

Metalogix® ControlPoint 8.6

Evaluation Guide



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Metalogix® ControlPoint

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Contents

Introduction	4
Prerequisites	4
Launching ControlPoint	5
The ControlPoint Application Interface	5
Running a Site Storage Analysis	8
Running a Site Permissions Analysis	12
Running an Orphaned Domain Users Report and Deleting Orphaned Users	15
Scheduling an Activity by Document Analysis	18
Duplicating a User's Permissions and Backing Up Permissions	21
Restoring Site Permissions	26
About Us	29
Contacting Quest	29
Technical Support Resources	29

Introduction

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

Prerequisites

In order to perform the evaluation scenarios for ControlPoint outlined in this document, you must first install and configure ControlPoint. See the *Metalogix ControlPoint Quick Start Guide* for details. It is available on the [Quest Technical Documentation page](#).

Launching ControlPoint

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

From your workstation browser:

Enter **`http://<server_machine_name>:<port_number>/_layouts/Axceler/xcMain.aspx`**.

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

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

From the server on which ControlPoint is installed:

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

The ControlPoint Application Interface

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

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

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

SHAREPOINT SUMMARY

SERVERS

4

WEB APPLICATIONS

7

SITE COLLECTIONS

42

SITES

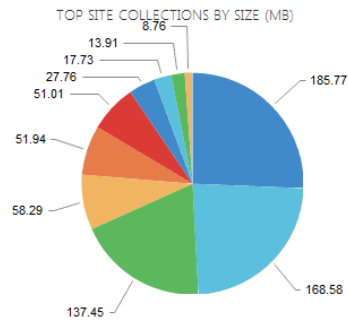
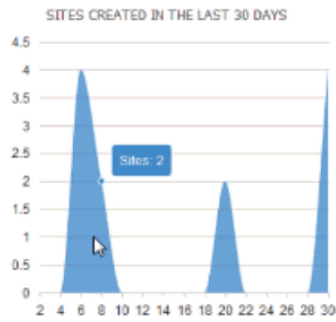
85

STORAGE (GB)

0.79

CONTENT DATABASE SIZE (GB)

1.86



RESOURCES

- Governance Policy Manager
- Permissions Management
- Orphaned Domain Users
- Site Permissions
- Most Least Report
- Audit Log Analysis
- Customer Portal Login
- Documentation

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

The screenshot displays the Metalogix ControlPoint web application. On the left is a blue sidebar with navigation links: DASHBOARDS, HIERARCHY, MANAGE, FAVORITES, and SEARCH. Below these is a section for 'Available Farms' with a dropdown menu currently showing '2010SharePoint'. At the bottom of the sidebar are 'HELP' and 'ABOUT' links. The top right corner shows the user 'Margaret Meade' with a profile icon. Below the user name are three buttons: 'Customer Portal Login' (green), 'Open a Support Ticket' (blue), and 'Documentation' (blue). The main content area is divided into two columns. The left column is titled 'Metalogix Academy' and contains text about a web-based customer training series, a list of topics (General Overview and Reporting, Permissions, Copy/Move, Audit, Automation and Policies, Site Admin Support and Customization), and a note about receiving a certificate of completion. The right column contains two sections: 'Latest News' and 'Upcoming Events', both with introductory text and a 'Read more >' link. Below these sections is a 'Metalogix Blog' section with introductory text and a 'Read more >' link. At the bottom of the right column are social media icons for Twitter, LinkedIn, Facebook, and YouTube.

Running a Site Storage Analysis

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

To run a site storage analysis:

