Quest

ControlPoint

Evaluation Guide

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1

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 *Quest® ControlPoint Quick Start Guide* for details. It is available on the Quest Technical Documentation page.

2

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:

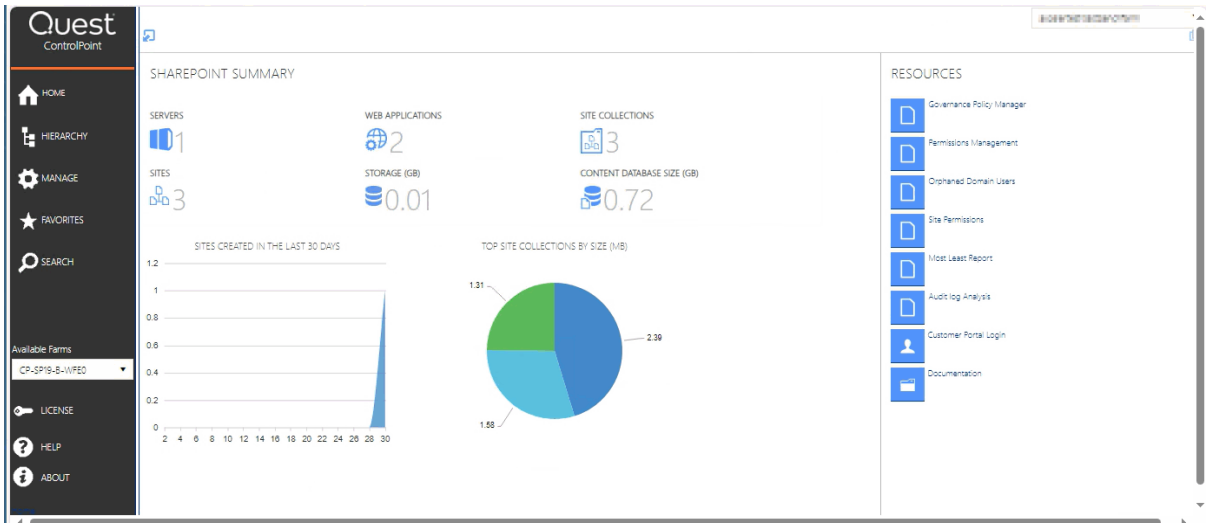
From the Windows Start menu, choose **Programs > Metalogix > ControlPoint > Launch ControlPoint Application**.

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.

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 Quest Support (Customer) Portal as well as ControlPoint user documentation on the Quest Support Portal.


Quest
ControlPoint
HOME
HIERARCHY
MANAGE
FAVORITES
SEARCH
Available Farms
LICENSE
HELP
ABOUT
SHAREPOINT SUMMARY
SERVERS
1
WEB APPLICATIONS
2
SITE COLLECTIONS
3
SITES
3
STORAGE (GB)
0.01
CONTENT DATABASE SIZE (GB)
0.72
SITES CREATED IN THE LAST 30 DAYS
TOP SITE COLLECTIONS BY SIZE (MB)
1.31
2.39
1.58
RESOURCES
Governance Policy Manager
Permissions Management
Orphaned Domain Users
Site Permissions
Most Least Report
Audit log Analysis
Customer Portal Login
Documentation

3

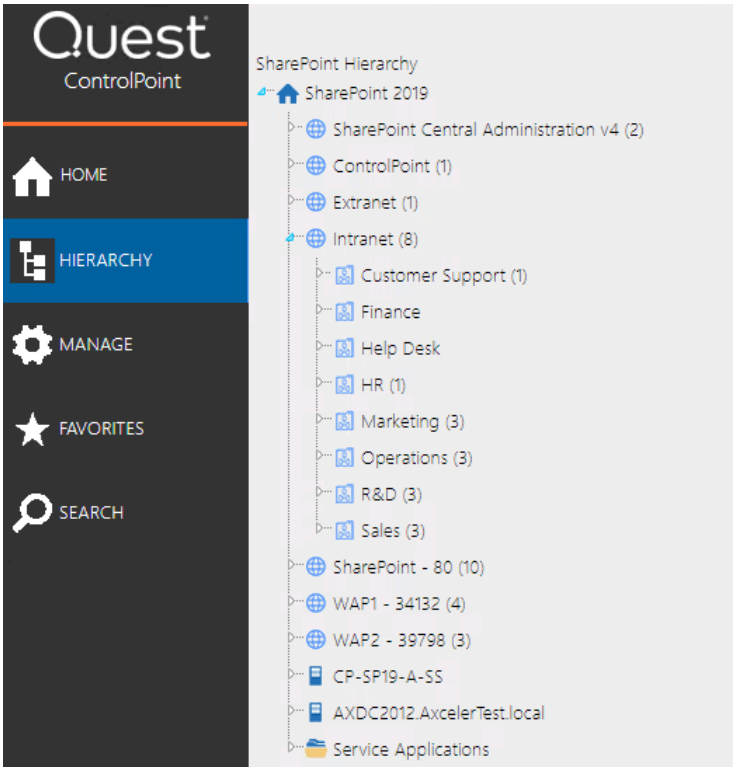
Running a Site Collection Storage Analysis

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

To run a Site Collection Storage analysis:

1 In the left navigation frame, select the Hierarchy tab, then In the SharePoint Hierarchy, select the Web application( ) 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.)

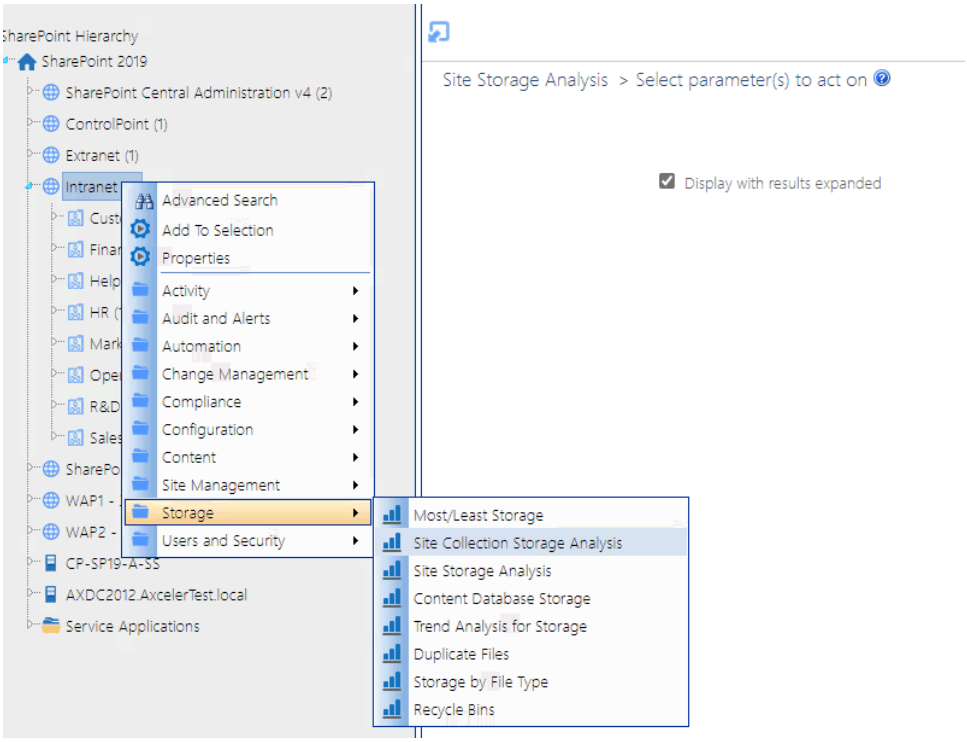
In keeping with ControlPoint security trimming , if you are a SharePoint Farm Administrator, all of the Site Collections within the Web applications display in the tree. Those for which you are not a Site Collection Administrators will appear greyed out.



