DocAve® 6 Report Center

User Guide

Service Pack 6, Cumulative Update 1

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What's New in this Guide

- Minor edits and cover page update for current release.

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.

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** on the ribbon. For more information about using Job Monitor, refer to the DocAve 6 Job Monitor User Guide.

Available Reports in Report Center

DocAve Report Center provides you with a comprehensive and customizable reporting toolset. The reports are broken down into seven categories, each with its own interface containing various report types.

For details on the supported object levels of each report mentioned above, refer to Appendix A: Supported Object Levels of DocAve Report Center Reports.

Usage Reports – Analyze SharePoint usage and behavior using data collected from SharePoint and IIS logs. This category offers the following report types:

- **Search Usage** – Displays usage data for search terms and scopes within the selected SharePoint farm or site collections.
- **Site Visitors and Activity** – Displays count of events (updates, deletions, and views) and unique visitors for the selected site collections, sites, lists, or items. Uses SharePoint Auditor.
- **Checked-Out Documents** – Displays information about checked-out documents within the selected Web applications, site collections, sites, or lists.
- **Page Traffic** – Displays the number of hits and amount of throughput the sites collections or sites have received.
- **Referrers** – Displays the top pages and hosts that have referred traffic to the selected site collections or sites.
- **Last Accessed Time** – Displays when the selected site collections or sites were last accessed, and by whom. Uses SharePoint Auditor.
- **Failed Login Attempts** – Displays information about failed login attempts for the selected farm or sites.
- **Workflow Status** – Displays information about workflow definitions and instances within the selected site collections, sites, or lists.
- **SharePoint Alerts** – Displays information about SharePoint alerts configured by end users within the selected farm, Web applications, site collections, sites, or lists.
- **Download Ranking** – Displays the number of times that documents have been downloaded within the selected sites.
- **Site Activity Ranking** – Displays the most and least active sites, pages, lists, items, and users per site collection or site, as determined by hits. Uses SharePoint Auditor.
- **Active Users** – Displays the number of non-system activities for all users within the selected Web applications, site collections, sites, or lists. Uses SharePoint Auditor.

***Note**: In a SharePoint Foundation 2010 environment, the **Search Usage** report and **Referrers** report are not available. In a SharePoint 2013 environment, the **Referrers** report are not available.

Infrastructure Reports – Monitor SharePoint storage, performance and capacity for planning and alerting. This category provides the following report types:

- **SharePoint Services** – Displays the servers and their respective roles within the selected SharePoint farms, as well as the status of the services on each server.
- **CPU/Memory Usage** – Monitors the CPU and memory usage, as well as other performance metrics, of the selected SharePoint Agent hosts.
- **Networking** – Monitors the network status and usage (both wired and wireless) of the selected SharePoint Agent hosts and adapters.
- **SharePoint Topology** – Displays the logical and physical topology of the selected SharePoint farms.
- **SharePoint Search Services** – Monitors the crawling status and settings of SharePoint Search service applications in the selected farms.
- **Environment Search** – Displays information about SharePoint servers, including which ones have DocAve installed, in the selected environment.
- **Site Collection Comparison** – Displays various site collection statistics in respect to basic information, settings, and security, and highlights the differences.
- **Site Collection Load Time** – Displays the latency of the selected site collections.
- **Storage Trends** – Displays current and projected storage consumption by the selected SharePoint on-premises farm, Web applications, content databases, or site collections, or SharePoint Online site collections. Drill-down allocation analysis is available at the site collection level.
- **Storage Analyzer** – Displays the size and proportion of data stored in SharePoint and external devices for the selected farm, Web applications, site collections, or content databases.
- **User Storage Size** – Displays the number of items and storage size of content created by each user within the selected site collections or sites. Also ranks the top contributors in each library, list, discussion board, survey, or issue.

Administration Reports – Oversee SharePoint settings and securities for governance purposes. This category provides the following report types:

- **Configuration Reports** – Displays configuration details and statistics for the selected SharePoint on-premises farms, Web applications, site collections, content databases, sites, and/or lists, or SharePoint Online site collections, sites, and/or lists.
- **Best Practice Reports** – Analyzes the health of the selected farms, Web applications, site collections, content databases, sites, or lists by comparing environment data against Microsoft issued boundaries and limitations or custom thresholds.

Compliance Reports – Respond to queries for "who did what where" for behavior, productivity and litigation analysis. This category provides the following report types:

- **Term Store Changes** – Displays detailed information for all managed metadata changes within the global and local term groups of the selected farm.
- **Content Type Usage** – Displays content type usage details within the selected site collections or sites.
- **Information Management Policies** – Displays details about the configured information management policies for the content types within the selected Web applications, site collections, sites, or lists.
- **Upcoming Content Expiration** – Displays details about items that have the configured information management policies and expiration dates within the selected Web applications, site collections, sites, or lists.
- **User Lifecycle** – Displays a log of activity of users within the selected SharePoint on-premises Web applications, site collections, sites, or lists, or SharePoint Online site collections, sites, or lists.
- **List Access** – Displays a log of user activity within the selected SharePoint on-premises Web applications, site collections, sites or lists, or SharePoint Online site collections, sites, or lists.
- **Item Lifecycle** – Displays a log of audit events for items within the selected SharePoint on-premises Web applications, site collections, sites, or lists, or SharePoint Online site collections, sites, or lists.
- **Site Access** – Displays a log of user activity within the selected SharePoint on-premises Web applications, site collections, sites, or lists, or SharePoint Online site collections, sites, or lists.
- **List Deletion** – Displays a log of deletion events for items within the selected SharePoint on-premises Web applications, site collections, sites or lists, or SharePoint Online site collections, sites, or lists.
- **Permission Changes** – Displays a log of permission changes within the selected SharePoint on-premises Web applications, site collections, sites, or lists, or SharePoint Online site collections, sites, or lists.
- **Content Type Changes** – Displays a log of changes made to content types within the selected SharePoint on-premises Web applications, site collections, sites, or lists, or SharePoint Online site collections, sites, or lists.
- **Custom Report** – Displays a customized log from the collected audit records for the selected SharePoint on-premises Web applications, site collections, sites, or lists, or SharePoint Online site collections, sites, or lists.

DocAve Reports – Track the DocAve system capacity, performance, and usage. This category provides the following report types:

- **DocAve Topology** – Displays the service topology of the DocAve Manager, as well as the statuses of the services on each server.
- **Performance Monitoring** – Monitors the CPU and memory usage, as well as other performance metrics, of the selected DocAve Manager hosts.
- **Disk Space Monitoring** – Displays current and projected storage consumption by the selected DocAve logical devices.
- **Job Performance Monitoring** – Displays job performance data for Granular Backup, Granular Restore, Platform Backup, and Platform Restore jobs.
- **DocAve Auditor** – Displays a log of user activity within the DocAve system.

***Note**: **Configuration Report** and **Best Practice Report** can collect most of the data in a SharePoint Foundation 2010/2013 environment, but some services and functions cannot be collected, as defined here:

- The **Configuration Report** does not collect the following data:
  - Data of **Shared Service** and **Current License** at the farm level
  - Data of **Web Application Feature** at the Web application level
  - Data of **Site Collection Usage** at the site collection level
  - Data of **Site Usage** at the site level
- The **Best Practice Report** does not collect the following data:
  - Data of User Profile Service and Managed Metadata Term Store (database) at farm level
  - Data of **Solution Cache Size** at Web application level

Usage Pattern Alerting – Monitor user activities based on predefined thresholds within your SharePoint environment.

  - **Activity Report** – Displays a report of the user activities identified by the rules in the Usage Pattern Alerting plans.
  - **Analysis Report** – Displays a analysis report on how many times the Usage Pattern Alerting rules were triggered and the distribution of the triggered times of each rule based on the corresponding data metric used in the rule threshold.

Usage Activity Web Parts – Allow for the creation of social Web parts in SharePoint that rank popular documents, discussions, blog posts, wiki pages, and content contributors, as well as a dashboard Web part that contains the multiple reports for analyzing SharePoint usage and behavior across a configurable scope. This category provides the following Web parts and report types:

- **Most Active Contributors** Web part – Displays the users who have contributes the most documents, blog posts, and discussions.
- **Most Popular Contributors** Web part – Displays the users who have received community feedback for their documents, blog posts, and discussions.
- **Top Documents** Web part – Displays the documents that have received the most views, followers, and likes.
- **Top Blog Posts** Web part – Displays the blog posts that have received the most views, likes, and comments.
- **Top Discussions** Web part – Displays the discussions that have received the most views, replies, and likes.
- **Top Wiki Pages** Web part – Displays the wiki pages that have been viewed the most.
- **Report Center Dashboard** Web part – Contains the following reports for analyzing SharePoint usage and behavior across a configurable scope:
    - **Summary** – Displays a summary on the usage of the SharePoint site collections or sites.
    - **Active Users** – Displays rankings of users by the number of activities within each of the selected site collections and sites.\
    - **Checked-Out Documents** – Displays the information of checked-out documents within the selected site collections or sites.
    - **Activity Ranking** – Displays rankings of sites, pages, lists, and documents by activity within each selected site collection or site.
    - **Last Accessed Time** – Displays when the selected site collections or sites were last accessed, and by whom.
    - **Site Traffic** – displays charts of the numbers of activities and throughput that the selected site collections or sites have received.
    - **Search Usage** – Displays the usage data for search activities, search terms and search scopes within the selected site collections.
    - **Site Visitors** – Displays the numbers of unique visitors and user activities of the selected site collections/sites.
    - **Top Document by Social Activities** – Displays rankings of documents which have been viewed the most and/or have the most followers and/or likes within each selected site collection or site.
    - **Content Type Usage** – Displays the latest content type usage details within the selected site collections or sites.

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 Report Center:

- DocAve Archiver for moving unused data to lower tiered storage which reduces storage cost.
- DocAve Connector for collaborating upon network file shares and cloud storage resources directly through SharePoint without migration. Connected content appears as normal SharePoint content and can be leveraged exactly as if it were residing within a SharePoint document library.
- DocAve Storage Manager for offloading BLOBs from SQL servers to more cost efficient storage devices.
- DocAve Content Manager for SharePoint for restructuring or moving SharePoint content.
- DocAve Replicator to perform live or event-driven and scheduled or offline replication. Synchronization and management of all content, configurations, and securities is performed with full fidelity.
- DocAve Data Protection for setting backup and recovery points prior to adjusting SharePoint governance policies in this product.
- DocAve Platform Backup and Restore to back up the entire SharePoint environment, including farm-level components.
- DocAve Granular Backup and Restore to back up all farm content and restore content down to the item level.

Submitting Documentation Feedback to AvePoint

AvePoint encourages customers to provide feedback regarding our product documentation. You can Submit Your Feedback on our website.

Before You Begin

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

AvePoint's Testing Policy and Environment Support

Supported Hardware

AvePoint is committed to maintaining a hardware agnostic platform to ensure that DocAve operates on common Windows file sharing and virtualization platforms. To ensure that DocAve is hardware agnostic, AvePoint tests hardware that is intended to support SharePoint and DocAve infrastructure, storage targets, and hardware-based backup and recovery solutions, as supported by AvePoint's partnerships. AvePoint directly integrates with the following platforms: any Net Share, IBM Storwize Family, FTP, Amazon S3, AT&T Synaptic, Dropbox, Box, Caringo Storage, Del DX Storage, EMC Centra, HDS Hitachi Content Platform, Rackspace Cloud Files, TSM, Network File System, and Windows Azure Storage.

All other hardware platforms that support UNC addressable storage devices are supported.

***Note:** Most of the hardware partnerships referenced in this guide are intended to make use of advanced functionality (such as snapshot mirroring, BLOB snapshots, indexing, long-term storage, WORM storage, etc.), and are not indications that any changes to the product are required for basic support. In most cases, hardware can be supported with no change to the product.

Supported Backup and Recovery

DocAve supports BLOB backup storage according to the list of hardware platforms above. BLOB snapshot functionally, however, is currently only supported on OEM versions and NetApp hardware.

DocAve supports SQL content and Application database backups via the SharePoint Volume Shadow Copy Service (VSS) on all Windows and SQL server platforms listed above. DocAve also supports snapshot-based SharePoint VSS on all hardware listed above where the hardware partner has certified support with Microsoft.

DocAve supports application and configuration server backups for all the supported software environments listed above. DocAve 6 SP5 supports VM backup via Hyper-V/VMWare for the following operating systems: Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2, and Microsoft Hyper–V Server 2012 R2.

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. 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 the 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, refer to the DocAve 6 Installation Guide.

Required 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 **Administrator**s 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 the User Policy for Web Applications
    - User Profile Service Application permissions:
        - Full Control
        - User Profile Service Application Administrator
        - Use Personal Features (For SharePoint 2010 only)
        - Create Personal Site
        - Use Social Features (For SharePoint 2010 only)
        - Follow People and Edit Profile (For SharePoint 2013 only)
        - Use Tags and Notes (For SharePoint 2013 only)
    - Managed Metadata Service: Term Store Administrator
    - Search Service: Full Control
3. SQL Server 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 or 2013 Content database and Stub database

      ***Note**: To use the Search Usage report and Referrers report for SharePoint 2010, the users must have the **db_owner** role for the SharePoint 2010 Web Analytics Service Databases.

      To use the Search Usage report for SharePoint 2013, the users must have the **db_owner** role for the SharePoint 2013 Search Service Application Analytics Reporting databases and Search Service Application Administration databases.

      To use the SharePoint Search Services report, the users must have the **db_owner** role for the SharePoint 2010 or 2013 WSS_Logging database.

To use the Configuration Reports, the users must have the **db_owner** role for the SharePoint 2010 or 2013 User Profile Service Application databases.

To use the Best Practice Reports, the users must have the **db_owner** role for the SharePoint 2010 or 2013 Metadata Service Application databases.

4. Registered SharePoint Sites Permission:

   - The site collection user used to register the site collection must be a member of Site Collection Administrators.

     ***Note**: If you want to use Configuration Reports or Storage Trends report to report on the site collection quota, the site collection user must be a member of SharePoint Administrators group.

   - The following permissions are required, if using **Scan Mode** to add the registered site collections:
     - To scan the SharePoint Online site collections or OneDrive for Business libraries, the user must be a member of:
       - SharePoint Administrators
       - Local Administrators
     - To scan the SharePoint on-premises site collections, the user must have:
       - Full Control to all zones of all Web applications via the User Policy for Web Applications
       - Database Role of **db_owner** for all the databases related with SharePoint, including Content databases, Config database, and Central Admin database.

Local System Permissions

Some local system permissions are automatically configured during DocAve 6 installation. The user will be set up as a member of the following local groups:

- IIS WPG (for IIS 6.0) or IIS IUSRS (for IIS 7.0, and IIS 8.0)
- 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\eventlog

- 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

***Note:** If you want to use **CPU/Memory Usage** or **Networking** reports, you must be the member of local **Administrators** group. If you want to use **Download Ranking**, **Failed Login Attempts**, **IIS Logging**, **Best Practice Reports**, or select the **Retrieve IIS Logs** option to retrieve data, you must have Full Control to the path of IIS log files, the path of the **redirection.config** file, IIS **applicationHost.config** file.

Getting Started

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

Launching Report Center

To launch Report Center and access its functionality, complete the following steps:

1. Log into DocAve. If you are already in the software, click the **DocAve** tab.
2. Click **Report Center** on the left-hand navigation menu to launch Report Center.
3. Click the report category, report type, or the specific report you want to access, or click **Settings** to configure the Report Center settings (details about the different report types and configuring settings can be found in the body of this user guide.)

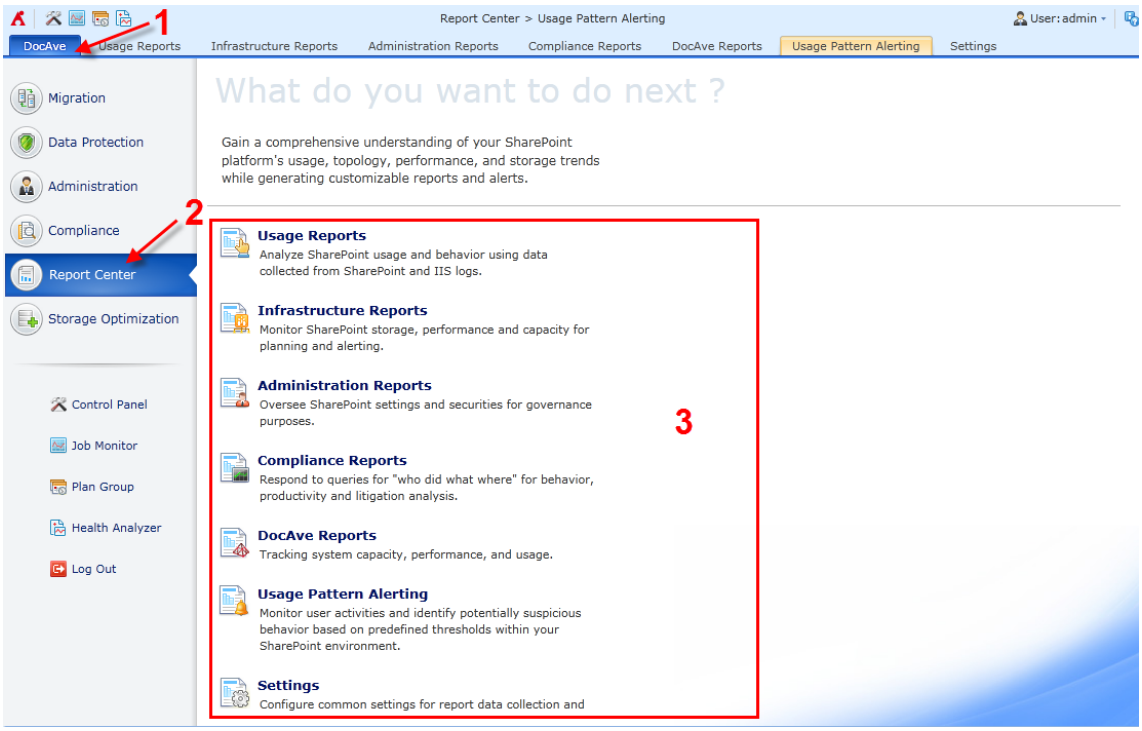


Figure 1: DocAve module launch window.

AvePoint recommends using Health Analyzer to check the prerequisites you need to correctly use DocAve Report Center

***Note:** Only the users in the DocAve **Administrators** group can use Health Analyzer.

For more information about Health Analyzer, refer to DocAve 6 Installation Guide.

Navigating DocAve

DocAve mimics the look and feel of many Windows products, making for an intuitive and familiar working environment. While there are many windows, pop-up displays, and messages within DocAve products, they share similar features and are navigated in the same ways.

Below is a sample window in DocAve. It features a familiar, dynamic ribbon, and a searchable, content list view.

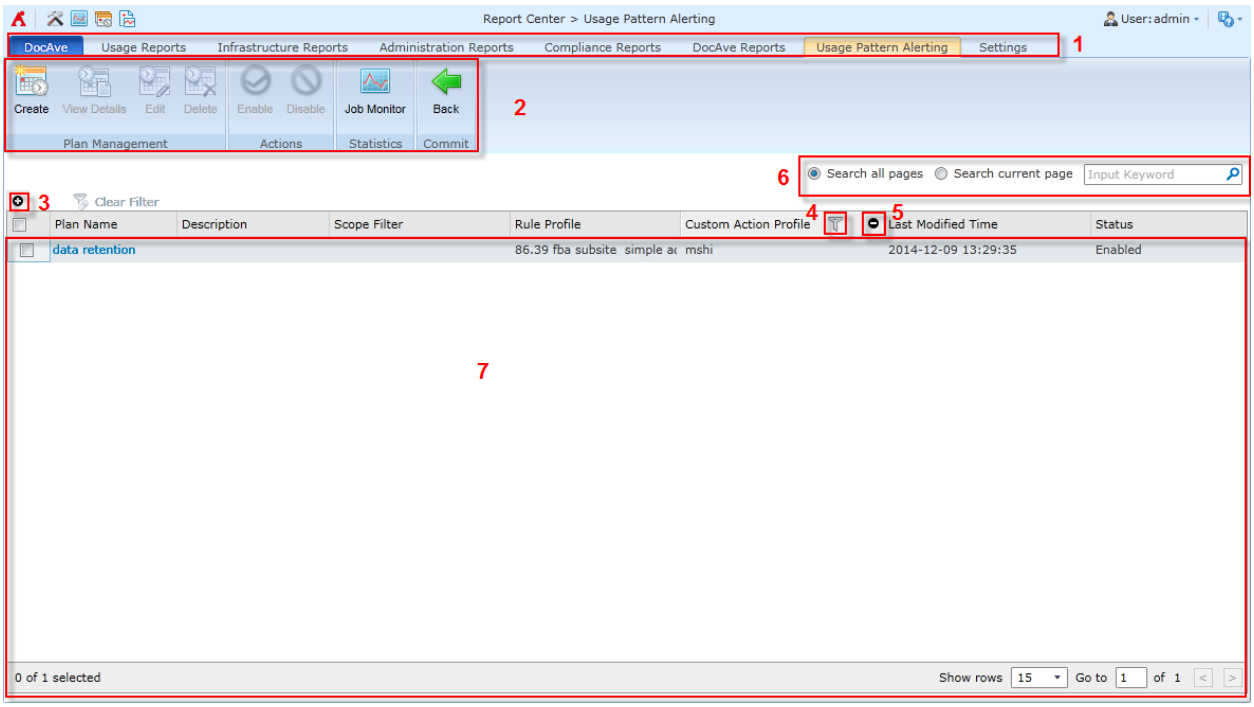


Figure 2: Navigating DocAve.