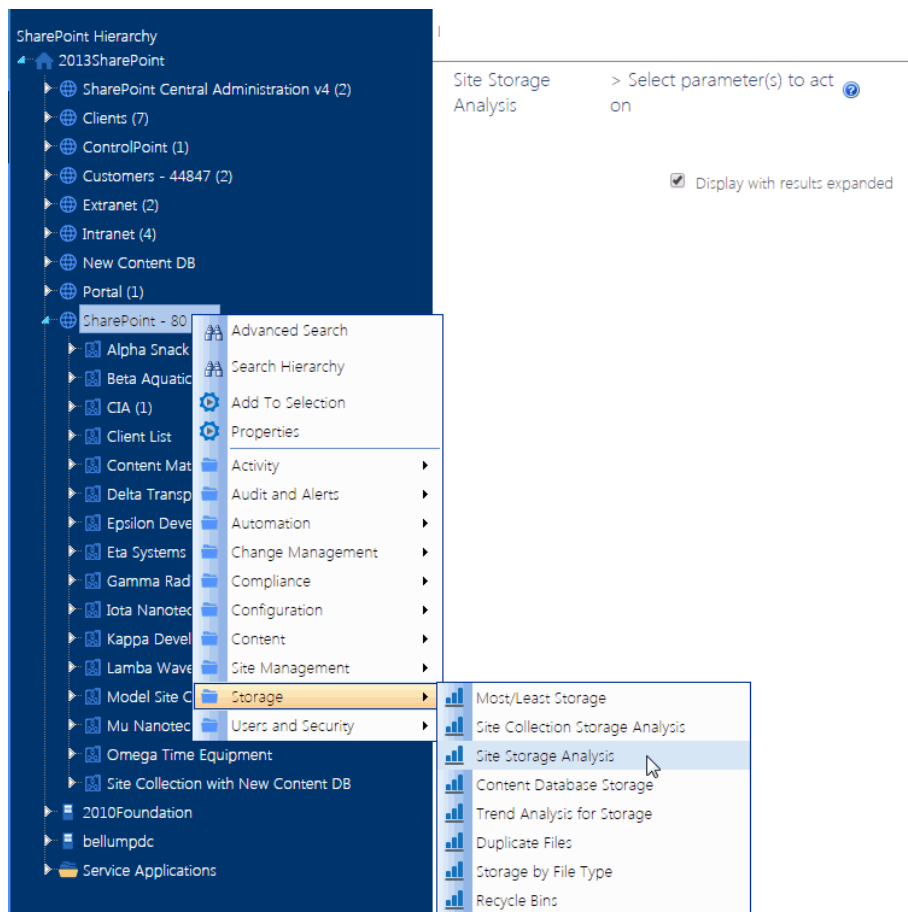
- 1 In the left navigation frame, select the Hierarchy tab, then In the SharePoint Hierarchy, expand the Web application(🌐) containing a Site Collection that, ideally, contains between ten and 20 sites. (Note that the number in the parentheses to the right of each object indicates the total number of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

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



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

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



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

- 3 Click the **Display with results expanded** box.
- 4 Click **[Run Now]**.

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

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

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.

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



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




Running a Site Permissions Analysis

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

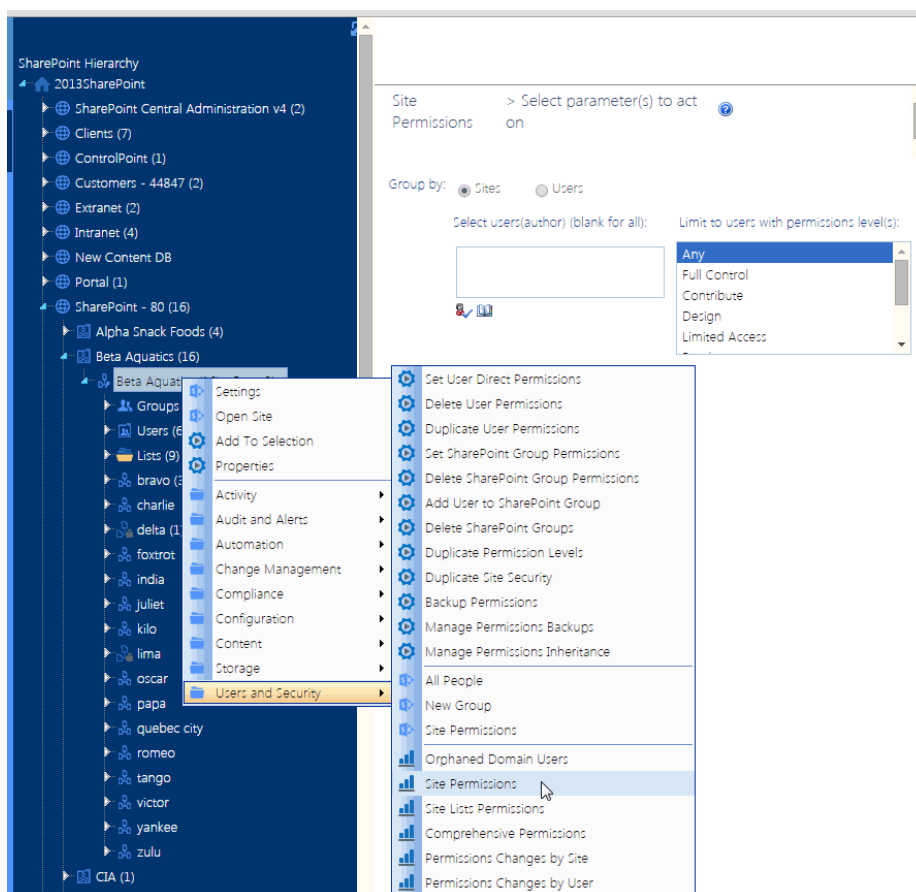
To run a site permissions analysis:

- 1 Expand the Site Collection to display its subsites.