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 Collection Storage Analysis**.



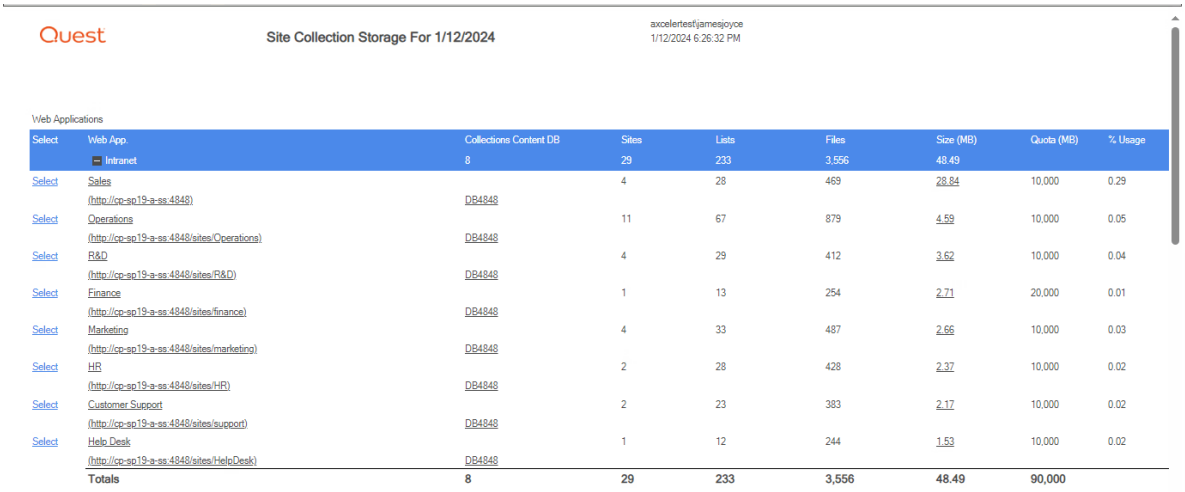
Note that you may see menu items that are greyed out. These items rely on the ControlPoint Discovery job, which collects information about your SharePoint farm and stores it in the ControlPoint Services (xcAdmin) database. Once the ControlPoint Discovery Service is configured, these menu items are enabled.

3 Make sure the **Display with results expanded** box is checked.

4 Click **[Run Now].**

The Site Collection Storage analysis consists of two sections: **Web Applications** and **Size Distributions**

The Web Applications section lists the sites collections within the Web appiication, 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.)



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Site Collection Storage For 1/12/2024

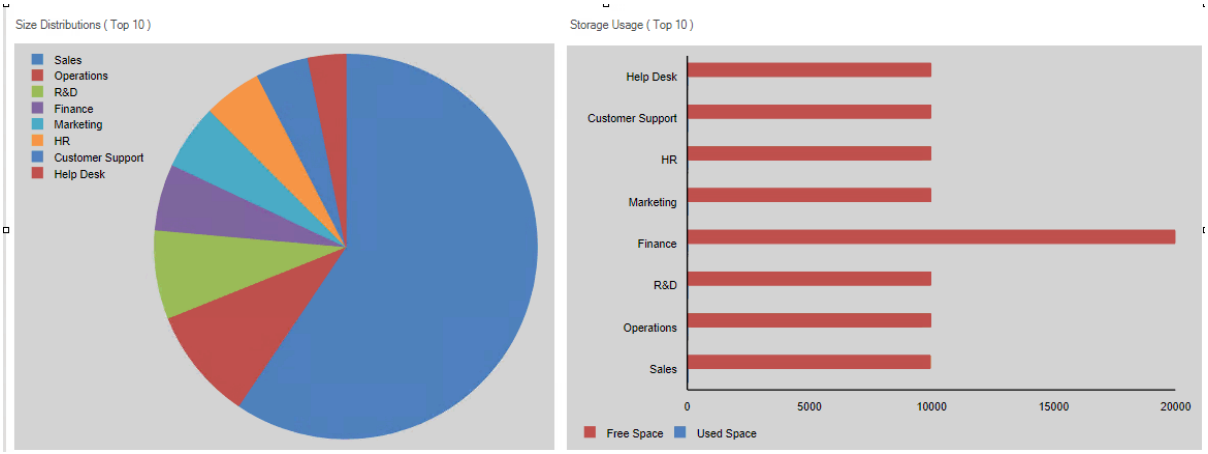
axcelertest\jamesjoyce
1/12/2024 6:26:32 PM

Web Applications

Select	Web App.	Collections Content DB	Sites	Lists	Files	Size (MB)	Quota (MB)	% Usage
	Intranet	8	29	233	3,556	48.49		
Select	Sales		4	28	469	28.84	10,000	0.29
	(http://cp-sp19-a-ss:4848)	DB4848						
Select	Operations		11	67	879	4.59	10,000	0.05
	(http://cp-sp19-a-ss:4848/sites/Operations)	DB4848						
Select	R&D		4	29	412	3.62	10,000	0.04
	(http://cp-sp19-a-ss:4848/sites/R&D)	DB4848						
Select	Finance		1	13	254	2.71	20,000	0.01
	(http://cp-sp19-a-ss:4848/sites/finance)	DB4848						
Select	Marketing		4	33	487	2.66	10,000	0.03
	(http://cp-sp19-a-ss:4848/sites/marketing)	DB4848						
Select	HR		2	28	428	2.37	10,000	0.02
	(http://cp-sp19-a-ss:4848/sites/HR)	DB4848						
Select	Customer Support		2	23	383	2.17	10,000	0.02
	(http://cp-sp19-a-ss:4848/sites/support)	DB4848						
Select	Help Desk		1	12	244	1.53	10,000	0.02
	(http://cp-sp19-a-ss:4848/sites/HelpDesk)	DB4848						
	Totals	**8**	**29**	**233**	**3,556**	**48.49**	**90,000**	

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 site collects within the scope of your analysis as well as the **Storage Usage** of each.



In this scenario you:

✓ Learned about ControlPoint security trimming.

✓ Initiated an operation for an object in the SharePoint Hierarchy.

✓ Ran a ControlPoint analysis interactively

4

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.

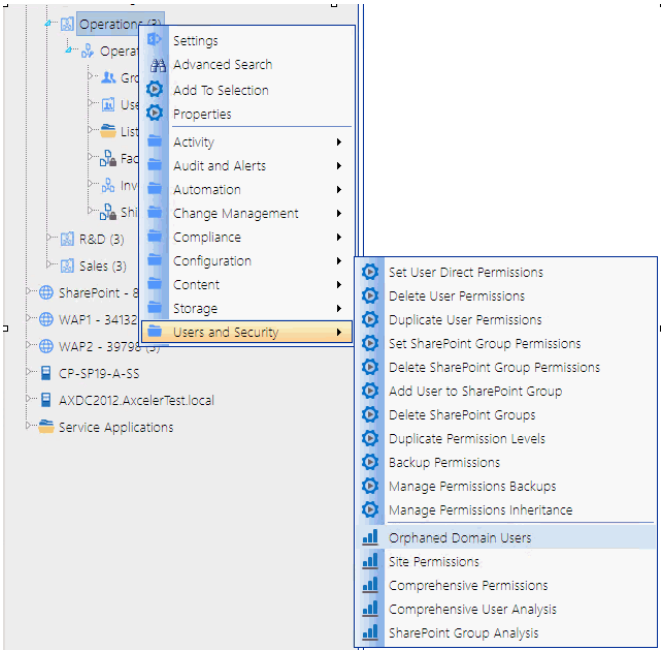
Notice that a site may be identified by one of the following icons:

- 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**.

