



# DocAve® 6.0.1

## Report Center

### User Guide

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## About Report Center

Gain a comprehensive understanding of your SharePoint platform's usage, topology, performance and storage trends while generating customizable SharePoint usage reports and alerts with DocAve Report Center.

Delivering all the tools of [DocAve SharePoint Monitor](#), plus many additional enterprise-class reporting solutions, DocAve Report Center enables administrators to configure customizable alerts to be notified immediately of network, storage, or usage issues that could result in a negative end-user experience, allowing for more proactive and intelligent management decisions.

Piloted via a single, easy-to-use interface, and delivering a customizable dashboard fully integrated into the SharePoint interface, DocAve Report Center is the only tool administrators need to obtain the knowledge vital for delivering optimal platform performance and successful strategic planning.

## Complementary Products

Many products and product suites on the DocAve 6 platform work in conjunction with one another. The following products are recommended for use with Content Manager:

- DocAve Archiver for moving unused data to lower tiered storage which lowers storage cost.
- DocAve Storage Manager for offloading BLOBs from SQL servers to more cost efficient storage devices.

## Submitting Documentation Feedback to AvePoint

AvePoint encourages customers to provide feedback regarding our product documentation. Click the following URL to access the **Submit Your Feedback** form on our Web site:

<http://www.avepoint.com/resources/documentation-feedback/?flush=1>

## Before You Begin

Refer to the sections for below for system requirements for Report Center.

### Configuration

In order to use Report Center, the DocAve 6 platform must be installed and configured properly on your farm. Report Center will not function without DocAve 6 present on the farm.

### Agents

SharePoint Agents are responsible for running DocAve jobs and interacting with the SharePoint object model. At the minimum, DocAve must have one agent installed on at least one of the Web Front End (WFE) servers. As for Report Center, the DocAve Agents must be installed on all the Web Front End (WFE) servers in your farm. DocAve Agents enable DocAve Manager to communicate with the respective servers, allowing for Report Center commands to function properly.

**\*Note:** The use of system resources on a server increases when the installed agent is performing actions. This may affect server performance. However, if the agent installed on a server is not being used, the use of system resources is very low and, therefore, the effect on server performance is negligible.

For instructions on installing the DocAve Platform, DocAve Manager, and DocAve Agents, see the [DocAve 6 Installation Guide](#).

## Licensing and Permissions

To install and use Report Center properly, ensure that the agent account has the following permissions.

1. Local System Permissions: These permissions are automatically configured by DocAve during installation. Refer to [Local System Permissions](#) for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.
  
2. SharePoint Permissions
  - User is a member of the Farm Administrators group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.
  - Full control to all zones of all web applications via User Policy for Web Applications
  - User Profile Service:
    - User Personal Features
    - Create Personal Site
    - User Social Features
  - Managed Metadata Service: Term Store Administrator
  - Business Data Connectivity Service: Full Control
  - Search Service: Full Control
  
3. SQL Permissions
  - Database Role of db\_owner for all the databases related with SharePoint, including Content Databases, Config Database, and Central Admin Database
  - Db\_owner of SharePoint 2010 Web Analytics Service Databases
  - Db\_owner of SharePoint 2010 WSS\_Logging Database
  - Db\_owner of SharePoint 2010 User Profile Service Application Databases

## Local System Permissions

The following Local System Permissions are automatically configured during DocAve 6 installation:

- User is a member of the following local groups:
  - IIS WPG (for IIS 6.0) or IIS IUSRS (for IIS 7.0)
  - Performance Monitor Users
  - DocAve Users (the group is created by DocAve automatically; it has the following permissions):

- Full control to the Registry of  
HKEY\_LOCAL\_MACHINE\SOFTWARE\AvePoint\DocAve6
- Full control to the Registry of  
HKEY\_LOCAL\_MACHINE\System\CurrentControlSet\Services\EventLog6
- Full Control to the Communication Certificate
- Permission of Log on as a **batch job** (it can be found within **Control Panel > Administrative Tools > Local Security Policy > Security Settings > Local Policies > User Rights Assignment**)
- Full Control Permission for DocAve Agent installation directory
- Local Administrator (This permission is required if you wish to use *CPU/Memory Usage* or *Networking*.)
- Full control to the path of IIS log files and IIS applicationHost.config file (This permission is required if you wish to use *Download Ranking*, *Failed Login Attempts* or select the *Retrieve IIS Logs* option when using Auditor Retrieved.)

## Getting Started

Refer to the sections below for important information on getting started with Report Center.

## Launching Report Center

To launch Central Admin and access its functionality, follow the instructions below:

1. Log in to DocAve. If you are already in the software, click the **DocAve** tab.
2. From the **DocAve** tab, click **Report Center** to launch Report Center.
3. Click the report category, report type, or the specific report you wish to access, or click **Settings** to configure Report Center settings. (Details about the different report types, and configuring settings can be found in the body of this user guide.)

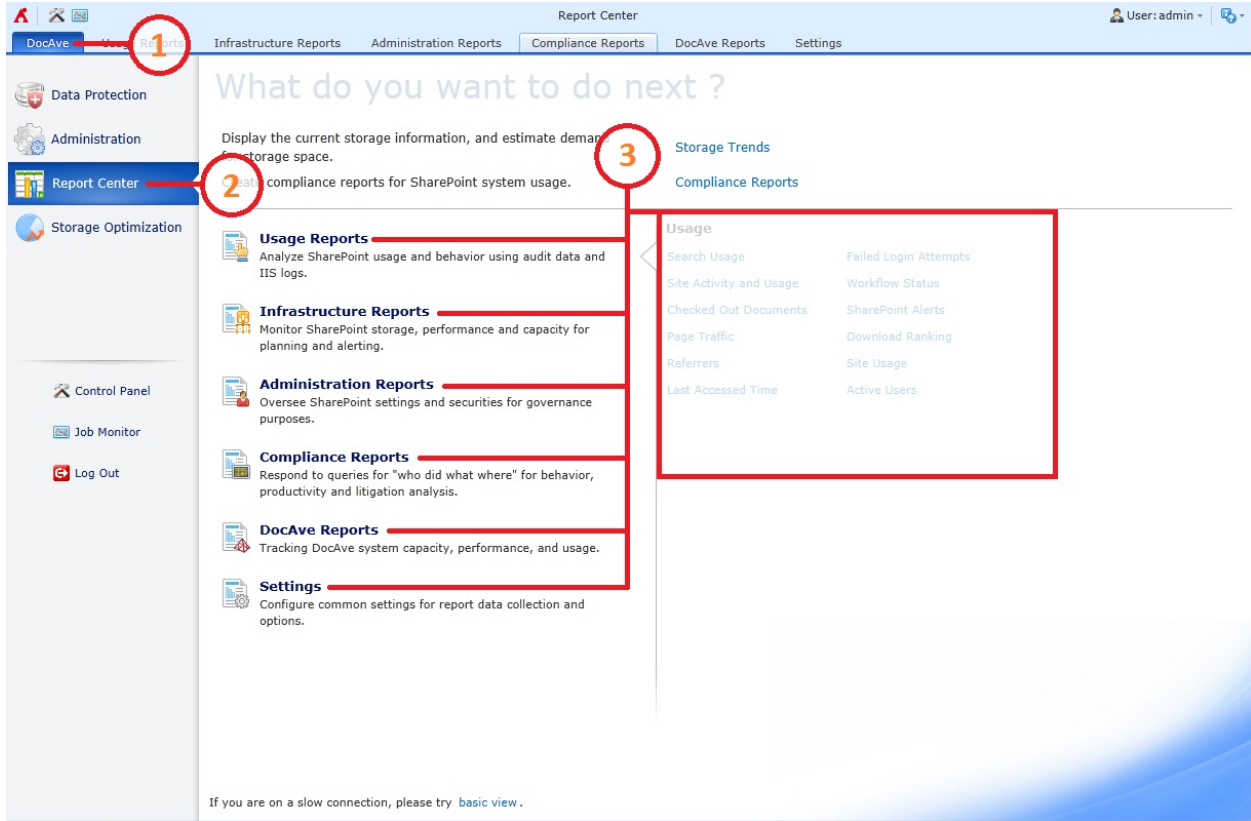


Figure 1: DocAve module launch window.

## Understanding Report Center

DocAve Report Center provides you with a comprehensive and customizable reporting toolset. The reports are broken down into five categories, each with its own interface:

- Usage Reports – Reports for SharePoint usage
- Infrastructure Reports – Reports for your IT infrastructure
- Administration Reports – Reports for your SharePoint Administration
- Compliance Reports – Reports for compliance records
- DocAve Reports – Reports for your DocAve usage

By having all of your reporting tools in a centralized location, you can quickly and easily access all of the information you need. To access a report category, click its corresponding tab.

Each report category contains a ribbon of tools for creating different types of reports within that category, along with an Actions toolbar for executing and managing reports. Below the ribbon, you will find the configuration areas for each report type as well as the report display pane. Due to each report category requiring different configurations, the interface for each report category is unique. You will be introduced to each category's interface at the beginning of each respective section in this guide.

Report Center also has the DocAve Job Monitor integrated within each module's interface so you can more easily keep track of running reports and scheduled reports. To access the jobs of each module, click **Job Monitor** in the ribbon. For more information about using Job Monitor, refer to the [DocAve 6 Job Monitor User Guide](#).

# Configuring Report Center Settings

While Report Center is able to generate some reports without any configuration, in order to have all features of Report Center ready to use when you need them, it is best to configure your settings ahead of time.

By configuring Report Center settings prior to use, you avoid the having to do so when you actually need the information. This way, you can confront any issues while configuring settings without facing a pressing deadline.

To configure settings for Report Center, follow the instructions in each of the corresponding section.



## Data Collection





Data Collection settings allows you to view and manage when and how often data is collected by Report Center. Report Center collectors are imperative for many of the Report Center components, and must be configured correctly before any data can be gathered. Note that the more frequently data is collected, the smaller the collection job is to run.

By giving you the flexibility of when and how often to collect data, Data Collection can be optimized to fit your scheduling needs.

To configure Data Collection settings for Report Center:

In Report Center, click the **Settings** tab, then click **Data Collection** on the ribbon. You are presented with the Collector Management pane where you will see a list of different types of collectors for Report center. The following are actions you can perform on Report Center collectors:

- **Priority** – Allows you to sort the Collectors in order of importance to you. To change the priority of a collector, click on its drop-down menu in the **Priority** column, then select where on the list you want the Collector to be.
- **View Profile** – Allows you to view all saved job profiles of the selected collector. Click on a profile to select it, then click **View Profile** on the ribbon to see a list of all of the saved Collector job profiles. You can customize how the Collector profiles are displayed in a number of different ways:
  - Search – Search allows you to filter the profiles displayed by the keyword you designate; The keyword must be contained in a column value. At the top of the View Profile pane, enter the keyword for the profile(s) you wish displayed. You can select for search to **Search all pages** or **Search current page**. Note that the search function is not case sensitive.
  -  - You can manage which columns are displayed in the list so that only information you want to see is displayed. Click  then check the checkbox next to the column name to have that column shown in the list.

-  – Click  of the column you want to hide, the specified column will not be displayed in the list.
-  – This allows you to filter which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than based on a keyword. Click the  icon of the column you want to filter, then check the checkbox next to the item name to have that item shown in the list.


Select a profile, then click **Enable** or **Disable** on the ribbon to perform that action to the profile. Click **View Scope** on the ribbon to see the scope tree in the View Scope pane.



- **Edit** – Allows you to configure the schedule of the selected collector at the bottom of the Collector Management pane. The schedule of a collector is displayed in the Interval column of the Collector Management pane. To change schedule of a collector, select the collector by clicking on its row in the display table, then click **Edit** on the ribbon. You will see a new pane below Collector Management. Designate a time of day you wish the collector to run by selecting a choice from the **Collect data at:** drop-down menu. Then enter an integer in the **Interval** text box. The collector job will run at the specified time automatically.
- **Collect Now** – Allows you to run the selected collector immediately.
- **Job Monitor** – Allows you to view the detailed job information about all of the Report Center jobs.
- Click **OK** to save the changes or click **Cancel** to cancel the configuration.
- **Back** – Returns you to the Report Center Settings page.

## IIS Logging

IIS Logging allows DocAve to retrieve data from the IIS Log. By configuring the IIS Logging settings, you can obtain reports for Download Ranking and Failed Login Attempts.

To configure IIS Logging settings, follow the instructions below:

1. In the **Settings** tab of Report Center, click **IIS Logging**. A window pops up with a list of all web applications allowing you to modify the IIS Logging settings for each web application. You can customize how the list is displayed by:
  - **Search** – Search allows you to filter the web applications displayed by the keyword you designate; The keyword must be a column value. At the top of the IIS Logging popup, enter the keyword for the web application(s) you wish displayed. You can select for search to **Search all pages** or **Search current page**. Note that the search function is not case sensitive.
  - Click the  icon. A drop-down menu where you can select the column(s) you wish to be displayed appears.

- Click the  in the column title of Web Application and IIS Log Status. A drop-down appears with a **Search** field, as well as a selection list allowing you to customize what is displayed in the respective column.
  - Click  in the column title to remove the column from view.
2. Select a web application by checking its corresponding checkbox. Then either click **Select All Fields** or **Rollback**.
    - **Select All Fields** – Include all of the IIS logging fields for data collection.
    - **Rollback** – Returns IIS logging configuration to the previous state.

**\*Note:** DocAve will not automatically restore the IIS log settings to the default value after the uninstallation. You must set it to the default value in this interface before uninstalling DocAve.

## Reporting Service

Reporting Service extracts data from the SQL Reporting Service for Report Center to generate reports with.

To configure Reporting Services for Report Center, follow the instructions below:

1. In the **Settings** tab of Report Center, click Reporting Services on the ribbon. A window pops up with the Reporting Services configuration page.
2. Check the **SQL Reporting Services Configuration** checkbox. This enables Reporting Services.
3. Enter the **Web Service URL**, then enter the **Username** and **Password** in the appropriate text box. This provides Report Center the **Report Server Web Service URL** used to connect to the the SQL reporting service.
4. Select which type of authentication method to use to access the database. Then enter the **Account** and **Password**.  
**\*Note:** Use the same credentials as you did when you set up Reporting Service on the SQL server.
5. Click **OK** to save the configuration.

## Audit Controller

Audit Controller leverages DocAve and native SharePoint functionalities to allow DocAve Auditor in Report Center to obtain user operation information at various SharePoint object levels from web applications down to folders. By creating plans in Audit Controller, you can fully customize what data to collect and from where. When creating plans, you can:

- Configure rules in Audit Controller to customize which audit record events you would like to collect from SharePoint.
- Create filters so that these rules are only applied to the object(s), user(s) or AD profile(s) you designate.
- Configure Audit Controller rules operations to either overwrite previous rules or append to previous rules if there is overlapping to provide you with more control when creating new Audit Controller plans.
- Even leverage DocAve Reporting Service to retrieve IIS logs and the log source IP.
- Finally, you can set up a schedule in the plan to apply the rule and retrieve data, or manually apply the rule and retrieve data, providing you with more flexibility in the execution of Audit Controller plans.

For any plans executed, rules applied, or data retrieved through Audit Controller, or any future plans scheduled to run, you can click **Job Monitor** on the ribbon of the Audit Controller page to see its

progress or check details about the job. For more information about using Job Monitor, refer to the [DocAve 6 Job Monitor User Guide](#).