Notice that a site may be identified by one of the following icons:

-  - a site collection's root site
-  - a site whose permissions are inherited from its parent.
-  - a site whose permissions are unique (not inherited)

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



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

- Change the **Group by:** selection to **Users**
- Expand the **Advanced Parameters** section and make sure the following Parameters are checked:
 - **Calculate Total Users with Permissions**
 - **Show unique permissions only** (this parameter will filter out permissions that are *inherited* from a parent site)

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

4 Click **[Run Now]**.

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

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

Site Permissions by User

12/1/2014 6:11:52 PM
 bellum\administrator

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

Farm Name	Total current users with permissions
2013SharePoint	12

Web Application Policies

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

User Rights

*** - site security not inherited

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

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

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

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

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

User	Display Name/Group	Admin	Full Control	Design	Contribute	Read	Limited	Other
bellum\patentattorneys	<bellum\patentattorneys>	SharePoint - 80 (Anonymous Access Enabled) http://2010foundation/sites/alpha/stayfresh						
Stay Fresh Packaging***					+			
					+			
Group: bellum\patentattorneys Potential SharePoint users		SharePoint - 80 (Anonymous Access Enabled) http://2010foundation/sites/alpha						
Name	Account Name	Member Of	Email					
Isaac Asimov	Bellum\isaacasimov	Bellum\PatentAttorneys	Isaac.Asimov@Bellum.com					
James Joyce	Bellum\jamesjoyce	Bellum\PatentAttorneys	James.Joyce@Bellum.com					
Mark Twain	Bellum\marktwain	Bellum\PatentAttorneys	Samuel.Clemens@Bellum.com		+			+
Oliver Twist	Bellum\OliverTwist	Bellum\PatentAttorneys			+			+
Washington Irving	Bellum\washingtonirving	Bellum\PatentAttorneys	Washington.Irving@SleepyHollow.com			+		+
Baking Technology***		SharePoint - 80 (Anonymous Access Enabled) http://2010foundation/sites/alpha/baking						
	<Summary>						+	
	Alpha Snack Foods Owners						+	
	nt authority\authenticated users						+	
Stay Fresh Packaging***		SharePoint - 80 (Anonymous Access Enabled) http://2010foundation/sites/alpha/stayfresh						
	<Summary>			+		+		+
	Alpha Snack Foods Owners							

In this scenario you:

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

Running an Orphaned Domain Users Report and Deleting Orphaned Users

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

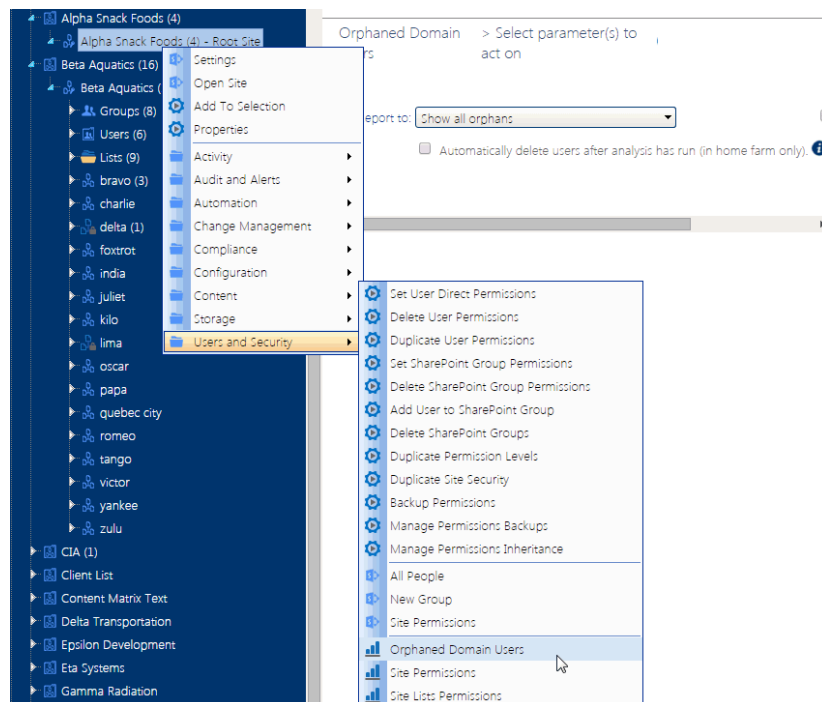
NOTE: You can also choose to have ControlPoint automatically submit a Delete User job to the ControlPoint scheduler. The job will be scheduled to run 30 minutes after the analysis has finished processing and will delete all users returned by the analysis. This is useful if, for example, you want to run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

To run an Orphaned Domain User Report:

- 1 Select an object in the SharePoint Hierarchy which you believe contains “orphaned” users.