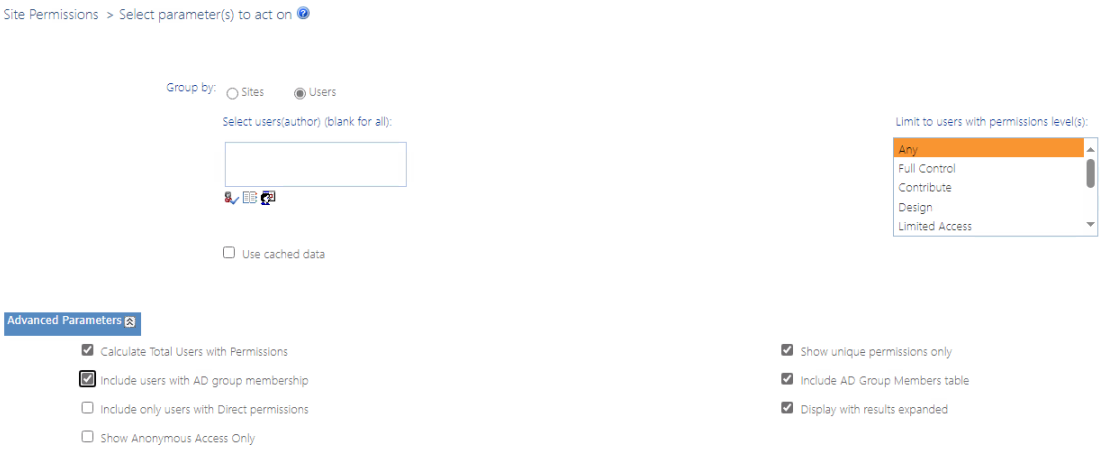


3 Run the analysis on all users within the Site Collection using the following parameters:

- Change the **Group by**: selection to **Users**
- Uncheck **Use cached data.**

- 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)

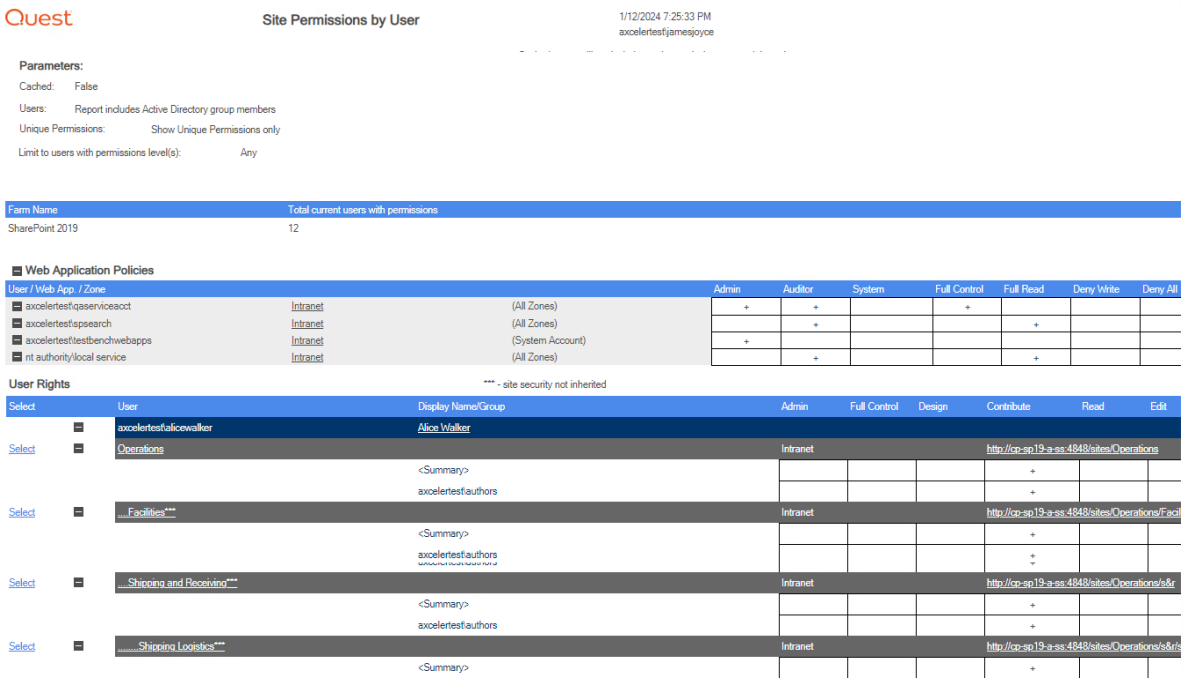
  Note that, since the analysis is being run on real-time (not cached) data, you can also choose to **Include users with AD group membership** and/or **Include AD Group Members table**, which requires a live call to Active Directory. In this scenario, however, we will leave these options unselected and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



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Site Permissions by User

1/12/2024 7:25:33 PM
axcelertest\jamesjoyce

Parameters:

Cached: False
Users: Report includes 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
SharePoint 2019	12

Web Application Policies

User / Web App. / Zone			Admin	Auditor	System	Full Control	Full Read	Deny Write	Deny All
axcelertest\qaserviceacct	Intranet	(All Zones)	+	+		+			
axcelertest\spsearch	Intranet	(All Zones)		+			+		
axcelertest\testbenchwebapps	Intranet	(System Account)	+						
nt authority\local service	Intranet	(All Zones)		+			+		

