

# Aquaforest CheckPoint Reference Guide

Version 1.01

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http://www.aquaforest.com/

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#### 1 Product Overview

Aquaforest CheckPoint is a SharePoint Governance tool that is designed to monitor and report various details from an organization's SharePoint farm. It supports both On Premise and Cloud SharePoint installations. It connects to SharePoint remotely, as a result you do not have to install it on the same machine as your SharePoint server and one installation can serve multiple SharePoint farms.

Aquaforest CheckPoint revolves around **Queries**, it allows users create queries that can be used to monitor the state of the SharePoint farm. This tool helps users:

**Gain Insight** – with SP object search engine to locate items such as newly created objects or those not complying with governance standards

**Identify Issues** – such as security problems, obsolete content, non-searchable PDFs, excessively large files or many other issues.

**Take Action** – Direct links to SharePoint administration and Automated Alerts and Reports enable rapid response to issues.

On Premises and In the Cloud – Support for SharePoint 2010, 2013 and Office 365.

Rapid Install - No Server Installation Required - Easy to Use.

## 2 Installation and Licensing

#### 2.1 Installation

The product is installed via Aquaforest\_CheckPoint.msi install package that can be downloaded from Aquaforest's download page: <a href="http://www.aquaforest.com/en/searchable\_pdf">http://www.aquaforest.com/en/searchable\_pdf</a> download.asp

#### 2.2 Requirements

Supported Operating Systems	Windows 7 (64-bit)
Supported Operating Systems	` '
	Windows 8 (64-bit)
	Windows Server 2008 (64-bit)
	Windows Server 2008 R2 (64-bit)
	Windows Server 2012 (64-bit)
	Windows Server 2012 R2 (64-bit)
Supported SharePoint Versions	SharePoint Online (Office 365)
	SharePoint 2010 (Standard or Enterprise)
	SharePoint 2013 (Standard or Enterprise)
Additional Tools	SharePoint Client Components SDK
Disk Space	200 MB
Memory	Minimum 2GB (recommended 8GB)
.NET Framework	4.5

#### 2.3 Folder Structure

- **Bin:** The bin folder contains all the libraries and executables used to make Aquaforest CheckPoint work.
- **Cache:** The cache folder stores the results of some reports so that it can used for later reports if the user enables caching.
- Config: This folder contains the config file where the Aquaforest CheckPoint settings are stored.
- Connections: This folder is used to store the connection details for sites and site collections.
- **License:** This folder is used to store license information.
- Query: This folder is used to store the definition files for reports, any report that is saved will be stored in this folder.
- **Reports:** This folder is used to store scheduled reports as csv and pdf files, it also contains logs and error produced during the generation of reports.
- **Temp:** This folder is used to download pdf files from SharePoint when Aquaforest CheckPoint is trying to find searchable pdf files.

### 3 CheckPoint Objects

#### 3.1 Connections

This represents a Site or a Site Collection in SharePoint. In CheckPoint, a user can Add, Edit and delete a connection. To add a new connection the user will need the URL, Username and Password of the SharePoint site or site collection.

#### 3.2 Reports

CheckPoint is built around the idea of users creating queries on certain SharePoint attribute and objects they are interested in. Each report contains the following:

- Report Name: This the name used to identify the query, it will show up on alerts sent to the administrator.
- SharePoint Object: These are the SharePoint objects that you can run queries on, in check point
  you can run queries on Sites (Site Collections), Lists (Document Libraries), Documents, List Items
  and Users.
- Conditions: These are like the Where clauses in a SQL statement, it allows the User to specify values for certain attribute of the SharePoint object they are interested in.
- Columns: These are the SharePoint attributes that will show up on the report or result returned from the query.
- Connections: This is the site(s) or List(s) a user wishes to run the query on.

#### 3.3 Scheduler

In most instances, the administrator would like to continuously monitor the SharePoint farm. CheckPoint allows users to run queries continuously using the scheduler, the result of these queries will be saved as CSV or PDF files. The different options are:

- Manually: When selected, the user will have to run the query from Graphical User Interface.
- Once a Day: This option allows the user to select a particular time during the day to run the query.
- Run Once: This option allows the user select a date and time in the future to run the query.
- Continuous: This allows the query to be scheduled to run periodically between a start time and end time each day. The periods may be seconds, minutes or hours. For example, a job may be specified to run every 30 seconds between 9:00 and 17:00.