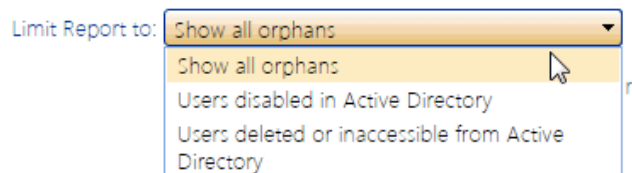
TIP: The identification of orphaned users can be an intensive process—especially the first time it is performed—as ControlPoint must query Active Directory for each user with permissions to a site, sometimes in more than one domain. The smaller the scope you choose, the more quickly the report will be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

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



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

Orphaned Domain Users > Select parameter(s) to act on

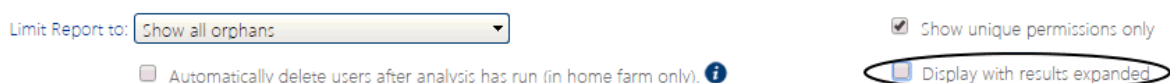


- If you want to exclude objects whose permissions are inherited, make sure **Show unique permissions only** is checked.

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

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

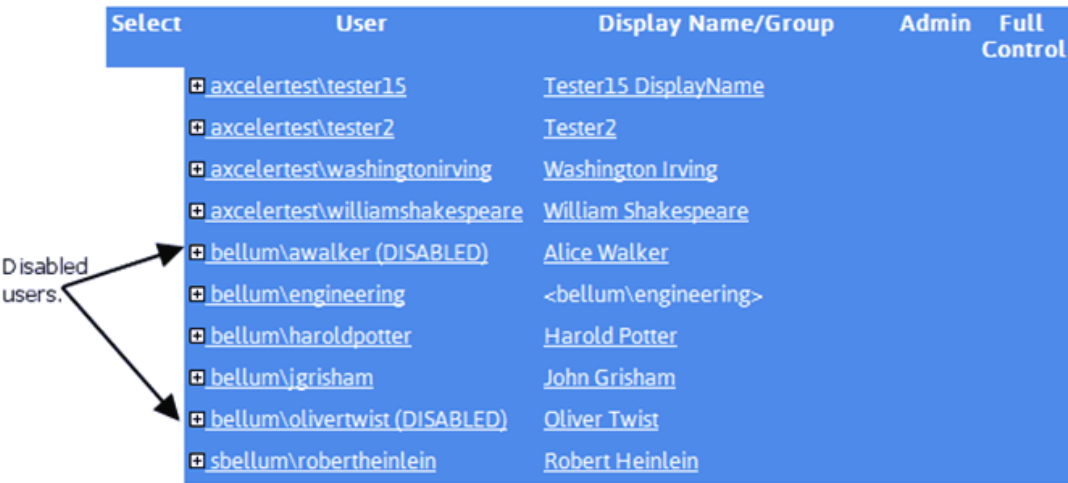
Orphaned Domain Users > Select parameter(s) to act on



- Click **[Run Now]**.

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

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

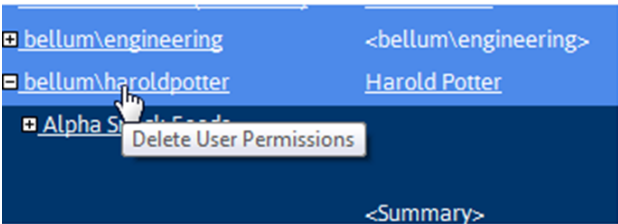


Select	User	Display Name/Group	Admin	Full Control
<input type="checkbox"/>	accelertest\tester15	Tester15 DisplayName		
<input type="checkbox"/>	accelertest\tester2	Tester2		
<input type="checkbox"/>	accelertest\washingtonirving	Washington Irving		
<input type="checkbox"/>	accelertest\williamshakespeare	William Shakespeare		
<input type="checkbox"/>	bellum\awalker (DISABLED)	Alice Walker		
<input type="checkbox"/>	bellum\engineering	<bellum\engineering>		
<input type="checkbox"/>	bellum\haroldpotter	Harold Potter		
<input type="checkbox"/>	bellum\jgrisham	John Grisham		
<input type="checkbox"/>	bellum\olivertwist (DISABLED)	Oliver Twist		
<input type="checkbox"/>	sbellum\robertheinlein	Robert Heinlein		