To access functions in Audit Controller, in the **Settings** tab of Report Center, click **Audit Controller** on the ribbon. You will be brought to the Audit Controller interface.

## Building Plans


In Audit Controller, there are two ways to build plans:

- **Wizard Mode** – For those unfamiliar with creating Audit Controller plans, Wizard Mode provides you with step-by-step guidance for creating a new plan.
- **Form Mode** – For more experienced users, Form Mode provides you with a consolidated interface where you can configure your Audit Controller plan.

**\*Note:** Fields marked with a \* means the field is required.

### Wizard Mode

To use the the wizard to build a new audit plan, in the Audit Controller interface, click **Plan Builder**. A drop-down menu appears. Click **Wizard Mode**. You are now in the plan creation wizard interface. Follow the instructions below to create your plan:

1. Step \*1. Plan Name - Enter a **Plan Name** for the new plan. Enter an optional **Description** for future references. Then click **Next**.
2. Step \*2. Audit Rules – Configure the **Scope** and Rules:
  - **Scope** – Select the scope for this plan. You can navigate to your desired objects either by clicking on the appropriate object names to expand the data tree. For the large environment, you can only view the desired node on the expanded tree using the **Search** function. In the blank field above the farm name, you can enter the characters contained in the URL/name of the specified node and click the  icon to only display the searched node on the tree. When you have found the object(s) you wish this plan to audit, check the checkbox next to its name to select it.
  - Once you select an object, an **Edit Rules** button appears next to the object's name. Click **Edit Rules** to configure settings for Action Controller and Audit action.
    - **Action Controller** – Check the **Trickle down** checkbox if you want to audit data in the child objects under the selected object.

This allows you to customize which objects you wish to audit. However, this also means that if **Trickle down** is not selected, DocAve will only audit the selected objects, and ignore the child objects under them.

**\*Note:** By default, this option is not selected.
    - **Audit Action** – Check the corresponding checkboxes of the audit record events you want to collect from SharePoint.

When you are finished configuring the rules for this plan, click **Next**.

3. Step 3. Options – Configure Filter Policy, Operation Settings and Advanced Rules:

- Filter Policy – Designate the specific objects or data to audit data from.
  - Type – Select either **URL**, **User** or **AD Profile** from the **Type** drop-down menu.
  - Condition – Select **Contains**, **Does not Contain**, **Matches**, **Does not Match**, **Is (exactly)** or **Is (exactly) not** from the **Condition** drop-down menu.
  - Value – Enter the value based on the selected **Type** and **Condition**.

Click **Add** to add the filter. You can create more than one filter by simply repeating these steps.

- Operation Settings – Configure how the rules of this plan are handled when interacting with previous audit rules for the same SharePoint object. Select one of the following:
  - **Overwrite** – Replaces the original audit actions of the specified nodes with the new ones.
  - **Append** - Adds the new audit actions to the original ones.
- You can also choose whether or not to delete audit data which are older than a specified time in SharePoint. Check the **Delete auditor data in SharePoint older than \_\_\_ day(s)** checkbox to delete audit data in SharePoint that is older than the specified number of days. You can specify the desired number of days in the text box that becomes active once the checkbox is checked.
- Advanced Rules – Configure whether or not to retrieve the IIS logs or source IP.
  - **Retrieve IIS Logs** – Check this checkbox to have item logs from IIS log retrieved. The retrieved IIS log item information will appear in the report. Note that this may slow down the performance.
  - **Log source IP** – Check this checkbox to retrieve information about the source IP of the host who accessed the selected node.

When you are finished configuring the Advanced Rules, click **Next**.

4. Step 4. Apply Rule Schedule – Configure whether or not to have the rules of this plan be applied at a scheduled time, or to apply the rules of this plan manually from Plan Manager:

- **No Schedule** – Select this to apply the rules of this plan manually from Plan Manager.
- **Configure the schedule myself** – Select this to configure the specific time you want the rules of this plan be applied. A schedule configuration area appears when you select this option. You can customize the schedule with the following options:
  - **Start Time** – Select the date and time for the rules of this plan to be applied. Note that the start time cannot be earlier than the current time.
  - **Interval** – Enter an integer into the text field and select **Hour(s)**, **Day(s)**, **Week(s)**, or **Month(s)**. The rules of this plan will be applied repeatedly

based on this schedule. Click **Calendar View** to see the schedule in a calendar.

- **Schedule ending** – Designate when to stop applying the rules of this plan. Select **No end date** for the rules of this plan to be applied repeatedly until you stop it manually. Select **End after \_\_\_ occurrence(s)** to have this rule to stop being repeatedly applied after the number of occurrences you designate in the text box. Select **End by** to specify the exact date and time for this rule to stop being applied.

When you are finished configuring the Apply Rule Schedule, click **Next**.

5. Step 5. Retrieve Data Schedule – Configure whether or not to have the Auditor data specified in this plan be retrieved at a scheduled time, or to retrieve the specified data manually from Plan Manager:
  - No Schedule – Select this to retrieve the data specified in this plan manually from Plan Manager.
  - Configure the schedule myself – Select this to configure the specific time you want the data specified in this plan to be retrieved. A schedule configuration area appears when you select this option. You can customize the schedule with the following options:
    - **Start Time** – Select the date and time for data specified in this plan to be retrieved. Note that the start time cannot be earlier than the current time.
    - **Interval** – Enter an integer into the text field and select **Hour(s)**, **Day(s)**, **Week(s)**, or **Month(s)**. The data specified in this plan will be retrieved repeatedly based on this schedule. Click **Calendar View** to see the schedule in a calendar.
    - **Schedule ending** – Designate when to stop retrieving the data specified in this plan. Select **No end date** for the data to be retrieved repeatedly until you stop it manually. Select **End after \_\_\_ occurrence(s)** to stop retrieving the data specified in this plan after the number of occurrences you designate in the text box. Select **End by** to specify the exact date and time for the data specified in this plan to stop being retrieved.

When you are finished configuring the Retrieve Data Schedule, click **Next**.

6. Overview –Once you have finished configuring this plan, the final step of the Wizard is the Overview page, where you can review and edit the various settings and scopes for this plan. In the **Settings** tab of the Overview pane, click **Edit** in the respective section to make changes to the settings in that section. To change the scope for this plan, click the **Audit Rules** tab in the Overview pane.
7. After you have reviewed all of the settings and scopes in the Overview pane, click **Finish** to save the plan. You can view and manage this plan in Plan Manager.

## Form Mode

To build a new audit plan in Form Mode, in the Audit Controller page, click **Plan Builder**. A drop-down menu appears. Click **Form Mode**. In the Form Mode interface, you can configure the plan settings in the **Settings** tab, and the scope and rules in the **Audit Rules** tab.

To create a plan using Form Mode, first configure the following fields in the **Settings** tab of the Form Mode plan creation pane:

1. Plan Name – Enter a **Plan Name** for the new plan. Enter a **Description** for future references.
2. Filter Policy – Designate the specific objects or data to audit data from.
  - Type – Select either **URL**, **User** or **AD Profile** from the **Type** drop-down menu.
  - Condition – Select **Contains**, **Does not Contain**, **Matches**, **Does not Match**, **Is (exactly)** or **Is (exactly) not** from the **Condition** drop-down menu.
  - Value – Enter the value based on the selected **Type** and **Condition**.

Click **Add** to add the filter. You can create more than one filter by simply repeating these steps.

3. Operation Settings – Configure how the rules of this plan are handled when interacting with previous audit rules for the same SharePoint object. Select one of the following:
  - **Overwrite** – Replaces the original audit actions of the specified nodes with the new ones.
  - **Append** - Adds the new audit actions to the original ones.

You can also choose whether or not to delete audit data which are older than a specified time in SharePoint. Check the **Delete auditor data in SharePoint older than \_\_\_ day(s)** checkbox to delete audit data in SharePoint that is older than the specified number of days. You can specify the desired number of days in the text box that becomes active once the checkbox is checked.

4. Advanced Rules – Configure whether or not to retrieve the IIS logs or source IP.
  - **Retrieve IIS Logs** – Check this checkbox to have item logs from IIS log retrieved. The retrieved IIS log item information will appear in the report. Note that this may slow down the performance.
  - **Log source IP** – Check this checkbox to retrieve information about the source IP of the host who accessed the selected node.
5. Apply Rule Schedule – Configure whether or not to have the rules of this plan be applied at a scheduled time, or to apply the rules of this plan manually from Plan Manager:
  - **No Schedule** – Select this to apply the rules of this plan manually from Plan Manager.
  - **Configure the schedule myself** – Select this to configure the specific time you want the rules of this plan be applied. A schedule configuration area appears when you select this option. You can customize the schedule with the following options:







- **Start Time** – Select the date and time for the rules of this plan to be applied. Note that the start time cannot be earlier than the current time.
  - **Interval** – Enter an integer into the text field and select **Hour(s)**, **Day(s)**, **Week(s)**, or **Month(s)**. The rules of this plan will be applied repeatedly based on this schedule. Click **Calendar View** to see the schedule in a calendar.
  - **Schedule ending** – Designate when to stop applying the rules of this plan. Select **No end date** for the rules of this plan to be applied repeatedly until you stop it manually. Select **End after \_\_\_ occurrence(s)** to have this rule to stop being repeatedly applied after the number of occurrences you designate in the text box. Select **End by** to specify the exact date and time for this rule to stop being applied.
6. Retrieve Data Schedule – Configure whether or not to have the data specified in this plan be retrieved at a scheduled time, or to retrieve the specified data manually from Plan Manager:
- **No Schedule** – Select this to retrieve the data specified in this plan manually from Plan Manager.
  - **Configure the schedule myself** – Select this to configure the specific time you want the data specified in this plan be retrieved. A schedule configuration area appears when you select this option. You can customize the schedule with the following options:
    - **Start Time** – Select the date and time for data specified in this plan to be retrieved. Note that the start time cannot be earlier than the current time.
    - **Interval** – Enter an integer into the text field and select **Hour(s)**, **Day(s)**, **Week(s)**, or **Month(s)**. The data specified in this plan will be retrieved repeatedly based on this schedule. Click **Calendar View** to see the schedule in a calendar.
    - **Schedule ending** – Designate when to stop retrieving the data specified in this plan. Select **No end date** for the data to be retrieved repeatedly until you stop it manually. Select **End after \_\_\_ occurrence(s)** to stop retrieving the data specified in this plan after the number of occurrences you designate in the text box. Select **End by** to specify the exact date and time for the data specified in this plan to stop being retrieved.
7. When you are finished configuring the **Settings** tab, click the **Audit Rules** tab to configure the scope and rules for this plan:
- **Scope** – Select the scope for this plan. You can navigate to your desired objects either by clicking on the appropriate object names to expand the data tree, or you can search for your desired objects by typing in keywords in text box and clicking the magnifying glass. When you have found the object(s) you wish this plan to audit, check the checkbox next to its name to select it.
  - Once you select an object, an **Edit Rules** button appears next to the object’s name. Click **Edit Rules** to configure settings for Action Controller and Audit action.

- Action Controller – Check the **Trickle down** checkbox if you want to audit data in the child objects that fall under the selected object.
  - Audit Action – Check the corresponding checkboxes of the audit record events you want to collect from SharePoint.
8. Click **OK** to save the plan. You can view and manage this plan in Plan Manager.

## Using Plan Manager

Plan Manager provides you with a centralized location to view and edit your previously created audit plans.

In the Audit Controller page, click **Plan Manager** on the ribbon. You will see a list of your previously created plans in the Plan Manager viewing pane. In the viewing pane, you can customize how your plans are displayed in a number of different ways:

- **Search** – Search allows you to filter the plans displayed by the keyword you designate; The keyword must be contained in a column value. At the top of the Plan Manager viewing pane, enter the keyword for the plan(s) you wish displayed. You can select for search to **Search all pages** or **Search current page**. Note that the search function is case sensitive.
-  - You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – Click  in the column title to hide the column.
-  – This allows you to filter which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than based on a keyword. Click the  of the column you want to filter, then check the checkbox next to the item name to have that item shown in the list.

## Operations in Plan Manager

Once you have configured Plan Manager to display the plans of your choice, you can perform the following actions on your plans:

- **View Details** – Select a plan, then click **View Details** on the ribbon to open the View Details page to see the **Settings** and **Audit Rules** of the selected plan. You can click **Edit** in View Detail interface to make changes to the plan. When you are finished reviewing the plan, click **Close** to return to the Plan Manager page.
- **Edit** – Select a plan, then click **Edit** on the ribbon to open the Form Mode plan editing page. Here you can make changes to the **Settings** and **Audit Rules** of the selected plan. Click **Save** to save any changes made to the plan, and return to the Plan Manager page. Click **Save As** to save the plan along with any changes made as a new plan; A window pops up for you to input a name for the new plan, then click **OK** to save the new plan, and return to the Plan Manager page. Click

**Reset** to reverse any changes made to any of the fields, but remain in the plan editing page to continue editing. Click **Cancel** to close the plan editing page without saving any changes.

- **Delete** – Select a plan, then click **Delete** on the ribbon to delete the plan. A window pops up to confirm that you want to proceed with deleting the selected profile. Click **OK** to delete the plan, or click **Cancel** to return to the Plan Manager page without deleting the plan.
- **Apply Rule** – Select a plan, then click **Apply Rule** on the ribbon to apply the rules of the selected plan.
- **Retrieve Data** – Select a plan, then click **Retrieve Data** on the ribbon to retrieve the data from the selected nodes. Note that the rules of the selected plan must first be applied before data can be retrieved.

**\*Note:** The lowest level node that can be retrieved is site collection. If you select a site or list, data from the corresponding parent site collection will be retrieved.

When you are finished viewing and editing your plans, click **Back** to return to the Audit Controller page. To exit the Audit Controller page, click **Back** on the ribbon of the Audit Controller interface. You will be brought back to the Settings page.

## Audit Pruning

Audit Pruning allows you to delete DocAve Auditor reports after a specified amount of time. By creating profiles in Audit Pruning, you can automate the deletion of outdated audit reports so as not to occupy storage space unnecessarily. When creating an Audit Pruning profile, you can:

- Configure how long to retain audit data for before automatically deleting it.
- Specify where, at various SharePoint object levels from web application down to folders, to delete audit data from.
- Choose to delete the data, or simply move it to another location.
- Set up a schedule in the profile to prune data, or run it manually, providing you with more flexibility in the execution of Audit Pruning profiles.

For any profiles you run in Audit Pruning, or any future profiles scheduled to run, you can click **Job Monitor** on the ribbon of the Audit Pruning page or Profile Manager page to see its progress or check details about the job. For more information about using Job Monitor, refer to the [DocAve 6 Job Monitor User Guide](#).


To access functions in Audit Pruning, in the **Settings** tab of Report Center, click **Audit Pruning** on the ribbon. You will be brought to the Audit Pruning interface.

## Creating a Pruning Profile

**\*Note:** Before creating a pruning profile, you can configure export locations which are used by Report Center to store the pruned audit data.

For details on how to configure export locations for Report Center, see the Configuring Export Locations section of the [DocAve 6 Control Panel Reference Guide](#).

To create a Pruning Profile, follow the instructions below:

1. In the Audit Pruning page, Within the **Scope** pane, click on the appropriate SharePoint object name to expand the date tree. For the large environment, you can only view the desired node on the expanded tree using the **Search** function. In the blank field above the farm name, you can enter the characters contained in the URL of the specified node and click the  icon to only display the searched node on the tree. Select the object(s) you wish this profile to affect by checking the checkbox next to it.
2. Click **New** on the ribbon. A pruning profile creation work space will appear next to the Scope pane.
3. Enter a **Rule Name** for this new pruning profile. Enter an optional **Description** for future references.







