Multi-Farm
Workflow Analysis	Analysis	Multiple
Broken Links	Analysis	Multiple
Storage folder		
Most/Least Storage	Analysis	Home Only
Site Storage Analysis	Analysis	Multiple
Site Lists and Libraries Storage	Analysis	Home Only
Duplicate Files	Analysis	Home Only
Storage by File Type	Analysis	Home Only
Users and Security Folder		
Set User Direct Permissions	Action	Multiple
Delete User Permissions	Action	Multiple
Duplicate User Permissions	Action	Multiple
Set SharePoint Group Permissions	Action	Home or Remote
Delete SharePoint Group Permissions	Action	Home or Remote
Add User to SharePoint Group	Action	Home Only
Delete SharePoint Groups	Action	Home Only
Duplicate Permission Levels	Action	Home Only
Duplicate Site Security	Action	Home or Remote
Backup Permissions	Action	Home Only
Manage Permissions Backups	Action	Home Only

Site-Level Menu Item	Type	Multi-Farm
Manage Permissions Inheritance	Action	Multiple
All People	SharePoint	Home or Remote
New Group	SharePoint	Home or Remote
Site Permissions	SharePoint	Home or Remote
Orphan Domain Users	Analysis	Multiple
Site Permissions	Analysis	Multiple
Site List Permissions	Analysis	Home Only
Comprehensive Permissions	Analysis	Multiple
Permissions Changes by Site	Analysis	Home Only
Permissions Changes by User	Analysis	Home Only
Comprehensive User Analysis	Analysis	Home Only
SharePoint Group Analysis	Analysis	Multiple

List-Level Default Menu Items

List-Level Menu Item	Type	Multi Farm
Open	SharePoint	Home or Remote
Settings	SharePoint	Home or Remote
Add to Selection	Action	(Depends on operation)
Activity folder:		
Activity by User	Analysis	Multiple

List-Level Menu Item	Type	Multi Farm
Not available for WSS-only farms.		
Activity by Document Not available for WSS-only farms.	Analysis	Multiple
Checked Out Documents	Analysis	Multiple
Social Activity Analysis Available for SharePoint Server 2010 farms.	Analysis	Home Only
Audit and Alerts folder:		
Manage Audit Settings	Action	Multiple
Create SharePoint Alerts	Action	Multiple
Manage SharePoint Alerts	Action	Multiple
Audit Log Analysis	Analysis	Multiple
SharePoint Alerts by Site/List	Analysis	Multiple
SharePoint Alerts by User	Analysis	Multiple
Automation folder:		
Create ControlPoint Policy	Action	Home Only
Manage ControlPoint Policies	Action	Home Only
Set Metadata Value Available for SharePoint Server 2010 and later farms.	Action	Home Only
Create Managed Metadata Available for SharePoint Server 2010 and later farms.	Action	Home Only

List-Level Menu Item	Type	Multi Farm
Change Management folder:		
Duplicate a Workflow Definition	Action	Multiple
Workflow Analysis	Analysis	Multiple
Compliance folder (visible only if license includes Sensitive Content Manager):		
Available for SharePoint 2010 and later farms, and not available to members of the Business Administrators group..		
Analyze Content	Action	Home Only
Managing Quarantine Documents	Action	Home Only
Compliance Summary	Analysis	Home Only
Sensitive Content Activity	Analysis	Home Only
Scanned files by Scope	Analysis	Home Only
Scanned files by Search terms	Analysis	Home Only
Configuration folder:		
Set List Properties	Action	Multiple
Duplicate List Properties	Action	Home Only
List Properties	Analysis	Home Only
Content folder:		
Copy List	Action	Home Only
Move List	Action	Home Only
Delete List	Action	Multiple
Copy List Item(s)	Action	Home Only

List-Level Menu Item	Type	Multi Farm
Move List Item(s)	Action	Home Only
Set Column Metadata Available for SharePoint Server 2010 and later farms.	Action	Home Only
Managed Metadata Usage Available for SharePoint Server 2010 and later farms.	Analysis	Multiple
Workflow Analysis	Analysis	Multiple
Users and Security folder:		
Set User Direct Permissions	Action	Multiple
Delete User Permissions	Action	Multiple
Duplicate User Permissions	Action	Multiple
Set SharePoint Group Permissions	Action	Home or Remote
Delete SharePoint Group Permissions	Action	Home or Remote
Manage Permissions Inheritance	Action	Multiple
Permissions by List Item	Analysis	Home Only
SharePoint Group Analysis	Analysis	Multiple

User-Level Default Menu Items

User-Level Menu Item	Type	Multi Farm*
Set User Direct Permissions	Action	Multiple
Delete User Permissions	Action	Multiple

User-Level Menu Item	Type	Multi Farm*
Duplicate User Permissions	Action	Multiple
Add User to SharePoint Group	Action	Home Only
Edit User	SharePoint	Home Only
Site Permissions	Analysis	Multiple
Site List Permissions	Analysis	Analysis
Comprehensive Permissions	Analysis	Multiple
Comprehensive User Analysis	Analysis	Home Only
SharePoint Group Analysis	Analysis	Multiple

* For a user from a remote farm to be included in a multi-farm operation, he/she must also be a valid user on the home farm.

Site Admin Menu Items

By default, the Site Admin menu has most of the same ControlPoint actions and analyses as the site-level menu.

Manage ControlPoint Default Menu Items

Menu items that are available to members of the Business Administrators group are identified by a checkmark (√) in the **Business Admin?** column.

Manage ControlPoint Menu Item	Type	Business Admin?
Governance Policy Manager and Provisioning		
Governance Policy Manager is available for SharePoint 2010 and later farms. Provisioning is available for SharePoint 2010 or later Standard (not Native) Installations.		
Governance Policy Manager	Action	
Provisioning Profile Manager	Action	
Provisioning Requests Manager	Action	

Manage ControlPoint Menu Item	Type	Business Admin?
Provisioning Custom Templates Manager	Action	
Compliance (visible only if license includes Sensitive Content Manager):		
Available for SharePoint 2010 and later farms.		
Profile Maintenance	Action	
Search Term Maintenance	Action	
User Maintenance	Action	
Sensitive Content Submission Maintenance	Action	
ControlPoint Compliance Actions	Action	
ControlPoint Configuration		
ControlPoint Configuration Site*	SharePoint Site	
ControlPoint Configuration Settings*	SharePoint List	
Auto Add Users to ControlPoint Groups	Action	
ControlPoint Menu List	SharePoint List	
Menu Maintenance	Action	
Favorites Maintenance	Action	
Manage Farm List	Action	
ControlPoint Management		
Discovery	Action	
Execute Saved Instructions	Action	

Manage ControlPoint Menu Item	Type	Business Admin?
Calculate Farm User Account NOTE: This item is only accessible by ControlPoint Application Administrators	Action	
Reload Servier-side Cache	Action	
Purge Historical Data	Action	
Schedule Management and Logging		
Scheduled Jobs Report	Analysis	√
ControlPoint Task Audit	Analysis	
Logged Errors Report	Analysis	
View ControlPoint Log	Analysis	
Schedule Monitor	Action	√
ControlPoint Sentinel		
This functionality is not available for SharePoint 2007.		
Semtinel Setup	Action	
Sentinel Report	Analysis	

* Administrators must have write access to the ControlPoint Configuration Site (as a member of the ControlPoint Application Administrators group, for example) to use this functionality.