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

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

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



In this scenario you:

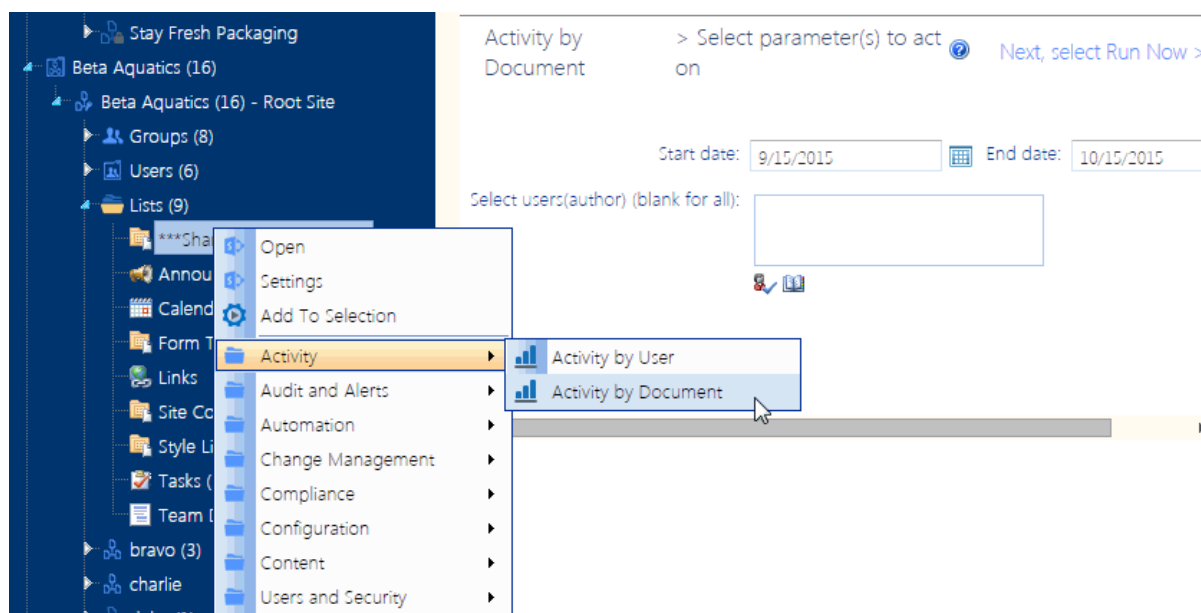
- ✓ Learned that you can initiate a follow-on ControlPoint action from analysis results.

Scheduling an Activity by Document Analysis

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



To schedule an Activity by Document Analysis:

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






2 For Parameters:

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

Start date: 9/15/2015  End date: 10/15/2015 

Select users(author) (blank for all):

Advanced Parameters 

Include File Extensions only:

File Name Contains:

Report On: ☒ All Activity ☐ Checked-out documents only
☐ Include Documents with no checked-in version (takes more time)

Exclude File Names:

☒ Display with results expanded

- 1 Click the **Schedule** tab.
- 2 Enter a **Job Name** and **Description**.
- 3 Keep the default Output Type (PDF).


Activity by Document ?

General Job Information

Job Name: Activity by Document for Beta Aquatics ☒ Active

Description: Scheduled Report Testing

Output File Name: kcrActivityByDoc Output Type: PDF

☐ Include Date Time stamp in file name 

SELECTION
PARAMETERS
SCHEDULE
RESULTS

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


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

Subject:

Message:

Destination Farm: 2013SharePoint

Add to Library List: **Select**


☐ Send to Admins  ☐ Send to Site Collection Admins ☐ Create Reports by 2

Schedule

Destination Selection Page - Google ...

2010foundation:1818/_layouts/axceler/xcrBn

Destination Farm Tree

Name: 