4. Specify the audit data you want to prune in **Data to Act on**:
  - To prune data older than a certain amount of time, select **All data older than:**, then enter an integer in the text box, and select **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down menu.
  - To prune data before a certain date, select **All data before:**, then click the calendar icon. A calendar will appear at your cursor. Select the desired date and time of day, then click **OK**.
  - To prune data between two dates, select **All data between**, then select the desired date range.
5. Choose what to do with the pruned data in **Action to Take**:
  - Select **Delete Data** to delete the specified audit data.
  - Select **Move data** to move the specified audit data to an export location. You must designate an export location in order to have the data moved; Click the Export Location drop-down menu, select a predefined export location or click New Export Location to create a new export location, then check the **Compression** checkbox to have the data compressed when moved. If you choose **New Export Location** in the **Export Location** drop-down, a ChildWindow will popup for you to configure the new export location. Enter a **Name** for the new export location and a **Description** for future references, then enter the **UNC path**, **Username** and **Password**. Click **Validation Test** to check that the UNC path, username and password provide a valid export location. Click **OK** to save the new export location, or click **Cancel** to return to the Audit Pruning profile creation page without saving this new export location.
6. Configure whether or not to run this profile at a scheduled time, or to run this profile manually from Profile Manager:
  - **No Schedule** – Select this to run this profile manually from Plan Manager.
  - **Configure the schedule myself** – Select this to configure the specific time you want this profile to run. A schedule configuration area appears when you select this option. You can customize the schedule with the following options:
    - **Start Time** – Select the date and time for this profile to run. Note that the start time cannot be earlier than the current time.
    - **Interval** – Enter an integer into the text field and select **Hour(s)**, **Day(s)**, **Week(s)**, or **Month(s)**. This profile will run repeatedly based on this schedule. Click **Calender View** to see the schedule in a calendar.
    - **Schedule ending** – Designate when to stop running this profile. Select **No end date** for this profile to run repeatedly until you stop it manually. Select **End after \_\_\_ occurrence(s)** to stop running this profile after the number of occurrences you designate in the text box. Select **End by** to specify the exact date and time for this profile to stop being run.

7. When creating an Audit Pruning Profile, you can customize which user to include or exclude, as well as which audit actions to include, when pruning audit data. Click **Advanced Data Selection** to access the **User Filter** and **Action Filter**.
  - **User Filter** – By default, **Include all users** is selected. To specify which user(s) to include, select **User(s) to include**, then enter the usernames in the textbox in the following format: *AD User: domain\username* and separate each username with a semicolon (;). To specify which user(s) to exclude, select **User(s) to exclude**, then enter the usernames in the textbox in the following format: *AD User: domain\username* and separate each username with a semicolon (;).
  - **Action Filter** – Check the checkbox for the audit actions that you want to prune.
8. Click **OK and Run Now** to save the profile and run it immediately, **OK** to save the profile, or **Cancel** to return to the Audit Pruning page without saving these configurations.

## Using Profile Manager

Profile Manager provides you with a centralized location to view and edit your previously created audit pruning profiles.

In the Audit Pruning page, click **Profile Manager** on the ribbon. You will see a list of your previously created profiles in the Profile Manager viewing pane. In the viewing pane, you can customize how your profiles are displayed in a number of different ways:

- **Search** – Search allows you to filter the profiles displayed by the keyword you designate; The keyword must be contained in a column value. At the top of the Profile Manager viewing pane, enter the keyword for the Profile(s) you wish displayed. You can select for search to **Search all pages** or **Search current page**. Note that the search function is not case sensitive.
-  - You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – Click  of the column you want to hide, the specified column will not be displayed in the list.
-  – This allows you to filter which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than based on a keyword. Click the  of the column you want to filter, then check the checkbox next to the item name to have that item shown in the list.

## Operations in Profile Manager

Once you have configured Profile Manager to display the plans of your choice, you can perform the following actions on your profiles:

- **View Details** – Select a profile, then click **View Details** on the ribbon to open the View Details page to see configurations of the selected profile. You can click **Edit** in View Detail interface to

make changes to the profile. When you are finished reviewing the profile, click **Close** to return to the Profile Manager page.

- **View Jobs** - Select a profile, then click **View Jobs** to see the jobs that have ran for this profile.
- **Edit** – Select a profile, then click **Edit** on the ribbon to open the profile editing page. Here you can make changes to the configurations of the selected profile. Click **Save** to save any changes made to the profile, and return to the Profile Manager page. Click **Save As** to save the profile along with any changes made as a new profile; A window pops up for you to input a name for the new profile, then click **OK** to save the new profile, and return to the Profile Manager page. Click **Cancel** to close the profile editing page without saving any changes.
- **Delete** – Select a profile, then click **Delete** on the ribbon to delete the profile. A window pops up to confirm that you want to proceed with deleting the selected profile. Click **OK** to delete the profile, or click **Cancel** to return to the Profile Manager page without deleting the profile.
- **Run Now** – Select a profile, then click **Run Now** to run the selected profile immediately.

When you are finished viewing and editing your plans, click **Back** to return to the Audit Controller page. To exit the Audit Controller page, click **Back** on the ribbon of the Audit Controller interface. You will be brought back to the Settings page.

## E-mail Notification Rules

E-mail Notification Rules can be created so that DocAve sends an e-mail notification to the designated user(s) when a threshold for a certain SharePoint object is exceeded. Click **E-mail Notification Rules** on the ribbon in the Settings tab of Report Center. You will be brought to the Notification Settings page where you can create and manage e-mail notification rules.







### Creating E-mail Notification Rules

To create an E-mail Notification Rule, follow the instructions below:

1. In the E-mail Notification Rules page, click **Create** on the ribbon. The Notification Settings page pops up.
2. Enter a new **Notification Name**, and then an optional **Description** for future references.
3. Enter the e-mail address(es) of the desired recipient(s). Multiple recipients can be added to the text box, separated by a semi-colon “;”. If you need to add a large number of recipients, it may be more efficient to create mailing lists prior to configuring these settings.
4. Click **Add** to add the e-mail address as a recipient for this rule. To add more recipients, repeat the previous step.
5. When you are finished adding recipients to this E-mail Notification Rule, click **OK** to save the new rule, and close the Notification Settings page, or click **Cancel** to close the Notification Settings page without saving these configurations.

### Managing E-mail Notification Rules

In Report Center, click the **Settings** tab, then click **E-mail Notification Rules** on the ribbon. The e-mail notification page appears. You will see a list of your previously created E-mail Notification Rules in the Notification Settings. In the viewing pane, you can customize how your rules are displayed in a number of different ways:

- Search – Search allows you to filter the rules displayed by the keyword you designate; The keyword must be contained in a column value. At the top of the Notification Settings viewing pane, enter the keyword for the rule(s) you wish displayed. You can select for search to **Search all pages** or **Search current page**. Note that the search function is not case sensitive.
-  - You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – Click  of the column you want to hide, the specified column will not be displayed in the list.
-  – This allows you to filter which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than based on a keyword. Click the  of the column you want to filter, then check the checkbox next to the item name to have that item shown in the list.

To edit an E-mail Notification Rule, select the rule, then click **Edit** on the ribbon to open rule configuration page. Make the necessary changes, then click **OK** to save any changes made to the profile, and return to the Profile Manager page, or click **Cancel** to exit the rule configuration page without saving any changes.

To delete an E-mail Notification Rule, select the rule, then click **Delete** on the ribbon to delete the rule.

To exit the E-mail Notification Rules page, click **Back** on the ribbon of the E-mail Notification Rules interface. You will be brought back to the Settings tab.

## Export Location

Export Location in Report Center allows you to store reports in a designated storage device through a Universal Naming Convention (UNC) path. Export Locations are also used to store pruned audit data.

To configure Export Locations, click **Export Locations** on the ribbon in the Settings tab of Report Center.

### Creating an Export Location

In the Export Location interface, click **Create** on the ribbon, then configure the following settings:

- Name and Description – Enter a **Name** for the new export location. Then enter an optional **Description** for future references.
- Path – Enter the **UNC path** for this export location. Then enter the **Username** and **Password** to access this path with.







Click **Validation Test** to check that the information are correct.

When you are finished, click **OK** to save these configurations, or click **Cancel** to close the New Export Location configuration interface without saving any changes.

### Managing Export Locations

In Report Center, click the **Settings** tab, then click **Export Location** on the ribbon. The Export Location page appears. You will see a list of your previously configured export locations. In the viewing pane, you can customize how these export locations are displayed in a number of different ways:

- Search – Search allows you to filter the export locations displayed by the keyword you designate; The keyword must be contained in a column value. At the top of the Notification Settings viewing pane, enter the keyword for the export location(s) you wish displayed. You can select for search to **Search all pages** or **Search current page**. Note that the search function is not case sensitive.

-  - You can manage which columns are displayed in the list so that only information you want to see. Click  then check the checkbox next to the column name to have that column shown in the list.
-  - Click  in the column title to hide the column.
-  - This allows you to filter which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than based on a keyword. Click the  of the column you want to filter, then check the checkbox next to the item name to have that item shown in the list.

To edit an export location, select the export location, then click **Edit** on the ribbon to open rule configuration page. Make the necessary changes, then click **OK** to save the changes, or click **Cancel** to close the Edit Export Location configuration interface without saving any changes.

To delete an export location, select the export location, then click **Delete** on the ribbon.

To exit the Export Location page, click **Back** on the ribbon. You will be brought back to the Settings tab.

# Working With Reports

Report Center allows you to perform a number of actions to reports. You can run a customized report immediately, save customized report profiles to run at a later time, view the previous report generated, and export reports to datasheets or screenshots.

In the following sections where each type of report and its configuration is discussed, you can perform one of the following actions. These actions can be found in the Report Actions toolbar in the ribbon of each tab in Report Center:

## Run Report

After configuring the scopes for a report in any of the Report Center modules, click **Run Report** in the ribbon to collect the data, then generate the report. The report will appear in the Report Display Panel.

## Show Report

After configuring the scopes for a report in any of the Report Center modules, click **Show Report** in the ribbon to generate the report. The report will appear in the Report Display Panel.

Having the report in the display panel allows you to remain on the DocAve interface rather than having to open the datasheet or screenshot.

## Export Report

Report Center allows you to export reports you create to datasheets, or as a screenshot.

By exporting to a datasheet, the report can be saved locally or to a specified location. The datasheet can be exported in the following formats:

- PDF
- CSV
- MHTML
- TIF
- XLS
- XML

By exporting the report as a screenshot, the report can be printed right from within the DocAve interface, or saved as an image on your local storage device.

## Exporting to a Datasheet

**\*Note:** In order to export the report files, Reporting Service must be configured in Report Center Settings. For instructions on configuring Reporting Service, see the [Reporting Service](#) section of Configuring Report Center Settings.

To export a report after it has been generated, follow the instructions below:

1. With the report displayed in the Report Display Panel, click **Export Report** in the ribbon. A drop-down menu appears.
2. Click **Export to Datasheet**. The Export to Datasheet window will pop up.
3. Select the format for the exported report from the **Report Format** drop-down menu.
4. Enter the **Date** Range of the data you wish displayed in the report.
5. Select the **Frequency** for this report. The frequency of a report is the time intervals the data is displayed in.
6. Choose the **Export Settings** for this report:
  - Select **Export now** to immediately export the report.
  - Select **Offline export** to export the report to a specific location. If you choose **Offline export**, the Export Location and E-mail Notification sections will appear.
    - Select the **Export Location**, or select **New Export Location**. For more information on creating export locations, see the Export Locations section of the Control Panel Reference Guide. Note that selecting **New Export Location** does not close your Export to Datasheet configuration page.
    - (Optional) Select the **E-mail Notification** profile, or select **New E-mail Notification**. Note that selecting **New E-mail Notification** does not close your Export to Datasheet configuration page.

Click **OK** to export the report based on these configurations.

Certain types of reports have additional configurable settings for exporting to datasheet. For details, refer to the corresponding section of this guide.

## Exporting As a Screenshot

To output a screenshot of the report, please refer to the following steps:

1. With the report displayed in the Report Display Panel, click **Export Report** in the ribbon. A drop-down menu appears.
2. Click **Output Screenshot**. A window pops up with a preview of the screenshot.

3. Click **Print**, to print the screenshot. Or click **Export**, to save the screenshot as an image to your local storage device.

Click **Close** once you are done printing or saving the screenshot. This closes the screenshot preview popup window.

## Auditor Database

By default, the Auditor Database size is 900GB. If it this threshold is reached, a new Auditor Database will be created automatically if Report Service has the proper permissions to create databases. If Report Service does not have the right permissions, you must create databases manually according to the naming format as following:

*docave6\_auditordb, docave6\_auditordb\_001, docave6\_auditordb\_002 ...*

You can also customize the Auditor Database size threshold. Find the configuration file **ReportCenterServiceProperties.config** located in the Manager installation path *...\\AvePoint\\DocAve6\\Manager\\Report\\bin\\*, and change the value of the node `<AuditorDatabaseSize>921600</AuditorDatabaseSize>` according to your requirements. The value range must be between 1024MB to 1048576MB (1TB).

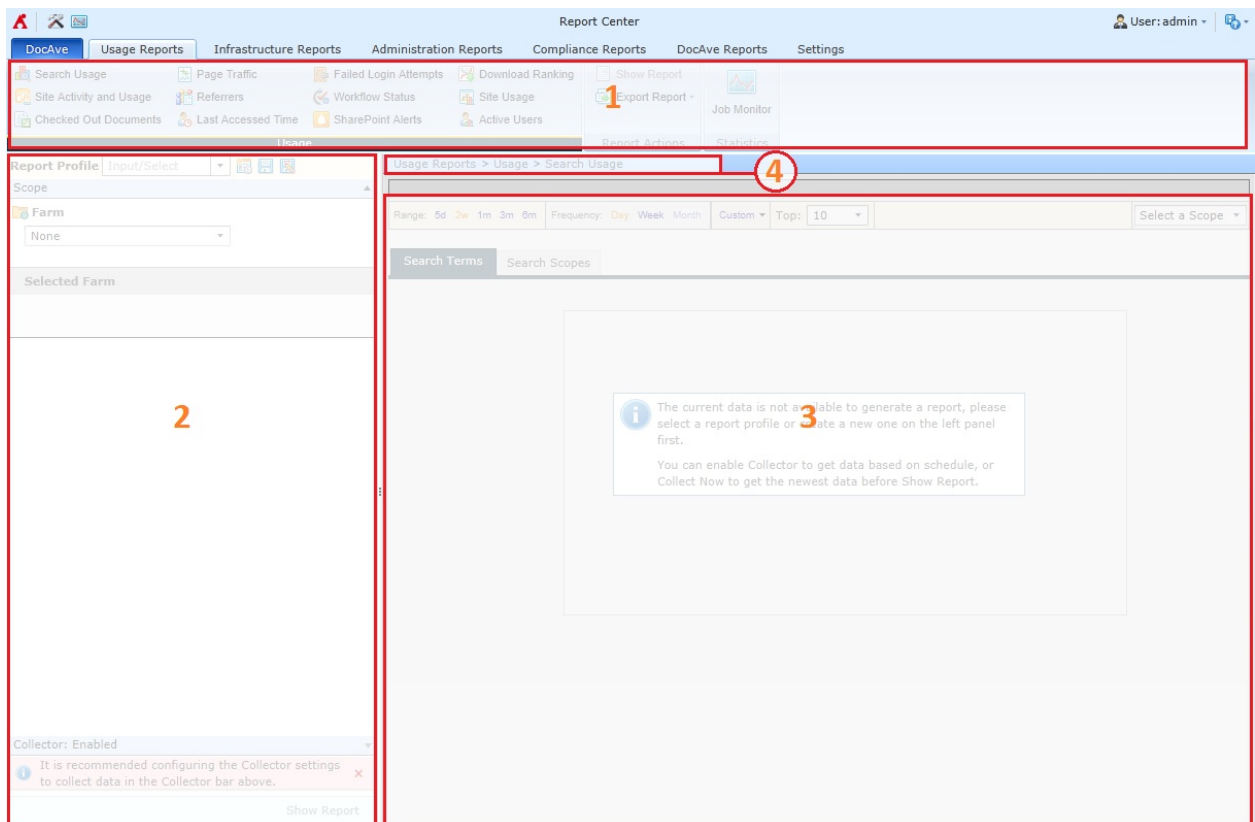
# Creating Usage Reports

Usage Reports allows you to analyze how your SharePoint environment is being utilized. You can use reports in this section to track user activity and behavior to gain perspective on the overall success of a SharePoint deployment.