#### 3.4 Alerts

Scheduled reports can be set to send Email Alerts to the user after each run. The user will have to provide the Email address, Subject and Body of the Email to be sent. Below are the different alert settings:

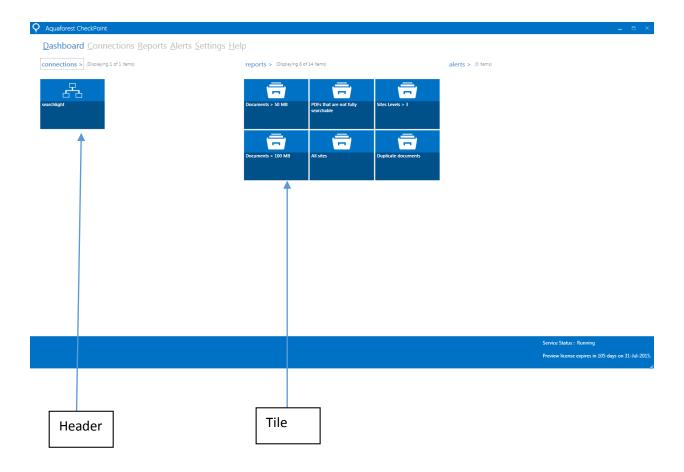
- Show Alert On Dashboard: Setting this to true allow new alerts to be shown on the dashboard.
- Send Email On Error: If set to true, an Email alert will be sent to the user if there is any error when the query is being executed.
- Send Email if Results Are More Than: This allows the user to provide an integer, after execution of a query, if the result has more rows that the integer specified then an email will be sent to the user.
- Attach Results To Alert: If set to true, the CSV result will be attached to Email sent to user.

### 4 Using the Aquaforest CheckPoint GUI

#### 4.1 Dashboard

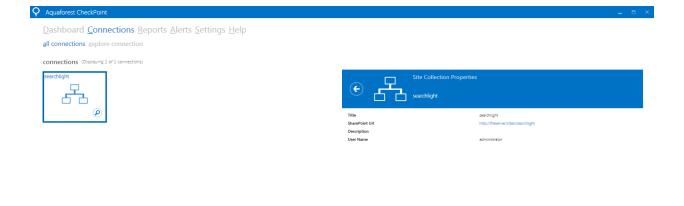
This tab give us an overview of what is going within Aquaforest CheckPoint, It shows the top six connections, Reports and alerts.

- Clicking on any of the headers will take you to a tab showing a full list of the items.
- Clicking on a tile will open the particular object represented by the tile.
- The status bar throughout the application will show you your license and service status



#### 4.2 Connections Tab

This tab shows all the connections that have been added to CheckPoint by the administrator.

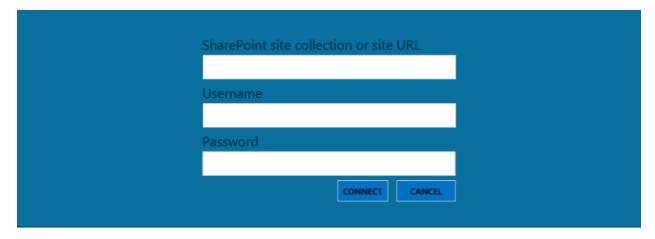




If the user clicks on any connection, more details about the connection will be shown on the right and all the grayed out controls (Inactive controls at the bottom) will become active.

#### 4.2.1 Adding a New Connection

To add a new connection click the "Add Connection" button and a dialog box will come up, all you need to enter is the connection URL, Username and password. After that is done click on the "CONNECT" button.



#### 4.2.1.1 SharePoint URL format

Below is an example of how to set the SharePoint URL format when setting up a document library in CheckPoint.