1. Ribbon Tabs— Allows users to navigate to the DocAve Welcome page and within the active module.
2. Ribbon Panes – Allows users to access the functionality of the active DocAve module.
3. Manage columns (⊕) – Allows users to manage which columns are displayed in the list. Click the manage columns (⊕) button, and then select the checkbox next to the column name in the drop-down list.
4. Filter the column ( ) – Allows users to filter the information in the List View. Click the filter the column ( ) button next to the column and then select the checkbox next to the column name.
5. Hide the column (⊖) – Allows users to hide the selected column.
6. **Search** – Allows users to search the List View pane for a keyword or phrase. You can select **Search all pages** or **Search current page** to define the search scope.
   ***Note:** The search function is not case sensitive.
7. Management Pane – Displays the actionable content of the DocAve module.

Data Retrieval Information

This section provides detailed information on the data retrieval types and methods that DocAve 6 SP5 Report Center uses to obtain these reports. Refer to the table below for more information on data retrieval of DocAve Report Center reports.

***Note:** Report Center uses three different retrieval methods to collect data as listed in the **Retrieval Method** column.

- **Collect**: Schedule data collector jobs run on the backend to collect all of the required data.
- **Real-time**: Data is obtained in real-time.
- **Run Report**: Run a job to collect data. You can wait for the report to display in the GUI interface, or later click **Show Report** to view the generated report.

Report Title	Report Category	Collector/Audit Controller	Retrieval Method	Comment
Checked-Out Documents	Usage Reports	Checked-Out Documents Collector	Collect	Collects the data from SharePoint and records it in the DocAve Report database, and then generates a report based on the data in the DocAve Report database.
Download Ranking	Usage Reports	Login and Download Events Collector	Collect	Collects the data from IIS logs and records them in the DocAve Report database, and then generates a report based on the data in the DocAve Report database.
Failed Login Attempts	Usage Reports	Login and Download Events Collector	Collect	Collects the data from IIS logs and records it in the DocAve Report database, and then generates a report based on the data in the DocAve Report database.
Last Accessed Time	Usage Reports	No Collector	Run Report	Gets data from SharePoint.
SharePoint Alerts	Usage Reports	No Collector	Run Report	Gets data from SharePoint.
Workflow Status	Usage Reports	No Collector	Run Report	Gets data from SharePoint.
Referrers	Usage Reports	Referrers Collector	Collect	Collects the data from SharePoint Web Analytics service and records it in the DocAve Report database, and then generates a report based on the data in the DocAve Report database. (SharePoint 2013 is not supported)

Report Title	Report Category	Collector/Audit Controller	Retrieval Method	Comment
Search Usage	Usage Reports	Search Usage Collector	Collect	Collects the data from SharePoint Web Analytics service and records it in the DocAve Report database, and then generates a report based on the data in the DocAve Report database.
Active Users	Usage Reports	Usage Collector	Collect	Collects the data from SharePoint and records it in the DocAve Audit database. The data analyzed will then be recorded to the Report database, and then generates a report based on the data in the DocAve Audit database and Report database.
Page Traffic	Usage Reports	Page Traffic Collector	Collect	Collects the data from IIS logs and records them in the DocAve Report database, and then generates a report based on the data in the DocAve Report database.
Site Visitors and Activity	Usage Reports	Usage Collector	Collect	Collects the data from SharePoint and records it in the DocAve Audit database. The data analyzed will then be recorded to the Report database, and then generates a report based on the data in the DocAve Audit database and Report database.
Site Activity Ranking	Usage Reports	Usage Collector	Collect	Collects the data from SharePoint and records it in the DocAve Audit database. The data analyzed will then be recorded to the Report database, and then generates a report based on the data in the DocAve Audit database and Report database.
Site Collection Load Time	Infrastructure Reports	Site Collection Load Time Collector	Collect	Obtains all of the Web front-end servers' information in the specified farm. Sends Web request to the site collection and calculates the load time. Generates a report based on data in the DocAve Report database.

Report Title	Report Category	Collector/Audit Controller	Retrieval Method	Comment
Storage Analyzer	Infrastructure Reports	No Collector	Run Report	Collects the data from SharePoint and records it in the DocAve Report database, and then generates a report based on the data in the DocAve Report database.
CPU/Memory Usage	Infrastructure Reports	No Collector	Real-Time	Obtains data from Operating System of the DocAve Agent servers.
Site Collection Comparison	Infrastructure Reports	No Collector	Real-Time	Obtains data from SharePoint using SharePoint API.
Environment Search	Infrastructure Reports	No Collector	Real-Time	Obtains SharePoint farm information from the Operating System of the filtered servers.
Networking	Infrastructure Reports	No Collector	Real-Time	Obtains data from Operating System of the DocAve Agent servers.
SharePoint Search Services	Infrastructure Reports	No Collector	Real-Time	Obtains data from SharePoint.
SharePoint Services	Infrastructure Reports	No Collector	Real-Time	Obtains data from SharePoint.
SharePoint Topology	Infrastructure Reports	No Collector	Real-Time	Obtains data from SharePoint.
Storage Trends	Infrastructure Reports	Storage Trends Collector	Collect	Collects the data from SharePoint and records it in the DocAve Report database, and then generates a report based on the data in the DocAve Report database.
User Storage Size	Infrastructure Reports	User Storage Size Collector (User Storage Size)	Collect	Collects the data from SharePoint and records it in the DocAve Report database, and then generates a report based on the data in the DocAve Report database.
		No Collector (Content Contributor)	Real-Time	Gets data from SharePoint.
Configuration Reports	Administration Reports	No Collector	Run Report	Gets data from SharePoint.
Best Practice Reports	Administration Reports	No Collector	Run Report	Gets data from SharePoint.
Term Store Changes	Compliance Reports	No Collector	Run Report	Gets data from SharePoint.
Content Type Usage	Compliance Reports	No Collector	Run Report	Gets data from SharePoint.

Report Title	Report Category	Collector/Audit Controller	Retrieval Method	Comment
Information Management Policies	Compliance Reports	No Collector	Run Report	Gets data from SharePoint.
Upcoming Content Expiration	Compliance Reports	No Collector	Run Report	Gets data from SharePoint.
Item Lifecycle	Compliance Reports	Audit Controller	Collect and Run Report	Generates report based on the data collected by Audit Controller.
List Access	Compliance Reports	Audit Controller	Collect and Run Report	Generates a report based on the data collected by Audit Controller.
List Deletion	Compliance Reports	Audit Controller	Collect and Run Report	Generates a report based on the data collected by Audit Controller.
Site Access	Compliance Reports	Audit Controller	Collect and Run Report	Generates a report based on the data collected by Audit Controller.
User Lifecycle	Compliance Reports	Audit Controller	Collect and Run Report	Generates a report based on the data collected by Audit Controller.
Permission Changes	Compliance Reports	Audit Controller	Collect and Run Report	Generates a report based on the data collected by Audit Controller.
Content Type Changes	Compliance Reports	Audit Controller	Collect and Run Report	Generates a report based on the data collected by Audit Controller.
Custom Report	Compliance Reports	Audit Controller	Collect and Run Report	Generates a report based on the data collected by Audit Controller.
Disk Space Monitoring	DocAve Reports	Disk Space Monitoring Collector	Collect	Obtains data from DocAve Control database.
DocAve Auditor	DocAve Reports	No Collector	Real-Time	Collects data from DocAve Control database and records it in the Report database, and then generates a report based on the data in DocAve Report database.
Job Performance Monitoring	DocAve Reports	No Collector	Real-Time	Obtains data from DocAve Control database.
Performance Monitoring	DocAve Reports	No Collector	Real-Time	Obtains data from Operating System of the DocAve Manager servers.
DocAve Topology	DocAve Reports	No Collector	Real-Time	Gets data from DocAve Control database.
Activity Report	Usage Pattern Alerting Report	No Collector	Real-Time	Gets data from SharePoint.
Analysis Report	Usage Pattern Alerting Report	Usage Pattern Alerting Analysis Collector	Collect	Obtains data from DocAve Report Database.

Report Title	Report Category	Collector/Audit Controller	Retrieval Method	Comment
Item Caching Service	N/A	Item Caching Service Collector	Collect	Collects the data from SharePoint and records it in the customized Item Caching database.
Usage Activity Web Parts	Usage Activity Web Parts	Usage Activity Web Parts Collector	Collect	Collects the data from SharePoint and records it in DocAve Report Database.

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.

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

Data Collection

In **Data Collection** settings, users can view and manage when and how often data is collected by Report Center collectors. Report Center collectors are imperative for many of the Report Center components, and must be configured correctly before any data can be gathered.

All of the collectors in **Data Collection** except the User Profile Collector and Item Caching Service Collector only run **Incremental** collector jobs to collect the data on the current day. User Profile Collector and Item Caching Service Collector can run **Full** collector jobs besides the **Incremental** collector jobs. To change the mode of the User Profile Collector jobs, configure the **<UserProfileSyncMode>** node in the **ReportCenterServiceProperties.config** file. For details, refer to Configuring the ReportCenterServiceProperties.config File. To configure the collection mode of the Item Caching Service Collector, refer to Collection Mode

- **Incremental** – **Incremental** is the default mode of all collector jobs. An incremental collector job collects the addition, modification, and deletion of the corresponding data after the last successful collector job. Scheduling incremental collector jobs to run more frequently will necessarily reduce the size of the data collected by each job.
- **Full** – A full collector job collects all of the corresponding data within the designated scope. Collector jobs run in **Full** mode will take more time to complete than incremental collector jobs. A full User Profile Collector job must be run after you add user properties into the **<UserProfileCustomProperties>** node within the **ReportCenterServiceCustomProperties.config** file.

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, click the **Settings** tab in Report Center, then click **Data Collection**. The Collector Management pane appears with a list of different types of collectors for Report Center. You can perform the following actions on Report Center collectors:

- **View Profile** – Allows you to view all saved job profiles of the selected collector. Click on a collector, and then click **View Profile** on the ribbon to see a list of all of the saved collector job profiles.

  ***Note**: The **View Profile** feature is not supported for Usage Activity Web Part Collector and User Profile Collector.

In the **View Profile** page, you can also perform the following operations on the profiles:

- **Enable** – To enable the collector jobs for a particular **Disabled** profile, select the profile and click **Enable** on the ribbon. The status of the profile becomes **Enabled**.
- **Disable** – To disable the collector jobs for a particular **Enabled** profile, select the profile and click **Disable** on the ribbon. The status of the profile becomes **Disabled**.

  ***Note**: The **Enable** and **Disable** buttons are only available for Storage Trends Collector, Site Collection Load Time Collector, Disk Space Monitoring Collector, and User Storage Size Collector.

- **View Scope** – To view the tree of a particular profile, select the profile and click **View Scope** on the ribbon. The scope tree is displayed in the **View Scope** pane.

- **Edit** – Allows you to configure the schedule and notification of the selected collector. Select the collector by clicking on its row in the display table, then click **Edit** on the ribbon. A configuration window appears.
  - **Schedule** – Enter an integer in the **Interval** text box to designate the frequency for the data to be collected and then designate a time of day you want the collector to run by selecting a choice from the **Collect data at** drop-down menu. As needed, click the time zone link and choose a time zone from the drop-down menu. The collector job will run at the specified time automatically. You can click **Calendar View** to read the schedule by **Day**, **Week**, or **Month**.
  - **Collection Mode** (only available for Item Caching Service Collector) – Schedule a full collection job to run after a number of consecutive incremental collections have run, enter a number into the **Run a full collection job after every_incremental collection jobs** field.
  - **E-mail Notification** – Select an e-mail notification profile from the drop-down menu or create a new profile by clicking **New E-mail Notification**. Refer to **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide for detailed information.
  - **Enable SharePoint Auditor** (only available for Usage Collector) – Select whether to enable SharePoint Auditor automatically for the site collections in the profile scopes while running each collector job. The **Automatically enable SharePoint Auditor for the site collections in plan scopes** option is selected unless you manually deselect it.
    - With this option selected, Usage Collector will initiate a sub-job to enable SharePoint Auditor for the site collections in the specified plan scopes while running each collector job for retrieving data.
    - If you do not select this option, Usage Collector will only automatically enable SharePoint Auditor for the site collections in the specified plan scopes when new plans are created. If you create new site collections

within a previously created plan scope, Usage Collector will not automatically enable SharePoint Auditor for these new site collections.

***Note**: If you do not want to collect the data for some SharePoint objects via the Usage Collector jobs, you can configure a URL filter to exclude these objects by URL via configuring the **<UsageCollectorSetting>** node in the **ReportCenterServiceProperties.config** file on each of your Report Service server. For detailed instructions, refer to Configuring the ReportCenterServiceProperties.config File.

Click **Save** to save your configurations, and close the window. Click **Cancel** to close the window without saving your configurations.

- **Collect Now** – Allows you to run the collector job immediately.
- **Job Monitor** – Allows you to view the detailed job information about all of the Report Center jobs.
- **Back** – Returns you to the Report Center Settings page.

Activity History Pruning

Activity History Pruning allows you to remove Report Center job data from the DocAve Report database based on pre-defined criteria. By creating profiles and running pruning jobs in Activity History Pruning, you can automate the deletion of outdated Report Center job data to save space in the SQL Server. When creating an Activity History Pruning profile, you can:

- Select the report types whose job data you want to remove from the Report database. Activity History Pruning supports the following report types:
  - Active Users
  - Checked-Out Documents
  - Download Ranking
  - Failed Login Attempts
  - Page Traffic
  - Referrers
  - Search Usage
  - Site Visitors and Activity
  - Site Collection Load Time
  - Storage Trends
  - Disk Space Monitoring
  - DocAve Auditor

- Configure the time range for pruning the job data. The job data generated within the designated time range will be automatically pruned.
- Choose how to deal with the job data in the DocAve Report database. You can choose to delete the data, or 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 Activity History Pruning profiles.

To access **Activity History Pruning**, click the **Settings** tab in Report Center, and then click **Activity History Pruning** on the ribbon. The **Profile Manager** interface appears.

To check the progress of any profile that has been run or is scheduled to run, you can click **Job Monitor** on the ribbon of the **Activity History Pruning** > **Profile**. For more information about using **Job Monitor**, refer to the DocAve 6 Job Monitor User Guide.

Creating a Pruning Profile

Before creating a pruning profile, you can configure export locations to store the pruned job data. For details on how to configure export locations for Report Center, see the Configuring Export Locations section of the Export Location.

To create a pruning profile, complete the following steps:

1. In the **Profile Manager** interface, click **Create** on the ribbon to access the **Create Profile** interface.
2. Enter a **Profile Name** for this new pruning profile. Enter an optional **Description** for future reference.
3. Specify the report types whose job data you want to remove from the DocAve Report database in the **Which reports' job data would you like to prune?** section by selecting the corresponding checkboxes in the right pane.

   ***Note**: You can only configure one pruning profile per report type. If a report type already has an existing pruning profile configured, the corresponding checkbox is grey out and not selectable.

4. Select the time range of the job data you want to prune in the **What time range would you like to cover in this pruning profile?** section:
   - To prune data older, select **All data older than:** and then enter an integer in the text box. Select **Days**, **Weeks** , **Months** or **Years** from the drop-down menu.
   - To prune data generated during a specific date range, select **All data between**, then select the desired starting and ending dates using the calendars.
5. Choose what to do with the pruned data in **What action would you like to perform on the pruned data?** section:
   - Select **Delete Data** to directly delete the job data from the Report database.

- Select **Move data** to move the job data to an export location. To designate an export location to store the pruned data, select an export location from the **Export Location** drop-down menu, or click **New Export Location** to create a new export location. For the detailed instructions on configuring a new export location, refer to Creating an Export Location.

6. Choose whether or not to set a schedule to run this profile on a regular basis, or to run this profile manually in **Profile Manager**:
    - **No Schedule** – Select this to run the profile manually in **Profile Manager**.
    - **Configure the schedule myself**– Select this option to configure the time you want this profile to run. A schedule configuration area appears. You can customize the schedule with the following options:
        - **Start time** – Select the date and time to start running this profile.

          ***Note:** The start time cannot be earlier than the current time.

        - **Interval** – Enter an integer into the text box and select by **Hour(s)**, **Day(s)**, **Week(s)**, or **Month(s)**. This profile will run repeatedly based on this schedule until manually stopped Click **Calendar 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 select the end date and time for this profile to stop being run.
7. **Would you like to notify users of the job status?** – Send the e-mail notifications according to the configurations of this profile. Select an existing e-mail notification profile from the drop-down menu, or click **New E-mail Notification** to create a new one. Refer to the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide for more information.
8. Click **Save and Run Now** to save the profile and run it immediately, **Save** to save the profile, or **Cancel** to return to the **Profile Manager** interface without saving these configurations.

Using Profile Manager

Profile Manager of Activity History Pruning provides you with a centralized location to view and edit your Activity History Pruning profiles. To access **Profile Manager**, click the **Settings** tab in Report Center, and then click **Activity History Pruning** on the ribbon. You will see a list of your previously created profiles in the Profile Manager viewing pane. To change the number of profiles displayed per page, select the desired number from the **Show rows** drop-down menu in the lower-right corner. To sort the profiles, click on a column heading **Profile Name** and **Action to Take**.

On the bottom message bar, you will see the selection status of the profiles. Click **Clear Selection** on the message bar to deselect all of the selected checkboxes.

Operations in Profile Manager

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

- **View Details** – Select a profile, and then click **View Details** on the ribbon to open the **View Details** page to view configurations of the selected 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.
    - To save your configurations of the profiles, click **Save** and make a selection from the drop-down list:
        - Click **Save** to save any changes made to the profile, and return to the **Profile Manager** page.
        - Click **Save and Run Now** to save any changes made to the profile, and run a job of this profile immediately.
    - If you do not want to save the changes to the profile, 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.
- **Restore Pruned Data** – Restore the data moved to exported locations by previously finished pruning jobs of Move Data profiles. For details, see Restoring Pruned Data in the Restore Interface.

  ***Note**: The data deleted by the jobs of the profiles with the **Delete data** option selected cannot be restored.
- **Job Monitor** – Keep track of running profiles and scheduled profiles. To access the jobs of each profile, click **Job Monitor** on the ribbon. For more information about using Job Monitor, refer to the DocAve 6 Job Monitor User Guide.

Restoring Pruned Data in the Restore Interface

Using the **Restore** interface of Activity History Pruning, you can restore the job data moved to export locations by previously finished **Move Data** pruning jobs by completing the following steps.

1. To access the **Restore** interface from **Profile Manager**, choose either of the following methods:

- Click **Restore Pruned Data** on the ribbon of **Profile Manager**. All the Activity History Pruning jobs which moved data to exported locations run within the current month will be displayed in the viewing pane of the **Restore** interface.
- To view the finished jobs of the selected Activity History Pruning profiles, select the profiles whose jobs you want to view in **Profile Manager**, and click **Restore Pruned Data** on the ribbon. All the finished jobs of the selected profiles will be displayed in the viewing pane of the **Restore** interface.