## Usage Reports Interface

When in the **Usage Report** tab of Report Center, you will see the following:

1. Ribbon – Toolbar where you can select the type of report you wish to generate, perform actions on reports, or access the integrated Job Monitor.
2. Scope pane – Configure the settings for a report.
3. Report Display pane – Review the report. There are a number of configurable settings to customize how the information is displayed.
4. Current report type – The report type currently selected.






**Figure 2:** Usage Report Interface.

## Search Usage

A Search Usage report displays the terms that have been searched, number of times these terms have been searched and the number of unique searches within the time frame you specify.

### Generating Search Usage Reports

To configure the basic settings for the Search Usage report, in the **Usage Reports** tab of Report Center, click **Search Usage** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the Scope configuration area, in the drop-down menu. click the farm name to expand the data tree, and load the tree to the list level. Select the node you want to view by checking the corresponding check-box. For the large environment, you can search the desire list by the searching function. In the blank field above the farm name, you can enter the characters that contained in list URL or name and click the search icon to search the list.
3. **Collector** – This collects search usage data for the report. By default it collects the information at midnight everyday according to your Control Service’s time zone. In the Collector configuration area, to change the interval, click **Link to Collector**. You will be brought to the Data Collection page. For more information about Collector, please refer to the Data Collection section of this guide.  
By default, the collector schedule is enabled. To disable the collector schedule, you can uncheck the **Enable Collector** checkbox, the status of the collector will change to *Disabled*, and DocAve will not collect the information according to the schedule.  
To collect the information of the current profiles immediately, click **Collect Now** button.

**\*Note:** The Web Analytic service in SharePoint must be started otherwise the Search Usage Collect job will fail.

Click **Show Report** on the ribbon to generate the report in the Report Display Pane on the right.

### Viewing Search Usage Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For Search Usage reports, the following settings can be configured in the Report Display Pane:

- **Range** - Time frame parameter for the report.
- **Frequency** - Time interval the report is displayed in.
- **Custom** - Customize the time Range and Frequency in a calendar.
- **Top** - Top number of results.








- **Scope** - Change the scope for the data shown in the report.
- **Search Terms** - Display by search terms.
- **Search Scopes** - Display by search scopes.

## Site Activity and Usage

A Site Activity and Usage report displays the activity, usage and number of unique visitors for site collections, sites, subsites, lists and/or libraries within the time frame you specify.

### Generating Site Activity and Usage Reports

To configure the basic settings for the Site Activity and Usage report, in the **Usage Reports** tab of Report Center, click **Site Activity and Usage** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the Scope configuration area, **Scope** is selected by default in the drop-down menu. Click the farm name to expand the data tree, and load the tree to the list level. Select the node you want to view by checking the corresponding check-box. For the large environment, you can search the desired list by the searching function. In the blank field above the farm name, you can enter the characters that contained in list URL or name and click the search icon to search the list.  
Alternatively, you may select **URL** from the drop-down menu, then select a farm from the **Farm** drop-down menu, and enter the **Site Collection URL** and **Item URL** in the **URL** textboxes. To add more URLs, click **Add Another URL**.
3. **User** – In the **User** configuration area, you can set the user(s) whose activity you want to view or do not want to view:
  - **Include All Users** – By default this option is selected. The activities of all users can be viewed.
  - **Users to Include** – Enter the user(s) whose activity you wish to view. You can click  to check the name you entered or click  to find the user(s) you want to include in the report.
  - **Users to Exclude** – Enter the user(s) whose activity you do not wish to view. You can click  to check the name you entered or click  to find the user(s) you want to exclude in the report.
4. **E-mail Notification** – In the E-mail Notification configuration area, check the **Usage alert** checkbox if you wish to have e-mail notifications sent out when the desired criteria are met. Then configure the following:

- Notification Name – Select previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification rule. For details on how to create an e-mail notification rule, see the [Creating E-mail Notification Rules](#) section of this guide.
- Time Range – Specify the time frame for this alert.
- Thresholds – Specify the triggers for the notification. You may choose to use one or both of these thresholds:
  - Check the **More than \_\_ event(s)** checkbox to activate this threshold, then enter a positive integer into the textbox.
  - Check the **More than \_\_ unique visitor(s)** checkbox to activate this threshold, then enter a positive integer into the textbox.

Note that by default, thresholds are checked at 6Am and 12Am every day. If these numbers exceed the thresholds set here, an e-mail notification will be sent.

- Interval – Specify how frequent to send e-mail notifications. Enter a positive integer into the **Every** textbox, then select **Day(s)** or **Week(s)** from the drop-down menu.
5. Collector – This collects site activity and usage data for the report. By default it collects the information at midnight everyday according to your Control Service’s time zone. To change the interval, click **Link to Collector**. You will be brought to the Data Collection page. For more information about Collector, please refer to the Data Collection section of this guide. By default, the collector schedule is enabled. To disable the collector schedule, you can uncheck the **Enable Collector** checkbox, the status of the collector will change to *Disabled*, and DocAve will not collect the information according to the schedule. To collect the information of the current profiles immediately, click **Collect Now** button.

Click **Show Report** to generate the report in the Report Display Pane on the right.

## Viewing Site Activity and Usage Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For Site Activity and Usage reports, the following settings can be configured in the Report Display Pane:




- **Range** - Time frame parameter for the report.
- **Frequency** - Time interval the report is displayed in.
- **Type** - Set report type.
- **Custom** - Customize the time Range and Frequency in a calendar.
- **Scope** - Change the scope for the data shown in the report.
- **Sort By** - Order to display the data in.
- **Events** -You can view the number of the corresponding events within your specified scope in a specified time range. By defaults, such events are update, delete and view.
- **Events Calculator** - Display by number of events.

- **Unique Visitors Calculator** - Display by number of unique visitors.
- **Details** - Display detailed information for each individual site.

## Checked Out Documents

A Checked Out Documents report displays the number of the documents checked out within the scope you select.

### Generating Checked Out Documents Reports

1. To configure the basic settings for the Checked Out Documents report, in the **Usage Reports** tab of Report Center, click **Checked Out Documents** on the ribbon. You can configure the following settings in the Scope pane:**Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the Scope pane, click the farm name to expand the data tree, and select the node you want to view by checking the corresponding check-box. For the large environment, you can search the desire list by the searching function. In the blank field above the farm name, you can enter the characters that contained in list URL or name and click the search icon to search the list.
3. E-mail Notification – In the E-mail Notification configuration area, check the **Usage alert** checkbox if you wish to have e-mail notifications sent out when the desired criteria are met. Then configure the following:
  - Notification Name – Select previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification rule. For details on how to create an e-mail notification rule, see the [Creating E-mail Notification Rules](#) section of this guide.
  - Time Range – Specify the time frame for this alert.
  - Threshold – Specify the trigger for the notification. Enter a positive integer into the **More than \_\_ checked out document(s)** textbox.

Note that by default, the threshold is checked at 6Am and 12Am every day. If the number exceeds the threshold set here, an e-mail notification will be sent.
  - Interval – Specify how frequent to send e-mail notifications. Enter a positive integer into the **Every** textbox, then select **Day(s)** or **Week(s)** from the drop-down menu.
4. Collector – This collects data for the report. By default it collects the information at midnight everyday according to your Control Service’s time zone. To change the interval, click **Link to Collector**. You will be brought to the Data Collection page. For more information about Collector, please refer to the Data Collection section of this guide.

By default, the collector schedule is enabled. To disable the collector schedule, you can uncheck the **Enable Collector** checkbox, the status of the collector will change to *Disabled*, and DocAve will not collect the information according to the schedule.

To collect the information of the current profiles immediately, click **Collect Now** button.

Click **Show Report** to generate the report in the Report Display Pane on the right.

## Viewing Checked Out Documents Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For Checked Out Documents reports, the following settings can be configured in the Report Display Pane:




- **Range** - Time frame parameter for the report.
- **Frequency** - Time interval the report is displayed in.
- **Type** - Set report type.
- **Custom** - Customize the time Range and Frequency in a calendar.
- **Scope** - Change the scope for the data shown in the report.
- **Checked Out Documents** - Graphical report of checked out documents based on the scope.
- **Details** - Display detailed information for each individual site.

## Page Traffic

A Page Traffic report analyzes the traffic level of the page at the site level. In the specific site, you can view the page traffic level, the throughputs and the hits within a specific time frame. Note that the traffic data has to be retrieved from Auditor first.

## Generating Page Traffic Reports

To configure the basic settings for the Page Traffic report, in the **Usage Reports** tab of Report Center, click **Page Traffic** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the Scope configuration area, click the farm name to expand the data tree, and select the node you want to view by checking the corresponding check-box. For the large environment, you can search the desire list by the searching function. In the blank field above the farm name, you can enter the characters that contained in list URL or name and click the search icon to search the list.
3. **E-mail Notification** – In the E-mail Notification configuration area, check the **Usage alert** checkbox if you wish to have e-mail notifications sent out when the desired criteria are met. Then configure the following:
  - **Notification Name** – Select previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification rule. For details on how to create an e-mail notification rule, see the [Creating E-mail Notification Rules](#) section of this guide.

- **Time Range** – Specify the time frame for this alert. Enter a positive integer into the **In the last** textbox, then select **Hour(s), Day(s), Week(s), Month(s), Year(s)**.
- **Thresholds** – Specify the triggers for this notification. Enter a positive integer into the **More than \_\_ hits** textbox.

Note that by default, thresholds are checked at 6Am and 12Am every day. If these numbers exceed the thresholds set here, an e-mail notification will be sent.

- **Interval** – Specify how frequent to send e-mail notifications. Enter a positive integer into the **Every** textbox, then select **Day(s)** or **Week(s)** from the drop-down menu.
4. **Collector** – This collects page traffic data for the report. By default it collects the information at midnight everyday according to your Control Service’s time zone. In the Collector configuration area, to change the interval, click **Link to Collector**. You will be brought to the Data Collection page. For more information about Collector, please refer to the Data Collection section of this guide.
- By default, the collector schedule is enabled. To disable the collector schedule, you can uncheck the **Enable Collector** checkbox, the status of the collector will change to *Disabled*, and DocAve will not collect the information according to the schedule.
- To collect the information of the current profiles immediately, click **Collect Now** button.

Click **Show Report** on the ribbon to generate the report in the Report Display Pane on the right.

## Viewing Page Traffic Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For Page Traffic reports, the following settings can be configured in the Report Display Pane:

- **Range** - Time frame parameter for the report.
- **Frequency** - Time interval the report is displayed in.
- **Display by** - Information to display the report by.
- **Custom** - Customize the time Range and Frequency in a calendar.
- **Scope** - Change the scope for the data shown in the report.
- **Page Traffic** - Page traffic information.
- **Details** - Detailed information by frequency.

## Referrers

A Referrers report is used to record and analyze the referring frequency of hosts or pages within a specified scope to site collection or sites.

The primary data displayed in Site Referrers, different from other features, has to be configured in SharePoint. The site collection or hosts selected have to be limited within the same farm instead of multiple farms.




## Configure the Data in SharePoint

Before generating a referrers report, you must configure the data in SharePoint following the instructions below:

1. Enter to your SharePoint 2010 environment.
2. Navigate to *Central Administration > Monitoring > Configure health data Collection*.
3. Enable Health Data Collection. Click **Log Collection Schedule**, then enable all the log collection schedules.
4. Select the target site collection with its reporting feature activated. By default, it is activated.
5. Add a link to the site collection in other web pages or farms. Click this link to access the site collection.

## Generating Referrers Reports

To configure the basic settings for the Referrers report, in the **Usage Reports** tab of Report Center, click **Referrers** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the Scope configuration area, click the farm name to expand the data tree, and select the node you want to view by checking the corresponding check-box. For the large environment, you can search the desire list by the searching function. In the blank field above the farm name, you can enter the characters that contained in list URL or name and click the search icon to search the list.
3. **Collector** – This collects site referring data for the report. By default it collects the information at midnight everyday according to your Control Service's time zone. In the Collector configuration area, to change the interval, click **Link to Collector**. You will be brought to the Data Collection page. For more information about Collector, please refer to the Data Collection section of this guide.  
By default, the collector schedule is enabled. To disable the collector schedule, you can uncheck the **Enable Collector** checkbox, the status of the collector will change to *Disabled*, and DocAve will not collect the information according to the schedule.  
To collect the information of the current profiles immediately, click **Collect Now** button.

Click **Show Report** on the ribbon to generate the report in the Report Display Pane on the right.

## Viewing Referrers Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For Referrers reports, the following settings can be configured in the Report Display Pane:

- **Sort by** – Information to display the report by.
- **Range** – Time frame parameter for the report.
- **Frequency** – Time interval the report is displayed in.
- **Custom** – Customize the time Range and Frequency in a calendar.
- **Type** – Set report type.
- **Y-Axis** – Set the parameter for the Y-Axis.
- **Scope** – Change the scope for the data shown in the report.
- **Site Referrers** – Site referrer information.
- **Details** – Display detailed information for each individual site.




## Last Accessed Time

Last Accessed Time Reports provide you with a list of users and their last accessed time at a site or site collection level. You must have Auditor enabled on the selected site or site collection for this report to work.

**\*Note:** SharePoint Audit must be enabled for any site collections or sites you wish to generate this report for.

## Generating Last Accessed Time Reports

To configure the basic settings for the Last Accessed Time report, in the **Usage Reports** tab of Report Center, click **Last Accessed Time** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name to expand the data tree, and select the node you want to view by checking the corresponding check-box. For the large environment, you can search the desire list by the searching function. In the blank field above the farm name, you can enter the characters that contained in list URL or name and click the search icon to search the list.

Click **Show Report** on the ribbon to generate the report in the Report Display Pane on the right.

## Viewing Last Accessed Time Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For Last Accessed Time reports, the following settings can be configured in the Report Display Pane:

- **Range** - Time frame parameter for the report.
- **Custom** - Customize the time Range and Frequency in a calendar.
- **Scope** - Change the scope for the data shown in the report.
- **Filter selection** - Filter the data displayed.








## Failed Login Attempts

Failed Login Attempts is used to monitor failed login or access attempts for the specified farm or site.