SharePoint 2010, actual URL:

http(s)://SharePoint2010/site/myLibrary/myForms/AllItems.aspx

Supported URL format in CheckPoint:

http(s)://SharePoint2010/site/myLibrary

SharePoint 2013, actual URL:

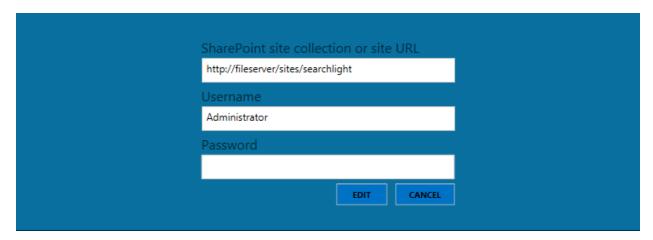
http(s)://SharePoint2013/site/Library/\_layouts/15/start.aspx#/mylibrary/Forms/AllItems.aspx

Supported URL format in CheckPoint:

http(s)://SharePoint2013/site/Library/mylibrary

#### 4.2.2 Editing a connection

A user might want to edit a connection after adding it. This could be because the Username or Password of the connection has changed. To edit a connection, the user will need to select the connection then click the "Edit Connection" button. This will bring up a dialog box similar to the one used to add a new connection, the only difference is that the URL and Username is populated. After the changes are made, the user should click the "EDIT" button.



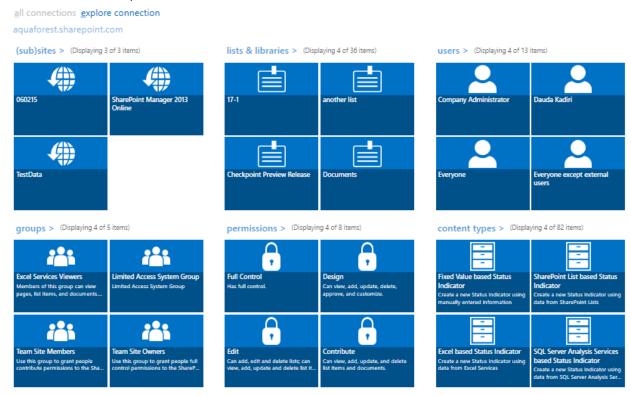
#### 4.2.3 Deleting a Connection

To delete a connection, the user will need to select the connection then click the "Delete Connection" button. This will delete the connection from CheckPoint.

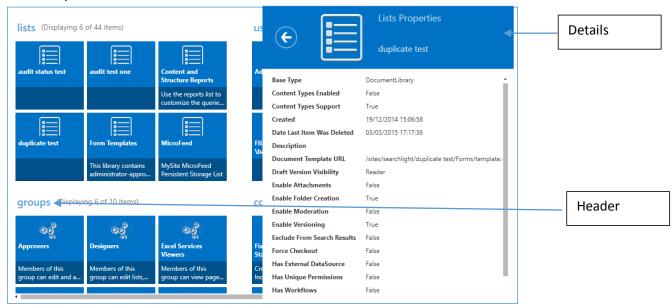
#### 4.2.4 Exploring a Connection

CheckPoint allows a user to drill down a SharePoint farm and see more details about it without having to run queries on the farm. To explore a connection, select the connection and either click the button that looks like an eye in the connection tile or the "Explore Connection" button at the bottom of the screen.

#### This will show the explorer similar to the one below



To view any more detail about the objects which are represented by the tiles the user should click on the tile he/she is interested in.



The window above shows the first six items of each object type, if the user wants to drill down to see all the items the user can click on the header shown above.

#### 4.2.5 Open site in web browser.

CheckPoint allows users to open SharePoint sites in the default web browser. There are two buttons that can help do that.

- Clicking the "Open in Browser" button allows the user to view the home page of the SharePoint site selected.
- Clicking the "Open Settings" button allows the user to view the settings page of the SharePoint site selected.

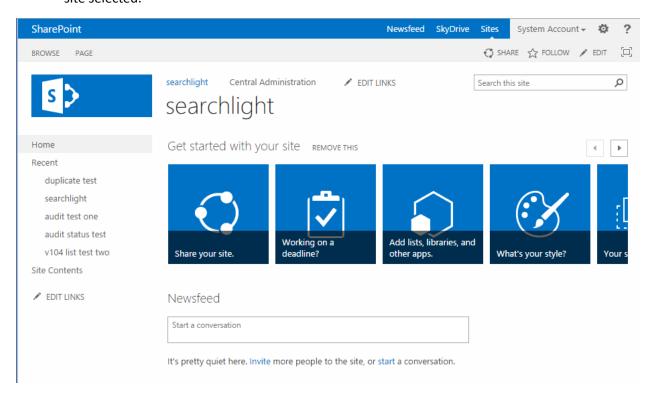


Fig: Showing the result of clicking the "Open in Browser" button.