2. Configure the settings in the **Set Filter** area to limit or expand the jobs loaded in the viewing pane of the **Restore** interface. The default filter rule includes all of the finished **Move Data** pruning jobs within the current month. For detailed instructions on using **Set Filter**, see Setting Filter for Activity History Pruning Jobs.
3. After applying the **Set Filter** settings, all the jobs that meet the configured filter rules are displayed in the viewing pane. You can also perform the following operations to determine how the jobs are displayed in the viewing pane.
    - **List View** – Click this button to view job information in table format. **List View** is the default view of the viewing pane for the **Restore** interface.
    - **Calendar View** – Click this button to view job information in calendar view.
    - **Search** – Filter the jobs displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the jobs you want to view. You can select to **Search all pages** or **Search current page**.
4. Select the jobs that pruned the data you want to restore and click **Restore** on the ribbon to start restoring the data.

Setting Filter for Activity History Pruning Jobs

To set the filter criteria to extend or limit the jobs displayed in the viewing pane via the **Set Filter** feature, complete the following steps:

1. Click **Set Filter** above the viewing pane to access the **Set Filter** window.
2. **Filter by Profile** – Filter the jobs by profile name. Select the profiles you want to run from the **Profile Name** drop-down list, or select **All Profiles** to display all jobs.
3. **Filter by Time Range** – Filter the jobs by finished time of pruning job or generated time of pruned data.
    - **Filter by job finished time** – Filter the jobs by finished time of pruning jobs.
        - **All jobs** – Select this option to display all Finished/Finished with Exception Activity History Pruning jobs.
        - **Job finished within** – Select this option to select a date range from the drop-down list. All of the Finished/Finished with Exception Activity History Pruning jobs whose finish time is in the specified date range will be displayed.

- **Filter by data generated time** – Filter the jobs by generated time of pruned data by selecting a date range from the drop-down list. All of the jobs that pruned the data generated within the specified date range will be displayed.

4. Click **Filter** to apply the configured filter criteria. All Activity History Pruning jobs that meet the criteria are listed in the viewing pane. To reset all filter criteria, click **Reset** .To return to the viewing pane without applying the filter criteria, click **Back**.

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, Failed Login Attempts, and Page Traffic. To ensure that Report Center can retrieve all of the required data from the IIS logs for these reports on SharePoint nodes, the IIS logging settings of IIS websites containing the corresponding SharePoint nodes must be in the **W3C** format with all of the logging fields selected. Instead, if you do not want to log all of the fields through the configuration of the **IIS Logging** in Report Center, make sure the required fields are selected as needed to retrieve data for Download Ranking, Failed Login Attempts, or Page Traffic, as well as for retrieving IIS logs and logging source IP to retrieve data for Audit Reports. For details, refer to Appendix D: Required W3C Logging Fields for Specific Functions.

To configure IIS Logging settings, complete the following steps:

1. In the **Settings** tab of Report Center, click **IIS Logging**. A window appears with a list of all Web applications allowing you to modify the IIS Logging settings for each Web application.
2. Select a Web application by checking its corresponding checkbox. Then click either **Select All Fields** or **Rollback** on the ribbon.
    - **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 original value after the uninstallation. You must set it to the original value in this interface before uninstalling DocAve.

Reporting Service

Reporting Service extracts data from the SQL Reporting Services for Report Center. **Reporting Center** also enables Report Center to export Usage, Infrastructure, and DocAve Reports in several formats, including PDF, TIF, XML, and MHTML.

***Note:** DocAve 6 Service Pack 1 and later versions support generating **CSV**, **XLS**, and, **XLSX** reports in all the report categories without the need to configure Reporting Service. When the Reporting Service is not configured, you can also generate the PDF report in Compliance Reports.

To configure Reporting Services for Report Center, complete the following steps:

1. In the **Settings** tab of Report Center, click **Reporting Service**. The Reporting Services configuration window appears.
2. Check the **SQL Reporting Services Configuration** checkbox to enable Reporting Services.
3. Enter the **Web Service URL**, and then enter the **Username** and **Password** in the appropriate text box. This provides Report Center with the **Report Server Web Service URL** used to connect to 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. If you want to store the report definition documents in a SharePoint library, check the **SharePoint Integrated** checkbox to use SharePoint Integrated mode. Enter the **Document Library URL** of the document library used to store the report file, and then enter the **Username** and **Password** in the appropriate text boxes.

   ***Note:** SharePoint Integrated mode is not supported in SQL Server 2012. If you are using SQL Server 2012 in SharePoint integrated mode, you can still export reports to UNC paths or SharePoint libraries. However, you are not able to configure the SQL Server Reporting Services in DocAve for exporting additional export reports in TIF, XML and, MHTML formats. You can only export reports in XLS, XLSX, and CSV formats (and .PDF format for Compliance Reports). To configure the SQL Server Reporting Services for SQL Server 2012, change your SQL Server Reporting Services to native mode.

Click **Save** to save the configuration. Click **Cancel** to go back to the Settings interface without saving any changes.

Cross-Farm Service Configuration

Cross-Farm Service Configuration specifies whether to collect data from the shared services of the publishing farm when generating reports on the consuming farm. The Cross-Farm Service Configuration on Web Analytics Service Application (only available in SharePoint 2010), User Profile Service Application, and Search Service Application can currently be used to generate the Search Usage reports, Referrer reports, Configuration reports, and reports in the Usage Activity Web parts.

A consuming farm is the farm using the service applications shared by the publishing farm, while the publishing farm is the farm sharing its service applications to other farms. The consuming farm can be its own publishing farm at the same time.

To configure the Cross-Farm Service Configuration for the Report Center, click **Cross-Farm Service Configuration** in the **Settings** tab of Report Center. The Cross-Farm Service Configuration page opens with a list of shared service applications for the consuming farm and publishing farm. You can perform the following actions in this window:

- **Configure** – Designate shared service applications for the consuming farm where you can collect data for the report as you want. Click **Configure** on the ribbon to make the following configurations:

    - **Consuming Farm** – Select the farm from the **Consuming Farm** drop-down menu which will be configured for the shared service applications it can use from the publishing farms. The shared service applications that the consuming farm has been using will appear and stay checked in the pane below. Check the checkboxes next to the services that you want to use across the farm. The configuration cannot change the usage status of the service applications in SharePoint, because it only enables Report Center to generate related reports depending on the data of those service applications.

      ***Note**: To ensure Report Center can collect the data of the selected shared service applications while generating reports, DocAve Agents must be running on the servers where the corresponding shared services are enabled.

    - **Rediscover** – Click **Rediscover** to return to the original SharePoint service usages status of the selected consuming farm.

  Click **Save** to save the configuration. Click **Cancel** to return without saving any changes.

- **Rediscover All** – Clear all the saved **Cross-Farm Service Configuration** and revert back the shared service application usage status to the original SharePoint service usage status of all the listed farms.
- **Delete** – Click **Delete** under the **Delete** column in the table to remove the corresponding shared service application usage.

Click **Save** to save the configuration. Click **Cancel** to go back to the setting page without saving any changes.

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 the Web applications to items. 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 to collect from SharePoint.
- Create filters so that these rules are only applied to the designated objects, users, or AD profiles.
- Configure Audit Controller rules to either overwrite previous rules or append to those rules if there are overlaps.

- Leverage DocAve Report Service to retrieve IIS logs and the log source IP.
- Schedule the plans to apply rules and retrieve data or manually apply the rule and retrieve data.

Click **Job Monitor** on the ribbon of the Audit Controller page to see Audit Control job progress or check the details of the jobs. 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 step-by-step guidance.
- 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 * are required fields.

Wizard Mode

To build a new Audit Controller plan with the wizard, click **Plan Builder** in the Audit Controller interface and then select **Wizard Mode** from the drop-down menu. To create your plan, complete the following steps:

1. **What would you like to name this plan?** – Enter a **Plan Name**. Enter an optional **Description** for future reference. Click **Next**.
2. **Which operations would you like to do with this plan?** – Choose the actions you want this plan to perform:
   - **Apply Rule** enables the auditing of the selected actions on the specified SharePoint scope.
   - **Retrieve Data** retrieves the auditing records from SharePoint and stores them in the DocAve Auditor database.

   Click **Next** to go to the next step.
3. **Scope** – Select the desired scope for this plan to audit by clicking on object names to expand the data tree or entering a URL or object name in the search text box above the tree. To narrow down the search criteria and display fewer nodes under a particular farm/Web application level node, a **Sites** node, or a **Lists** node on the tree, right-click the node and select **Advanced Search** to access the **Advanced Search** interface. For detailed instructions on using the **Advanced Search** feature, refer to Searching Nodes Using the Advanced Search Feature. Check the checkboxes next to the desired objects to begin configuring the audit settings. To configure

settings for an individual node, select an object, and then click **Edit Rules Individually** next to the object name.

- **Would you also like to audit these actions in lower object levels?** – This section is only available when site or list level nodes are selected in the **Scope** pane. Select the **Trickle down** checkbox if you want to audit the data of the child objects under the selected object. If you do not select the **Trickle down**, DocAve will only audit the selected objects and ignore the child objects under them. The **Trickle down** option is unavailable for nodes at the site collection or above level because the child objects of site collections are automatically audited.

  ***Note**: If the **Trickle down** settings on the selected nodes are configured differently at an individual level, the **Trickle down** checkbox will be greyed out. Click **Set All to Default** if you need to clear the existing trickle down settings on the selected nodes, and then perform the configuration in bulk.

- **Which audit events would you like to audit?** – Check the corresponding checkboxes of the audit record events you want to audit in the selected nodes. In the **Which audit events would you like to audit?** area for an individual node, you can view the audit events that are currently being audited in this node by clicking the link **here** at the bottom of the page.

  ***Note:** If different audit events are selected for individual nodes, the settings area for selecting audit events for the selected scope in bulk will be disabled. Click **Set All to default** if you need to clear all of the individual selections for your selected nodes, and then perform the configuration in bulk.

  ***Note**: If you want to audit the **Site Collection Deletion** or **Site Creation** actions, make sure the **SP2010AuditorMonitor.wsp** solution has already been deployed. Refer to the **Solution Manager** section in the DocAve 6 Control Panel Reference Guide for the detailed instructions to deploy this solution.

After you have finished the configuration, click **Next** to go to the next step.

4. **Options** – Configure the **Apply Rule Settings** and **Retrieve Data Settings**. These configurations are optional.

   - **Apply Rule Settings** – Configure the filter policy, operation settings, and schedule for applying the audit rules.

     - **Would you like to filter the scope for applying the audit rules?** – This field is only available when SharePoint on-premises nodes are selected in the **Scope** pane in step **3**. Designate the specific objects or data you want to filter. Click the **Add a Filter Category** link to add a category, and then select **Site Collection**, **Site**, or **List/Library** from the drop-down menu to specify the objects you want

to audit. Click **Add a Criterion**, make selections in the **Rule** and **Condition** drop-down lists and then enter a value in the **Value** text box.

Repeat this step to create additional criteria. Click to delete any of the filter policies.

- **What would you like to do with existing audit actions?** – Configure how the new rules of this plan are handled when there are already auditing rules configured for the same SharePoint object. Select one of the following options from the drop-down list:
  - **Overwrite** – Overwrite the original audit actions of the specified nodes with the new ones.
  - **Append** – Append the new audit actions to the existing ones.
- **How should the schedule be defined?** – Select the type of schedule to apply the audit rule by choosing one of the following options: **No schedule** and **Configure the schedule myself**. Select **No schedule** to retrieve auditing data of this plan manually from Plan Manager. Select **Configure the schedule myself** to configure the specified time you want to retrieve the plan's auditing data. A separate **Schedule** configuration area appears when you select this option where 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:** The start time cannot be earlier than the current time.
  - **Interval** – Enter an integer in the text box and select by **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 schedules 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 the job stopped after a defined number of occurrences. Select **End by** to specify the exact date and time for this rule to stop being applied.
- **Would you like to have the audit log for the selected nodes automatically trimmed?** – This field is only available when the nodes under **My Registered Sites** are selected in the Scope pane in step **3**. This field is used to determine whether or not the audit log for the selected nodes should be automatically trimmed. If yes, select the **Delete auditor data in SharePoint older than _ days** checkbox and then enter the number of days to retain audit log data.

- **Retrieve Data Settings** – Configure the filter policy, advanced rules, and schedule for retrieving the auditing data.
    - **Would you like to filter the objects whose audit data will be retrieved?** – Designate the specific objects or data you want to filter. Click the **Add a Filter Category** link to add a category, and then select **Site Collection**, **URL**, **User**, or **AD Profile** from the drop-down menu to specify the objects containing the audit data you want to retrieve. Click **Add a Criterion**, make selections in the **Rule** and **Condition** drop-down lists, and then enter a value in the **Value** text box.

      Note the following:

        - The **Custom Property: Text** criterion in the **Site Collection** category filters the site collections created by Governance Automation.
        - The **AD Profile** category is only available when SharePoint on-premises nodes are selected in the Scope pane in step **3.**

      Repeat this step to create additional criteria. Click the delete button ( ) if you want to delete any of the filter policies you have configured.

    - **Would you like to configure advanced settings for retrieving data?** – This field is only available when SharePoint on-premises nodes are selected in the **Scope** pane in step **3**. Configure the following advanced settings for retrieving audit data:

        - **Retrieve IIS Logs –** Check this checkbox to have **view item** type logs from IIS log retrieved. The retrieved IIS log item information will appear in the report.

          ***Note:** Retrieving IIS logs may slow down the retrieving job performance.

        - **Log source IP –** Check this checkbox to retrieve the information about the source IP of the host that accessed the selected node.
        - **Retrieve Deleted Site Collection Data (only for web application level) –** Check this checkbox to retrieve the auditing data of the deleted Site Collection.
        - **Delete auditor data in SharePoint older than __ day(s) –** Select this checkbox to delete the auditing data in SharePoint that is older than a specified number of days, if you have DocAve auditor configured to collect and retain the data.
        - **Track object last accessed time –** Select this checkbox to run a separate job that collects data for the Last Accessed Time filter criterion in Archiver and Storage Manager.

    - **How should the schedule be defined?** – Specify the type of schedule to retrieve auditing data by choosing one of the following options: **No schedule** and **Configure the schedule myself**. Select **No schedule** to retrieve auditing data of

this plan manually from Plan Manager. Select **Configure the schedule myself** to configure the specified time you want to retrieve the plan's auditing data. A separate **Schedule** configuration area appears when you select this option where you can customize the schedule with the following options:

- **Start time** – Select the date and time for the auditing data of this plan to be retrieved.

  ***Note:** The start time cannot be earlier than the current time.

- **Interval** – Enter an integer in the text box and select by **Hour(s)**, **Day(s)**, **Week(s)**, or **Month(s)**. The auditing data of this plan will be retrieved repeatedly based on this schedule. Click **Calendar View** to see the schedules in a calendar.
- **Schedule ending** – Designate when to stop retrieving the auditing data of this plan. Select **No end date** for the auditing data of this plan to be retrieved until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after a number defined occurrences. Select **End by** to specify the exact date and time for the auditing data to stop being retrieved.

- **Would you like to notify users of the job status?** – Send notifications for the jobs of this plan. Select an existing e-mail notification profile from the drop-down menu, or click **New E-mail Notification** to create a new one. Refer to the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide for more information.

After you have finished the configuration, click **Next** to go to the next step.

5. **Overview** – Review and edit the configured selections for this plan in the **Overview** pane. In the **Settings** tab, click **Edit** in the any section to make changes. To view or change the scope for this plan, click the **Scope** tab.
6. Review and edit the configured selections for this plan. Click **Finish** and choose from the following three options in the drop-down list or click **Cancel** to leave this page without saving any of your changes:

   - Click **Finish** to save the plan. You can view or manage this plan in Plan Manager.
   - Click **Finish and Apply Rule** to save the plan, and then apply the configured auditing rules.
   - Click **Finish and Retrieve Data** to save the plan, and then retrieve the auditing data.

Form Mode

To build a new Audit Controller plan with the form, click **Plan Builder** on the Audit Controller page, and then select **Form Mode** from the drop-down list. To create a plan using Form Mode, complete the following steps:

1. **Scope** – Select the desired scope for this plan to audit by clicking on object names to expand the data tree or entering a URL or object name in the search text box above the tree. Check the

checkboxes next to the desired nodes to begin configuring the audit settings in the pane to the right. To configure settings for an individual node, select it, and then click **Edit Rules Individually** next to the name.

2. **What would you like to name this plan?** – Enter a **Plan Name**. Enter an optional **Description** for future reference.

3. **Which operations would you like to do with this plan?** – Choose the actions you want to this plan to perform:

    - **Apply Rule** enables the auditing of the selected actions on the specified SharePoint scope.
    - **Retrieve Data** retrieves the auditing records from SharePoint and stores them in the DocAve Auditor database.

4. **Would you also like to audit these actions in lower object levels?** – This section is only available when site or list level nodes are selected in the **Scope** pane in step **1**. Select the **Trickle down** checkbox if you want to audit the data of the child objects under the selected object. If you do not select the **Trickle down**, DocAve will only audit the selected objects and ignore the child objects under them The **Trickle down** option is unavailable for nodes at the site collection or above level because the child objects of the site collection are automatically audited.

    ***Note**: If the **Trickle down** settings on the selected nodes are configured differently at an individual level, the **Trickle down** checkbox will be greyed out. Click **Set All to Default** if you need to clear the existing trickle down settings on the selected nodes, and then perform the configuration in bulk.

5. **Which audit events would you like to audit?** – Select the corresponding checkboxes of the audit record events you want to monitor. In the **Which audit events would you like to audit?** area for an individual node, you can view the audit events that are currently being audited in this node by clicking the link **here** at the bottom of the page.

    ***Note:** If different audit events are selected for individual nodes, the settings area for selecting audit events for the selected scope in bulk will be disabled. Click **Set all to default** if you need to clear all of the individual selections for your selected nodes, and then perform the configuration in bulk.

    ***Note**: If you want to audit the **Site Collection Deletion** or **Site Creation** actions, make sure the **SP2010AuditorMonitor.wsp** solution has already been deployed. Refer to the **Solution Manager** section in the DocAve 6 Control Panel Reference Guide for the detailed instructions to deploy this solution.

6. **Apply Rule Settings** – Configure the filter policy, operation settings, and schedule for applying the audit rules.

    - **Would you like to filter the scope for applying the audit rules?** – This field is only available when SharePoint on-premises nodes are selected in the **Scope** pane in step **1**. Designate the specific objects or data you want to filter. Click the **Add a Filter Category**

link to add a category, and then select **Site Collection**, **Site**, or **List/Library** from the drop-down menu to specify the objects you want to audit. Click **Add a Criterion**, make selections in the **Rule** and **Condition** drop-down lists, and then enter a value in the **Value** text box.

Repeat this step to create additional criteria. Click the delete ( ) button to delete any of the filter policies.

- **What would you like to do with existing audit actions?** – Configure how the new rules of this plan are handled when there are already auditing rules configured for the same SharePoint object. Select one of the following options from the drop-down list:
    - **Overwrite** – Overwrite the original audit actions of the specified nodes with the new ones.
    - **Append** – Append the new audit actions to the existing ones.
- **How should the schedule be defined?** – Specify the type of schedule to apply the audit rule by choosing one of the following options:
    - **No schedule** – Apply the rules of this plan manually from Plan Manager.
    - **Configure the schedule myself** – Configure the specific time you want the rules of this plan be applied. A separate **Schedule** configuration area appears when you select this option where 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:** The start time cannot be earlier than the current time.

        - **Interval – Enter an integer in the text box and select** by **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 schedules 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 the job stopped after a defined number of occurrences. Select **End by** to specify the exact date and time for this rule to stop being applied.
- **Would you like to have the audit log for the selected nodes automatically trimmed?** – This field is only available when nodes under the **My Registered Sites** are selected in the Scope pane in step **1**. This field is used to determine whether or not the audit log for the selected nodes should be automatically trimmed. If yes, select the **Delete auditor data in SharePoint older than _ days** checkbox and then enter the number of days to retain audit log data.