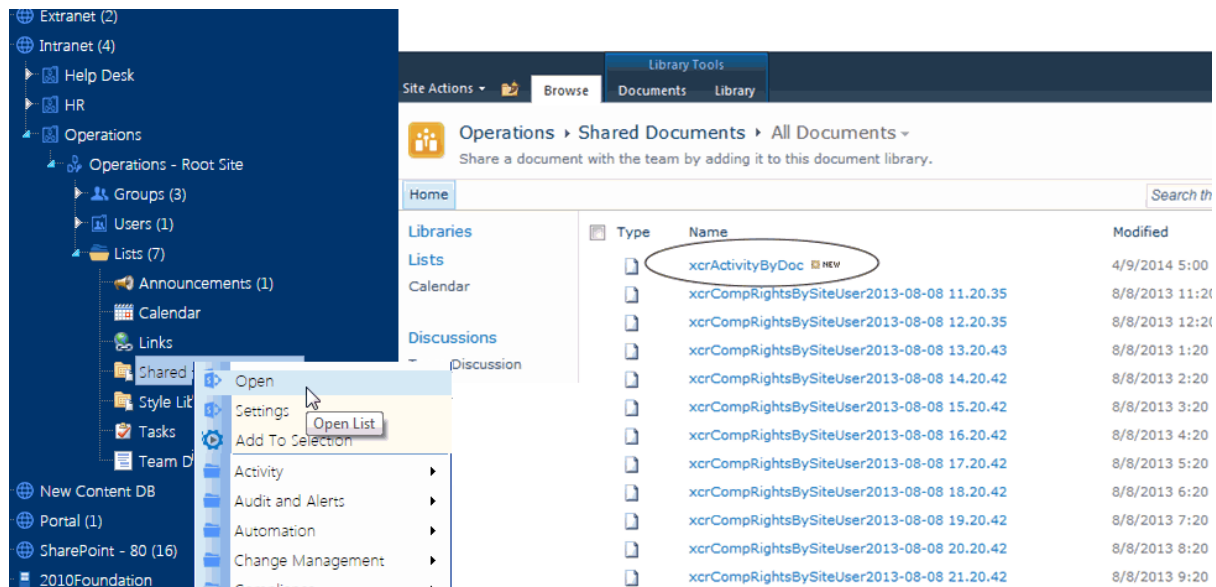
URL:

2013SharePoint

- Clients (7)
- ControlPoint (1)
- Customers - 44847 (2)

- b) From the **Destination Farm** tree, drill down to the library where you want to post analysis results.
- c) Highlight the library then click **[OK]**.
- d) Click **[Schedule]**.

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




In this scenario you:

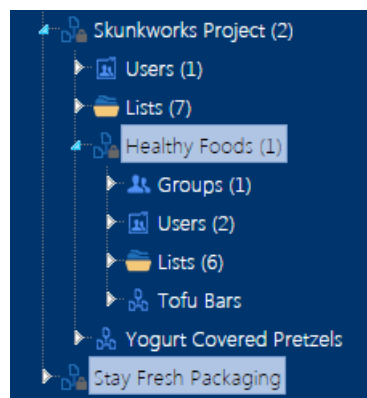
- ✓ Scheduled a ControlPoint analysis.
- ✓ Reviewed the status of the scheduled job in the Schedule Monitor.
- ✓ Opened a SharePoint library from the ControlPoint application interface.

Duplicating a User's Permissions and Backing Up Permissions

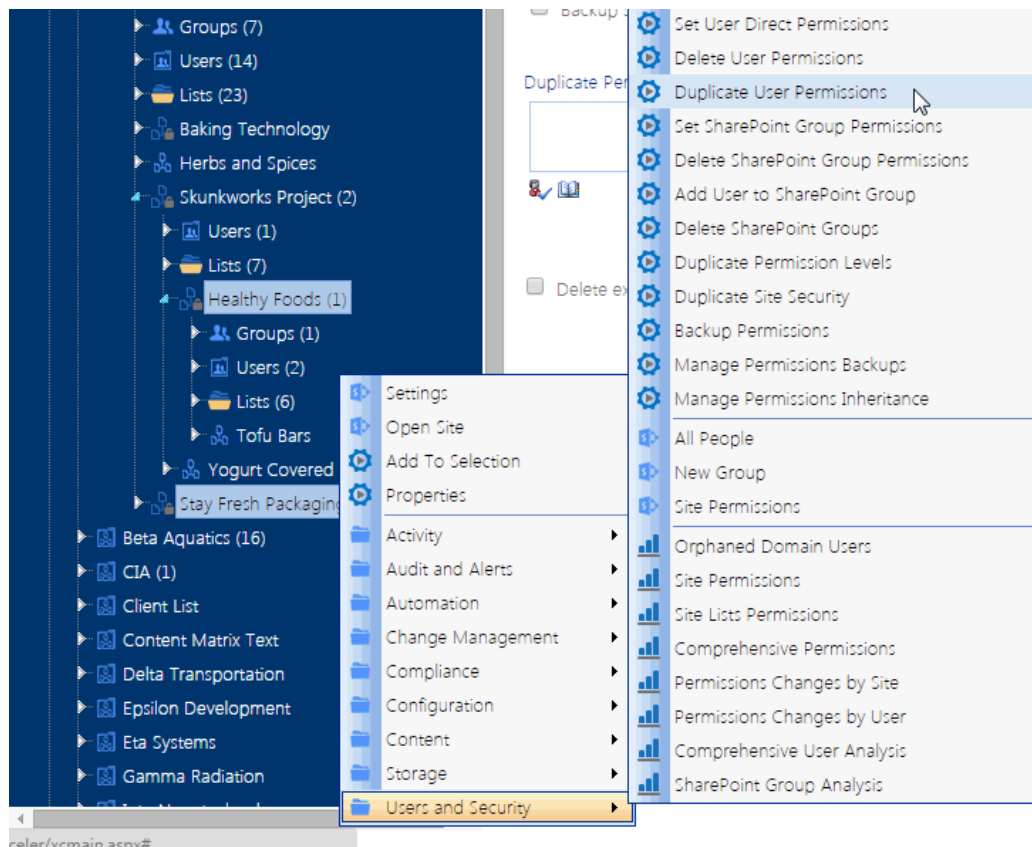
In this scenario, we will duplicate the permissions of a selected user to another user. This operation is useful if, for example, a user has left the company and you want to transfer that user's permissions to his/her replacement. We will perform this operation on two sites with unique permissions. As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