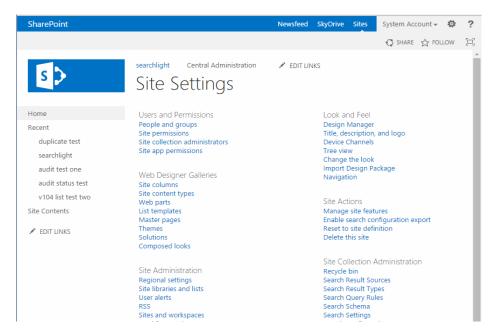
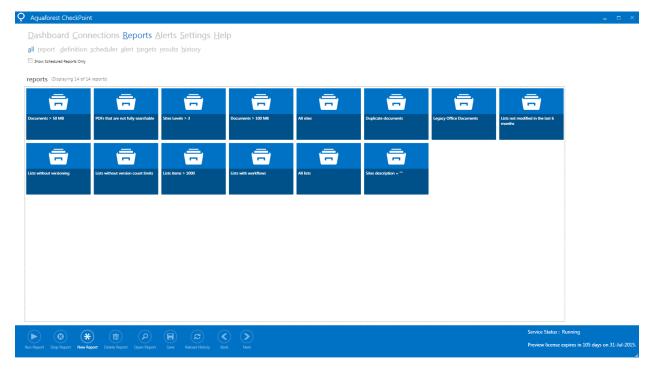


Fig: Showing the result of clicking the "Open Settings" button.

#### 4.3 Reports Tab

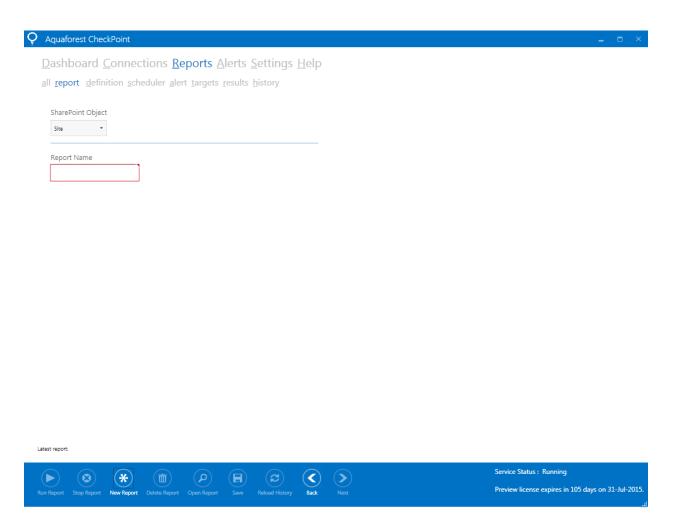
This tab shows all the queries that have been saved by the user and it also shows a set predefined queries shipped out with CheckPoint to help the user get started.



#### 4.3.1 Creating a Report

To create a new report, the user has to click on the "Report" tab, then click on the "New Report" button. This will show a new window that will enable the user in the creation of a new query.

#### 4.3.1.1 Reports

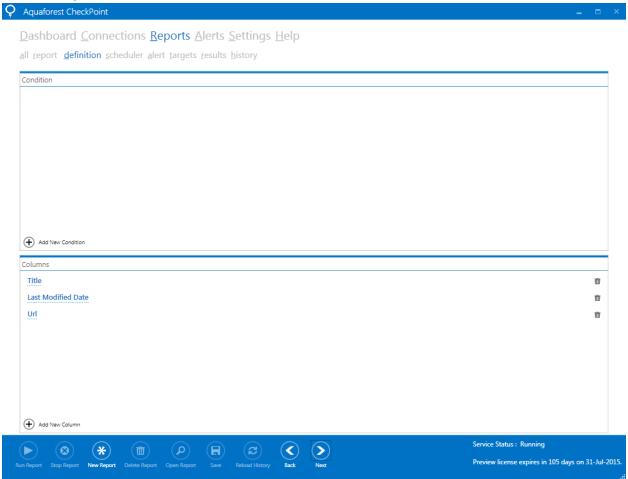


When the above window come up, the user should select the SharePoint object he/she wishes to query, the available options are:

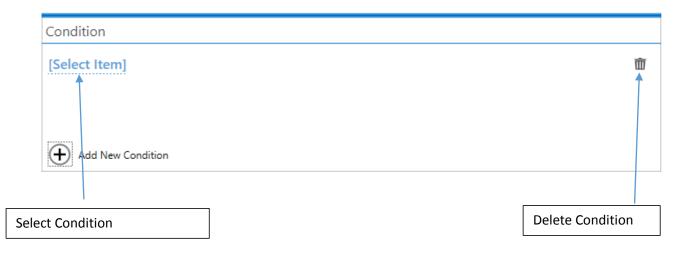
- Sites (Site Collections)
- Lists (Document Library)
- Documents
- List Items
- Users

The user should also provide the report name, this is important especially if the user wants to save the report for future use. After all this is done the user should click on the next button, this will take the user to the "Definition" Tab.

#### 4.3.1.2 Definition

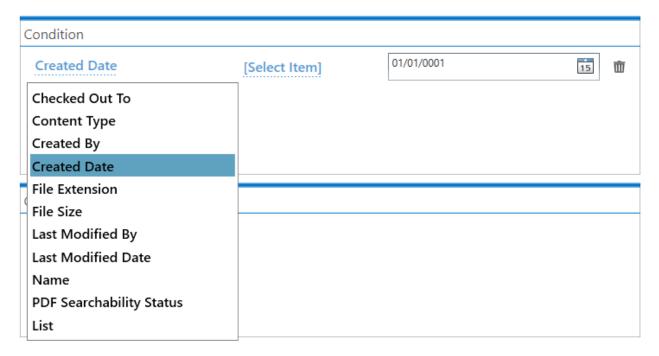


Click the "Add New Condition" button at the bottom of the condition section to add an empty condition.



Clicking the delete button will delete the condition, while clicking on the "Select Item" will give you a list of attributes that can be added as a drop down list.

The user should select the condition he/she is interested in.

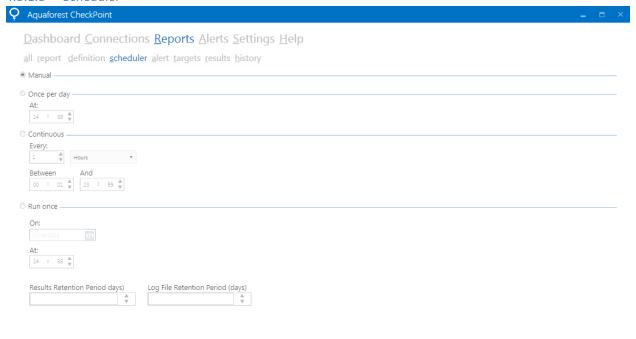


After the condition is selected, the user should select the appropriated comparison operator and value as shown below.



The columns can be added the same way the condition was added. After adding the columns, click next. This will bring you to the scheduler page.

#### 4.3.1.3 Scheduler

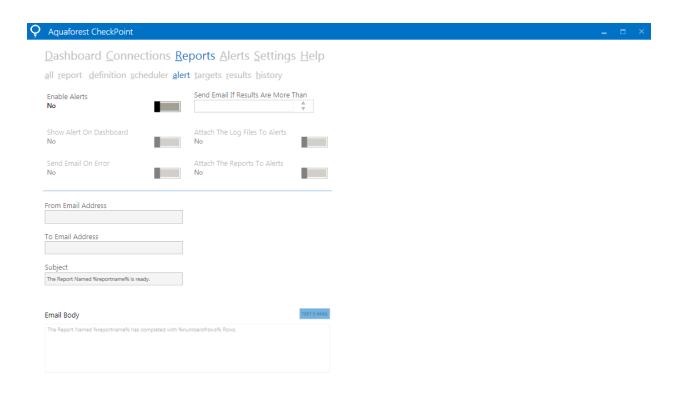




The scheduler allows Aquaforest CheckPoint to automate the monitoring and running of reports depending on the user's choice. There are three types of schedule types namely:

- Manual: If this option is selected, Aquaforest CheckPoint will generate the reports whenever the
  user clicks on the "Run Report" button. Note that Aquaforest CheckPoint generate these reports
  only once per click.
- Once per day: This setting allows the user to select any time during the day that Aquaforest CheckPoint will generate Reports.
- **Continuous:** This allows reports to be generated periodically between a start time and end time each day. The periods may be minutes or hours. For example, a job may be specified to run every hour between 9:00 and 17:00.
- **Run Once:** This setting allows the user to schedule the report to be generated once on a given date and time.
- **Results Retention Period:** This is an integer that represents the number of days the reports should be kept, all reports older than this value will be deleted automatically.
- **Log File Retention Period:** This is an integer that represents the number of days the log files should be kept, all reports older than this value will be deleted automatically.

#### 4.3.1.4 Alerts





The "Alert" tab allows the User to specify email addresses and messages to be sent after a report is successfully generated or fails during generation. It also allows the user to specify the criteria to be met before alerts are sent or displayed.

- From Email Address: This textbox takes the Email Address of the sender.
- **To Email Address:** This textbox takes the Email Address of the receiver.
- **Subject:** This textbox takes the subject of the email to be sent.
- Body: This textbox takes the main message to be sent.
- **Show Alert On Dashboard:** If this toggle button is checked, latest alerts sent out will appear on the dashboard.
- Attach Log Files To Alerts: Checking this toggle button while attach log files of reports being generated to the Email alerts.
- Send Email On Error: Checking this option will send an Email to the user when a report fails to be generated, this will also attach the log file to the Email so that the user can know the reason for the failure.

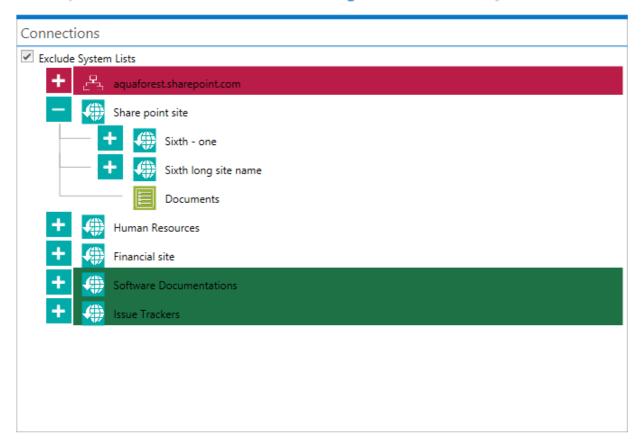
• **Send Email If Results are More Than:** This textbox takes an integer as the input, whenever the number of rows contained in the results in more than the integer specified, an alert will be sent.

N.B: Before the alerts are sent out properly, you will have to put in a valid SMTP configuration in the "Settings" tab.

#### 4.3.1.5 Targets

# Dashboard Connections Reports Alerts Settings Help

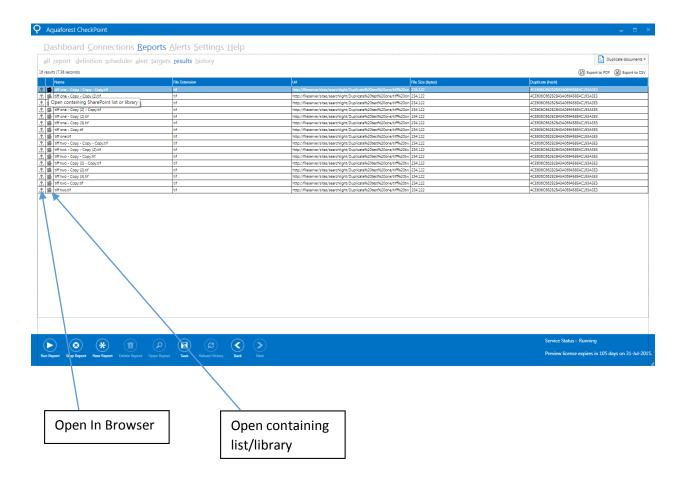
all report definition schedule alert targets results history



This tab allows the user to select the site collections, sites, lists and document libraries that the report should be generated from. The user should select the items he/she is interested in and click on the next button.