User Rights

*** - site security not inherited

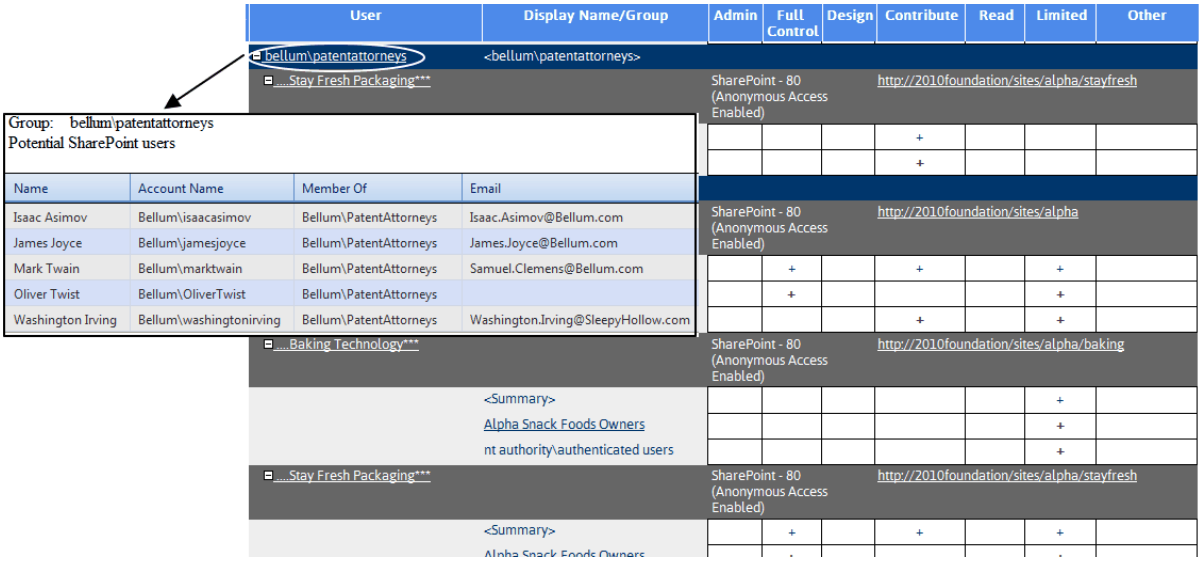
Select	User	Display Name/Group	Admin	Full Control	Design	Contribute	Read	Edit
	axcelertest\alicewalker	Alice Walker						
Select	Operations		Intranet			http://cp-sp19-a-ss:4848/sites/Operations		
		<Summary>				+		
		axcelertest\authors				+		
Select	...Facilities***		Intranet			http://cp-sp19-a-ss:4848/sites/Operations/Facil		
		<Summary>				+		
		axcelertest\authors				+		
Select	...Shipping and Receiving***		Intranet			http://cp-sp19-a-ss:4848/sites/Operations/s&r		
		<Summary>				+		
		axcelertest\authors				+		
Select	.....Shipping Logistics***		Intranet			http://cp-sp19-a-ss:4848/sites/Operations/s&r/s		
		<Summary>				+		

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

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

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

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



In this scenario you:

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

5

Running an Orphaned Domain Users Report and Deleting Orphaned Users

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

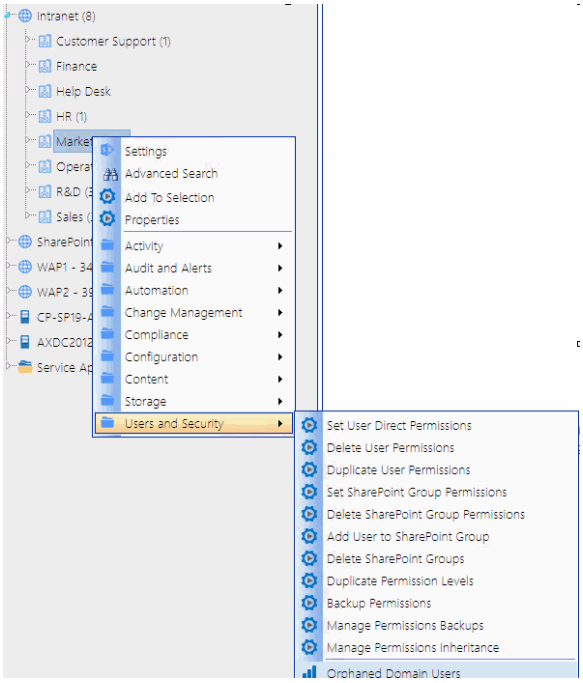
> NOTE: You can also choose to have ControlPoint automatically submit a Delete User job to the ControlPoint scheduler. The job will be scheduled to run 30 minutes after the analysis has finished processing and will delete all users returned by the analysis. This is useful if, for example, you want to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

To run an Orphaned Domain User Report:

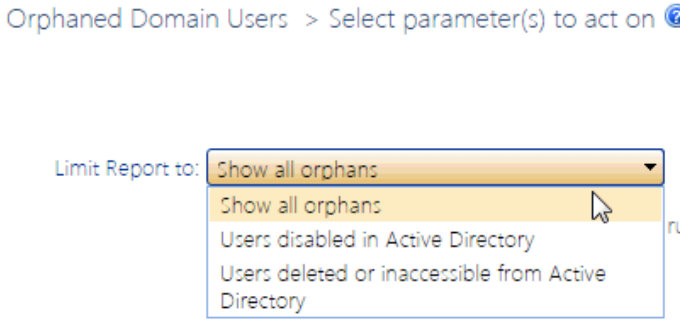
1 Select an object in the SharePoint Hierarchy which you believes contains "orphaned" users.

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

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



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



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

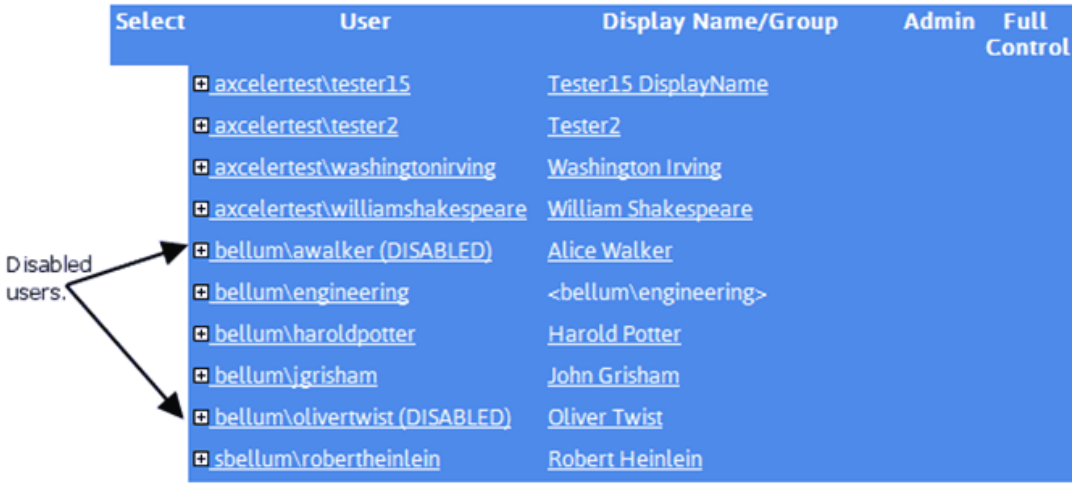
TIP: This option is especially useful if your primary objective is to delete orphaned users, because your result set will be more targeted. (You can not delete permissions directly from an object that has inherited permissions.)