7. **Retrieve Data Settings** – Configure the filter policy, advanced rules, and schedule for retrieving the auditing data.

- **Would you like to filter the objects whose audit data will be retrieved?** – Designate the specific objects or data you want to filter. Click the **Add a Filter Category** link to add a category, and then select **Site Collection**, **URL**, **User**, or **AD Profile** from the drop-down menu to specify the objects containing the audit data you want to retrieve. Click **Add a Criterion**, make selections in the **Rule** and **Condition** drop-down lists, and then enter a value in the **Value** text box.

  Note the following:

  - The **Custom Property: Text** criterion in the **Site Collection** filters the data of site collections created by Governance Automation.
  - The **AD Profile** category is only available when SharePoint on-premises nodes are selected in the Scope pane in step **1**.

  Repeat this step to create additional criteria. Click the delete ( ) button if you want to delete any of the filter policies you have configured.

- **Would you like to configure advanced settings for retrieving data?** – This field is only available when SharePoint on-premises nodes are selected in the **Scope** pane in step **1**. Configure the following advanced settings for retrieving the audit data:

  - **Retrieve IIS Logs –** Check this checkbox to have **view item** type logs from IIS log retrieved. The retrieved IIS log item information will appear in the report.

    ***Note:** Retrieving IIS logs may slow down the retrieving job performance.

  - **Log source IP –** Check this checkbox to retrieve the information about the source IP of the host who accessed the selected node.
  - **Retrieve Deleted Site Collection Data (only for web application level) –** Check this checkbox to retrieve the auditing data of the deleted Site Collection.
  - **Delete auditor data in SharePoint older than __ day(s) –** Select this checkbox to delete the auditing data in SharePoint that is older than a specified number of days, if you have DocAve auditor configured to collect and retain the data. The default threshold is seven (7) days.
  - **Track object last accessed time –** Select this checkbox to run a separate job that collects data for the Last Accessed Time filter criterion in Archiver and Storage Manager.

- **How should the schedule be defined?** – Specify the type of schedule to retrieve auditing data by choosing one of the following options:

  - **No Schedule** – Retrieve auditing data of this plan manually from Plan Manager.
  - **Configure the schedule myself** – Configure the specific time you want to retrieve the plan's auditing data. A separate **Schedule** configuration area appears when you select this option where you can customize the schedule with the following options:

- **Start time** – Select the date and time for the auditing data of this plan to be retrieved.

  ***Note:** The start time cannot be earlier than the current time.

- **Interval** – Enter an integer in the text box and select by **Hour(s)**, **Day(s)**, **Week(s)**, or **Month(s)**. The auditing data of this plan will be retrieved repeatedly based on this schedule. Click **Calendar View** to see the schedules in a calendar.
- **Schedule ending** – Designate when to stop retrieving the auditing data of this plan. Select **No end date** for the auditing data of this plan to be retrieved repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences you designate in the text box. Select **End by** to specify the exact date and time for the auditing data to stop being retrieved.

8. **Would you like to notify users of the job status?** – Send notifications for the jobs of this plan. Select an existing e-mail notification profile from the drop-down menu, or click **New E-mail Notification** to create a new one. Refer to the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide for more information.

9. Review and edit the configured selections for this plan. Click **Finish** and choose from the following three options in the drop-down list, or click **Cancel** to leave this page without saving any of your changes:

   - Click **Finish** to save the plan. You can view or manage this plan in Plan Manager.
   - Click **Finish and Apply Rule** to save the plan, and then apply the configured auditing rule.
   - Click **Finish and Retrieve Data** to save the plan, and then retrieve the auditing data.

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 of Report Center, click **Plan Manager** on the ribbon to see a list of your previously created plans in the Plan Manager viewing pane. To change the number of plans displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the plans, click on a column heading such as **Plan Name**, **Plan Type**, **Farm**, or **Last Modified Time**.

On the bottom message bar, you will see the selection status of the plans. Click **Clear Selection** on the message bar to deselect all of the selected checkboxes.

Operations in Plan Manager

You can perform the following actions on your plans with the Plan Manager:

- **View Details** – Select a plan and then click **View Details** on the ribbon to open the **View Details** page, which will show the **Settings** and **Audit Rules** of the selected plan. 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 and then click **Edit** on the ribbon to open the Form Mode plan editing page. You can make changes to the scope and settings of the selected plan here. To save the plan:
    - Click **Save** and then make a selection from the drop-down list:
        - Click **Save** to save any changes made to the plan and return to the Plan Manager page.
        - Click **Save As** to save the changes as a new plan. Enter a name for the new plan and then click **OK** to save the new plan.
        - Click **Save and Apply Rule** to save any changes made to the plan and apply the rules of the selected plan.
        - Click **Save and Retrieve Data** to save any changes made to the plan and retrieve the data from the selected nodes.
    - Click **Reset** to reverse any changes made back to the previously saved settings in any of the fields.
    - Click **Cancel** to close the plan editing page without saving any changes.
- **Delete** – Select a plan and click **Delete** on the ribbon to delete the plan. A pop-up window appears to confirm that you want to proceed. Click **OK** to delete the plan or click **Cancel**.
- **Apply Rule** – Select a plan and then click **Apply Rule** on the ribbon to apply the rules of the selected plan.
- **Retrieve Data** – Select a plan and then click **Retrieve Data** on the ribbon to retrieve the data from the selected nodes.

  ***Note**: Prior to retrieving audit data from particular SharePoint nodes, you must enable the audit settings of the desired nodes.

  ***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.
- **Job Monitor** – Can help you keep track of running reports and scheduled reports. To access the jobs of each module, click **Job Monitor** on the ribbon. For more information about using Job Monitor, refer to the DocAve 6 Job Monitor User Guide.

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

Audit Pruning

Audit Pruning allows you to delete the retrieved SharePoint audit data from the DocAve Auditor database after a specified amount of time. By creating profiles in Audit Pruning, you can automate the deletion of outdated audit data. When creating an Audit Pruning profile, you can:

- Configure the time range for pruning audit data. The audit data generated within the specified time range will be automatically pruned.
- Specify where, at the Web application or site collection level of SharePoint on-premises or at the site collection level of SharePoint Online, to delete audit data.
- 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 to return to the Audit Pruning interface.

Creating a Pruning Profile

Before creating a pruning profile, you can configure export locations, which are used by Report Center to store the pruned auditing 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, complete the following steps:

1. In the Audit Pruning page in the **Scope** pane, click on the appropriate SharePoint object name and expand the data tree down to the desired object level, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to view.
2. Click **New** on the ribbon. A pruning profile creation work space will appear next to the **Scope** pane.
3. Enter a **Profile Name** for this new pruning profile. Enter an optional **Description** for future reference.
4. Specify the auditing data you want to prune in under **What time range would you like to cover in this pruning profile**:
    - To prune data older than a certain amount of time, select **All data older than:** and 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:** and 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 **How would you like to deal with the audit data specified above?**:
    - Select **Delete Data** to delete the specified auditing data.
    - Select **Move data** to move the specified auditing 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. If you choose **New Export Location** in the **Export Location** drop-down menu, a child window will appears for you to configure the new export location. For the detailed instructions on configuring a new export location, refer to the Creating an Export Location section in this user guide.
6. Configure whether or not to run this profile at a scheduled time or manually from Profile Manager:
    - **No Schedule** – Select this to run this profile manually from Plan Manager.
    - **Configure the schedule myself** – Select this option to configure the specific time you want this profile to run. A schedule configuration area appears. You can customize the schedule with the following options:
        - **Start time** – Select the date and time for this profile to run.
        - **Interval** – Enter an integer into the text box and select by **Hour(s)**, **Day(s)**, **Week(s)**, or **Month(s)**. This profile will run repeatedly based on this schedule. Click **Calendar 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. **Would you like to receive e-mail notifications on the status of the pruning job?** – Send notifications according to the configurations of this plan. Select an existing e-mail notification profile from the drop-down menu or click **New E-mail Notification** to create a new one. Refer to the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide for more information.
8. 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 auditing data. Click **Advanced Data Selection** to access the **User Filter** and **Action Filter**.
    - **Would you like to filter any user activity?** – By default, **Include all users** are selected. To specify which users to include, select **User(s) to include**, then enter the usernames in the text box in the following format: *AD User: domain\username* and separate each

username with a semicolon (;). To specify which users to exclude, select **User(s) to exclude**, then enter the usernames in the text box in the following format: *AD User: domain\username* and separate each username with a semicolon (;).

- **Which audit action would you like to prune?** – Check the checkbox for the audit actions that you want to prune.

9. Click **Save and Run Now** to save the profile and run it immediately, **Save** 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 central location to view and edit audit pruning profiles and the previously run jobs for the profiles. In the Audit Pruning page in Report Center, click **Profile Manager** on the ribbon. You will see a list of profiles in the Profile Manager viewing pane. To change the number of profiles displayed per page, select the desired number from the show rows drop-down menu in the lower right-hand corner. To sort the profiles, click on a column heading such as **Profile Name**, **Action to Take**, or **Last Pruned Time**.

On the bottom message bar, you will see the selection status of the profiles. Click **Clear Selection** on the message bar to deselect all of the selected checkboxes.

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, and 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 and click **View Jobs** to see the jobs that have run for this profile. The **View Jobs** interface appears, displaying all of the previously run jobs for the selected profile. You can perform the following operations on the jobs:
    - **Delete** – Select the jobs you want to delete and click **Delete** on the ribbon to delete the jobs. A pop-up window appears to confirm that you want to proceed. Click **OK** to delete the jobs or click **Cancel**.
    - **Restore** – Select a job of the **Move** type and click **Restore** on the ribbon to restore the data moved to an export location by this job.

      ***Note**: The data deleted by the jobs of the **Delete** type cannot be restored.
- **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.
    - To save your configurations of the profiles, click **Save** and make a selection from the drop-down list:

        - 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 pop-up window appears for you to input a name for the new profile. Click **OK** to save the new profile and return to the Profile Manager page.
        - Click **Save and Run Now** to save any changes made to the profile, and run a job of this profile immediately.
    - If you do not want to save the changes to the profile, click **Cancel** to close the profile editing page without saving any changes.
- **Delete** – Select a profile and click **Delete** on the ribbon to delete the profile. A pop-up window appears 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 and click **Run Now** to run the selected profile immediately.
- **Job Monitor** – You can keep track of running reports and scheduled reports. To access the jobs of each module, click **Job Monitor** on the ribbon. For more information about using Job Monitor, refer to the DocAve 6 Job Monitor User Guide.

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 to return to the Settings page.

Manage Feature

Report Center provides you an integrated interface to manage all of the DocAve Report Center features. You can view and manage the status of the features as well as activate or deactivate the features on the specified SharePoint site collections.

Navigate to **Report Center** > **Settings** > **Manage Feature** to go to the **Manage Feature** interface to activate or deactivate the Report Center **Document Auditing** and **Usage Activity Web Parts** features.

Managing the Document Auditing Feature

By deploying the Document Auditing solution (**SP2010DocumentAuditing.wsp** for SharePoint 2010 and **SP2013DocumentAuditing.wsp** for SharePoint 2013) on SharePoint farms, Report Center adds the **Document Auditing** feature into SharePoint site collections, which allows you to view the audit history of all documents within the site collection. For detailed information on deploying and using the Document Auditing feature in SharePoint, refer to Document Auditing Feature.

After the Document Auditing solution is deployed on your SharePoint farm, you can activate the feature in SharePoint site collections or through the **Manage Feature** interface. To activate the feature in SharePoint, refer to Activating Document Auditing Feature. In **Manage Feature**, you can activate or

deactivate the feature on site collections and configure the advanced settings for the activation of the feature in SharePoint site collections. To manage the Document Auditing Feature through **Manage Feature**, complete the following steps:

1. In the **Manage Feature** interface, click **Document Auditing** on the ribbon.
2. In the interface for managing the Document Auditing feature interface you can perform the following operations:

    - **Advanced Settings** – Advanced settings will affect the activation of the Document Auditing feature in SharePoint site collections. To configure the **Advanced Settings** for a farm, select the checkbox next to the farms and click **Advanced Settings** on the ribbon. The **Advanced Settings** interface appears. Configure the following settings:

        - **Password** – Check the **Enable Password** checkbox and enter the password in the **Feature activation password** and **Confirm password** text boxes. You will be asked to enter this password when activating the **AvePoint Document Auditing** feature for a specified site collection in SharePoint.
        - **Legal Terms** – Enter your legal terms for managing this feature. The legal terms will be displayed when activating the **AvePoint Document Auditing** feature for a specified site collection in SharePoint. The users must agree with the legal terms before they activate this feature.
        - **Advanced Settings** – Configure the Advanced Settings to be used when activating the feature. If you select the **Check style** checkbox, the auditing data of the site collections in SharePoint 2007 style will not be collected. If you select the **Check site collection size** checkbox, enter an integer in the text box and select **MB** or **GB** to set up the maximum site collection size.

          ***Note**: If the site collection where you want to activate the feature is beyond the configured size limitation, this feature will fail to activate.

    - **Activate** – Expand the tree to load the site collection level and activate the Document Auditing feature on site collections via the following methods:

        - Click **Activate** in the **Actions** column besides the site collection where you want to activate the Document Auditing feature.
        - Select multiple site collections or check the **Select All** checkbox under one Web application where you want to activate the Document Auditing feature and click **Activate** on the ribbon to operate the status of this feature in bulk.

      After the feature is activated on a site collection, the **Status** of the site collection becomes **Active**.

    - **Deactivate** – Expand the tree to load the site collection level and then you can deactivate the Document Auditing feature on site collections through the following methods:

        - Click **Deactivate** in the **Actions** column besides the site collection where you want to deactivate the Document Auditing feature.

- Select multiple site collections or check **Select All** checkbox under one Web application where you want to deactivate the Document Auditing feature and click **Deactivate** on the ribbon to operate the status of this feature in bulk.

After the feature is deactivated on a site collection, the **Status** of the site collection becomes **Inactive**.

Managing the Usage Activity Web Parts Feature

By deploying the Usage Activity Web Parts solution (**SP2010UsageActivityWebParts.wsp** for SharePoint 2010 and **SP2013UsageActivityWebParts.wsp** for SharePoint 2013) on SharePoint farms, Report Center adds the **Usage Activity Web Parts** feature into SharePoint site collections. The Usage Activity Web Parts allow for the creation of social Web parts that rank popular documents, discussions, blog posts, wiki pages, and content contributors, as well as a dashboard Web part that displays usage analytics reports. For detailed information about deploying and using the Usage Activity Web Parts feature in SharePoint, refer to Usage Activity Web Parts Feature.

After the Usage Activity Web Parts solution is deployed on your SharePoint farm, you can activate the feature in SharePoint site collections or through **Manage Feature**. To activate the feature in SharePoint, refer to Activating the Usage Activity Web Parts Feature. To activate or deactivate the **Usage Activity Web Parts** feature in **Manage Feature**, complete the following steps:

1. In the **Manage Feature** interface, click **Usage Activity Web Parts** on the ribbon.
2. In the interface for managing the Usage Activity Web Parts feature, expand the tree to the site collection level and then you can activate or deactivate the feature on site collections:

    - **Activate** – Click **Activate** in the **Actions** column next to the site collection where you want to activate the feature. You can also select multiple site collections or check **Select All** checkbox under the Web application and click **Activate** on the ribbon to operate the status of this feature in bulk.

      After the feature is activated on a site collection, the **Status** of the site collection becomes **Active**.

    - **Deactivate** – Click **Deactivate** in the **Actions** column besides the site collection where you want to deactivate the feature. You can also select multiple site collections or check **Select All** checkbox under the Web application, and then click **Deactivate** on the ribbon to change the status of this feature in bulk.

After the feature is deactivated on a site collection, the **Status** of the site collection becomes **Inactive**.

Export Location

Export Location in Report Center allows you to store reports in a designated storage device through a universal naming convention (UNC) path or in a specified SharePoint document library. Export locations are also used to store pruned auditing data under a desired universal naming convention (UNC) path.

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

***Note:** SharePoint Foundation users are unable to export reports from the web part. This is because the functionality is not supported by SharePoint natively.

Creating an Export Location

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

1. **Name and Description** – Enter a **Name** for the new export location. Then enter an optional **Description** for future reference.
2. **Location Type** – Specify the type of the export location you want to create from the drop-down menu.
    - **UNC Path** – To use a net share location as the export location, select **UNC Path** from the drop-down menu. The **Path** configuration area appears. Enter the **UNC path** for this export location and select a previously created managed account from the drop-down list or create a new one to retrieve the account credentials to access this path. For more information on configuring a managed account, refer to DocAve 6 Control Panel Reference Guide. Click **Validation Test** to check that the entered information is correct. Click **Save** to save these configurations, or click **Cancel** to close the New Export Location configuration interface without saving any changes.
    - **SharePoint Document Library** – To use document libraries in SharePoint on-premises or SharePoint Online as the export location, select **SharePoint Document Library** from the drop-down menu. The **SharePoint Document Library** configuration area appears. Complete the following steps:
        i. Choose one of the following options:
            - Check the **Specify a Document library** checkbox to select the farm or **My Registered Sites**, and enter the site URL and library name where you want to store the exported report files.
            - Check the **Each site in selected scope** checkbox to store the report about each site to the document library of each site accordingly. Enter the document library name you want to use to store the exported report files in the text box; you can also use the default name: **DocAve Report Center Reports.** The specified library will be created in each site in the selected scope.

              ***Note:** This configuration is only effective when you select site collection level nodes or site level nodes to perform the reports' offline export.

        ii. **Rules** – Choose one of the following actions to perform when exporting the report to the document library which already contains an exported report file:

- Select **Overwrite Previous Reports** from the drop-down menu to overwrite the previously generated report file stored in the library.
- Select **Create a New Report File** to create a new one. If you choose to create a new report file, the most recent report file will be appended with a time stamp and the new report file will be created with the specified name.

iii. **File Name** – Designate the exported report file name. By default, the report file will be named based on the report type; for example, the latest exported content type usage report will use the name **Content_Type_Usage.XLSX**. To specify the file name manually, check the **Specify the file name** radio button, and then enter a name in the text box.

- **Physical Device** – To use a physical device as the export location, select **Physical Device** and then configure the following settings:

i. **Storage Type** – Select the storage type of the physical device that you want to use as the export location from the drop-down list. The previously configured physical devices of the selected storage type will be automatically loaded in the **Physical Device** drop-down list below.

ii. **Physical Device** – Select a previously created physical device from the drop-down list as the export location. To create a new physical device, select **New Physical Device**. For more information on creating a new physical device, refer to the DocAve 6 Control Panel Reference Guide.

iii. **Folder** – Choose to export reports to a specific folder in the physical device or exports reports to the root folder of the physical device.

- To export reports to a specific folder under the selected physical device, select **Specify a folder** and then enter the desired folder name. If the entered folder does not exists, the folder will be automatically created under the physical device when report is exported to this new export location for the first time.
- To export all of the reports to the root folder of the physical device, deselect **Specify a folder**.

3. When you have finished, click **Save** 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 with a list of your previously configured export locations.

To change the number of export locations displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the export locations, click on a column heading such as **Location Name** or **Location Type**.

On the bottom message bar, you will see the selection status of the export locations. Click **Clear Selection** on the message bar to deselect all of the selected checkboxes.

You can perform the following actions to the export locations:

- **Create** – Click **Create** on the ribbon to create a new export location. For detailed on creating a new export location, see the Creating an Export Location section in this guide.
- **View** – Click **View** on the ribbon to open the **View Details** interface to view the detailed configuration of the selected export location. If you want to make any changes, click **Edit** on the ribbon. Click **Save** to save the changes, or click **Cancel** to go back without saving any changes.
- **Edit** –Select the export location, and then click **Edit** on the ribbon to open the Edit Export Location Interface. Make the necessary changes, and then click **Save** to save the changes, or click **Cancel** to close the Edit Export Location configuration interface without saving any changes.
- **Delete** – Click **Delete** on the ribbon. A confirmation window pops up and asks if you are sure you want to proceed with the deletion. Click **OK** to delete the selected export locations, or click **Cancel** to return to the Export Location interface without deleting the selected export locations.

To exit the **Export Location** page, click **Back** on the ribbon to return to the **Settings** tab.