#### 4.3.1.6 Result

The "result" tab is used to display the result of a report that is executed manually, it is simply a data grid that can be sorted according to the columns select in the definition windows.

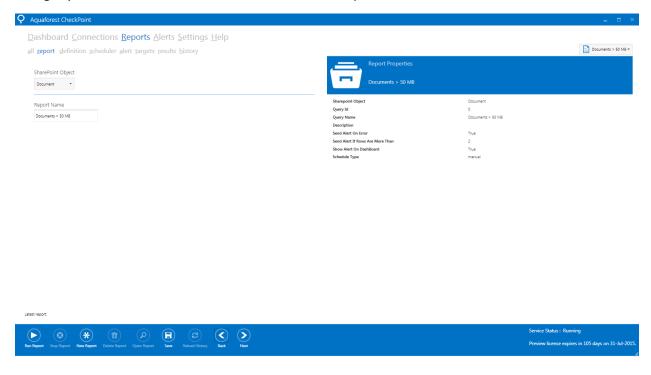


Below is a list of operations that a user can perform in the "results" tab.

- Clicking the folder icon or double click anywhere in a row will open that row in the default web browser.
- The export to CSV button will generate a csv file containing the results displayed in the data grid.
- The export to PDF button will generate a PDF file containing the results displayed in the data grid.

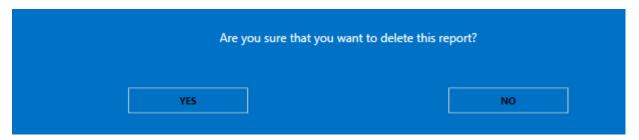
#### 4.3.2 Editing a Report

To edit a report, the user has to click on the "Report" tab, in the Report tab, the user should select the "all" sub-tab to view all the reports saved in Aquaforest CheckPoint. Click on the report that is to be edited then click on the "Open Report" report button, this will take you to the "report" tab. Make the changes you want to make and click the save button to update it.



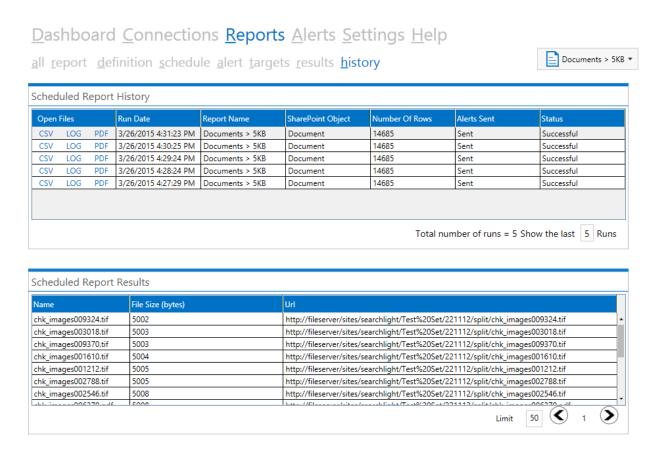
#### 4.3.3 Deleting a Report

To delete a report, the user has to click on the "Report" tab, in the Report tab, the user should select the "all" sub-tab to view all the reports saved in Aquaforest CheckPoint. Click on the report that is to be deleted then click on the "Delete Report" report button. A dialog box will pop up asking you if you really want to delete the report, click on yes and your report will be deleted.



#### 4.3.4 Report History

This tab is mainly used with reports that are executed by the scheduler. It gives the user an overview of the number of times a report was executed, the jobs that failed, the number of rows returned if the job was successful and also the results returned by each execution.