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

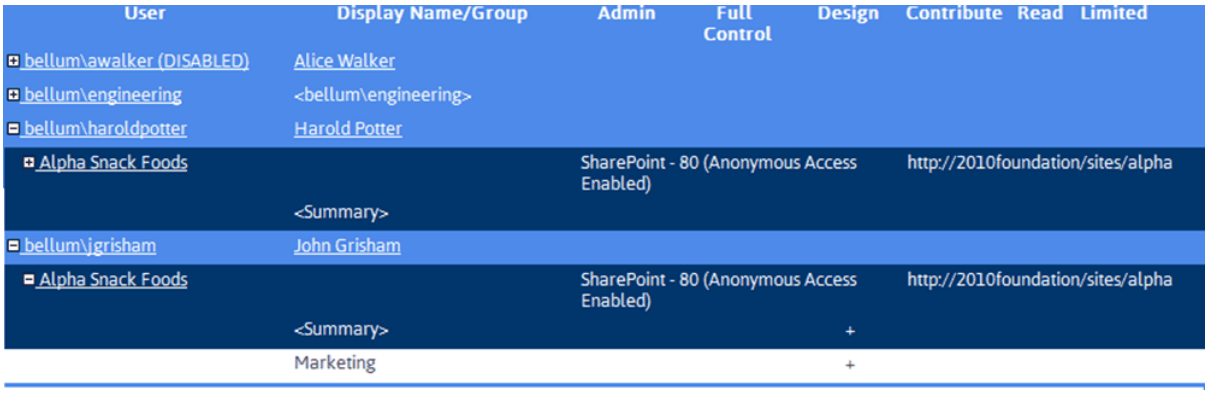
5 Click **[Run Now].**

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

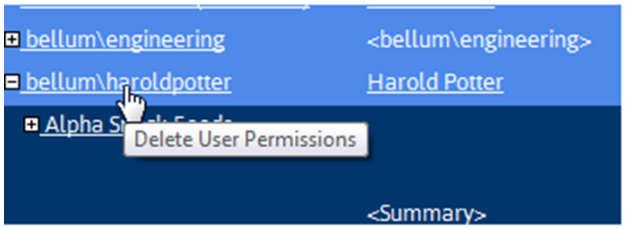
Note that users who are *disabled* in Active Directory are flagged.



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



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.

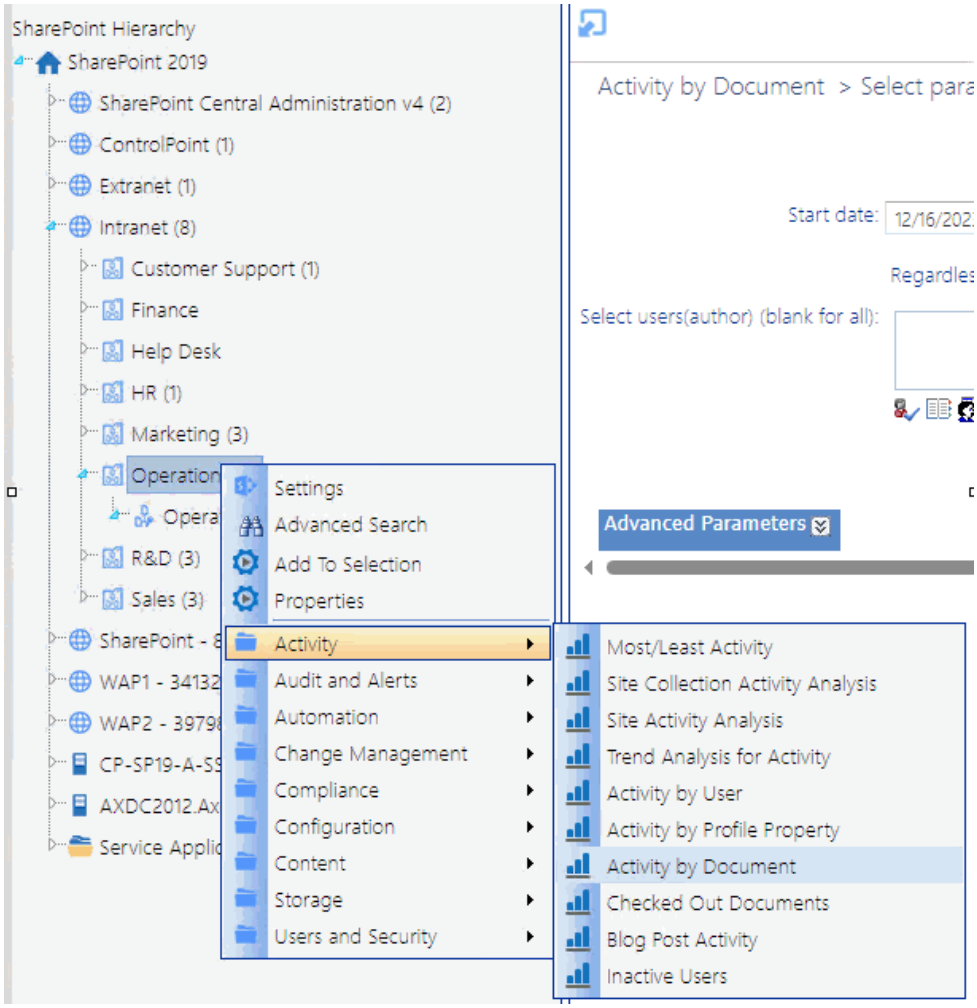
6

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:

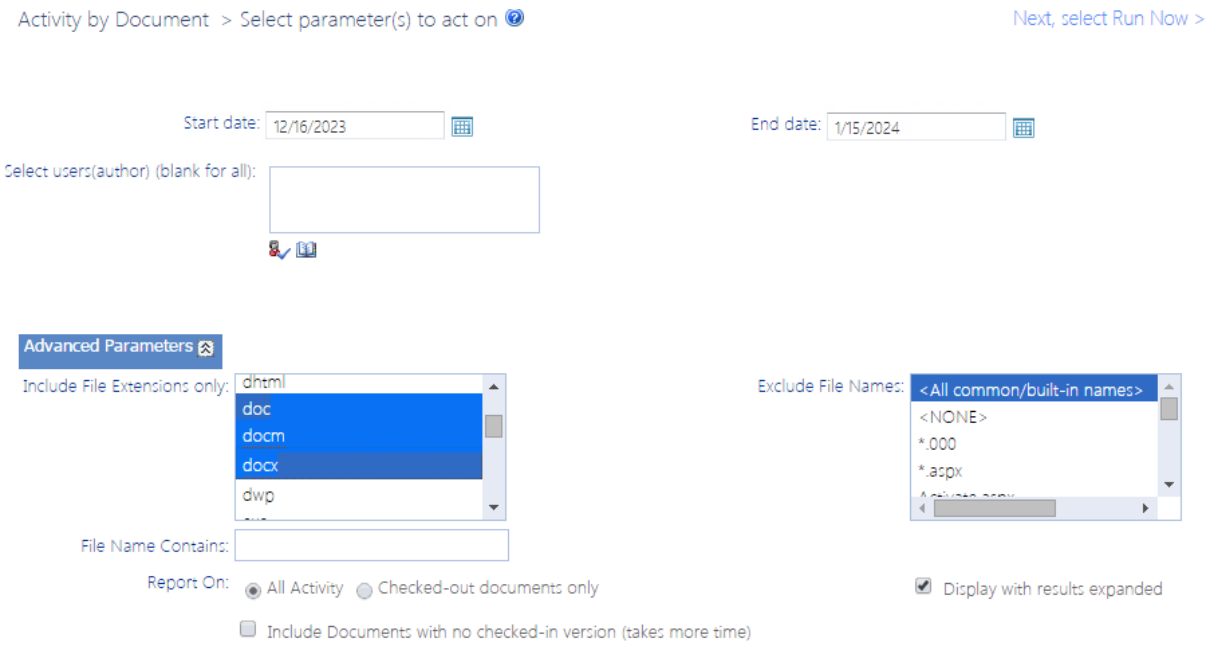
1. Expand a site within the current site collection, then expand the Lists folder. Highlight a document library within that folder, right click and choose **Activity > Activity by Document**.



2 For Parameters:

- Keep the default **Start date** and **End date**.