### Generating Failed Login Attempts Reports

To configure the basic settings for the Failed Login Attempts report, in the **Usage Reports** tab of Report Center, click **Failed Login Attempts** on the ribbon. You can configure the following settings in the Scope pane:

**\*Note:** To get the failed login attempts information, you must first configure IIS Logging. For details on configuring IIS Logging, see the [IIS Logging](#) section of this guide.

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the Scope configuration area, click the farm name to expand the data tree, and select the node you want to view by checking the corresponding check-box. For the large environment, you can search the desire list by the searching function. In the blank field above the farm name, you can enter the characters that contained in list URL or name and click the search icon to search the list.
3. **User** – In the User configuration area, you can set the user(s) whose activity you want to view or do not want to view:
  - **Include All Users** – By default this option is selected. The activities of all users can be viewed.
  - **Users to Include** – Enter the user(s) whose activity you wish to view. You can click the  to check the name you entered or click  to find the user(s) you want to include in the report.
  - **Users to Exclude** – Enter the user(s) whose activity you do not wish to view. You can click the  to check the name you entered or click  to find the user(s) you want to exclude in the report.
4. **E-mail Notification** – In the E-mail Notification configuration area, check the **Usage alert** checkbox if you wish to have e-mail notifications sent out when the desired criteria are met. Then configure the Interval – Specify how frequent to send e-mail notifications. Enter a positive integer into the **Send the e-mail every** textbox, then select **Day(s)** or **Week(s)** from the drop-down menu.
5. **Collector** – This collects data for the report. By default it collects the information at midnight everyday according to your Control Service’s time zone. In the Collector configuration area, to change the interval, click **Link to Collector**. You will be brought to the Data Collection page. For more information about Collector, please refer to the Data Collection section of this guide. By default, the collector schedule is enabled. To disable the collector schedule, you can uncheck the **Enable Collector** checkbox, the status of the collector will change to *Disabled*, and DocAve

will not collect the information according to the schedule.  
To collect the information of the current profiles immediately, click **Collect Now** button.

Click **Show Report** on the ribbon to generate the report in the Report Display Pane on the right.

## Viewing Failed Login Attempts Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For Failed Login Attempts reports, the following settings can be configured in the Report Display Pane:




- **Range** – Time frame parameter for the report.
- **Frequency** – Time interval the report is displayed in.
- **Custom** – Customize the time Range and Frequency in a calendar.
- **Scope** – Change the scope for the data shown in the report.
- **Y-Axis** – Set the parameter for the Y-Axis.
- **Display by** – Information to display the report by.
- **Failed Login Attempts** – Failed login attempt per frequency.
- **Details** – Display detailed information for each individual site.





## Workflow Status

Workflow Status reports is used to view each workflow status by workflow template/users/list or library within a specific scope, the average time to complete the workflow, the number of the workflow which is currently open, as well as the person who the workflow is assigned to.

## Generating Workflow Status Reports

To configure the basic settings for the Workflow Status report, in the **Usage Reports** tab of Report Center, click **Workflow Status** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the Scope configuration area, click the farm name to expand the data tree, and select the node you want to view by checking the corresponding check-box. For the large environment, you can search the desire list by the searching function. In the blank field above the farm name, you can enter the characters that contained in list URL or name and click the search icon to search the list.

3. User – In the User configuration area, you can set the user(s) whose activity you want to view or do not want to view:
  - Include All Users – By default this option is selected. The activities of all users can be viewed.
  - Users to Include – Enter the user(s) whose activity you wish to view. You can click the  to check the name you entered or click  to find the user(s) you want to include in the report.
  - Users to Exclude – Enter the user(s) whose activity you do not wish to view. You can click the  to check the name you entered or click  to find the user(s) you want to exclude in the report.
4. E-mail Notification – In the E-mail Notification configuration area, check the **Usage alert** checkbox if you wish to have e-mail notifications sent out when the desired criteria are met. Then configure the following:
  - Notification Name – Select previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification rule. For details on how to create an e-mail notification rule, see the [Creating E-mail Notification Rules](#) section of this guide.
  - Thresholds – Specify the triggers for the notification. Enter a positive integer into the **More than \_\_ open workflow(s) assigned to a user** textbox.

Note that by default, thresholds are checked at 6Am and 12Am every day. If these numbers exceed the thresholds set here, an e-mail notification will be sent.
  - Interval – Specify how frequent to send e-mail notifications. Enter a positive integer into the **Every** textbox, then select **Day(s)** or **Week(s)** from the drop-down menu.

Click **Run Report** on the ribbon to generate the report in the Report Display Pane on the right.

## Viewing Workflow Status Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For Workflow Status reports, the following settings can be configured in the Report Display Pane:








- **Sort by** – Order to display the data in.
- **Y-Axis** – Set the parameter for the Y-Axis.
- **Show Average** – Show average workflow.
- **Scope** – Change the scope for the data shown in the report.
- **Workflow Status** – Workflow status per frequency.
- **Allocation by Templates** – Workflow allocation.
- **Details** – Display detailed information for each individual sites.

## SharePoint Alerts

SharePoint Alerts reports display the number of alerts for the specified scope.

### Generating SharePoint Alerts Reports

To configure the basic settings for the SharePoint Alerts report, in the **Usage Reports** tab of Report Center, click **SharePoint Alerts** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the Scope configuration area, click the farm name to expand the data tree, and select the node you want to view by checking the corresponding check-box. For the large environment, you can search the desire list by the searching function. In the blank field above the farm name, you can enter the characters that contained in list URL or name and click the search icon to search the list.
3. **User** – In the User configuration area, you can set the user(s) whose activity you want to view or do not want to view:
  - **Include All Users** – By default this option is selected. The activities of all users can be viewed.
  - **Users to Include** – Enter the user(s) whose activity you wish to view. You can click the  to check the name you entered or click  to find the user(s) you want to include in the report.
  - **Users to Exclude** – Enter the user(s) whose activity you do not wish to view. You can click the  to check the name you entered or click  to find the user(s) you want to exclude in the report.

Click **Show Report** on the ribbon to generate the report in the Report Display Pane on the right.

### Viewing SharePoint Alerts Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For SharePoint Alerts reports, the following settings can be configured in the Report Display Pane:

- **Sort by** – Order to display the data in.
- **Scope** – Change the scope for the data shown in the report.
- **Alerts** – Alerts per farm.
- **Details** – Where the alerts were encountered and how often.




## Download Ranking

A Download Ranking report is used to list the downloaded files' information.

**\*Note:** To get Download Ranking information, you must first configure IIS Logging. For details on configuring IIS Logging, see the [IIS Logging](#) section of this guide.

### Generating Download Ranking Reports

To configure the basic settings for the Download Ranking report, in the **Usage Reports** tab of Report Center, click **Download Ranking** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the Scope configuration area, click the farm name to expand the data tree, and select the node you want to view by checking the corresponding check-box. For the large environment, you can search the desire list by the searching function. In the blank field above the farm name, you can enter the characters that contained in list URL or name and click the search icon to search the list.
3. **Collector** – This collects download data for the report. By default it collects the information at midnight everyday according to your Control Service's time zone. In the Collector configuration area, to change the interval, click **Link to Collector**. You will be brought to the Data Collection page. For more information about Collector, please refer to the Data Collection section of this guide.  
By default, the collector schedule is enabled. To disable the collector schedule, you can uncheck the **Enable Collector** checkbox, the status of the collector will change to *Disabled*, and DocAve will not collect the information according to the schedule.  
To collect the information of the current profiles immediately, click **Collect Now** button.

Click **Show Report** on the ribbon to generate the report in the Report Display Pane on the right.

## Viewing Download Ranking Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For Download Ranking reports, the following settings can be configured in the Report Display Pane:








- **Range** - Time frame parameter for the report.
- **Custom** - Customize the time Range and Frequency in a calendar.
- **Advanced** - Top downloads per scope.
- **Scope** - Change the scope for the data shown in the report.
- **Filter selection** - Filter the data displayed.

## Site Usage

A Site Usage report analyzes the site usage at the site collection level. In a specific site collection, you can view the site which is the top hit site, page, user for a specific time. By default, it will list the top 8 hit sites, pages, users, lists or items.

## Generating Site Usage Reports

To configure the basic settings for the Site Usage report, in the **Usage Reports** tab of Report Center, click **Site Usage** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the Scope configuration area, click the farm name to expand the data tree, and select the node you want to view by checking the corresponding check-box. For the large environment, you can search the desire list by the searching function. In the blank field above the farm name, you can enter the characters that contained in list URL or name and click the search icon to search the list.
3. **User** – In the User configuration area, you can set the user(s) whose activity you want to view or do not want to view:
  - **Include All Users** – By default this option is selected. The activities of all users can be viewed.
  - **Users to Include** – Enter the user(s) whose activity you wish to view. You can click the  to check the name you entered or click  to find the user(s) you want to include in the report.
  - **Users to Exclude** – Enter the user(s) whose activity you do not wish to view. You can click the  to check the name you entered or click  to find the user(s) you want to exclude in the report.

4. **Collector** – This collects site usage data for the report. By default it collects the information at midnight everyday according to your Control Service’s time zone. In the Collector configuration area, to change the interval, click **Link to Collector**. You will be brought to the Data Collection page. For more information about Collector, please refer to the Data Collection section of this guide.  
By default, the collector schedule is enabled. To disable the collector schedule, you can uncheck the checkbox, the status of the collector will change to *Disabled*, and DocAve will not collect the information according to the schedule.  
To collect the information of the current profiles immediately, click **Collect Now** button.

Click **Show Report** on the ribbon to generate the report in the Report Display Pane on the right.

## Viewing Site Usage Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For Site Usage reports, the following settings can be configured in the Report Display Pane:




- **Range** - Time frame parameter for the report.
- **Advanced** - Top or Bottom number of parameters set here.
- **Custom** - Customize the time Range and Frequency in a calendar.
- **Scope** - Change the scope for the data shown in the report.
- **Filter selection** - Filter the data displayed.





## Active Users

An Active Users report displays the users with the most activities within the scope you configure.

## Generating Active Users Reports

To configure the basic settings for the Active Users report, in the **Usage Reports** tab of Report Center, click **Active Users** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
6. **Scope** – In the Scope configuration area, click the farm name to expand the data tree, and select the node you want to view by checking the corresponding check-box. For the large environment, you can search the desire list by the searching function. In the blank field above the farm name, you can enter the characters that contained in list URL or name and click the search icon to search the list.

7. User – In the User configuration area, you can set the user(s) whose activity you want to view or do not want to view:
  - Include All Users – By default this option is selected. The activities of all users can be viewed.
  - Users to Include – Enter the user(s) whose activity you wish to view. You can click the  to check the name you entered or click  to find the user(s) you want to include in the report.
  - Users to Exclude – Enter the user(s) whose activity you do not wish to view. You can click the  to check the name you entered or click  to find the user(s) you want to exclude in the report.
8. E-mail Notification – In the E-mail Notification configuration area, check the **Usage alert** checkbox if you wish to have e-mail notifications sent out when the desired criteria are met. Then configure the following:
  - Notification Name – Select previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification rule. For details on how to create an e-mail notification rule, see the [Creating E-mail Notification Rules](#) section of this guide.
  - Time Range – Specify the time frame for this alert.
  - Thresholds – Specify the trigger for the notification. Enter a positive integer into the **More than \_\_ activities** textbox.

Note that by default, the threshold is checked at 6Am and 12Am every day. If the number exceeds the threshold set here, an e-mail notification will be sent.

  - Interval – Specify how frequent to send e-mail notifications. Enter a positive integer into the **Every** textbox, then select **Day(s)** or **Week(s)** from the drop-down menu.
9. Collector – This collects site activity and usage data for the report. By default it collects the information at midnight everyday according to your Control Service’s time zone. To change the interval, click **Link to Collector**. You will be brought to the Data Collection page. For more information about Collector, please refer to the Data Collection section of this guide. By default, the collector schedule is enabled. To disable the collector schedule, you can uncheck the **Enable Collector** checkbox, the status of the collector will change to *Disabled*, and DocAve will not collect the information according to the schedule. To collect the information of the current profiles immediately, click **Collect Now** button.

Click **Show Report** to generate the report in the Report Display Pane on the right.

## Viewing Active Users Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For Active Users reports, the following settings can be configured in the Report Display Pane:

- **Range** - Time frame parameter for the report.
- **Custom** - Customize the time Range and Frequency in a calendar.
- **Sort by** - Order to display the data in.
- **Scope** - Change the scope for the data shown in the report.
- **Active Users** - Active users per scope.
- **Details** - Display detailed information for each individual site.

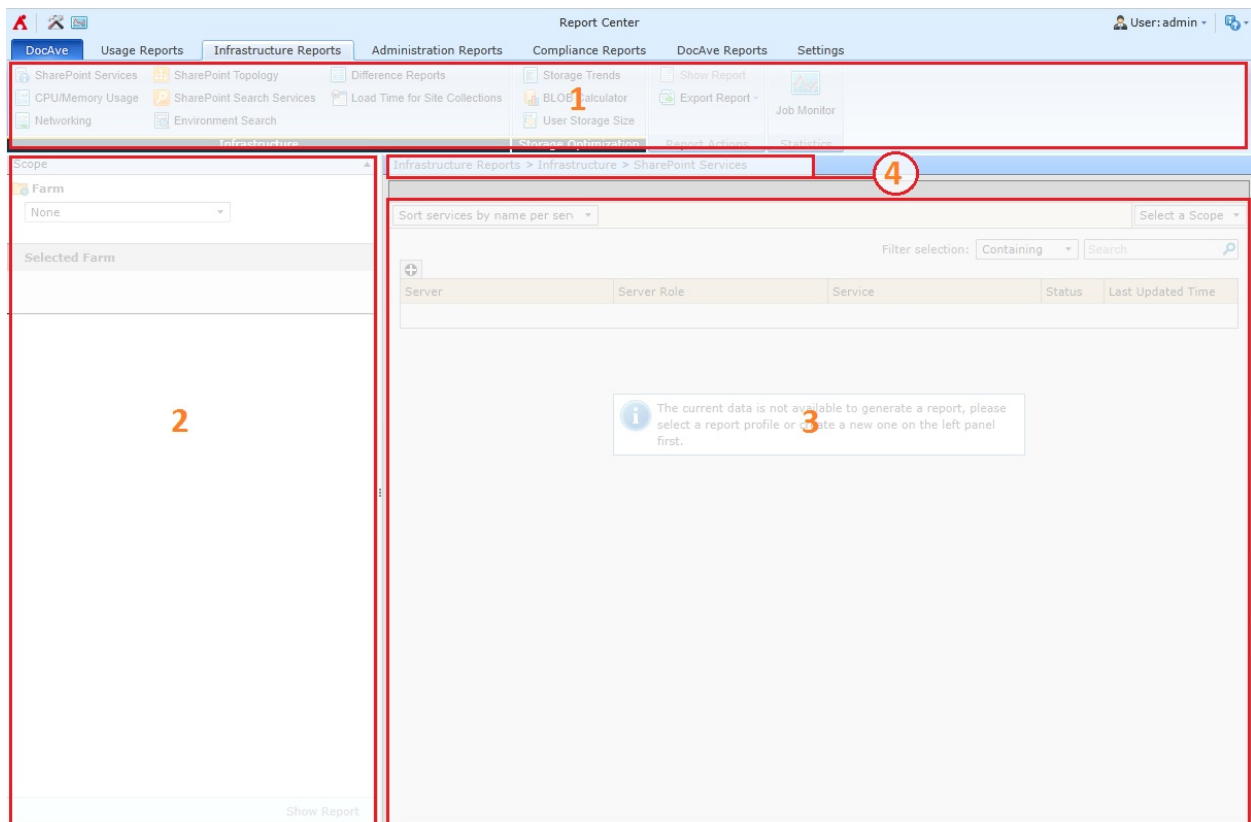
# Creating Infrastructure Reports

SharePoint Infrastructure Reporting consists of two categories: Real-time Monitoring and Infrastructure Reports. Real-time monitoring allows you to view live performance data regarding your SharePoint deployment, while Infrastructure Reports assists in management and long-term planning of your data.