Shared Location

Shared Location allows you to configure a location for storing the shared files of Report Center via a Universal Naming Convention (UNC) path. With a configured shared location, the files that are uploaded during the configuration of Usage Pattern Alerting custom action profiles will be stored in this shared location and can be shared by all of the Report services within your DocAve system. Report Center Shared files include **.exe** application files and PowerShell scripts uploaded while configuring Usage Pattern Alerting custom action profiles. For detailed on uploading shared files, refer to Creating a Custom Action Profile.

If you do not configure a shared location, an uploaded file will be stored in the default location (*…\AvePoint\DocAve6\Manager\Report\SharedLocation*) on the server containing the Report service that is used for configuring the custom action profile, therefore, the uploaded file cannot be shared by multiple Report services.

***Note**: If you have multiple Report services in your DocAve system and you want to use the **Run .exe file** or **Run a PowerShell script** features in Usage Pattern Alerting custom action profiles, you must configure a shared location.

To configure a shared location, complete the following steps:

1. Navigate to **Report Center** > **Settings** > **Shared Location**. The **Shared Location** interface appears.

2. Select the **Use the UNC path as the shared location** checkbox.
3. Configure the **UNC Path** by entering the UNC path to the location where you want to store the shared files of Report Center.
4. **Select a managed account profile** – Select a managed account profile from the drop-down menu to specify the credentials for accessing the entered UNC path. Click **Validation Test** to check that the entered information is correct.
5. Click **Save** to save the configuration.

Scope Filter

Scope Filter allows you to set up filter rules to filter SharePoint objects within site collection/site/list/library level within the selected scopes of **Usage Reports**, **Usage Pattern Alerting**, and **Auditor Reports**, so that you can target objects more precisely. By setting up scope filters, apply the same filter policies to different plans/profiles without having to recreate them each time.

To configure scope filters, click **Scope Filter** on the ribbon in the **Settings** tab of Report Center.

In the viewing pane, you can view a list of all previously created scope filters. See the sections below to configure a scope filter and manage scope filters.

Managing Scope Filters

In **Scope Filter**, you can perform the following operations to create new or manage existing scope filters:

- **Create** – Click **Create** on the ribbon to create a new scope filter. For details on creating a new scope filter, see Configuring a Scope Filter.
- **View** – To view the detailed configuration of a scope filter, select the corresponding checkbox in the viewing pane and then click **View** on the ribbon to access the **View Details** interface. If you want to make any changes to the scope filter, click **Edit** on the ribbon to access the **Edit Scope Filter** interface. For details on editing a scope filter, see Configuring a Scope Filter.
- **Edit** – To edit a previously created scope filter, select the corresponding checkbox in the viewing pane, and then click **Edit** on the ribbon to access the **Edit Scope Filter** Interface. For details on editing a scope filter, see Configuring a Scope Filter.
- **Delete** – To delete specific scope filters, select the corresponding checkboxes in the viewing pane and click **Delete** on the ribbon. A confirmation window pops up and asks if you are sure you want to proceed with the deletion. Click **OK** to delete the selected scope filters, or click **Cancel** to return to the **Scope Filter** interface without deleting the selected scope filters.

To exit the **Scope Filter** page, click **Back** on the ribbon to return to the **Settings** tab.

Configuring a Scope Filter

To create a new scope filter, click **Create** on the ribbon. To modify a previously configured scope filter, select the scope filter and then click **Edit** on the ribbon. In the **Create Scope Filter** or **Edit Scope Filter** interface, configure the following settings:

1. In the **Name** and **Description** text boxes, enter a name and an optional description for the scope filter you are about to create.
2. Configure the criteria of this scope filter by completing the following steps:
    a. Click **Add a Filter Level Group** to add a new rule of the specified level and then click **Add a Criterion** to add criteria for the new rule by completing the fields below, or click to delete the rule that is no longer needed.
        - **Rule** – Select the new rule you want to create from the drop-down list. Each level has a unique set of rules that can be applied to enhance configurations. Refer to Appendix E: Examples of Scope Filters for examples of filter policies that users can configure.
        - **Condition** – Select the condition for the rule.
        - **Value** – Enter a value you want the rule to use in the text box.

    b. To add more filters to the scope filter, repeat step a, above.
        - If two or more rules are configured, configure the logical relationships between the filter rules. There are currently two logical relationships: **And** and **Or**. The default logical relationship is **And**. To change the logical relationship between the rules, click on the links in the **And/Or** column.
            - **And** – Objects that meet all of the rules will be filtered and included in the results.
            - **Or** – Objects that meet any one of the rules will be filtered and included in the results.

        ***Note**: **And** and **Or** are available choices for the logical relationship between filter rules of the same level. The logical relationship between filter rules of different levels can only be **And**. For example, the logical relationship between two filter rules of the **Site** level can be **And** or **Or**. The logical relationship between the filter rules of the **Site** level and the rules of the **Site Collection** level can only be **And**.

        - In the **Basic Filter Condition** section, you can view the logical relationship of the filter rules.

    For example: if the logical relationship is "(Filter 1 **Or** Filter 2) **And** Filter 3" in the **Basic Filter Condition** area, the objects that meet either of the Filter 1 and Filter 2 rules and meet the Filter 3 rule will be included in the result.

3. Click **Save** to save the configurations and return to the **Scope Filter** interface, or click **Cancel** to return to the **Scope Filter** interface without saving the configurations.

Item Caching Service

Using the **Item Caching Service**, you can configure the database to store the data collected on the column types within the SharePoint Web applications or site collections. .

Configuring an Item Caching Database

To configure a dedicated Item Caching Database to store the data collected via the Item Caching Service Collector, complete the following steps:

1. Navigate to **DocAve 6** > **Report Center** > **Settings**. Click **Item Caching Service**. The **Item Caching Service** interface appears.
2. Click **Item Caching Database** on the ribbon. The **Item Caching Database** window appears.
3. Configure the following settings for the **Item Caching Database**:
    - **Configure the Item Caching Database –** Report Center supplies a default **Database Server** and **Database Name**. The database server of the DocAve 6 Control database is automatically set as the default database server for the Item Caching Database. If desired, enter a new database server and database name in the corresponding fields. If the database does not exist, DocAve will create a new database using the specified name. However, AvePoint recommends that you use the default database server for most instances.
    - **Authentication –** Select the authentication mode, database credentials and an optional failover database server for the Item Caching Database:
        - Select the **Windows Authentication** or **SQL Authentication** mode for the database and enter the database credential for the selected authentication mode. After this, you can validate the specified account by clicking **Validation Test**.
            - **Windows Authentication (recommended)** – Use this method if you want the user's identity to be confirmed by Windows. Select a previously configured account from the **Select a managed account profile** drop-down list, or click **New Managed Account Profile** to create a new managed account profile in Control Panel. For more information on configuring a managed account profile, refer to the DocAve 6 Control Panel Reference Guide.
            - **SQL Authentication** – SQL Server will confirm the user's identity according to the user's account and password.

        ***Note**: The account for creating or accessing the Item Caching Database must be the **db_creator** in the SQL server where you want to create the Item Caching

Database and the **db_owner** in the newly created/existing Item Caching Database.

- **Failover Database Server –** Optionally select this checkbox and enter a failover database server. In the event that the Item Caching Database collapses, the data stored in the Item Caching Database can be transferred to this standby database.

4. Click **OK** to save the configurations.

Using the Item Caching Service Scope Settings interface

The **Item Caching Service Scope Settings** interface is used to configure the scope settings for the Item Caching Service Collector, to select the column values to collect within the Web applications and site collections.

To access the **Item Caching Service Scope Settings**, Navigate to **DocAve 6** > **Report Center** > **Settings** > **Item Caching Service** > **Item Caching Service Scope Settings**. In the **Item Caching Service Scope Settings** interface, expand the **Scope** tree to the Web application or site collection level to view the scope settings on each node.

- **Status** – This column displays whether you have configured which columns to collect values from the node. If you have selected which column values to collect from a node, its **Status** is **Configured**.
- **Inherited Column Settings?** – This column displays whether the site collection node is inheriting column settings from its parent Web application node. **Yes** represents that the site collection is inheriting the column settings from its parent node. **No** represents that the site collection has unique column settings.

You can perform the following operation in the **Item Caching Service Scope Settings** interface:

- **Configure** – To configure the values of which columns you want to collect via the Item Caching Service Collector, follow the instructions in Configuring Item Caching Service Scope Settings.
- **Clear All** – To clear all of the previously configured Item Caching Service scope settings in all of the nodes within your SharePoint environment, click **Clear All** and click **OK** in the confirmation window.
- **Collect Now** –To collect data on the selected scope, click **Collect Now.** You can choose to run a Full Collection job or an Incremental Collection job. Full Collection is to collect all of the data under the selected scope. Incremental Collection only collects data generated between since the last incremental job.
- **Job Monitor** –Click **Job Monitor** on the ribbon of the Item Caching Service Scope Setting page to see the job's progress or check the details of the jobs. For more information about using Job Monitor, refer to the DocAve 6 Job Monitor User Guide.
- **Back** – To return to the **Item Caching Service** interface, click **Back**.

Configuring Item Caching Service Scope Settings

To configure the **Item Caching Service Scope Settings** for the Item Caching Service Collector, select the column values to collect within the Web applications and site collections, by completing the following steps:

1. In the **Scope** pane of the **Item Caching Service Scope Settings** interface, expand the farm name and expand the data tree to the desired Web applications or site collections, or enter the keyword for the desired URL or object name in the search text box above the farm name.
    - To configure the scope settings for multiple nodes in bulk, select the checkboxes of the desired nodes and click **Configure** on the ribbon. The I**tem Caching Service Scope Settings** interface for the selected nodes appears.
    - To configure the scope settings for an individual node, hover over the URL of the desired node and click the **Configure** button next to the URL. The **Item Caching Service Scope Settings** interface for the selected node appears.
2. Configure the following settings in the **Item Caching Service Scope Settings** interface:
    - **Inheritance Settings** – This section is only available when site collection nodes are selected in the **Scope** pane in step **3**. Use this section to inherit the column setting from the parent nodes or configure unique settings.
        - **Inherit column settings from the parent node –** To enforce that the selected site collection nodes inherit the column settings from their parent nodes, select this option. The **Column Settings** section below will become disabled.
        - **Configure unique column settings –** To configure unique column settings for the selected site collection nodes, select this option and then configure the **Column Settings** section below.
    - **Column Settings** – This section is available when the selected nodes in step **3** are Web applications nodes or site collection nodes for which the **Configure unique column settings** option is selected above. Use this section to select the columns whose values you want to collect from the selected nodes.
        - To collect the values of a desired column, click **Add a Row** below the table on the right, enter the **Column Name**, and select the **Column Type** in the table.
        - Not to collect the values of a desired column which has been added to the table, click the **Remove** ( ) button for this column in the table, or select the checkbox for the column and click **Delete the Selected Rows**.
        - To collect values of the columns that are recommended by DocAve from the selected nodes, select **Include the recommended columns**. The recommended columns are **Created**, **Created By**, **Modified**, and **Modified By**.
3. Click **Save** to save the configurations or click **Cancel** to cancel the changes and exit the current page.

After the configured column settings for the selected nodes are saved, the Item Caching Service Collector will run collection jobs on these nodes as the schedule configured in **Data Collection**. For

detailed instructions on configuring the schedule for the Item Caching Service Collector, refer to Data Collection.

Usage Activity Web Parts Settings

The Usage Activity Web Parts Setting allows you to configure whether or not to cache the data displayed in Web parts and configure the cache expiration date, and set up the filter to collect the data for the Usage Activity Web parts.

To configure the Usage Activity Web Parts Settings, follow the instructions below:

1. Navigate to **Report Center** > **Settings**. Click **Usage Activity Web Parts Setting**. The **Usage Activity Web Parts Settings** window appears.
2. **Would you like to cache the stored data?** – Choose whether or not to store the data displayed on Web parts into cache and configure when the cache expires. Select the **Enable Caching** option to enable the cache setting, and then specify when to expire the cache. Enter a number into the text box behind **Cache expires in:**, and select **Minutes** or **Hours** from the drop-down list. The data will be removed from cache after being stored for the specified time. The Web parts will receive the data from the Report database and store the newly obtained data into the cache again.
3. **Would you like to filter the data to be displayed?** – Choose whether or not to set up filters for filtering the collected data on the Web parts. Select the **Enable Filters** option to add filters into the **Data Filters** field.
4. **Data Filter** – The default filters are provided. You can change or delete them as desired. Click **Add a Criterion** to add criteria for the new rule by completing the fields below, or click to delete the rule that is no longer needed.
    - **Rule** – Select the new rule you want to create from the drop-down list. Each level has a unique set of rules that can be applied to enhance configurations.
    - **Condition** – Select the condition for the rule.
    - **Value** – Enter a value you want the rule to use in the text box.

    To add more filters to the scope filter, repeat the step above.
5. If two or more rules are configured, configure the logical relationships between the filter rules. There are currently two logical relationships: **And** and **Or**. The default logical relationship is **And**. To change the logical relationship between the rules, click on the links in the **And/Or** column.
    - **And** – Objects that meet all of the rules will be filtered and included in the results.
    - **Or** – Objects that meet any one of the rules will be filtered and included in the results.

      ***Note**: **And** and **Or** are available choices for the logical relationship between filter rules of the same level. The logical relationship between the filter rules of the different levels can only be **And**.

6. Click **Save** to save the configurations; click **Cancel** to go back to the Settings interface without saving any changes.

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.

The following sections explain how to work with reports. These actions can be found in the **Report Actions** toolbar on 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** on the ribbon or at the bottom of the window, and then select **Run Report Only** or **Save and Run Report** from the drop-down menu to collect the data and generate the report. The report will appear in the **Report Display** pane. Clicking **Save and Run Report** will save the configured profile.

Show Report

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

If you select a previously saved profile whose data has been collected according to the profile's settings, click **Show Report** on the ribbon or at the lower left section. The report will appear in the **Report Display** pane to display the previously collected data.

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

- XLSX

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

In DocAve 6, Report Center supports report exports in CSV and XLSX format without the connection to the SQL Reporting Service. Additionally, Compliance Reports support exports of CSV/PDF/XLSX reports without connection to the SQL Reporting Service.

If you want to export a report in additional formats, the Reporting Service must be configured in Report Settings. For instructions on configuring Reporting Service, see the Reporting Service section.

To export a report after it has been generated, complete the following steps:

1. With the report displayed in the **Report Display** pane, click **Export Now** in the **Report Actions** group on the ribbon, and then select **Export to Datasheet**. The **Export to Datasheet** window appears. Complete the following steps to generate the report:
    - **Report Format** – Select the desired report format from the drop-down menu.
    - **Export Settings** – Choose whether to export the report now. Check the **Export to local immediately** checkbox and click **OK** to export the report immediately, or check the **Export to a different location** checkbox, and then configure the following settings:
        - **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location** then follow the instructions provided in the Export Location section of this guide.
        - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile and click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.
2. Click **OK** to export the report based on these configurations.

***Note:** Certain types of reports have additional configurable settings for exporting to datasheet. Detailed instructions on these settings are provided in the sections for the corresponding reports.

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** pane, click **Export Now** on the ribbon. A drop-down menu appears.
2. Click **Output Screenshot**. A window appears 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

In DocAve 6 Service Pack 5, there is no default threshold for the size of an **MS SQL** type Auditor Database. You can configure a threshold for the Auditor Database size by completing the following steps:

***Note**: The default threshold for the size of a **Build-in** type Auditor Database is **9 GB** and cannot be changed.

1. Navigate to the *…\AvePoint\DocAve6\Manager\Report\bin* directory on the DocAve Manager server.
2. Open the **ReportCenterServiceProperties.config** file.
3. Locate the **<AuditorDatabaseSize>** node; its default value is **-1**.
4. Change the value of this node to your desired threshold.

   ***Note**: The threshold is calculated in MB and value of the threshold must be a positive integer.
5. Save your changes and close the file.

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

docave6_auditordb, *docave6_auditordb_001*, *docave6_auditordb_002* …

***Note**: If you update your DocAve platform to DocAve 6 Service Pack 5 from a previous version, the threshold of the Auditor Database size depends on the threshold before the update:

- If you have customized the threshold of the Auditor Database size before the update, the threshold will remain the same after the update.
- If you keep the default threshold of the Auditor Database size before the update, there will no default threshold for the Auditor Database size after the update.

Usage Reports

Usage Reports in Report Center 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 or on a specified object.

Usage Reports Interface

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

1. **Ribbon** – Toolbar where you can create or manage the Usage Reports plans, generate, export, or view reports of the previous created plans, and access the integrated Job Monitor.
2. **Plan Management pane** – Review the previous created Usage Reports plans. You can also expand the plan to view the included report types.

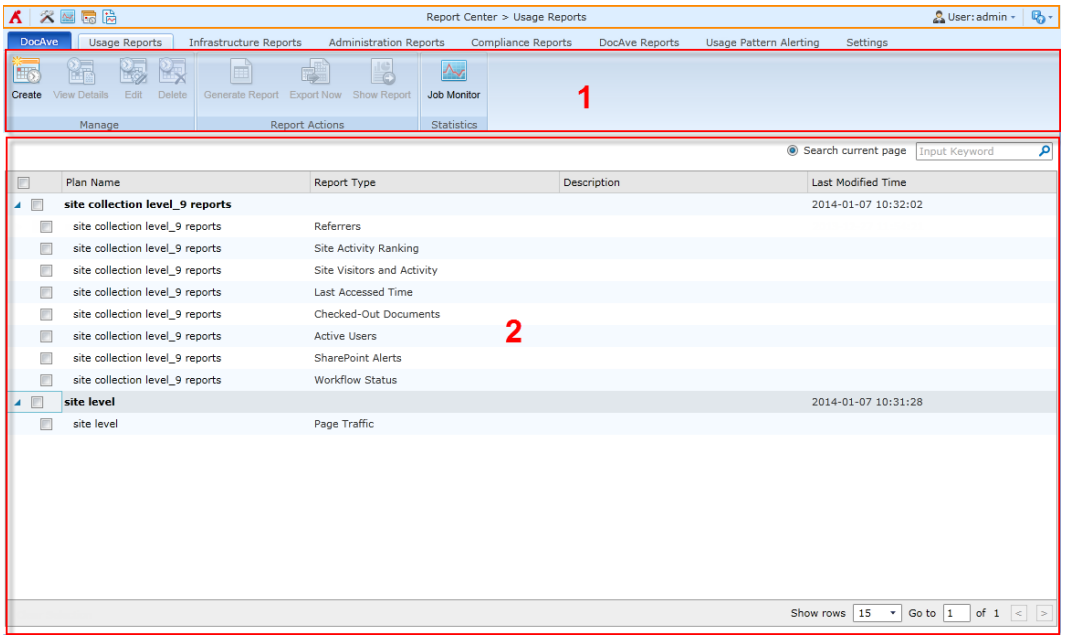


Figure 3: Usage Reports Interface.

Creating a Usage Reports Plan

Prior to generating usage reports, you must configure Usage Reports plans which include the desired reporting scope, report types, and other settings for generating reports. To create a Usage Reports plan, navigate to **Report Center** > **Usage Reports**, click **Create** on the ribbon, and then complete the following steps on the **Create Plan** tab:

1. **Report Scope and Type Selection** – Select the scope and report types for the plan you are about to create.
    a. In the left pane, specify desired scope for this plan to generate reports in the following methods:
        - **Select the scope on the tree** – With this option selected, specify the desired scope by clicking on object names to expand the data tree or entering a URL or object name in the search text box above the tree. To narrow down the search criteria and display fewer nodes under a particular farm/Web application level node, a **Sites** node, or a **Lists** node on the tree, right-click the node and select **Advanced Search** to access the **Advanced Search** interface. For detailed instructions on using the **Advanced Search** feature, refer to Searching Nodes Using the Advanced Search Feature.
        - **Manually input URLs** – To create a plan for showing **Site Visitors and Activity** reports of specified URLs, select this option, and then select a farm from the **Farm** drop-down menu. Enter the **Site Collection URL** and **Item URL** in the **URL** text boxes. To add more URLs, click **Add Another URL**.
    b. **At which level would you like to generate reports?** – If you selected Web application/site collection/site level nodes on the tree, select the desired scope level for reporting by selecting the corresponding radio button. If the option for all current and new objects within is selected, then newly created objects under the selected nodes will automatically be included in the plan for future reports.