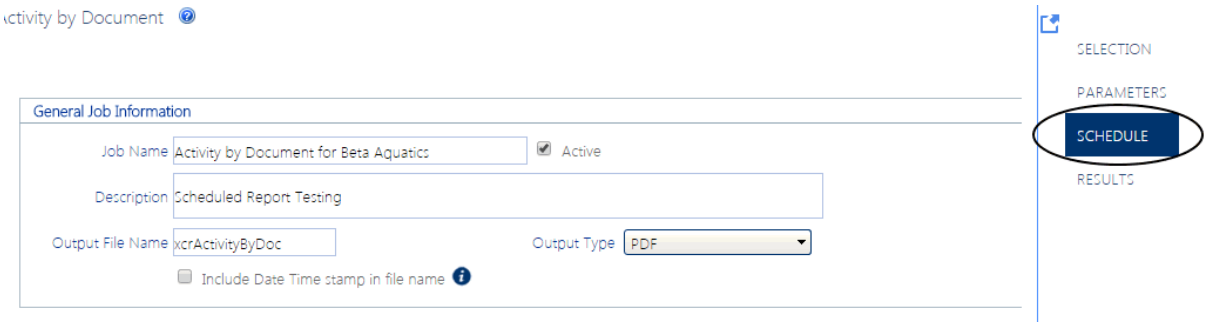
- Expand the Advanced Parameters section and from **the Include File Extensions only** list box, select the following (document) file types:
  - doc
  - docm
  - docx
  - pdf



1 Click the **Schedule** tab.

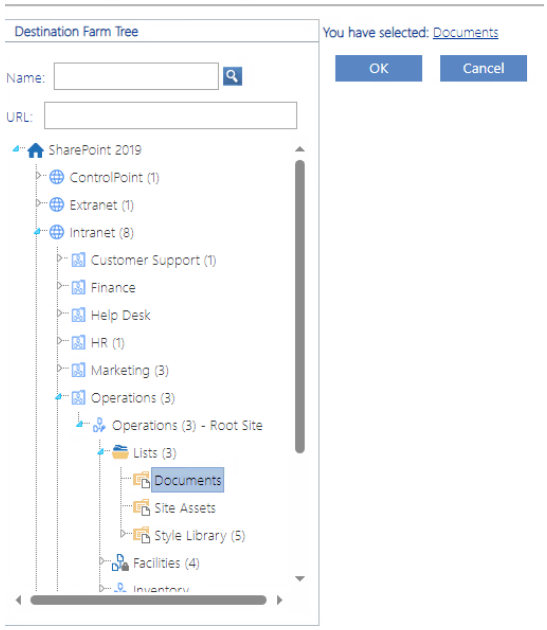
2 Enter a **Job Name** and **Description**.

3 Keep the default Output Type (PDF).



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

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

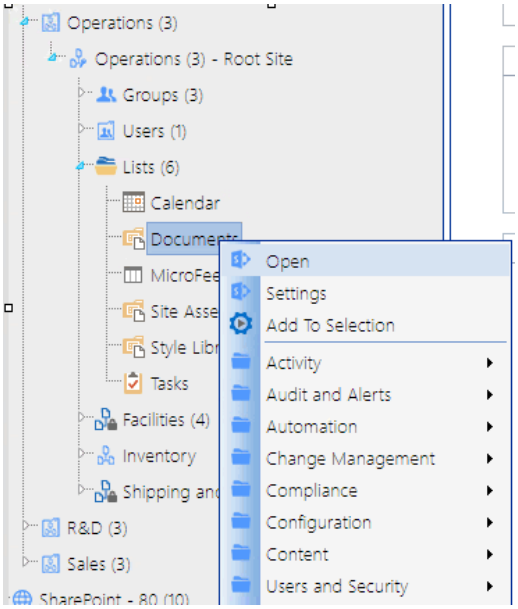


b) From the **Destination Farm** tree, drill down to the library where you want to post analysis results.

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

d) Click [**Schedule].**

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



In this scenario you:

- ✓ Scheduled a ControlPoint analysis.
- ✓ Reviewed the status of the scheduled job in the Schedule Monitor.

- ✓ Opened a SharePoint library from the ControlPoint application interface.

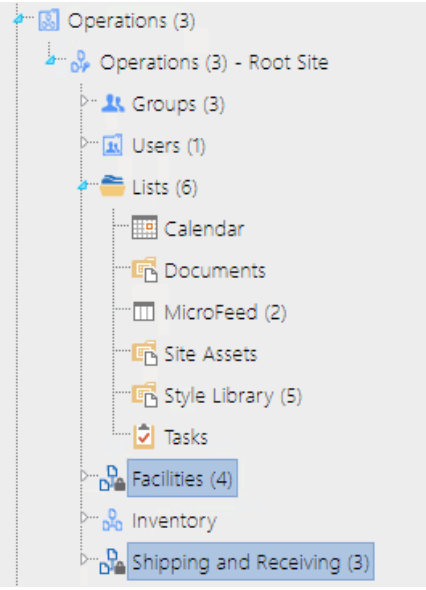
7

Duplicating a User's Permissions and Backing Up Permissions

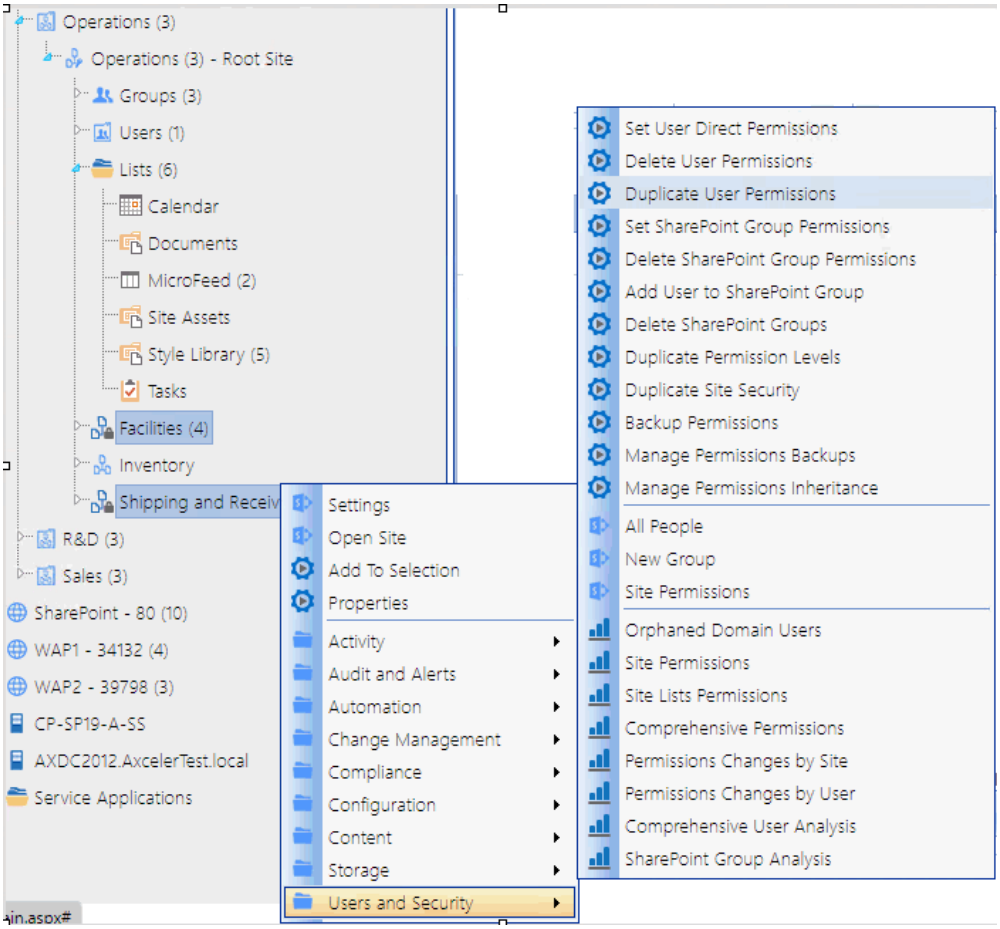
In this scenario, we will duplicate the permissions of a selected user to another user. This operation is useful if, for example, a user has left the company and you want to transfer that user's permissions to his/her replacement. We will perform this operation on two sites with unique permissions. As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