## Infrastructure Reports Interface

When in the **Infrastructure Report** tab of Report Center, you will see the following:

1. Ribbon – Toolbar where you can select the type of report you wish to generate, perform actions on reports, or access the integrated Job Monitor.
2. Scope pane – Configure the settings for a report.
3. Report Display pane – Review the report. There are a number of configurable settings to customize how the information is displayed.
4. Current report type – The report type currently selected.



**Figure 3:** Infrastructure Reports interface.

## SharePoint Services

SharePoint Services allows you to view the latest active SharePoint Servers and SharePoint services, along with their status. Note that while the **Details** tab of the SharePoint Topology report shows similar information, the SharePoint Topology report is able to display information about multiple farms.

### Generating SharePoint Services Reports

To configure the basic settings for the SharePoint Services report, in the **Infrastructure Reports** tab of Report Center, click **SharePoint Services** on the ribbon. You can configure the following settings in the Scope pane:

1. **Scope** – In the **Scope** configuration area, select the farm you wish to view from the drop-down menu by checking the corresponding check-box.

Click **Show Report** to generate the report in the Report Display Pane on the right.

### Viewing SharePoint Services Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For SharePoint Services reports, the following settings can be configured in the Report Display Pane:




- **Sort Services by** - Order to display the data in.
- **Scope** - Change the scope for the data shown in the report.
- **Filter selection** - Filter the data displayed.

## CPU/Memory Usage

A CPU/Memory Usage report provides a real time monitoring of the CPU and memory usage of the host machine where the DocAve agent is located

### Generating CPU/Memory Usage Reports

To configure the basic settings for the CPU/Memory Usage report, in the **Infrastructure Reports** tab of Report Center, click **CPU/Memory Usage** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.

2. **Host** – Select the host machine where the DocAve agent is located.
3. **E-mail Notification** – In the E-mail Notification configuration area, check the **Usage alert** checkbox if you wish to have e-mail notifications sent out when the desired criteria are met. Then configure the following:
  - **Notification Name** – Select previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification rule. For details on how to create an e-mail notification rule, see the [Creating E-mail Notification Rules](#) section of this guide.
  - **Thresholds** – Specify the triggers for the notification. You may choose to use one or both of these thresholds:
    - Check the **CPU** checkbox to activate this threshold, then enter the values for **\_\_% lasts for more than \_\_ minute(s)**.
    - Check the **Memory** checkbox to activate this threshold, then enter the values for **\_\_% lasts for more than \_\_ minute(s)**.

Note that by default, thresholds are checked twice each minute. If these numbers exceed the thresholds set here, an e-mail notification will be sent.

- **Interval** – Specify how frequent to send e-mail notifications. Enter a positive integer into the **Every** textbox, then select **Day(s)** or **Week(s)** from the drop-down menu.

Click **Show Report** to generate the report in the Report Display Pane on the right.

## Viewing CPU/Memory Usage Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For CPU/Memory Usage reports, the following settings can be configured in the Report Display Pane:




- **Time Interval** - Time interval the report is displayed in.
- **CPU/Memory** - Display CPU information, Memory information, or both.
- **Scope** - Change the scope for the data shown in the report.
- **Details** - Detailed usage information per host machine.
- **Filter selection** - Filter the data displayed.

## Networking

A Networking report provides real-time information on networking usage (both wired and wireless) of SharePoint services.

### Generating Networking Reports

To configure the basic settings for the Networking report, in the **Infrastructure Reports** tab of Report Center, click **Networking** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Host** – Select the host machine where the DocAve agent is located.
3. **Adapter** – Select the adapter.
4. **E-mail Notification** – In the E-mail Notification configuration area, check the **Usage alert** checkbox if you wish to have e-mail notifications sent out when the desired criteria are met. Then configure the following:

- **Notification Name** – Select previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification rule. For details on how to create an e-mail notification rule, see the [Creating E-mail Notification Rules](#) section of this guide.
- **Thresholds** – Specify the triggers for this notification. Enter the values for **\_\_% lasts for \_\_ minute(s)**.

Note that by default, thresholds are checked twice each minute. If the number exceeds the threshold set here, an e-mail notification will be sent.

- **Interval** – Specify how frequent to send e-mail notifications. Enter a positive integer into the **Every** textbox, then select **Day(s)** or **Week(s)** from the drop-down menu.

Click **Show Report** to generate the report in the Report Display Pane on the right.

### Viewing Networking Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For Networking reports, the following settings can be configured in the Report Display Pane:

- **Time Interval** - Time interval the report is displayed in.
- **Scope** - Change the scope for the data shown in the report.
- **Details** - Networking data per host machine.
- **Filter selection** - Filter the data displayed.

## SharePoint Topology

The SharePoint Topology is a role-based function that displays all the server names and number in one of your SharePoint farms with an intuitive topology. You can view more information on a particular server on your farm by clicking the corresponding icons.

### Generating SharePoint Topology Reports

To configure the basic settings for the SharePoint Topology report, in the **Infrastructure Reports** tab of Report Center, click **SharePoint Topology** on the ribbon. You can configure the following settings in the Scope pane:

1. **Scope** – In the **Scope** configuration area, select the farm you wish to view from the drop-down menu by checking the corresponding check-box.

Click **Show Report** to generate the report in the Report Display Pane on the right.

### Viewing SharePoint Topology Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how the report displays the data. For SharePoint Topology reports, the following settings can be configured in the Report Display Pane:




- **Topology by Role** - Find information by role in farm.
- **Topology by Server** - See all of the services.
- **Details** - Service and status per server role.
  - **Sort services by** - Order to display data in.
  - **Filter selection** - Filter the data displayed.

## SharePoint Search Services

The SharePoint Search Services report provides real time information on the crawling speed of the SharePoint SSA, as well as the detailed information about the SSA such as content source status, system status and the search application topology.

### Generating SharePoint Search Services Reports

To configure the basic settings for the SharePoint Search Service report, in the **Infrastructure Reports** tab of Report Center, click **SharePoint Search Services** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, select the **Farm** you wish to view from the drop-down menu. Then select the **Search Service Application** from the drop-down menu.

Click **Show Report** to generate the report in the Report Display Pane on the right.

## Viewing SharePoint Search Services Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how to display the reports, the following settings can be configured in the Report Display Pane:




- **Time Interval** - Time interval the report is displayed in.
- **Scope** - Change the scope for the data shown in the report.
- **Crawling Speed** - Crawling speed of search service.
- **Content Sources** - Information about the search service.
  - **Filter selection** - Filter the data displayed.
- **System Status** - Status of the search service.
- **Search Application Topology** - Where the search service is.
  - **Filter selection** - Filter the data displayed.

## Environment Search

Environment Search generates reports for objects in specified environments, such as host, farm as well as services, servers and their status in farm.

### Generating Environment Search Reports

To configure the basic settings for the Environment Search report, in the **Infrastructure Reports** tab of Report Center, click **Environment Search** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Criteria** – In the Criteria configuration area, configure the following:
  - **Criteria** – Select **Domain**, **IPv4 Range** or **Host Name**.

- **Value** – Enter the Domain Name, IPv4 range or Host Name depending on the Criteria you have selected.
  - **Username** – Enter the username according to the Criteria and Value you have entered.
  - **Password** – Enter the password for the account.
3. Additional filters – You may add additional filters of the same Criteria.
- Domain - For multiple filters, click **Add another filter**. By default, the logic is set to *And*. The logic may be configured as *And* or *Or* by clicking on the logic itself. Click **Search Host**. Host Name, Username and Operating System will be displayed in the Host table. Click **Save** to save these search results. They will remain on the screen when you reopen this layout page.
  - IPv4 Range - For multiple filters, click **Add another IPv4 Range filter**. The logic for IPv4 Range filters is *Or*.
  - Host Name - For multiple filters, click **Add another Host Name filter**. The logic for Host Name filters is *Or*.




Click **Scan** to scan the environment based on the filters configured.

## Difference Report

A Difference Reports displays the differences among selected site collections based on predefined criteria.

### Generating Difference Reports

To configure the basic settings for the Difference Reports, in the **Infrastructure Reports** tab of Report Center, click **Difference Reports** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the Scope configuration area, click the farm name to expand the data tree, and select the node you want to view by checking the corresponding check-box. For the large environment, you can search the desire list by the searching function. In the blank field above the farm name, you can enter the characters that contained in list URL or name and click the search icon to search the list.

Click **Show Report** to generate the report in the Report Display Pane on the right.

## Viewing Difference Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how to display the reports, the following settings can be configured in the Report Display Pane:




- **Information**
- **Scope** - Change the scope for the data shown in the report.

## Load Time for Site Collections

This report displays the time taken to load the selected site collections.

### Generating Load Time for Site Collections Reports

To configure the basic settings for the Load Time for Site Collections report, in the **Infrastructure Reports** tab of Report Center, click **Load Time for Site Collections** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the Scope configuration area, click the farm name to expand the data tree, and select the node you want to view by checking the corresponding check-box. For the large environment, you can search the desired list by the searching function. In the blank field above the farm name, you can enter the characters that contained in list URL or name and click the search icon to search the list.
3. **E-mail Notification** – In the E-mail Notification configuration area, check the **Usage alert** checkbox if you wish to have e-mail notifications sent out when the desired criteria are met. Then configure the following:
  - **Notification Name** – Select previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification rule. For details on how to create an e-mail notification rule, see the [Creating E-mail Notification Rules](#) section of this guide.
  - **Thresholds** – Specify the trigger for this notification. Enter the values for **More than \_\_ second(s) with \_\_ consecutive tries**.

Note that by default, the threshold is checked at 6Am and 12Am every day. If the number exceeds the threshold set here, an e-mail notification will be sent.

- **Interval** – Specify how frequent to send e-mail notifications. Enter a positive integer into the **Every** textbox, then select **Day(s)** or **Week(s)** from the drop-down menu.

4. **Collector** – This collects site collection load time data for the report. By default it collects the information at midnight everyday according to your Control Service’s time zone. In the Collector configuration area, to change the interval, click **Link to Collector**. You will be brought to the Data Collection page. For more information about Collector, please refer to the Data Collection section of this guide.  
By default, the collector schedule is enabled. To disable the collector schedule, you can uncheck the **Enable Collector** checkbox, the status of the collector will change to *Disabled*, and DocAve will not collect the information according to the schedule.  
To collect the information of the current profiles immediately, click **Collect Now** button.

Click **Show Report** to generate the report in the Report Display Pane on the right.

## Viewing Load Time for Site Collections Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how to display the reports, the following settings can be configured in the Report Display Pane:

- **Range** - Time frame parameter for the report.
- **Frequency** - Time interval the report is displayed in.
- **Type** - Set report type.
- **Custom** - Customize the time Range and Frequency in a calendar.
- **Scope** - Change the scope for the data shown in the report.
- **Load Time** - Load time per frequency.
- **Details** - Display detailed information for each individual site.

## Storage Optimization





Storage Optimization reports are Infrastructure reports that are more specific to information on your storage use.

### Storage Trends

A Storage Trends report displays the current and projected storage use by selected site collections on an adjustable time scale. It also provides a drill down analysis of the size of each site collection by document type, size by sites and size by SharePoint lists or libraries.

### Generating Storage Trends Reports

To configure the basic settings for the Storage Trends report, in the **Infrastructure Reports** tab of Report Center, click **Storage Trends** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, select the **Farm/Web Application/Site Collection** you want to view from the drop-down menu by checking the corresponding check-box. For the large environment, you can only view the desired node on the expanded tree using the **Search** function. In the blank field above the farm name, you can enter the characters contained in the URL of the specified node and click the  icon to only display the searched node on the tree.
3. E-mail Notification – In the E-mail Notification configuration area, check the **Usage alert** checkbox if you wish to have e-mail notifications sent out when the desired criteria are met. Then configure the following:

- Notification Name – Select previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification rule. For details on how to create an e-mail notification rule, see the [Creating E-mail Notification Rules](#) section of this guide.
- Thresholds – Specify the triggers for this notification. When the storage size exceeds the specified value, an email will be sent. Enter the values for **Storage: More than \_\_**, then select **MB** or **GB** from the drop-down menu.

Note that by default, thresholds are checked at 0Am and 12Am every day. If these numbers exceed the thresholds set here, an e-mail notification will be sent.

- **Prediction** – Check this checkbox to enable notifications triggered by prediction values, then configure the following settings:
    - Time Range – Enter a positive integer into the **In the following \_\_** textbox, and select **Day(s)**, **Week(s)** or **Month(s)** from the drop-down menu.
    - Storage – Enter a positive integer into the **More than \_\_** textbox, then select **MB** or **GB** from the drop-down menu.
  - Interval – Specify the interval for sending the email.
4. **Collector** – This collects storage trend data for the report. By default it collects the information at midnight everyday according to your Control Service’s time zone. In the Collector configuration area, to change the interval, click **Link to Collector**. You will be brought to the Data Collection page. For more information about Collector, please refer to the [Data Collection](#) section of this guide.

By default, the collector schedule is enabled. To disable the collector schedule, you can uncheck the **Enable Collector** checkbox, the status of the collector will change to *Disabled*, and DocAve will not collect the information according to the schedule.

To collect the information of the current profiles immediately, click **Collect Now** button.

Click **Show Report** to generate the report in the Report Display Pane on the right.

## Viewing Storage Trends Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how to display the reports, the following settings can be configured in the Report Display Pane:





- **Range** - Time frame parameter for the report.
- **Frequency** - Time interval the report is displayed in.
- **Type** - Set report type.
- **Custom** - Customize the time Range and Frequency in a calendar.
- **Scope** - Change the scope for the data shown in the report.
- **Storage Trends** - Storage trends per frequency.
- **Predictions** - Predicted trends based on current trends.

## BLOB Calculator

A BLOB Calculator report displays the size and proportion of data stored in SharePoint and external devices. The external devices are related to your settings in the module of Storage Optimization.

### Generating BLOB Calculator Reports

To configure the basic settings for the BLOB Calculator report, in the **Infrastructure Reports** tab of Report Center, click **BLOB Calculator** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, select the **Farm/Web Application/Site Collection/Content Database** you want to view from the drop-down menu by checking the corresponding check-box. Then select the **Search Service Application** from the drop-down menu. For the large environment, you can only view the desired node on the expanded tree using the **Search** function. In the blank field above the farm name, you can enter the characters contained in the URL/name of the specified node and click the  icon to only display the searched node on the tree.
3. **External Rule** - Specify the critical **BLOB Size** and the **Increment Size**. The range from 0 to the specified BLOB size will be divided by the increment size, and displayed as the Y-Axis of the report diagram. For example, if the specified **BLOB size** is 100MB, and the **Increment Size** is 20MB. The Y-Axis will display 0MB, 20MB, 40MB, 60MB, 80MB, 100MB.