To Duplicate a User's Permissions:

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



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

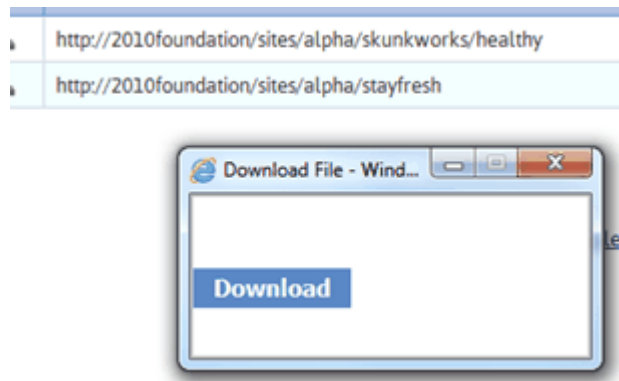



3. We will save our selection—so that we can quickly retrieve it when it comes time to restore permissions—as follows:


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



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



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

Duplicate User Permissions > Select parameter(s) to act on 

Model User Name:

bellum\jamesjoyce



Check Names

[View Permissions](#)
[View Comprehensive User Analysis](#)

☐ Backup site permissions before operation

Duplicate Permissions to:

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

☒ Backup site permissions before operation

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

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

Model User Name:

James Joyce



[View Permissions](#)

[View Comprehensive User Analysis](#)

☒ Backup site permissions before operation

Duplicate Permissions to:

Mark Twain



8 Click [Run Now].

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

Metalogix

Task Audit

axce

Parameters:

Start Date:

End Date:

Task Type:

<ALL>

Performed By:

<ALL>

Search Criteria:

Total Tasks: 1

Task Type	Performed By	Date
Duplicate User Permissions	bellum\administrator	4/11/2014

☐ USERS: bellum\jamesjoyce TYPE: SITE COPYTO: bellum\marktwain

Performed On	URL	Pa
Healthy Foods 2013sharepoint	http://2013sharepoint/sites/alpha/skunkworks/healthy	2013SharePoint > Shar Snack Foods >> He
Added Full Control permission for bellum\marktwain to the Healthy Foods- Subsite		
Stay Fresh Packaging	http://2013sharepoint/sites/alpha/stayfresh	2013SharePoint > Shar Snack Foods >> Sta
Stay Fresh Packaging: Added user bellum\marktwain to the group Sales		
Stay Fresh Packaging: Added user bellum\marktwain to the group Stay fresh		

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

In this scenario you:

- ✓ Initiated a ControlPoint operation for multiple objects.