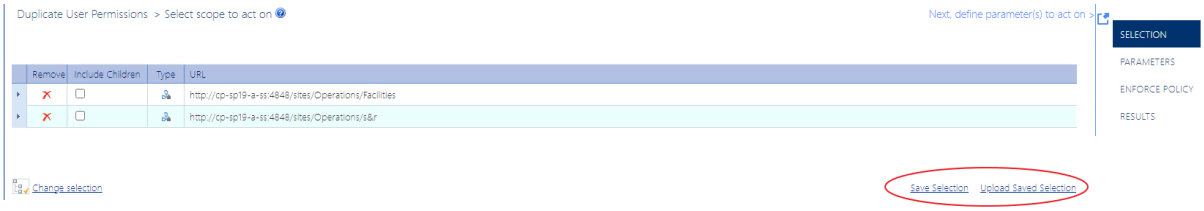
2. Right-click on either site and choose **Users and Security > Duplicate User Permissions.**



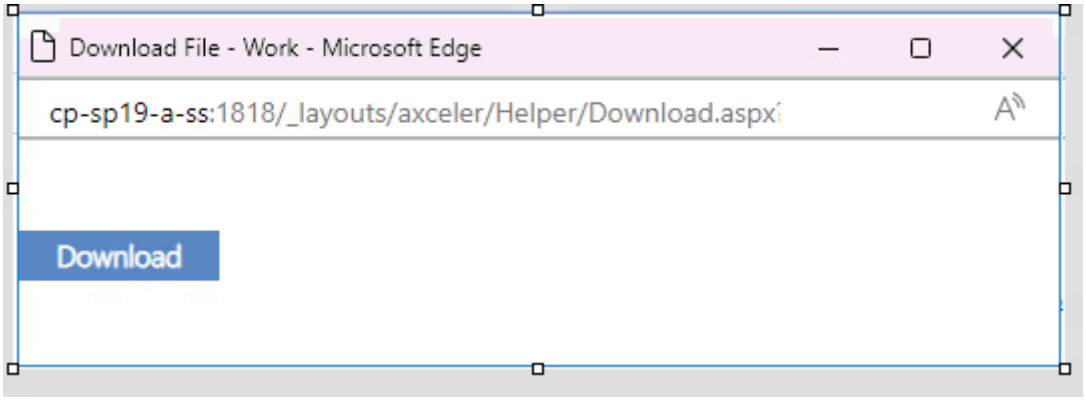
3. We will save our selection—so that we can quickly retrieve it when it comes time to restore permissions—as follows:

   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.

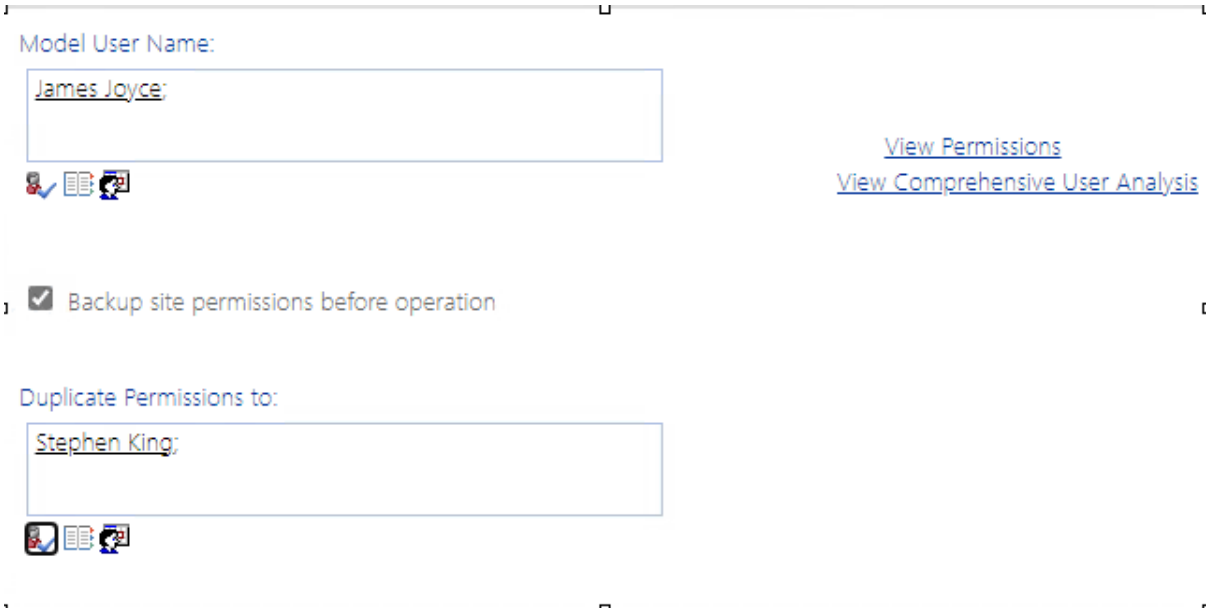


4. Click the **Parameters** tab.
5. To select the user whose permissions you want to duplicate:
   a) In the **Model User Name** field, enter a *full* user account name (for example, *domain\username* or *service provider:username*):
   b) Click the Check Names icon ( ) or press **[Ctrl] k** to validate the user name.
   c) If you want to review the permissions that the model user has for the selected scope, click the View Permissions link to generate a real-time Site Permissions analysis.

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

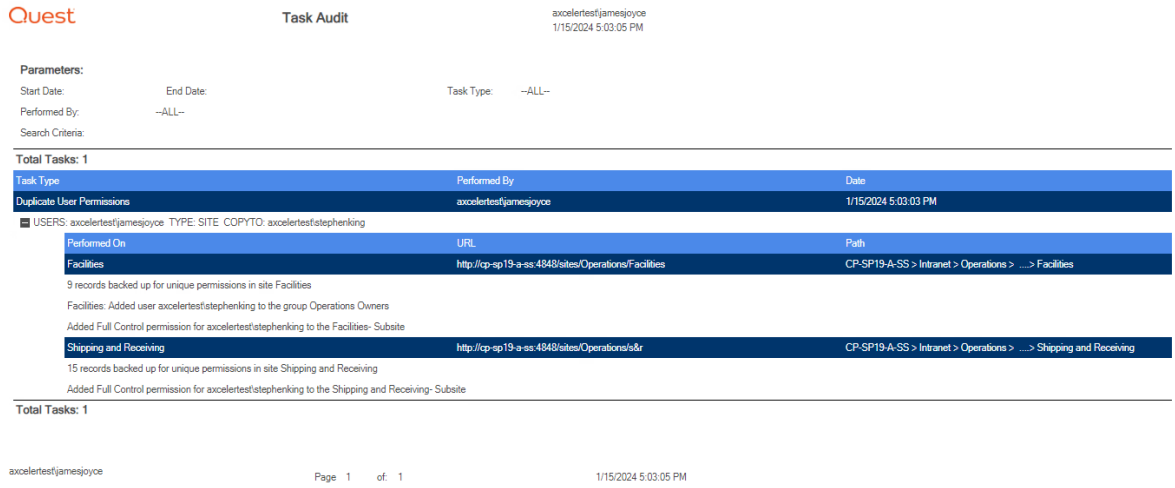
This option will enable you to restore the permissions to what they were before the operation.