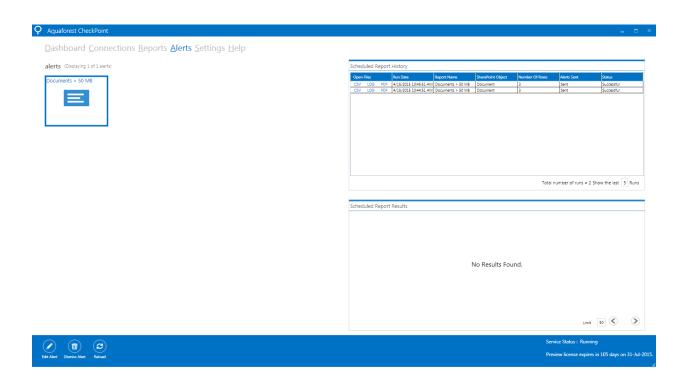


The first table shows the shows the details of each report executed in the past, selecting any row in the first table will populated the Schedule.

#### 4.4 Alerts

The "Alerts" tab shows you all the alerts the recent alerts that have been sent by Aquaforest CheckPoint. It is a super set of the alerts shown in the "Dashboard". It allows the user to perform the following actions.

- View Alert History: Clicking any alert in this tab will populate the alert history control found on the left side of the "Alert" tab. This control looks exactly like the "Report History", the only difference is that it contains only report that have alerts sent to the user.
- Edit Alert: Selecting an alert and clicking on the "Edit Alert" Button will take you to the "Alerts" tab of the report section, this will allow you update the alert settings.
- Dismiss Alert: Selecting an alert and clicking on this button will remove the alert notification for that report from the Aquaforest CheckPoint UI.

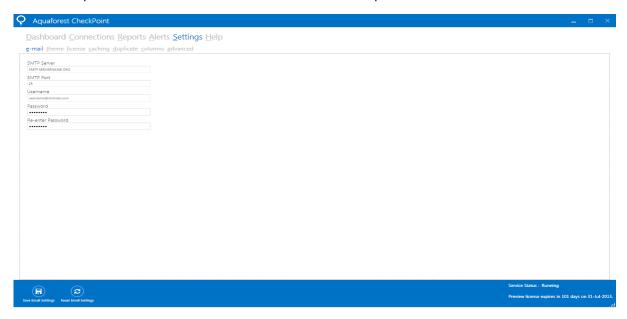


#### 4.5 Settings

The settings tab is used to carry out application wide settings, there are a number of different sections which are described below.

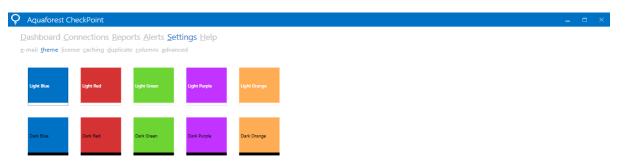
#### 4.5.1 Email

Here you will need to configure details for your SMTP server including a username and password which will enable Aquaforest CheckPoint to send email alerts for a report.



#### 4.5.2 Theme

Aquaforest checkpoint comes with ten different themes, to change the theme just click on the desired tile.



#### 4.5.3 License

To update the license key enter the license key provided in the License Key Text Area and click on the "Update License" from the bottom control.



#### 4.5.4 Caching

Aquaforest CheckPoint uses caching by default which can help with performance when running reports. The setting by default is enabled, the cache will be updated after 1 day.



#### 4.5.5 Duplicate

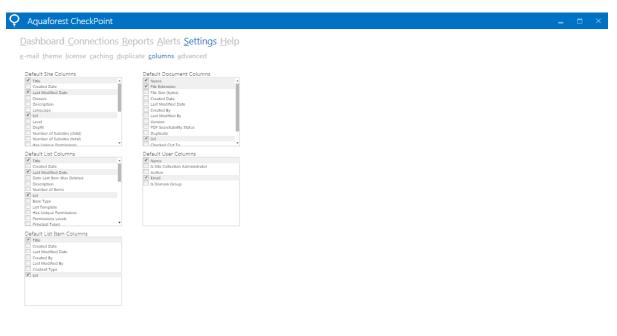
Aquaforest CheckPoint provides functionality for detecting duplicate data. Due to the way SharePoint manages certain documents types (primarily office documents) we need to use a small threshold when determining duplicate data. The default threshold is set to 10 bytes.





#### 4.5.6 Columns

This tab controls the columns which are available for selection when viewing results for reports.





#### 4.5.7 Advanced

The Advanced tab includes the service status, the option to display the welcome screen at start-up and the option to use parallel queries.