Click **Run Report** to generate the report in the Report Display Pane on the right.

### Viewing BLOB Calculator Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how to display the reports, the following settings can be configured in the Report Display Pane:









- **Display by** - Order to display the data in.
- **Scope** - Change the scope for the data shown in the report.
- **SQL Data Analyzer** - BLOB data broken down by the specified object.
- **BLOB Inventory** - BLOB storage information.

## User Storage Size

User Storage Size is used to display storage size down at site collection level/site level for certain users as well as the information on the content contributors to certain libraries, lists, and discussion boards.

### Generating User Storage Size Reports

To configure the basic settings for the User Storage Size report, in the **Infrastructure Reports** tab of Report Center, click **User Storage Size** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, select the **Site Collection/Site** you want to view from the drop-down menu by checking the corresponding check-box. Then select the **Search Service Application** from the drop-down menu. For the large environment, you can only view the desired node on the expanded tree using the **Search** function. In the blank field above the farm name, you can enter the characters contained in the URL/name of the specified node and click the  icon to only display the searched node on the tree.
3. **User** – In the User configuration area, you can set the user(s) whose activity you want to view or do not want to view:
  - **Include All Users** – By default this option is selected. The activities of all users can be viewed.
  - **Users to Exclude** – Enter the user(s) whose activity you do not wish to view. You can click the  to check the name you entered or click  to find the user(s) you want to exclude in the report.
  - **Users to Include** – Enter the user(s) whose activity you wish to view. You can click the  to check the name you entered or click  to find the user(s) you want to include in the report.
  - **Include Anonymous Users** – Check the check-box of **Include Anonymous Users** to include the activities of anonymous users.

4. E-mail Notification – In the E-mail Notification configuration area, check the **Usage alert** checkbox if you wish to have e-mail notifications sent out when the desired criteria are met. Then configure the following:
  - Notification Name – Select previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification rule. For details on how to create an e-mail notification rule, see the [Creating E-mail Notification Rules](#) section of this guide.
  - Thresholds – Specify the triggers for this notification. Enter the values for **More than** \_\_, then select **MB** or **GB** from the **storage size** drop-down menu.

Note that by default, thresholds are checked at 0Am and 12Am every day. If these numbers exceed the thresholds set here, an e-mail notification will be sent.
  - Interval – Specify how frequent to send e-mail notifications. Enter a positive integer into the **Every** textbox, then select **Day(s)** or **Week(s)** from the drop-down menu.
5. Collector – This collects storage size data for the report. By default it collects the information at midnight everyday according to your Control Service’s time zone. In the Collector configuration area, to change the interval, click **Link to Collector**. You will be brought to the Data Collection page. For more information about Collector, please refer to the [Data Collection](#) section of this guide.

By default, the collector schedule is enabled. To disable the collector schedule, you can uncheck the **Enable Collector** checkbox, the status of the collector will change to *Disabled*, and DocAve will not collect the information according to the schedule.

To collect the information of the current profiles immediately, click **Collect Now** button.

Click **Show Report** to generate the report in the Report Display Pane on the right.

## Viewing User Storage Size Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how to display the reports, the following settings can be configured in the Report Display Pane:

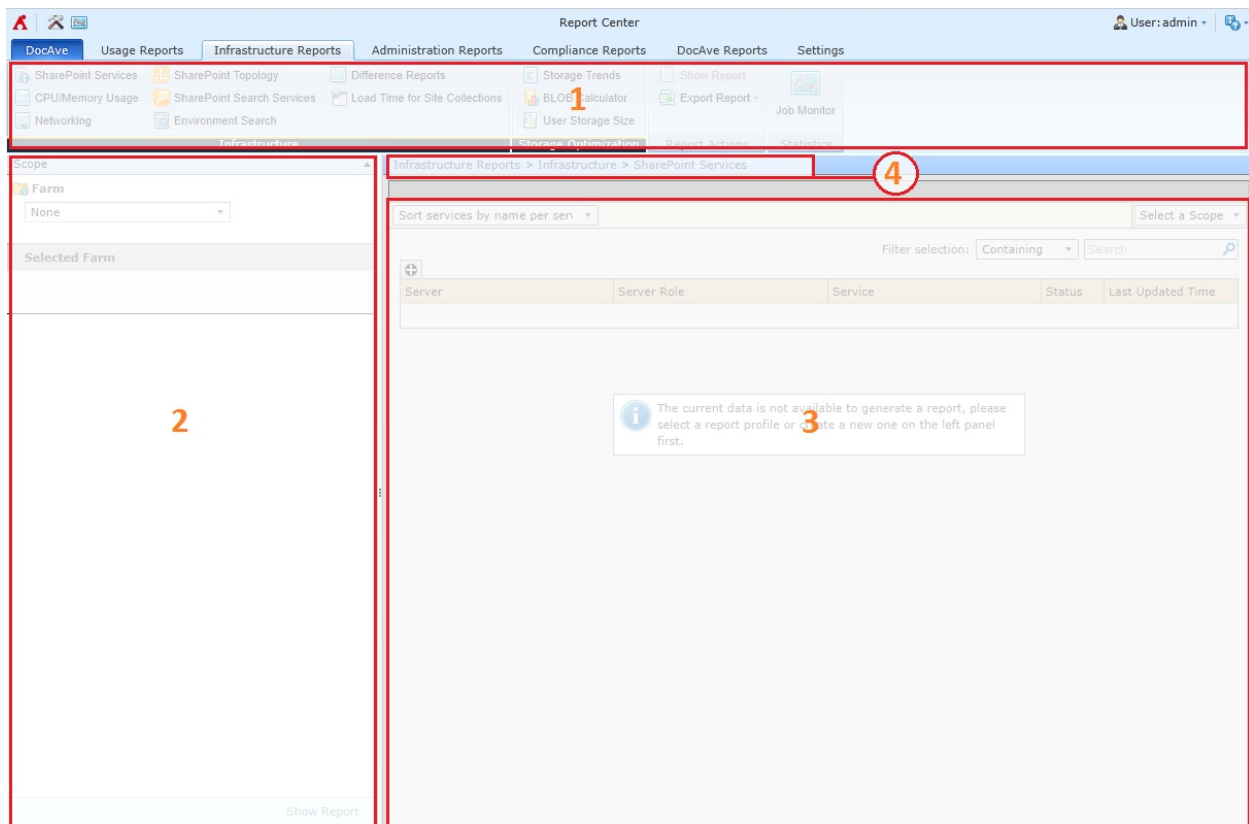
- **Display by** - Information to display the report by.
- **Sort by** - Order to display the data in.
- **Scope** - Change the scope for the data shown in the report.
- **User Storage Size** - Storage size per user.
- **Details** - Storage size per user per site collection/site URL.

# Creating Administration Reports

## Administration Reports Interface

When in the **Administration Report** tab of Report Center, you will see the following:





1. Ribbon – Toolbar where you can select the type of report you wish to generate, perform actions on reports, or access the integrated Job Monitor.
2. Scope pane – Select the farm or SharePoint object.
3. Report settings – Configure what to include in the reports.



**Figure 4:** Administration Report Configuration interface.

## Generating Configuration Reports

To configure the basic settings for the Configuration report, in the **Administration Reports** tab of Report Center, click **Configuration Reports** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, select the **Farm/Web Application/Content Database/Site Collection/Site/Library(List)** you want to view from the drop-down menu by checking the corresponding check-box. For the large environment, you can only view the desired node on the expanded tree using the **Search** function. In the blank field above the farm name, you can enter the characters contained in the URL/name of the specified node and click the  icon to only display the searched node on the tree.
3. **Schedule** – In the schedule configuration area, choose one of the following:
  - **No Schedule** – Select this to apply the rules of this profile and collect the data manually by clicking **Save Profile and Run Report**.
  - **Configure the schedule myself** – Select this to configure the specific time you want to collect the data of this profile. A schedule configuration area appears when you select this option. You can customize the schedule with the following options:
    - **Start Time** – Select the date and time for applying the rules of this profile and collecting the data. Note that the start time cannot be earlier than the current time.
    - **Interval** – Enter an integer into the text field and select **Hour(s)**, **Day(s)**, **Week(s)**, or **Month(s)**. The data will be collected repeatedly based on this schedule. Click **Calendar View** to see the schedule in a calendar.
4. **Schedule ending** – Designate when to stop collecting the data of this profile. Select **No end date** for the data of this profile to be applied repeatedly until you stop it manually. Select **End after \_\_\_ occurrence(s)** to have the data to stop being repeatedly collected after the number of occurrences you designate in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected. Then in the Export Report Settings configuration area, select the desired **Report Format** and **Export Location**. If you wish to configure a new export location, click **New Export Location**, then follow the instructions provided in the [Export Location](#) section of this guide.
5. **Notification (Optional)** – Check the **Export Report** checkbox to have notifications sent when reports are exported. Then select the **Notification Names**. You can choose to have the report be included in the e-mail as an attachment by checking the **Attach report to the e-mail** checkbox, then enter the maximum size of the report allowed in the **less than \_\_\_ MB** textbox.
6. **Report Settings** – Configure what information you would like the report to contain. Click on a drop-down menu to see its options, then check the corresponding checkboxes to have the

information included. If you select **Include Compare Report**, the compare report of different nodes will be included.

When you are finished configuring the settings, click **Save Profile and Run Report**. The Export Report window will pop up. Choose the **Report Format** and **Export Location**, then click **OK** to generate the report or **Cancel** to return to the configurations.

# Creating Compliance Reports

In Compliance Reports, you can apply pre-configured filter settings to the SharePoint object(s) you select to generate Auditor Reports, or customize the filter settings for Customized Reports.

Only the SharePoint objects with Auditor records retrieved can be displayed on the tree. Before running the report, you must collect the audit data in Audit Controller. For more information, please refer to [Audit Controller](#) section.

## Compliance Reports Interface

When in the **Compliance Reports** tab of Report Center, you will see the following:

1. Ribbon – Toolbar where you can select the type of report you wish to generate, perform actions on reports, or access the integrated Job Monitor.
2. Scope pane – Select the SharePoint object(s) you wish to generate the report for.
3. Filter settings – Configure these settings for Customized Report.
4. Report Display pane – Review the report. There are a number of configurable settings to customize how the information is displayed.
5. Current report type – The report type currently selected.

The screenshot shows the Report Center interface with the Compliance Reports tab selected. The ribbon at the top contains various report types and actions, with a red box and the number 1 highlighting the ribbon area. Below the ribbon, a message bar indicates the report profile is generated at 2012-01-10 18:52:18. A red box and the number 5 highlight this message bar. The main interface is divided into two panes. The left pane, labeled 'Report Profile', shows a tree view of SharePoint objects under 'PROD Fam', with a red box and the number 2 highlighting the tree. The right pane, labeled 'Configure filter settings', shows filter options for 'Time Range', 'URL Filter', 'Action Filter', and 'User Filter', with a red box and the number 3 highlighting these settings. Below the filters, the 'User Lifecycle' section is visible, with a red box and the number 4 highlighting the table of audit records. The table has columns for URL, Type, Action, Time, and Details, and contains several rows of audit data for 'SHAREPOINT\system'.

URL	Type	Action	Time	Details
SHAREPOINT\system				
http://intranet.contoso.com	Site	AuditMaskChange	2012-01-06 15:30:09	SHAREPOINT\system chang
http://intranet.contoso.com	SiteCollection	AuditMaskChange	2012-01-09 14:18:01	SHAREPOINT\system chang
http://finweb.contoso.com/	SiteCollection	AuditMaskChange	2012-01-09 14:18:01	SHAREPOINT\system chang
http://finweb.contoso.com/	SiteCollection	AuditMaskChange	2012-01-09 14:18:01	SHAREPOINT\system chang
http://hrweb.contoso.com/	SiteCollection	AuditMaskChange	2012-01-09 14:18:01	SHAREPOINT\system chang
http://hrweb.contoso.com/s	SiteCollection	AuditMaskChange	2012-01-09 14:18:01	SHAREPOINT\system chang
http://intranet.contoso.com	SiteCollection	AuditMaskChange	2012-01-09 14:18:02	SHAREPOINT\system chang
http://intranet.contoso.com	SiteCollection	AuditMaskChange	2012-01-09 14:18:02	SHAREPOINT\system chang
http://intranet.contoso.com	SiteCollection	AuditMaskChange	2012-01-09 14:18:02	SHAREPOINT\system chang

**Figure 5:** Compliance Report interface.







## Viewing Compliance Reports

Once a Compliance Report has been generated, you can review it in the Report Display pane. In this area, you can choose the group to include in the report from the **Show Group** drop-down menu.

Compliance reports contain the following information:

- URL
- Type
- User
- Action
- Title
- Time
- Detail
- Source IP
- Host Name

By default, only URL, Type, User, Action, Time and Details are displayed. You can customize how the reports are displayed with the following methods:

-  – You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – Click  in the column title to hide the column.  – This allows you to filter which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than based on a keyword. Click the  of the column you want to filter, then check the checkbox next to the item name to have that item shown in the list.

## User Lifecycle

Reports on actions of the specified user(s).

To generate a User Lifecycle report, select the desired SharePoint web application/site collection/site/list in the Scope pane, then click **User Lifecycle** on the ribbon to use the User Lifecycle filter settings. Click **Run Report** on the ribbon to generate the report. You can review the most recently generated report by clicking **Show Report** on the ribbon.

**\*Note:** All of the selections in the Scope pane must be on the same SharePoint object level. For example, you may select multiple web applications, or you may select multiple site collections within different web applications, but you may not select a web application and a site collection at the same time.

## List Access

Reports on what has happened to the specified list(s).

To generate a List Access report, click on the SharePoint objects to expand the tree down to the site/list level. Select the desired site(s), then click **List Access** on the ribbon to use the List Access filter settings. Click **Run Report** on the ribbon to generate the report. You can review the most recently generated report by clicking **Show Report** on the ribbon.

**\*Note:** All of the selections in the Scope pane must be on the same SharePoint object level. For example, you may select multiple web applications, or you may select multiple site collections within different web applications, but you may not select a web application and a site collection at the same time.

## Item Lifecycle

Reports on the entire life of items under the specific list(s).

To generate a Item Lifecycle report, click on the SharePoint objects to expand the tree down to the list level. Select the desired list(s), then click **Item Lifecycle** on the ribbon to use the Item Lifecycle filter settings. Click **Run Report** on the ribbon to generate the report. You can review the most recently generated report by clicking **Show Report** on the ribbon.

**\*Note:** All of the selections in the Scope pane must be on the same SharePoint object level. For example, you may select multiple web applications, or you may select multiple site collections within different web applications, but you may not select a web application and a site collection at the same time.

## Site Access

Reports on what has happened to the specified site(s).

To generate a Site Access report, click on the SharePoint objects to expand the tree down to the site level. Select the desired site(s), then click **Site Access** on the ribbon to use the Site Access filter settings. Click **Run Report** on the ribbon to generate the report. You can review the most recently generated report by clicking **Show Report** on the ribbon.

**\*Note:** All of the selections in the Scope pane must be on the same SharePoint object level. For example, you may select multiple web applications, or you may select multiple site collections within different web applications, but you may not select a web application and a site collection at the same time.

## List Deletion

Reports on what has been deleted under the specified list(s)

To generate a List Deletion report, click on the SharePoint objects to expand the tree down to the site/list level. Select the desired site(s), then click **List Deletion** on the ribbon to use the List Deletion filter settings. Click **Run Report** on the ribbon to generate the report. You can review the most recently generated report by clicking **Show Report** on the ribbon.