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



8 Click **[Run Now]**.

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



Quest

Task Audit

axcelertest\jamesjoyce
1/15/2024 5:03:05 PM

Parameters:

Start Date: End Date: Task Type: --ALL--
Performed By: --ALL--
Search Criteria:

Total Tasks: 1

Task Type	Performed By	Date
Duplicate User Permissions	axcelertest\jamesjoyce	1/15/2024 5:03:03 PM

USERS: axcelertest\jamesjoyce TYPE: SITE COPYTO: axcelertest\stephenking

Performed On	URL	Path
Facilities	http://cp-sp19-a-ss:4848/sites/Operations/Facilities	CP-SP19-A-SS > Intranet > Operations > ....> Facilities
9 records backed up for unique permissions in site Facilities		
Facilities: Added user axcelertest\stephenking to the group Operations Owners		
Added Full Control permission for axcelertest\stephenking to the Facilities- Subsite		
Shipping and Receiving	http://cp-sp19-a-ss:4848/sites/Operations/s&r	CP-SP19-A-SS > Intranet > Operations > ....> Shipping and Receiving
15 records backed up for unique permissions in site Shipping and Receiving		
Added Full Control permission for axcelertest\stephenking to the Shipping and Receiving- Subsite		

Total Tasks: 1

axcelertest\jamesjoyce Page 1 of: 1 1/15/2024 5:03:05 PM

(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

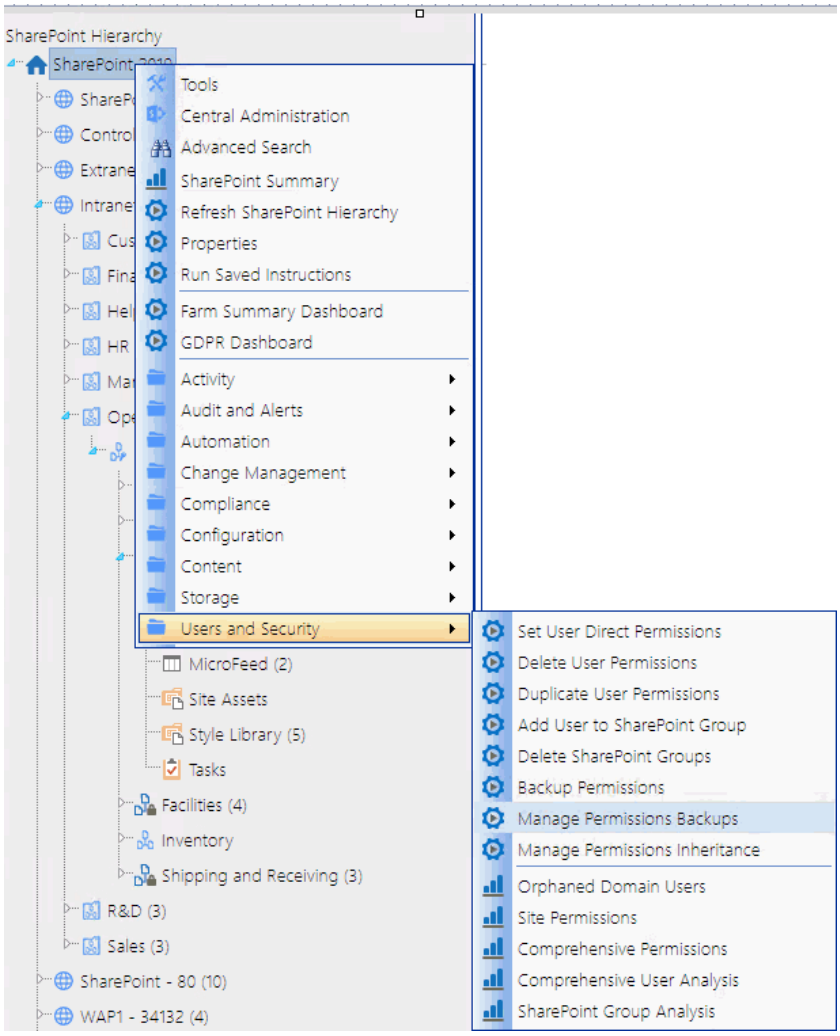
8

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



3. Retrieve the saved selection we used for the Duplicate User Permissions operation as follows:

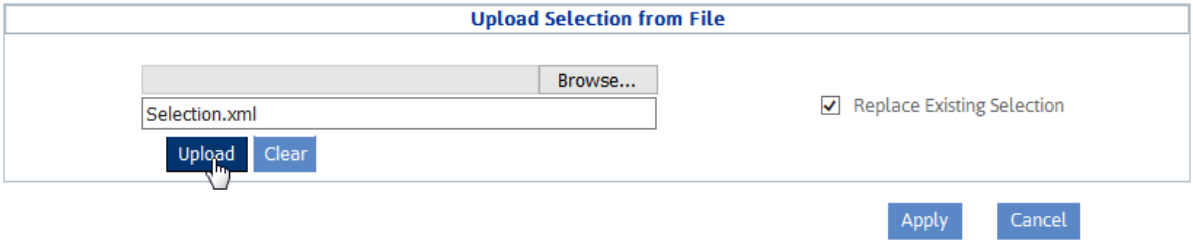
   a) Click the **Selection** tab.

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]**.



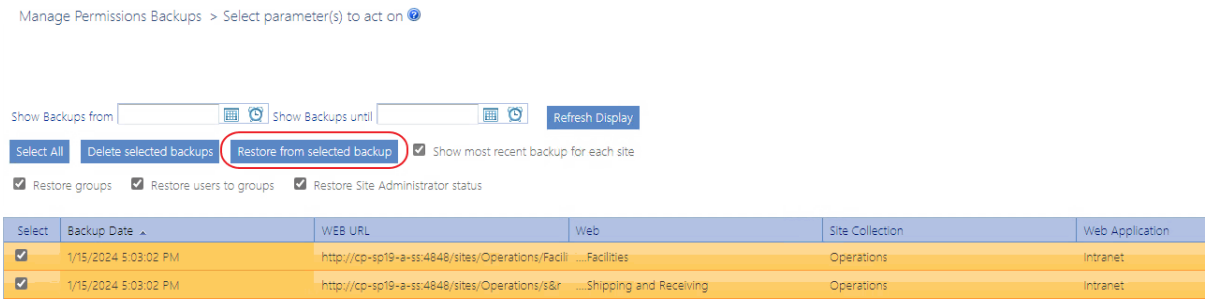
f) Click **[Apply]**.

4 Return to the Parameters tab.

5 Click **[Refresh Display].**

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

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



In this scenario you:

✓ Reused a saved selection.

✓ Restored permissions from a backup.

9

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 Microsoft 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