        ***Note**: If you select a farm node or list level nodes on the tree, the selected farm or list level nodes are automatically set as the reporting scope and cannot be changed.

    c. **Would you like to filter objects within the selected scope?** – To filter SharePoint objects you would like to include in this plan within the selected scope, select a previously created scope filter from the drop-down list. To create a new scope filter, click **New Scope Filter**. For details on creating a scope filter, refer to Configuring a Scope Filter.
    d. **Which report types would you like to include in this plan?** – Select the desired report types for this plan. Report Center automatically loads the supported report types based on the configured report scope and report levels. To get an example of a particular report type, click the corresponding report type name or the button next to it.

2. **Basic Settings** –Enter the plan name, description, and the required settings for the selected report types.

   - **What would you like to name this plan?** – Enter a name and an optional description for the plan you are about to create.
   - **Would you like to enable the Collectors for retrieving data on schedule?**– This section is available when you select one or more of the following report types in step 1: Search Usage, Site Visitors and Activity, Checked-Out Documents, Page Traffic, Referrers, Failed Login Attempts, Download Ranking, Site Activity Ranking, and Active Users. In this section, specify whether to enable the Collector for the reports whose data are collected via Collector jobs.
     - If you select the **Enable Collector** checkbox, the Collectors retrieve the data according to the schedule configured in **Data Collection**. By default, the collector schedule is enabled and each Collector collects data once a day.
     - To disable the collector schedule, 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.

     Click **Data Collection** to jump to the **Data Collection** page. For more information about Collector, refer to the Data Collection section of this guide.

     ***Note**: If you select Site Visitors and Activity, Site Activity Ranking, or Active Users in step 1, DocAve will automatically enable SharePoint Auditor for the site collections in this plan's scope since these reports use the Usage Collector to collect SharePoint audit data. If you decide to disable SharePoint Auditor in the future, go to Data Collection to edit the **Enable SharePoint Auditor** settings for Usage Collector to stop Report Center re-enabling it.

     If you select Search Usage or Referrers in step 1, the Web Analytic service in SharePoint must be started to ensure the Search Usage Collector job can retrieve the required data.

   - **Would you like to filter any user activity?** –This section is available when you select one or more report types of the following report types in step 1: Site Visitors and Activity, Last Accessed Time, Failed Login Attempts, Workflow Status, SharePoint Alerts, Site Activity Ranking, and Active Users. In this section, specify the user whose activity you want to include in, or exclude from, the reports.
     - **Include All Users** – By default this option is selected. The activities of all users can be viewed.
     - **Users to Include** – Enter the users whose activity you want to view. Click the check names ( ) button to check the name you entered, or click the browse ( ) button to find the users you want to include.
     - **Users to Exclude** – Enter the users whose activity you do not wish to view. Click the check names ( ) button to check the name you entered, or click the browse ( ) button to find the users you want to exclude.

- **What time range would you like to cover in the Last Accessed Time Report** – This section is available when you select the Last Accessed Time report in the **Report Scope and Type Selection** step of this wizard. Choose one of the following options:
    - **Duration** – Check the **Duration** checkbox, and then select the desired time range from the drop-down menu. There are eight durations available: **This Month**, **Last Month**, **Last 2 Months**, **This Week**, **Last Week**, **Last 2 Weeks**, **Today**, and **Yesterday.**
    - **Custom** – Check the **Custom** checkbox to designate the time frame for collecting the data.

3. **Advanced Settings** – Configure the settings for exporting and sending usage alerts for the selected reports.
    - **Would you like to export reports for this plan?** – Select whether to export reports for this plan by selecting the corresponding radio button.
        - When you select **Yes**, the **Export Report Settings** and **Export Schedule** sections are displayed below. Configure the settings and schedule for exporting reports and Report Center will export reports for this plan based on these configurations.
        - If you do not want to configure a schedule for this plan, select **No**. The **Export Report Settings** and **Export Report Schedule** sections will not appear. You must collect data and export reports of this plan manually.
    - **How would you like to export the reports?** –Specify the common settings for exporting each report in this plan and advanced settings for exporting certain reports in this plan.
        - **Common Settings** – Specify the following common settings for exporting each report.
            - **Report Format** – Select the desired report format from the drop-down menu.
            - **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location** and refer to Export Location for instructions.
            - **Send Notification** – To send an e-mail notification of the export report jobs, check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

- **Advanced Settings** – Specify the advanced settings for certain reports in this plan.
    - **Date Range** – The **Date Range** configuration area is available when one or more of the following report types are selected in step 1: Search Usage, Site Visitors and Activity, Checked-Out Documents, Page Traffic, Referrers, Failed Login Attempts, Download Ranking, Site Activity Ranking, and Active Users. In this area, choose one of the following options:
        - Select a predefined time range by clicking the **Duration** radio button and selecting the desired time range from the drop-down list. There are eight durations available: **This Month**, **Last Month**, **Last 2 Months**, **This Week**, **Last Week**, **Last 2 Weeks**, **Today**, and **Yesterday**.
        - Choose to customize a start date by clicking the **Starting Date** radio button and selecting the desired date using the calendar.
    - **Frequency** – This field is only available when the Page Traffic and/or Site Visitors and Activity reports are selected in step 1. Select an interval in which the data in the exported report is displayed.
    - Specific Settings – In this configuration area, configure each specific setting for certain reports in this plan. For detailed information on configuring these settings, refer to Configuring Specific Export Report Settings.

- **Would you like to configure a schedule for exporting the reports?** – Specify the schedule for exporting the reports in this plan. In this configuration area, choose one of the following options:
    - **No Schedule** – Select this option if you do not want to configure a schedule for this plan. If you choose this option, you must generate reports manually.
    - **Configure the schedule myself** – Select this option to configure the specific time you want to export reports of this plan. A schedule configuration area appears. Customize the schedule with the following options:
        - **Start time** – Select the date and time when to start exporting reports of this plan.

          ***Note:** The start time cannot be earlier than the current time.

        - **Interval** – Enter an integer into the text box and select by **Hour(s)**, **Day(s)**, **Week(s)**, or **Month(s).** The reports will be exported repeatedly based on this schedule. Click **Calendar View** to see the schedules in a calendar.
        - **Schedule ending**– Designate when to stop exporting reports of this plan. Select **No end date** for the reports of this plan to be exported repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you

configured in the text box. Select **End by Date + Time** to specify the exact date and time to stop exporting the reports of this plan.

- **Would you like to receive e-mail alerts for specific reports?** – This configuration area is available, when one or more of the following report types are selected in step 1: Site Visitors and Activity, Checked-Out Documents, Page Traffic, Failed Login Attempts, Workflow Status, and Active Users. In this area, select the checkboxes for the desired repots to have usage alert e-mail notifications sent out when the specified criteria are met. For more information on configuring the usage alert e-mails, refer to Configuring Usage Alert E-mails.

4. **Overview** – In this page, review and edit all of your plan configurations. To make changes, click **Back** on the ribbon and edit the settings in the corresponding page.
5. After you finish configuring this plan, click **Finish** and choose from the following two options in the drop-down list, or click **Cancel** to leave this page without saving any of your changes:
    - Click **Finish** to save the plan. You can view or manage this plan in the Usage Reports interface.
    - Click **Finish and Generate Report** to save the plan, and then generate reports immediately.

Searching Nodes Using the Advanced Search Feature

To narrow down the search criteria and display fewer nodes under a particular farm/Web application level node, a **Sites** node, or a **Lists** node on the tree, right-click the node and then select **Advanced Search**. In the **Advanced Search** interface, click **Add a Criterion** and configure the following settings:

1. **Rule** – Select the rule for this search. You can use the **URL** rule to filter Web application level nodes, and the **URL** rule and the **Name** rule to filter site collection/site/list/library level nodes.
2. **Condition** – Select the condition for the rule from the drop-down list.
3. **Value** – Enter the value for the rule in the text box.
4. To add more criteria, click **Add a Criterion**, and repeat steps above. You can change the logical relationships between the criteria by clicking the **And** or **Or**. By default, the logical relationship is set to **And**.
    - **And** means that the child nodes that meet all of the criteria will be included in the result.
    - **Or** means that the child nodes that meet any criterion will be included in the result.

    The **Basic Filter Condition** area displays the logic relationships of filter criteria.
5. Click **Search** to start searching the child nodes.

Configuring Specific Export Report Settings

If you select **Page Traffic**, **Download Ranking**, **Site Activity Ranking**, and **Active Users** in the **Report Scope and Type Selection** step of this wizard, the following specific settings are available in the **Export Report Settings** section of the **Edit Plan** page:

- **Page Traffic** – This setting is available when you select **Page Traffic** in the **Report Scope and Type Selection** step of this wizard. Select **Hits** or **Throughput** as the type to display the page traffic in the Page Traffic report.
- **Download Ranking** – This setting is available when you select **Download Ranking** in the **Report Scope and Type Selection** step of this wizard. Enter an integer into the **Top __ for** text box, and select **Sites** or **Selected Scope** from the drop-down menu to designate the number and nodes to be displayed in the report.
- **Site Activity Ranking** – This setting is available when you select **Site Activity Ranking** in the **Report Scope and Type Selection** step of this wizard. Enter an integer into the **Top/Bottom __** text box, and select **Sites /Pages/Users/Items/Lists** from the drop-down menu to designate the number and nodes to be displayed in the report.
- **Active Users** – This setting is available when you select **Active Users** in the **Report Scope and Type Selection** step of this wizard. Check the **Show all records** checkbox to display all the collected data in the report pane, or check the **Top/Bottom __ records** checkbox, and then enter an integer into the text box to designate the number of the top/bottom ranking results to be displayed in the report.

Configuring Usage Alert E-mails

To configure the **Usage Alert E-mails** settings for specific report types, complete the following steps:

- **Active Users usage alert** –Select this checkbox to have e-mail notifications sent out when the desired criteria are met. Then configure the following settings:
  - **Notification Name** – Select a previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification profile. For more information, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference 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** text box.

    ***Note:** By default, the threshold is checked depending on the interval you configured. If the number exceeds the threshold set here, an e-mail notification will be sent.

  - **Interval** – Specify the frequency of e-mail notifications. Enter a positive integer into the **Every** text box, then select by **Day(s)** or **Week(s)** from the drop-down menu.

- **Checked-Out Documents usage alert** – Select this checkbox to have e-mail notifications sent out when the desired criteria are met. Then configure the following options:
    - **Notification Name** – Select a previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference 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)** text box.

      ***Note:** By default, the threshold is checked depending on the interval you configured. 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** text box, then select **Day(s)** or **Week(s)** from the drop-down menu.
- **Failed Login Attempts usage alert** – Select this checkbox to send out e-mail notifications when the desired criteria is met. Then configure the following options:
    - **Notification Name** – Select a previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.
    - **Interval** – Specify how frequent to send e-mail notifications. Enter a positive integer into the **Send the e-mail every** text box, then select **Day(s)** or **Week(s)** from the drop-down menu.
- **Page Traffic usage alert** – Select this checkbox to send out e-mail when the desired criteria is met. Then configure the following options:
    - **Notification Name** – Select a previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.
    - **Time Range** – Specify the time frame for this alert. Enter a positive integer into the **In the last** text box, 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** text box.

      ***Note:** By default, the threshold is checked depending on the interval you configured. If the number exceeds the threshold set here, an e-mail notification will be sent.

- **Interval** – Specify the frequency of e-mail notifications. Enter a positive integer into the **Every** text box, then select by **Day(s)** or **Week(s)** from the drop-down menu.

- **Site Visitors and Activity usage alert** – Select this checkbox to send out e-mail notifications when the desired criteria are met. Then configure the following options:
  - **Notification Name** – Select a previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification profile. For more information, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference 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, and then enter a positive integer into the text box.
    - Check the **More than __ unique visitor(s)** checkbox to activate this threshold, and then enter a positive integer into the text box.

    ***Note:** By default, thresholds are checked depending on the interval you have configured. 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** text box, and then select **Day(s)** or **Week(s)** from the drop-down menu.

- **Workflow Status usage alert** – Select this checkbox to send out e-mail notifications when the desired criteria are met. Then configure the following options:
  - **Notification Name** – Select a previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification rule, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.
  - **Thresholds** – Specify the triggers for the notification. Enter a positive integer into the **More than __ open workflow(s) assigned to a user** text box.

    ***Note:** By default, thresholds are checked depending on the interval you configured. If these numbers exceed the thresholds set here, an e-mail notification will be sent.
  - **Interval** – Specify the frequency to send e-mail notifications. Enter a positive integer into the **Every** text box, and then select **Day(s)** or **Week(s)** from the drop-down menu.

Using the Usage Reports Interface

When you finish configuring the Usage Report plans, you can view and manage all of the previously created plans and generate reports of the plans in the **Usage Reports** interface. In the viewing pane of this interface, you can view the **Plan Name**, **Report Type**, **Description**, and **Last Modified Time** of each previously created Usage Reports plan. Refer to the following sections for detailed instructions of managing the Usage Reports plans and generating reports of the plans.

Managing Usage Report Plans

In the **Usage Reports** interface, you can perform the following operations to manage the plans:

- To view the report types included in a particular plan, click the arrow ( ) button next to the desired plan to expand it in the **Plan Management** pane. All of the included report types are displayed under the plan name.
- **View Details** – Select a plan, and then click **View Details** on the ribbon to open the **View Details** page to see the reporting scope and settings of the selected plan. You can click **Edit Plan** on the ribbon to make changes to the plan. When you are finished reviewing the plan, click **Close** to return to the **Usage Reports** page.
- **Edit** – Select a plan, then click **Edit** on the ribbon to open the **Edit Plan** page. Here you can make changes to the scope and settings of the selected plan. Then, choose from the following options:
    - Click **Finish** and then make a selection from the drop-down list:
        - Click **Finish** to save the plan. You can view or manage this plan in the Usage Reports interface.
        - Click **Finish and Generate Report** to save the plan, and then generate reports immediately.
    - Click **Cancel** to close the **Edit Plan** 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 whether you want to proceed with deleting the selected plan. Click **OK** to delete the plan, or click **Cancel** to return to the Plan Manager page without deleting the plan.
- **Job Monitor** – Keep track of running reports and scheduled reports. To access the jobs of each module, click **Job Monitor** on the ribbon. For more information about using Job Monitor, refer to the DocAve 6 Job Monitor User Guide.

Generating Reports in the Usage Reports Interface

If you configure an export report schedule for a specific plan, Report Center will generate and export reports based on the configured export schedule and export report settings. When the scheduled export report jobs finish, you can go to the specified export locations to view the exported reports. If you want

to generate reports of specific plans immediately, perform the following operations in the **Usage Reports** interface:

- **Generate Report** – Select your desired reports, and then click **Generate Report** on the ribbon to run jobs immediately to retrieve the latest data for the selected reports.
- **Export Now** – Select your desired reports, and then click **Export Now** on the ribbon to export the report details to the export location you configured in the corresponding plans.
- **Show Report** – Select a specific report whose data has been retrieved, and then click **Show Report** on the ribbon to access the **Show Report** page. You can view the report of previously collected data. If you select a report whose data has not been retrieved, and then click **Show Report**, the report display pane in the Show Report page displays no data. For more detailed on viewing reports in the Show Report page, refer to Viewing Usage Reports.

Using the Show Report Interface

In the **Show Report** interface, you can view the report details or run jobs to generate reports of the reports in a specific Usage Reports plan. Also, you can view and edit the specified Usage Reports plan. To access the **Show Report** interface, choose either of the following methods:

- To access the **Show Report** interface to view all of the generated reports for a particular plan, navigate to the **Usage Reports** tab, select the desired plan, and then click **Show Report** on the ribbon. The **Show Report** interface for the selected plan appears.
- To access the **Show Report** interface to view a particular report, complete the following steps:
    i. Navigate to the **Usage Reports** tab, and click the arrow ( ) button next to the plan that contains the desired report to expand the plan. All of the included reports are displayed under the plan node.
    ii. Select the desired report included in this plan.
    iii. Click **Show Report** on the ribbon. The **Show Report** interface for the selected report appears.

In the **Show Report** interface, you can perform the following operations:

- **Report Type** – If you access the **Show Report** interface for a particular plan, all of the report types for this plan are included in the **Report Type** drop-down list. Select a desired report type from this drop-down list, and then choose to view the report details or generate a report of the selected plan immediately.

  ***Note**: If you access the **Show Report** interface for a particular report, the selected report type is the only option in the **Report Type** drop-down list and cannot be changed.

- **Report** – Click this button to view the details of the report specified in **Report Type**. For more information on how to view the reports, refer to Viewing Usage Reports.
- **Plan Details** – Click this button to view the detail settings of the current selected plan.
- **Edit Plan** – Click this button to edit the current selected plan on the **Edit Plan** page. For more information on editing the plan, refer to Managing Usage Report Plans.
- **Run Report** – This button is available when you select one of the following report types in **Report Type**: Last Accessed Time, SharePoint Alerts, and Workflow Status. Click this button to run the report of the selected report immediately. When the report is generated, the report details are displayed in the report display pane below. When the report is generated, you can view the latest retrieved data in the report display pane below. For more information on view the reports, refer to Viewing Usage Reports.
- **Collect Now** – This button is available when you select one of the following report types in **Report Type**: Search Usage, Site Visitors and Activity, Checked-Out Documents, Page Traffic, Referrers, Failed Login Attempts, Download Ranking, Site Activity Ranking, and Active Users. Click this button to run the Collector of the selected report immediately to retrieve the latest data for this report. When the report is generated, you can view the latest retrieved data in the report display pane below. For more information on view the reports, refer to Viewing Usage Reports.
- **Export Now** – Click this button and then select a desired option from the drop-down list to export the report details of the selected report in **Report Type**. For more information on exporting a report, refer to Export Report.
- **Job Monitor** – Keep track of running reports and scheduled reports. To access the jobs of each module, click **Job Monitor** on the ribbon. For more information about using Job Monitor, refer to the DocAve 6 Job Monitor User Guide.
- **Close** – Click this button to exit this page and return to the Usage Reports interface.

Viewing Usage Reports

In the report display pane of the **Show Report** interface, the latest retrieved data of the selected **Report Type** in a specific plan is displayed. Refer to the section below for detailed instructions on viewing the Usage Reports.

Viewing Search Usage Reports

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.

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 **Date 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.

Viewing Site Visitors and Activity Reports

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

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 Visitors and Activity 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 **Date Range**, **Frequency** and **Type** 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 selected 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.

Viewing Checked-Out Documents Reports

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

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 **Date Range**, **Frequency**, and **Type** 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.

Viewing Page Traffic Reports

A Page Traffic report analyzes the traffic level of the page at the site/site collection level. In the specific site, you can view the page traffic level, the amount of throughput and the hits within a specific time frame.

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 **Date 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.

Viewing Referrers Reports

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.
***Note:** The Referrers report does not support SharePoint 2013. The site collections or sites selected for this report have to be limited within the same farm instead of multiple farms.

To generate a Referrers report in Report Center, the required primary data in Site Referrers of SharePoint has to be configured in SharePoint. To configure the primary data in SharePoint, complete the following steps:

1. Enter to your SharePoint 2010 environment.
2. Navigate to **Central Administration** > **Monitoring** > **Configure health data Collection.**
3. Enable **Health Data Collection**.
4. Click **Log Collection Schedule**, and then enable all the log collection schedules.

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 **Date 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.

Viewing Last Accessed Time Reports

Last Accessed Time report displays when the selected site collections or sites were last accessed, and by whom, using SharePoint Auditor.

*__Note:__ SharePoint Audit settings must be enabled for any site collections or sites of which you want to generate the 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:

- **Display by** – Information to display the report by.
- **Scope** – Change the scope for the data shown in the report.
- **Filter selection** – Filter the data displayed.

Viewing Failed Login Attempts Reports

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

***Note:** To get Failed Login Attempts information, you must first configure IIS Logging. For details on configuring IIS Logging, refer to IIS Logging section.

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 **Date 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.

Viewing Workflow Status Reports

Workflow Status reports display the number of workflows per workflow template created by SharePoint 2013, SharePoint 2010, or SharePoint Designer. Workflow Status reports are used to view each workflow status by workflow template, users, library, or list within a specific scope, the average time to complete the workflow, the number of the workflow which is currently open, and the person assigned to each workflow.