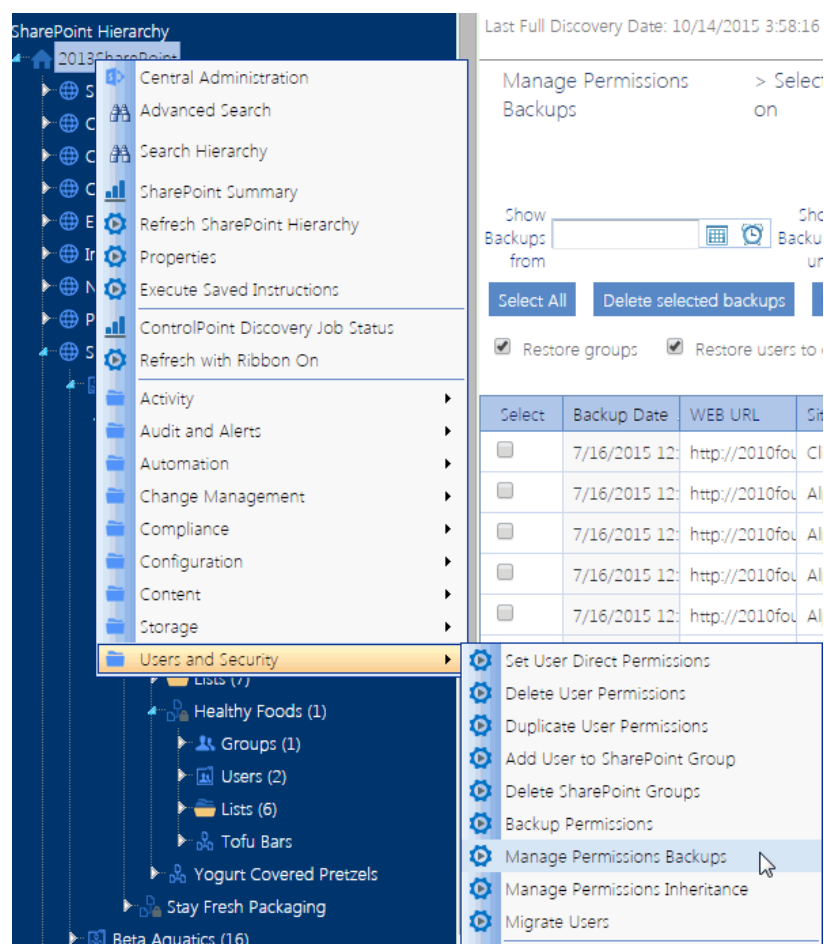
- ✓ Saved a selection for reuse.
- ✓ Performed an action on specific users.
- ✓ Backed up site permissions.
- ✓ Generated a ControlPoint Task Audit

Restoring Site Permissions

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

To restore site permissions:

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



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



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

d) Check the Replace Existing Selection box.

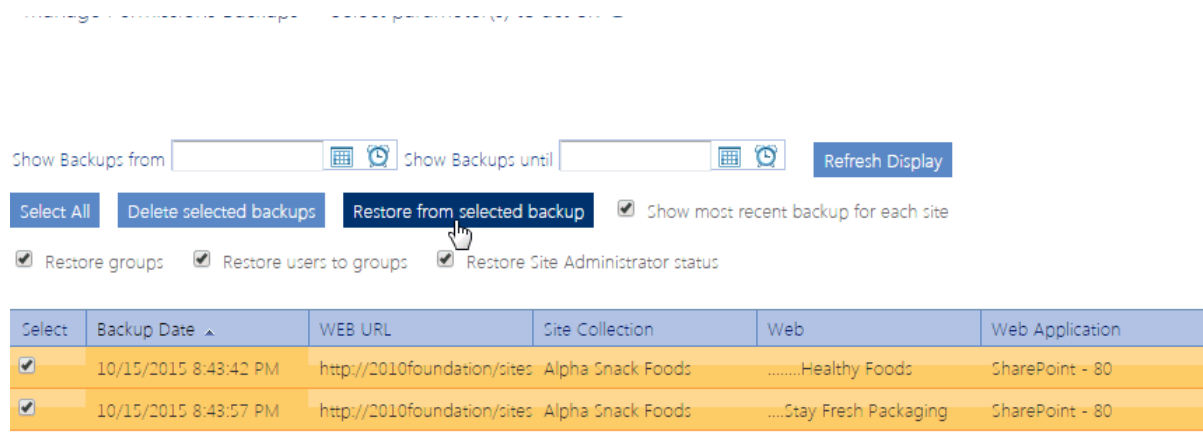
e) Click [Upload].

f) Click [Apply].

1 Return to the Parameters tab.





2 Click [Refresh Display].

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



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

Manage Permissions Backups > Select parameter(s) to act on [?](#)

Show Backups from   Show Backups until   [Refresh Display](#)

[Select All](#) [Delete selected backups](#) [Restore from selected backup](#) ☒ Show most recent backup for each site

☒ Restore groups ☒ Restore users to groups ☒ Restore Site Administrator status

Select	Backup Date ▲	WEB URL	Site Collection	Web	Web Application
<input type="checkbox"/>	10/15/2015 8:43:42 PM	http://2010foundation/sites	Alpha Snack FoodsHealthy Foods	SharePoint - 80
<input type="checkbox"/>	10/15/2015 8:43:57 PM	http://2010foundation/sites	Alpha Snack FoodsStay Fresh Packaging	SharePoint - 80

In this scenario you:

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

About Us

Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit www.quest.com.

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Technical Support Resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <https://support.quest.com>

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product