**\*Note:** All of the selections in the Scope pane must be on the same SharePoint object level. For example, you may select multiple web applications, or you may select multiple site collections within different web applications, but you may not select a web application and a site collection at the same time.

## Creating Customized Reports

Customize reports from the collected audit records.

To generate a Customized Report, select the desired SharePoint objects in the Scope pane, then click **Customized Report** on the ribbon to configure your own filter settings. Click **Run Report** on the ribbon to generate the report. You can review the most recently generated report by clicking **Show Report** on the ribbon.

**\*Note:** All of the selections in the Scope pane must be on the same SharePoint object level. For example, you may select multiple web applications, or you may select multiple site collections within different web applications, but you may not select a web application and a site collection at the same time.

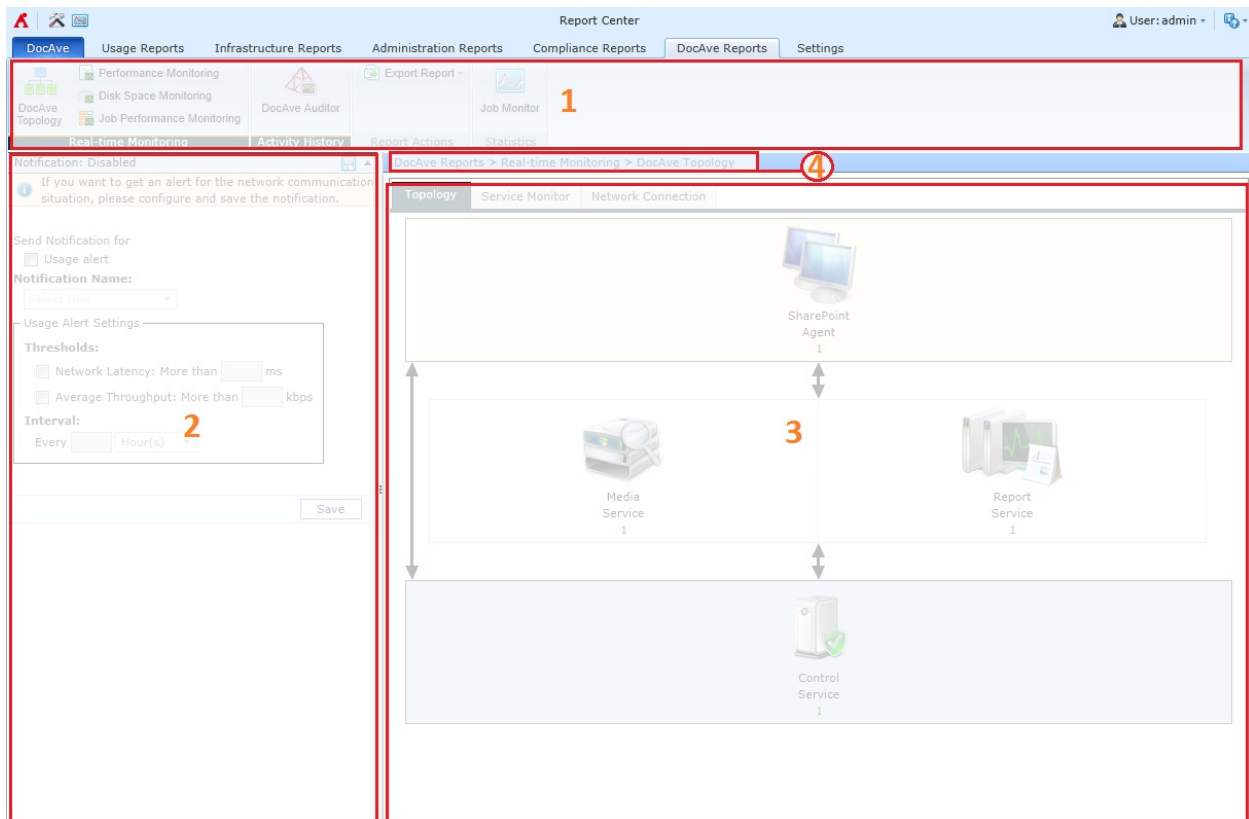
# Creating DocAve Reports

DocAve Reports are used to monitor the DocAve System setup from a System Hardware perspective.

## DocAve Reports Interface

When in the **DocAve Report** tab of Report Center, you will see the following:

1. Ribbon – Toolbar where you can select the type of report you wish to generate, perform actions on reports, or access the integrated Job Monitor.
2. Scope pane – Configure the settings for the reports.
3. Report Display pane – Review the report. There are a number of configurable settings to customize how the information is displayed.
4. Current report type – The report type currently selected.



**Figure 6:** DocAve Reports interface.

## DocAve Topology

DocAve Topology is used to monitor the service topology of the DocAve Manager.

To access DocAve Topology, in the **DocAve Reports** tab of Report Center, click **DocAve Topology** on the ribbon.

The DocAve Topology report displays the Agent names with the service status. Click a Manager service or an Agent to get the detailed information such as server name, status, operating system, memory and so on. You can view the status on each service in the topology under the Service Monitor tab and the network throughput under the Network Connection tab.

1. Notification – In the Notification configuration area, check the **Usage alert** checkbox if you wish to have e-mail notifications sent out when the desired criteria are met. Then configure the following:
  - Notification Name – Select previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification rule. For details on how to create an e-mail notification rule, see the [Creating E-mail Notification Rules](#) section of this guide.
  - Thresholds – Specify the triggers for the notification. You may choose to use one or both of these thresholds:
    - Check the **Network Latency: More than \_\_ ms** checkbox to activate this threshold, then enter a positive integer into the textbox.
    - Check the **Average Throughput: More than \_\_ kbps** checkbox to activate this threshold, then enter a positive integer into the textbox.

Note that by default the network latency and the average throughput are checked each hour. If these numbers exceed the thresholds set here, an e-mail notification will be sent.




- Interval – Specify how frequent to send e-mail notifications. Enter a positive integer into the **Every** textbox, then select **Hour(s)**, **Day(s)**, **Week(s)**, **Month(s)** or **Year(s)** from the drop-down menu.

# Performance Monitoring

Performance Monitoring displays the CPU and Memory Usage of the DocAve Manager host.

## Generating Performance Monitoring Reports

To configure the basic settings for the Performance Monitoring report, in the **Usage Reports** tab of Report Center, click **Performance Monitoring** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – Select the **Host** you wish to have the report generated on.
3. **E-mail Notification** – In the E-mail Notification configuration area, check the **Usage alert** checkbox if you wish to have e-mail notifications sent out when the desired criteria are met. Then configure the following:
  - **Notification Name** – Select previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification rule. For details on how to create an e-mail notification rule, see the [Creating E-mail Notification Rules](#) section of this guide.
  - **Thresholds** – Specify the triggers for the notification. You may choose to use one or both of these thresholds:
    - Check the **CPU** checkbox to activate this threshold, then enter the values for **\_\_% lasts for more than \_\_ minute(s)**.
    - Check the **Memory** checkbox to activate this threshold, then enter the values for **\_\_% lasts for more than \_\_ minute(s)**.

Note that by default the CPU and memory are checked twice each minute. If these numbers exceed the thresholds set here, an e-mail notification will be sent.

- **Interval** – Specify how frequent to send e-mail notifications. Enter a positive integer into the **Every** textbox, then select **Minute(s)** or **Hour(s)** from the drop-down menu.

Click **Show Report** to generate the report in the Report Display Pane on the right.

## Viewing Performance Monitoring Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how to display the reports, the following settings can be configured in the Report Display Pane:




- **Time Interval** - Time interval the report is displayed in.
- **CPU/Memory** - Display CPU data, Memory data, or both.
- **Scope**- Change the scope for the data shown in the report.
- **Details** - Performance per host machine.
  - **Filter selection** - Filter the data displayed.

## Disk Space Monitoring

A Disk Space Monitoring report displays the space usage of DocAve logical devices.

## Generating Disk Space Monitoring Reports

To configure the basic settings for the Disk Space Monitoring report, in the **DocAve Reports** tab of Report Center, click **Disk Space Monitoring** on the ribbon. You can configure the following settings in the Scope pane:

1. **Report Profile Name** – Enter a new Report Profile name in the textbox if you wish to create a new profile. Click the  to clear all fields, click the  icon to save changes to the current report profile, or click the  to save any changes under a new profile name.
2. **Scope** – Select the **Logical Device** you wish to have the report generated on.
3. **E-mail Notification** – In the E-mail Notification configuration area, check the **Usage alert** checkbox if you wish to have e-mail notifications sent out when the desired criteria are met. Then configure the following:

- **Notification Name** – Select previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification rule. For details on how to create an e-mail notification rule, see the [Creating E-mail Notification Rules](#) section of this guide.
- **Thresholds** – Specify the triggers for this notification. Enter the values for **More than \_\_\_% usage**.

Note that by default, thresholds are checked each hour. If these numbers exceed the thresholds set here, an e-mail notification will be sent.

- **Prediction** – Check this checkbox to enable notifications triggered by prediction values, then configure the following settings:

- Time Range – Enter a positive integer into the **In the following** \_\_ textbox, and select **Day(s)** or **Week(s)** from the drop-down menu.
    - Enter the value for **More than** \_\_% usage.
  - Interval – Specify how frequent to send e-mail notifications. Enter a positive integer into the **Every** textbox, then select **Hour(s)**, **Day(s)**, **Week(s)**, **Month(s)** or **Year(s)** from the drop-down menu.
4. Collector – This collects disk space data for the report. By default it collects the information at midnight everyday according to your Control Service’s time zone. In the Collector configuration area, to change the interval, click **Link to Collector**. You will be brought to the Data Collection page. For more information about Collector, please refer to the [Data Collection](#) section of this guide.
- By default, the collector schedule is enabled. To disable the collector schedule, you can uncheck the **Enable Collector** checkbox, the status of the collector will change to *Disabled*, and DocAve will not collect the information according to the schedule.
- To collect the information of the current profiles immediately, click **Collect Now** button.

Click **Show Report** to generate the report in the Report Display Pane on the right.

## Viewing Disk Space Monitoring Reports

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how to display the reports, the following settings can be configured in the Report Display Pane:

- **X-Axis** - Set the parameter for the X-Axis.
- **Range** - Time frame parameter for the report.
- **Frequency** - Time interval the report is displayed in.
- **Type** - Set report type.
- **Custom** - Customize the time Range and Frequency in a calendar.
- **Scope** - Change the scope for the data shown in the report.
- **Data** - Data group to display.
- **Usage** - Usage per frequency.
- **Prediction** - Predicted trends based on current trends.
- **Status** - Current data types broken down.
- **Details** - Usage per device data.

## Job Performance Monitoring

Job Performance Monitoring displays the job performance of granular and platform level backups and restores.

Click **Job Performance Monitoring**. The Job Performance Monitoring report will be displayed in the window. Select the job type you want to monitor at the top right corner of the window. You can view the detailed information about the job in Details tab.

## Viewing the Job Performance Monitoring Report

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how to display the reports, the following settings can be configured in the Report Display Pane:

- **Range** - Time frame parameter for the report.
- **Custom** - Customize the time Range and Frequency in a calendar.
- **Filter selection** - Filter the data displayed.
- **Job Performance Monitoring** - Job performance per frequency.
- **Details** - Job performance data per job.

## DocAve Auditor

DocAve Auditor monitors the activities of the DocAve system, such as creating a plan, deleting a profile and so on.

To access DocAve Auditor, in the **DocAve Reports** tab of Report Center, click **DocAve Auditor** on the ribbon.

## Viewing the DocAve Auditor Report

Once you have generated a report, the Report Display Pane has a number of configurable settings so that you can customize how to display the reports, the following settings can be configured in the Report Display Pane:

- **Range** - Time frame parameter for the report.
- **Frequency** - Time interval the report is displayed in.
- **Type** - Time interval the report is displayed in.
- **Custom** - Customize the time Range and Frequency in a calendar.
- **Y-Axis** – Set the parameter for the Y-Axis.
- **DocAve Auditor** - Activities by time per frequency.
- **Details** - Activities per user with modular data.

## DocAve Report Center Use Cases

The following use cases demonstrate the use of features described in this guide in several real-world situations. These use cases are intended to give the user a sense of when to use certain features of Report Center, as well as how the Report Center work with other DocAve products to create a better user experience overall.

### Utilizing Infrastructure Reports to Lower Storage Cost

Jack heads the IT department of a medium sized company. Months ago, Jack's proposal for the company to adopt SharePoint was approved. To fully utilize their SharePoint environment, Jack configured DocAve 6 Connector to allow users to access documents stored in their File Share through SharePoint. This way, the data can live on its current storage device without affecting the end user.

Jack knew that as SharePoint becomes more widely used within the company, storage needs would increase quickly. To keep track of data usage, Jack sets up E-mail Notifications to alert him when storage trends reach a certain threshold. He also runs Storage Trend reports every two weeks to help him plan the company's storage needs as their SharePoint environment grows. Jack decided that rather than purchasing additional SQL databases, he would purchase lower tier storage devices, and use the DocAve Storage Manager to offload BLOBs. To calculate how much storage he would need to purchase, Jack uses the BLOB Calculator in DocAve Report Center to see the trends for BLOB size. He then analyzes the BLOB Calculator report to better determine how to configure the rules in Storage Manager to most effectively move data off of their SQL databases. For data that is outdated and no longer used, Jack sets up rules in DocAve Archiver to move them onto the lowest tier storage. This way the data is retained for records and compliance purposes in the most affordable way.

### Utilizing Usage Reports to Monitor SharePoint Activity

The company has been using SharePoint for six months now, and the management is keen on seeing employees really leveraging SharePoint to increase collaboration and efficiency in workflow. To keep track of SharePoint usage, every month since the company first started using SharePoint, Jack launched Report Center in DocAve, and ran the following reports:

- Site Activity and Usage –Provides information on how many people visit the specified site(s).
- Page Traffic – Provides information on how many people are visiting what specific parts of these sites, which tells him if the most important part(s) of the team site(s) are being utilized.
- Workflow Status – Provides information on the number of workflows in the site(s), the templates used, statuses and the users assigned.
- Active Users – Provides information on which user performs the most actions in which sites.

Because he would be running the same reports each month, Jack configured the report settings, and saved the profile. This way he can generate the same report without having to reconfigure all of the settings each time. This also rules out human errors in configuring the report setting each month, offering more consistency in the parameters for the data generated. Jack also had each report exported into an Excel sheet, and saved all of them in the same location. So when asked for statistics on usage trends for SharePoint, Jack was able to forward along all of the datasheets that he has generated in the last six months.

## **Utilizing Compliance Reports to Remove Security Risks**

Jack is approached by management regarding documents on an internal site that were recently leaked to the public. Jack knew immediately that he can run customized Compliance Reports in DocAve Report Center to obtain information about who accessed the pertaining sites and documents within a specific time frame, as well as what actions they took. He first generates Item Lifecycle reports to see who has accessed these documents, and submits them to the management team as well as the company's compliance department. After reviewing these reports, it is determined that the person who was responsible for the leak was not actually supposed to have access to them. This meant that there are incorrect permissions settings to the site in question. Jack then runs Site Access and List Access reports to find who has altered permissions to the sites recently. Once management finished reviewing the reports, Jack launched DocAve Administrator, and ran a Security Search to see which users and user groups have what level of permissions in the site. He then checks the User Permissions for the site, and removes the inappropriate users.

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