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.
- **Template Allocation** – Show a summary of all of the workflows and the workflow allocation by template within the selected scope.
- **Details** – Display detailed information for each individual site.

Viewing SharePoint Alerts Reports

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

Viewing Download Ranking Reports

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, refer to IIS Logging section.

Once you have generated a report, the Report Display pane has a number of configurable settings so 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.

Viewing Site Activity Ranking Reports

A Site Activity Ranking report analyzes the site activities at the site collection and site levels. In a specific site collection, you can view the site which is the top hit site, page, or user for a specific time. By default, it will list the top eight hit sites, pages, users, lists, or items.

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 Ranking 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 **Date Range** and **Frequency** in a calendar.
- **Scope** – Change the scope for the data shown in the report.
- **Filter selection** – Filter the data displayed.

Viewing Active Users Reports

An Active Users report displays the users with the most activities within the scope you configured. 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 **Date 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.

Exporting Active Users Reports with Additional User Properties

By default, exported **Active Users** reports include the same information as the **Show Report** feature, but also include the login and display names of the reported users. To export **Active Users** reports with more user properties, complete the following steps:

1. Add the user properties you want to include in the exported Active Users report into the **<UserProfileCustomProperties>** node in **ReportCenterServiceCustomProperties.config** file on your Report service server. For detailed instructions, refer to Configuring the ReportCenterServiceCustomProperties.config File.
2. After adding the user properties, you must run a Full User Profile Collector job to collect the data of the corresponding user properties from the Search service application. To do so, complete the steps below:
    a. Change the mode of data collector jobs to **Full** by configuring the **<UserProfileSyncMode>** node in the **ReportCenterServiceProperties.config** under the same directory. For detailed instructions, refer to Configuring the ReportCenterServiceProperties.config File.
    b. Go to **DocAve Manager** > **Report Center** > **Data Collection**, to run a job of the User Profile Collector. For detailed information on running a data collector job in **Data Collection**, refer to Data Collection.
    c. After this User Profile Collector job is finished, the data of the configured user properties are retrieved and stored to the Report database. Later, you can run incremental User Profile Collector jobs to collect the user profile data. Go back to your Report service server and change the mode of data collector jobs to **Incremental** by configuring the **<UserProfileSyncMode>** node in the **ReportCenterServiceProperties.config**. For detailed instructions, refer to Configuring the ReportCenterServiceProperties.config File.
3. After the steps mentioned above are completed, the newly export Active Users report will include the user properties of each reported user as configured in the **ReportCenterServiceProperties.config** file. With a configured schedule for exporting reports in the **Would you like to export reports for this plan?** section of the Usage Report plan that contains the Active Users report type, you can export an Active Users report in the following methods:
    - Wait for the next scheduled export report job to export the Active Users report including the configured user properties.

- To manually export an Active Users report of a Usage Report plan, use the **Export Now > Export to Datasheet** feature in the **Usage Reports** or **Show Report** interface.

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 assist in management and long-term planning of your data.

Infrastructure Reports Interface

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

1. **Ribbon** – Toolbar where you can select the type of report you want 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.

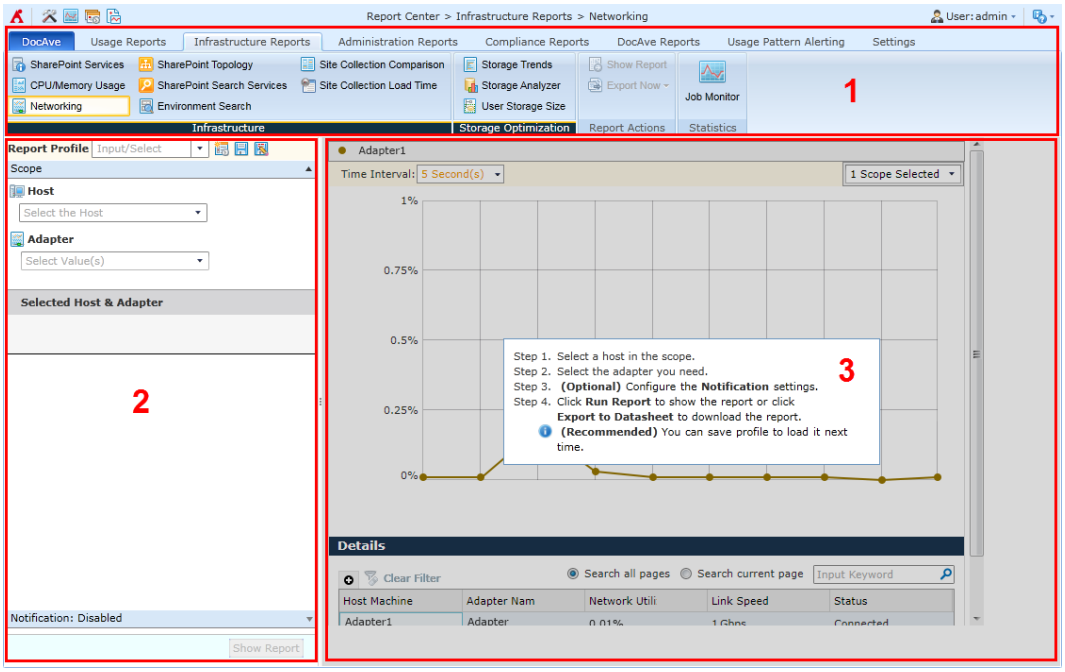


Figure 4: Infrastructure Reports interface.

SharePoint Services

SharePoint Services allows you to view the latest active SharePoint Servers and SharePoint services, along with their status.

***Note:** 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, go to the **Infrastructure Reports** tab of Report Center, and click **SharePoint Services** on the ribbon. In the **Scope** configuration area, select the farm you want to view from the drop-down menu by checking the corresponding checkbox. 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** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) 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** – Check the **Usage alert** checkbox if you want to have e-mail notifications sent out when the desired criteria are met. Then configure the following options:

    - **Notification Name** – Select a previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference 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, and then enter the values for **__% lasts for more than __ minute(s)**.
        - Check the **Memory** checkbox to activate this threshold, and then enter the values for **__% lasts for more than __ minute(s)**.

      ***Note:** By default, thresholds are checked one time each minute. If these numbers exceed the thresholds set here, an e-mail notification will be sent.
    - **Interval** – Specify the frequency of e-mail notifications. Enter a positive integer into the **Every** text box, 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 DocAve Agent servers.

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** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) 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** – Check the **Usage alert** checkbox if you want to have e-mail notifications sent out when the desired criteria are met. Then configure the following options:
    - **Notification Name** – Select a previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.
    - **Thresholds** – Specify the triggers for this notification. Enter the values for **__% lasts for __ minute(s)**.

      ***Note:** By default, thresholds are checked one time each minute. If the number exceeds the threshold set here, an e-mail notification will be sent.
    - **Interval** – Specify the frequency of e-mail notifications. Enter a positive integer into the **Every** text box, 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:

- **Scope** – In the **Scope** configuration area, select the farm you want to view from the drop-down menu.

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** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button

( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.

2. **Scope** – In the **Scope** configuration area, select the **Farm** you want to view from the drop-down menu. Then select the **Search Service Application** from the drop-down menu. You can generate the **SharePoint Search Service** report for the **Search Service Applications** of SharePoint 2010 and SharePoint 2013 at the same time.

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** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click to clear all fields, click to save changes to the current report profile, or click to save any changes under a new profile name.
2. **Criteria** – In the Criteria configuration area, configure the following options:
    - **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 can be configured as **And** or **Or** by clicking on the logic itself. Click **Search Host.** The 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.

Site Collection Comparison

A Site Collection Comparison displays the differences among selected site collections based on predefined criteria.

Generating Site Collection Comparison

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

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired object level, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report. To narrow down the search criteria and display fewer nodes under a particular farm/Web appellation level node on the tree, right-click the node and select **Advanced Search** to access the **Advanced Search** interface. For detailed instructions on using the **Advanced Search** feature, refer to Searching Nodes Using the Advanced Search Feature.

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

Viewing Site Collection Comparison

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** – Various site collection statistics in respect to basic information, settings, and security highlighting the differences.
- **Scope** – Change the scope for the data shown in the report.

Site Collection Load Time

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

Generating Site Collection Load Time Reports

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

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired object level, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report. To narrow down the search criteria and display fewer nodes under a particular farm/Web appellation level node on the tree, right-click the node and select **Advanced Search** to access the **Advanced Search** interface. For detailed instructions on using the **Advanced Search** feature, refer to Searching Nodes Using the Advanced Search Feature.
3. **Enable Collector** – Collect data for the report. By default, this feature collects the information at midnight everyday (according to your Control Service's time zone). Click **Data Collection** to jump to the **Data Collection** page. By default, the collector schedule is enabled. To disable the collector schedule, 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. For more information about Collector, refer to the Data Collection section of this guide.
4. **E-mail Notification** – Check the **Usage alert** checkbox if you want to have e-mail notifications sent out when the desired criteria are met. Then configure the following options:
    - **Notification Name** – Select a previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.

- **Thresholds** – Specify the trigger for this notification. Enter the values for **More than __ seconds with __ consecutive tries**.

  ***Note:** By default, the threshold is checked depending on the interval you have configured. If the number exceeds the threshold set here, an e-mail notification will be sent.

- **Interval** – Specify the frequency of e-mail notifications. Enter a positive integer into the **Every** text box, then select **Day(s)** or **Week(s)** from the drop-down menu.

Click **Collect Now** to collect the information of the current profile immediately. Click **Show Report** to generate the report in the **Report Display** pane on the right.

Viewing Site Collection Load Time 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 provide specific information on your storage use in DocAve.

Storage Trends

A Storage Trends report displays the current and projected storage use by selected SharePoint on-premises farm, Web applications, content databases, or site collections or SharePoint Online 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 a Storage Trends report, go to the **Infrastructure Reports** tab of Report Center, and click **Storage Trends** on the ribbon. You can configure the following settings in the **Scope** pane:

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired farm/Web application/site collection, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report. To narrow down the search criteria and display fewer nodes under a particular farm/Web appellation level node on the tree, right-click the node and select **Advanced Search** to access the **Advanced Search** interface. For detailed instructions on using the **Advanced Search** feature, refer to Searching Nodes Using the Advanced Search Feature.
3. **Enable Collector** – Collect data for the report. By default, this feature collects the information at midnight everyday (according to your Control Service's time zone). Click **Data Collection** to jump to the **Data Collection** page. By default, the collector schedule is enabled. To disable the collector schedule, 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. For more information about Collector, refer to Data Collection.
4. **Export Schedule** – In the schedule configuration area, choose one of the following options:
    - **No Schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must run the report manually.
    - **Configure the schedule myself** – Select this option to configure the specific time you want to export reports of this profile. A schedule configuration area appears. You can customize the schedule with the following options.
        - **Start time** – Select the date and time when to start exporting reports of this profile.

          ***Note:** The start time cannot be earlier than the current time.

        - **Interval** – Enter an integer into the text box and select by **Hour(s)**, **Day(s)**, **Week(s)**, or **Month(s).** The reports will be exported repeatedly based on this schedule. Click **Calendar View** to see the schedules in a calendar.
        - **Schedule ending** – Designate when to stop exporting reports of this profile. Select **No end date** for the reports of this profile to be exported repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time to stop exporting the reports of this profile.

- **Export Report Settings** – Select the desired **Report Format** and **Export Location**, and then click **View** to access detailed information about the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions provided in the Export Location section of this guide.
- **Date Range** – In the **Date Range** configuration area, choose one of the following options:
  - **Duration** – Click the **Duration** radio button, and then select the desired time range from the drop-down menu. There are eight durations available: **This Month**, **Last Month**, **Last 2 Months**, **This Week**, **Last Week**, **Last 2 Weeks**, **Today**, and **Yesterday**.
  - **Custom Start Date** – Click the **Starting Date** radio button to designate the start date from when the data will be included in the exported reports.
- **Frequency** – Select the time interval in which the data is displayed in the exported report.
- **Notification** – Optionally, check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, refer to the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB**.

5. **E-mail Notification** – In the e-mail notification configuration area, you can set up two types of notifications for this report. You can configure one or both of the **Usage Alert Settings** and **Prediction Settings**. Check the **Usage alert** checkbox if you want to have e-mail notifications sent out when the desired criteria are met (the **Usage Alert Settings** area becomes active), and/or check the **Prediction** checkbox if you want to have email notifications sent out when the prediction value is met (the **Prediction Settings** area becomes active). Configure the following settings as necessary:

   - **Notification Name** – The two types of notifications use the same notification profile to send the e-mail. Select a previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.
   - **Usage Alert Settings** – Specify the storage and time interval triggers by configuring the following settings. When the storage size exceeds the set values, the e-mail will be sent out.
     - **Thresholds** – Specify the usage alert triggers for this notification.

- When the storage size exceeds the specified value, an e-mail will be sent. Enter the values for **Storage: More than __**, and then select **MB** or **GB** from the drop-down menu.
- When the storage limit exceeds the specified percentage, an e-mail will be sent out. Enter an integer for **Storage: More than __% of the storage limit in quota template.** The notification configured for the storage limit is only supported for the site collection level nodes.

***Note:** By default, thresholds are checked depending on the interval you have configured. If these numbers exceed the thresholds set here, an e-mail notification will be sent out.

- **Interval** – Specify the frequency of e-mail notifications. Enter a positive integer into the **Every** text box, then select **Day(s)** or **Week(s)** from the drop-down menu.

- **Prediction Settings** – Check this checkbox to enable notifications triggered by prediction values, then configure the following settings:
  - **Time Range** – Enter a positive integer into the **Projected usage in the upcoming__** textbox, and select **Day(s)**, **Week(s)** or **Month(s)** from the drop-down menu.
  - **Thresholds** – Enter a positive integer into the **Storage: More than __**, and then select **MB** or **GB** from the drop-down menu.

    ***Note:** By default, thresholds are checked depending on the interval you have configured. If these numbers exceed the thresholds set here, an e-mail notification will be sent out.
  - **Interval** – Specify the frequency of e-mail notifications. Enter a positive integer into the **Every** text box, then select **Day(s)** or **Week(s)** from the drop-down menu.

Click **Collect Now** to collect the information of the current profile immediately. 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.
- **Prediction** – Predicted trends based on current trends.
- **Allocation** – This tab is only available for site collection level Storage Trends reports. Use it to view the allocation of the sites, contents, and types by size or number within a specific site collection.
- **Item Details** – This tab is only at the site collection level Storage Trends reports. Use it to view the details of each list/library of a specific site collection.

Storage Analyzer

A Storage Analyzer 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 Storage Analyzer Reports

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

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired farm/Web application/site collection/content database, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report.
3. **Generate Raw Data** – Generate raw data of selected scopes. Click **Generate Raw Data**. The configuration window appears. Complete the following steps:
    - **Export Location** – Select a configured export location from the drop-down menu, or click **New Export Location** to create a new one. Refer to Export Location for more information.
    - **E-mail Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.
    - **Physical Location** – Check the **Physical Location** checkbox to include the physical location information in the raw data report. The **Physical Location** column will be added

to the report files, and it allows you to have a general view on the physical location information of the data.

***Note**: Including physical location information may slow down the generation speed.

The generated report displays the size of the object accordingly in the **Size in Content Database(KB)** column and the **Size in Other Storage(KB)** column.

4. **Analysis Rule** – Specify the critical object type, and configure the rules accordingly to generate report:
    - **Object Type** – Select the object (**Attachment**, **Document**, **Document Version**, **Item**, and **Item Version**) you want to contain in the report from the drop-down menu.
    - **Rules** – You must select at least one rule. **Size Rule** and **Time Rule** collect data and then display data separately in the report pane according to your configurations:
        - **Size Rule** – Specify **BLOB Size** and **Size Interval**. The range from 0 to the specified BLOB size will be divided by the size interval, and displayed as the Y Axis of the report diagram. For example, if the specified BLOB size is 100MB and the size interval is 20MB. The Y Axis will display: 0MB, 20MB, 60MB, 80MB, and 100 MB.
        - **Time Rule** – Specify the **Time Range** and **Time Interval**. Select the **Created Date** or **Last Modified Date** as the start time when the data is collected and displayed. Click the calendar button ( ) to specify the time range and time zone, and then enter an integer in the **Time Interval** text box. The time range will be divided by the time interval, and displayed as the Y Axis of the report diagram.
5. **Schedule** – In the schedule configuration area, choose one of the following options:
    - **No Schedule**– Collect the data manually by clicking the **Run Report** drop down list and selecting **Run Report Only** or **Save Profile and Run Report**. Clicking **Save Profile and Run Report** also saves the configured report profile.
    - **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
        - **Start time** – Select the date and time for collecting the data.

          ***Note:** The start time cannot be earlier than the current time.
        - **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.
        - **Schedule ending** – Designate when to stop collecting the data of this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by**

Date + Time to specify the exact date and time for the data to stop being collected.

- **Export Report Settings** – Check the **Export report** checkbox and configure the following settings for the reports to be exported.
  - **Report Format** – Select the desired format for the reports you want to export.
  - **Export Location** – Select the export location where you want to store the exported reports, and then click **View** to access the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions provided in the Export Location section of this guide.
  - **Storage Analyzer Type** – Select the type of the data you want to export.
  - **Analysis Rule** – Specify the rule based on which exported reports are generated.
  - **Send Notification** – Optionally, check the **Send Notification** checkbox and select the **Recipient** of this notification to send notification e-mails for the jobs of this profile. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, refer to the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB**.

Click the **Run Report** drop-down list, and then select **Run Report only** or **Save Report and Run Report** to generate the report in the **Report Display** pane on the right.

Viewing Storage Analyzer 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:

- **Rule** – Display the report according to the rule settings.
- **Display by** – Order to display the data in.
- **X-Axis** – Set the parameter for the X-axis.
- **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** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired site collection/site, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report. To narrow down the search criteria and display fewer nodes under a particular farm/Web appellation level node or a **Sites** node on the tree, right-click the node and select **Advanced Search** to access the **Advanced Search** interface. For detailed instructions on using the **Advanced Search** feature, refer to Searching Nodes Using the Advanced Search Feature.
3. **Enable Collector** – Collect data for the report. By default, this feature collects the information at midnight everyday (according to your Control Service's time zone). Click **Data Collection** to jump to the **Data Collection** page. By default, the collector schedule is enabled. To disable the collector schedule, 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. For more information about Collector, refer to Data Collection.
4. **User** – In the **User** configuration area, you can set the users 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 users whose activity you do not wish to view. You can click the check names button ( ) to check the name you entered or click the browse button ( ) to find the users you want to exclude in the report.
    - **Users to Include** – Enter the users whose activity you want to view. You can click the check names button ( ) to check the name you entered or click the browse button ( ) to find the users you want to include in the report.
    - **Include Anonymous Users** – Check the checkbox of **Include Anonymous Users** to include the activities of anonymous users.
5. **E-mail Notification** – Check the **Usage alert** checkbox if you want to have e-mail notifications sent out when the desired criteria are met. Then configure the following options:

- **Notification Name** – Select a previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference 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:** By default, thresholds are checked depending on the interval you have configured. If these numbers exceed the thresholds set here, an e-mail notification will be sent.
- **Interval** – Specify the frequency of e-mail notifications. Enter a positive integer into the **Every** text box, then select **Day(s)** or **Week(s)** from the drop-down menu.

Click **Collect Now** to collect the data of the current profile immediately, or 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 are used to oversee SharePoint settings and securities for governance.

Administration Reports Interface

The **Administration Report** tab of Report Center is split up into the following three areas:

1. **Ribbon** – Toolbar where you can select the type of report you want 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.

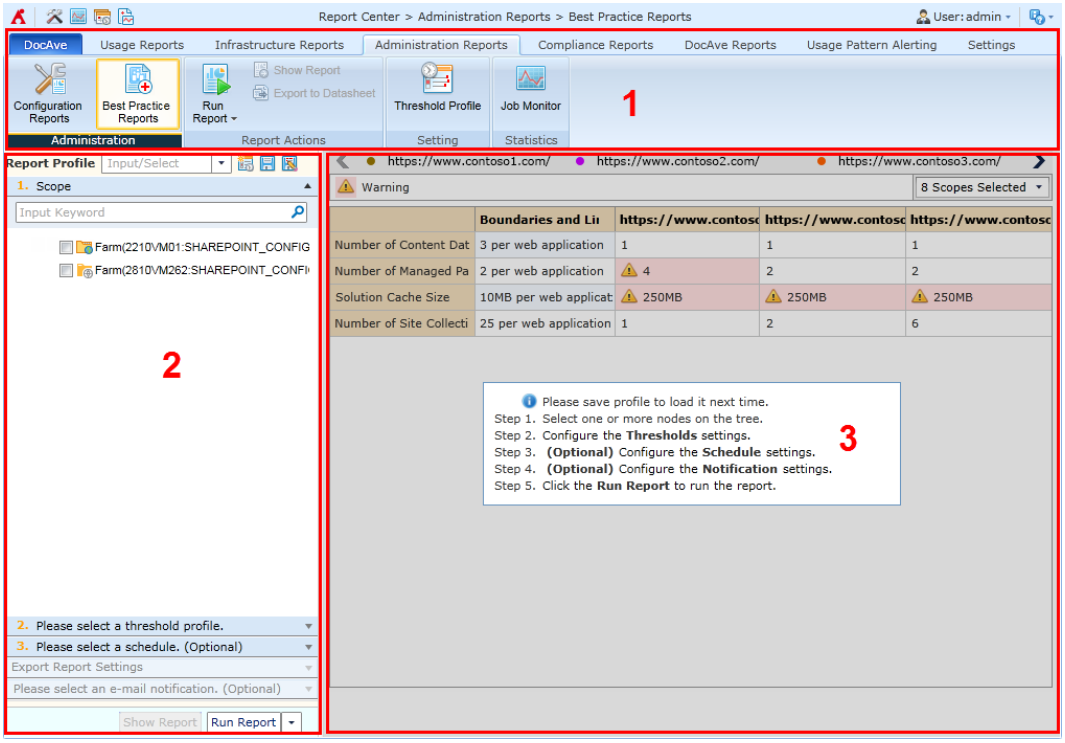


Figure 5: Administration Report Configuration interface.

Configuration Reports

Configuration Reports are used to display the specific and detailed information of SharePoint settings and configurations for the selected SharePoint on-premises farms, Web applications, site collections, content databases, sites, and/or lists, or SharePoint Online site collections, sites, and/or lists.

***Note:** The Configuration Reports are not supported for reporting on the Site Collection/Site Usage in SharePoint 2013. To include Site Collection/Site Usage in the Configuration Reports, ensure the Web Analysis service is started in SharePoint.

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** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired farm/Web application/content database/site collection/site/library/list, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report.

   ***Note:** You can generate the Configuration Report when selecting multiple nodes at the same level from both the SharePoint 2010 tree and SharePoint 2013 tree at the same time.
3. **Please select a schedule (Optional)** – In the schedule configuration area, choose one of the following:
   - **No Schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must collect the data manually by clicking **Save Profile and Run Report**.
   - **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
     - **Start time** – Select the date and time for collecting the data.

       ***Note:** The start time cannot be earlier than the current time.
     - **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.
     - **Schedule ending –** Designate when to stop collecting the data of this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after __ occurrence(s)** to have the job stopped after the defined 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 select the desired **Report Format** and **Export Location** in the **Export Report Settings** configuration area, and click **View** to access to the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, then follow the instructions provided in the Export Location section of this guide.
4. **Please select an e-mail notification (Optional)** – Check the **Export Report** checkbox and select a notification profile from the **E-mail Notification** drop-down menu, or click **New E-mail Notification** to create a new profile. For more information, see the **User Notification Settings**

section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

5. **Please configure report settings** – Configure what information you would like the report to contain.

    - **Report Settings** – Select the corresponding checkboxes next to the information you want to include.

      ***Note:** You can configure to generate the **SharePoint Storage Report** by selecting the **SharePoint Storage Report** option in the **Statistics** group. The **SharePoint Storage Report** will be included in the **SharePoint Storage Report** section of the exported report, displaying the number of lower level nodes and the storage size of the objects within the selected scope. The data in the **Total Size** column includes the specific object's SQL storage size and the size of data stored in logical devices. The **SQL Size** includes the specific object's SQL storage size. The **Actual Storage Size** includes the occupied SQL storage size and the size of other storages occupied by Storage Manager and Connector.

    - **Additional Report Type** – Select whether to include summary reports in the exported report.

        - **Include summary report (XLS and XLSX formats only)** –To include the summary reports of each node at specific levels, select this option and then select the corresponding checkboxes for the levels where you want to include the summary reports.

When you have finished configuring the settings, click **Save Profile and Run Report**. The Export Report window appears. Select the desired **Report Format** and **Export Location**, and then click **View** to access to the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, then follow the instructions provided in the Export Location section of this guide.

***Note:** When exporting a Configuration report in Microsoft Excel (XLS) format, the workbook cannot exceed 1370 sheets, or it will not be viewable. This is a restriction is built-in to the Microsoft Excel software.

Check the **Send Notification** checkbox to notify the users of the status of reports. Select the **Recipient** of this notification. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

Click **OK** to generate the report or **Cancel** to return to the configurations.

Best Practice Reports

Since SharePoint comes with some performance limitations, Best Practice Reports are designed to oversee configurations and settings in SharePoint and help you to check performance and inform the related users in a timely manner.

About Threshold Profile

Best Practice Reports include a Threshold Profile that is used to judge whether the SharePoint environment is healthy or not. The threshold profile allows you to configure the boundaries and limitations of each SharePoint object level with the SharePoint default limitation as a reference. Each SharePoint 2010 farm and SharePoint 2013 farm has a whole set of default threshold profiles at each SharePoint object level.

In the **Best Practice Reports** interface, click **Threshold Profile** on the ribbon to go to the **Settings > Threshold Profile** interface. A list of the default threshold profiles and your previously-created threshold profiles will be displayed in this page.

To change the number of threshold profiles displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the threshold profiles, click on the column heading such as **Profile Name**, **SharePoint Version**, or **Report Level**.

In the viewing pane, you can customize how these threshold profiles are displayed in the following ways:

- **Search** – Filter the threshold profiles displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the threshold profiles you want to display. You can select to **Search all pages** or **Search current page**.

  ***Note:** The search function is not case sensitive.

- **Manage columns** (⊕) – Manage which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), and then check the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hide the column. Hover over the column name of the column you want to hide, and then click the hide the column button (⊖).
- **Filter the column** ( ) – Filter which item in the list is displayed. Unlike search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name, and then click the filter the column button ( ) of the column you want to filter. Check the checkbox next to the item name to have that item shown in the list.

You can perform the following actions to the threshold profiles:

- **Create** – Click **Create** on the ribbon to create a new threshold profile. For details on creating a new threshold profile, see the Configuring Threshold Profile section in this guide.
- **Edit** – Select the threshold profile, and then click **Edit** on the ribbon to open the **Settings > Threshold Profile** Interface. Make the necessary changes, and then click **Save** to save the changes, or click **Cancel** to close the interface without saving any changes.
- **Delete** – Click **Delete** on the ribbon. A confirmation window pops up and asks if you are sure you want to proceed with the deletion. Click **OK** to delete the selected threshold profiles, or click **Cancel** to return to the **Threshold Profile** interface without deleting the selected threshold profiles.

To exit the **Threshold Profile** page, click **Close** on the ribbon to return to the **Best Practice Reports** interface.

Configuring Threshold Profile

1. In the Threshold Profile interface, click **Create** on the ribbon to create a new threshold profile, or click **Edit** when you selected a previously-created threshold profile to edit the settings. To configure the threshold profile settings, complete the following steps: **Profile Name** – Enter a new **Profile Name** in the text box.
2. **SharePoint Version** – Specify the SharePoint version of the threshold profile that you are about to create.
3. **Report Level** – Select the desired **Report Level** from the drop-down menu.
4. **Threshold Settings** – Check the desired **Limit**, and then the value of the threshold becomes editable (the default value is the **Maximum Value**). Select the desired type of threshold and configure the value. Refer to the following explanations of these columns.
    - **Limit** – The name of SharePoint Limitation.
    - **Maximum Value** – The maximum value of each limit recommended by Microsoft.
    - **Limit Type** – There are two limit types:
        - **Threshold** – Configurable limits that can be exceeded to accommodate specific requirements.
        - **Supported** – Configurable limits that have been set by default to a tested value.

    ***Note**: When you create a farm/Web application/site collection threshold profile, the **Include Lower Level** area will appear below the table. The **Include Lower Level** area is only for exporting the report, meaning that lower level information will only be contained in the exported report, and the corresponding information will not be displayed in the report pane. If you want to contain the performance information of the lower levels in the exported report, check the corresponding checkbox next to desired level and specify the threshold settings.
5. When you have finished, click **Save** to save these configurations, or click **Cancel** to close the **Threshold Profile** configuration interface without saving any changes.

Generating Best Practice Reports

To configure the basic settings for the Best Practice Reports, click **Best Practice Reports** on the ribbon in the **Administration Reports** tab of Report Center. Configure the following settings in the **Scope** pane:

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.

2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired object level, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report.

   ***Note:** You can generate the Best Practice Reports when selecting multiple nodes at the same level from both the SharePoint 2010 tree and the SharePoint 2013 tree at the same time.

3. **Threshold Profile** – Select one of the default threshold profiles from the **Threshold Profile** drop-down menu. If you want to view or edit the selected profile, click the **View and Edit Threshold Profile** link to jump to the **Threshold Profile** interface. To create a new threshold profile, click **New Threshold Profile** in the drop-down menu to create a new one. Refer to Configuring Threshold Profile for more information on configuring the threshold profile settings. If you want to view all current profiles, click **Threshold Profile** on the ribbon. Refer to About Threshold Profile for more information on managing the threshold profiles.

   ***Note**: If you select the nodes of SharePoint 2010, only the threshold profiles of SharePoint 2010 can be selected. If you select the nodes of SharePoint 2013, the threshold profiles of SharePoint 2010 and SharePoint 2013 are both available to be selected. If you have selected the nodes across different SharePoint versions, only the threshold profiles whose SharePoint version is SharePoint 2010 can be selected.
   In the farm level threshold profile, the **Social Tags, Notes and Ratings** threshold is not supported for the ratings data in SharePoint 2013.

4. **Schedule** – In the schedule configuration area, choose one of the following:

   - **No Schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must collect the data manually by clicking **Run Report only** or **Save Profile and Run Report**.
   - **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
     - **Export report –** Choose whether to configure the **Export Report Settings** to store the Best Practice reports by checking the **Export report** checkbox.
     - **Start time** – Select the date and time for applying the rules of this profile and collecting the data.

       ***Note:** The start time cannot be earlier than the current time.

- **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.
- **Schedule ending** – Designate when to stop collecting the data for this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected.
- **Export Report Settings** – Check the **Export report** checkbox. The **Export Report Settings** configuration area appears. Select the desired **Report Format** and **Export Location**, and then click **View** to access the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions provided in the Export Location section of this guide.

  ***Note:** When exporting a Best Practice report in Microsoft Excel (XLS) format, the workbook cannot exceed 1370 sheets, or it will not be viewable. This is a restriction is built-in to the Microsoft Excel software.
- **Notification (Optional)** – Check the **Send Notification** checkbox. The settings area appears.

  Select the **Recipient** of this notification. You can choose to send the e-mail notification to **Farm Administrator** (for the reports at farm/Web application/Content Database level), **Site Collection Administrator** (for the reports at site collection or list level), or the **Predefined Recipient**. If you choose **Predefined** Recipient, select a predefined e-mail notification profile from the drop-down menu and click **View** to access the details. Or, you can click **New E-mail Notification** to create a new one. See the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide for more information.

  You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box. If you check the **Send unhealthy information only** checkbox, the attached report in the e-mail will only contain the information of the unhealthy nodes (the nodes whose settings exceed the boundaries or limitations configured in the corresponding threshold profile); otherwise, you will receive all of the information contained in the attached report, according to the threshold profile settings you have configured.

5. Choose one of the following instructions to run the job:

   - Click **Save profile and run report** to save the configuration and then run the job. After the job finishes, the report is displayed in the pane. You can click **Show Report** to view

the history data collected before. However, if this profile has no running job record, the **Show Report** is grayed out.

- You can click the save button ( ) to save the report profile, and then navigate to **Export to Datasheet** from the **Report Actions** group on the ribbon. You are brought to the **Export Report** window. Complete the following steps to generate report:
    - Select the desired **Report Format** and **Export Location** which has been already created. If you want to configure a new export location, click **New Export Location**, and then follow the instructions provided in the Export Location section of this guide.

      ***Note:** The report generated by the **Export Report** will not be displayed on the report **pane**. But the export job will be recorded in Job Monitor.

      ***Note:** When exporting a Best Practice report in Microsoft Excel (XLS) format, the workbook cannot exceed 1370 sheets, or it will not be viewable. This is a restriction built-in to the Microsoft Excel software.
    - **Source Data** – Check **Last generated data** checkbox is to export the report whose data was collected last time. Check **Generate data now** to run this job immediately.
    - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

Click **OK** to generate the report or **Cancel** to return to the configurations.

Viewing Best Practice 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:

- **Object Bar** – The nodes whose information will be displayed in the table below.
- **Scope** – Change the scope for the data shown in the report.
- **Warning** ( ) – Emphasize the configurations which have exceeded the limitations.

Creating Compliance Reports

You can create compliance reports for SharePoint system usage to respond to queries for “who did what, where” for behavior, productivity, and litigation analysis. It enables you to track term store changes and content type usages, and to apply pre-configured filter settings to the SharePoint objects you select to generate auditor reports, or to customize the filter settings for customized reports.

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 want to generate, perform actions on reports, or access the integrated Job Monitor.
2. **Scope pane** – Select the SharePoint objects you want to generate the report for.
3. **Filter settings** – Configure these settings for Customized Report (this section is only functional to the audit reports).
4. **Report Display pane** – Review the report. There are a number of configurable settings to customize how the information is displayed.

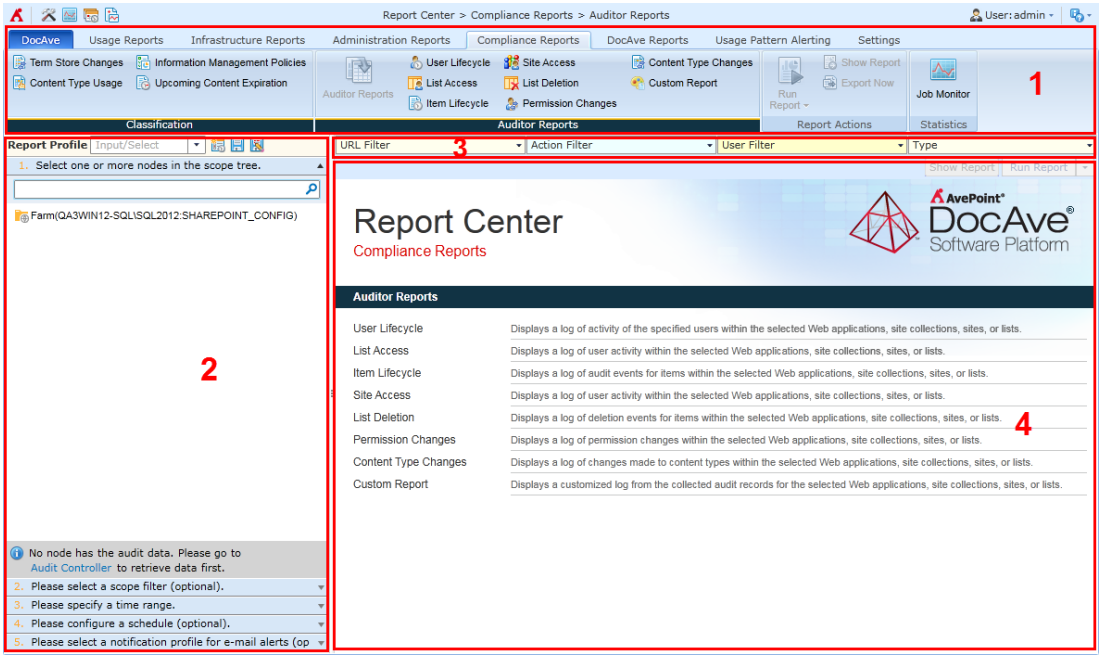


Figure 6: Compliance Reports interface.

Term Store Changes

Term Store Changes reports enable you to track changes of metadata across your SharePoint environment.

Generating Term Store Changes Reports

To configure the basic settings for the Term Store Changes report, open the **Compliance Reports** tab of Report Center, click **Term Store Changes** in the **Classification** group on the ribbon. You can configure the following settings in the **Scope** pane:

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired term group/term set, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report.
3. **Schedule** – In the schedule configuration area, choose one of the following options:
    - **No Schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must collect the data manually by clicking **Run Report Only** or **Save Profile and Run Report.**
    - **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
        - **Export report** – Choose whether or not to configure the **Export Report Settings** to store the **Term Store Changes** reports by checking the **Export report** checkbox.
        - **Start time** – Select the date and time for collecting the data.

          ***Note:** The start time cannot be earlier than the current time.
        - **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.
        - **Schedule ending** – Designate when to stop collecting the data for this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected.
        - **Export Report Settings** – Check the **Export report** checkbox. The **Export Report Settings** configuration area appears. Select the desired **Report Format** and **Export Location**, and then click **View** to access the detailed

information of the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions provided in the Export Location section of this guide.

- **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

4. **Time Range** – Specify the time range for collecting the data of term store changes. In the **Time Range** configuration area, choose one of the following options:

   - **Duration** – Check the **Duration** checkbox, and then select the desired time range from the drop-down menu. There are eight durations provided: **This Month**, **Last Month**, **Last 2 Months**, **This Week**, **Last Week**, **Last 2 Weeks**, **Today**, and **Yesterday**.
   - **Custom** – Check the **Custom** checkbox to customize the time range as you want.

5. Choose one of the following options to run the Term Store Changes report:

   - Click **Run Report**, and then select **Run Report only** to run the job, or select **Save profile and run report** from the drop-down menu to save the configuration and then run the job. After the job finishes, the report is displayed in the Report Display pane. You can click **Show Report** to view the history data collected before. However, if this profile has no running job record, the **Show Report** is grayed out.
   - Click the save button ( ) to save the report profile, and then click **Export Now** in the **Report Actions** group on the ribbon. The **Export to Datasheet** window appears. Complete the following steps to generate the report:

     - **Report Format** – Select the desired report format from the drop-down menu.
     - **Export Settings** – Choose whether to export the report now. Check the **Export to local immediately** checkbox and click **OK** to export the report immediately, or check the **Export to a different location** checkbox, and then configure the following settings:

       - **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location**, then follow the instructions provided in the Export Location section of this guide.
       - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile and click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User**

Notification Settings section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

Click **OK** to save the configurations and export the report. Click **Cancel** to go back to the Term Store Changes report interface without saving the configurations.

Viewing Term Store Changes 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:

- **Object Bar** – Display all of the selected nodes.
- **Scope** – Change the scope for the data shown in the report.

Content Type Usage Reports

Content Type Usage reports are designed to report the site content type usage across the sites and lists in SharePoint.

Generating the Content Type Usage Reports

To configure the basic settings for the Content Type Usage reports, open the **Compliance Reports** tab of Report Center, and click **Content Type Usage** in the **Classification** group on the ribbon. You can configure the following settings in the **Scope** pane:

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired site collection/site, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report. To narrow down the search criteria and display fewer nodes under a particular farm/Web appellation level node or a **Sites** node on the tree, right-click the node and select **Advanced Search** to access the **Advanced Search** interface. For detailed instructions on using the **Advanced Search** feature, refer to Searching Nodes Using the Advanced Search Feature.

3. **Schedule** – In the schedule configuration area, choose one of the following options:

    - **No Schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must collect the data manually by clicking **Run Report Only** or **Save Profile and Run Report**.
    - **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
        - **Export report** – Choose whether or not to configure the **Export Report Settings** to store the **Content Type Usage** reports by checking the **Export report** checkbox.
        - **Start time** – Select the date and time for collecting the data.

          ***Note:** The start time cannot be earlier than the current time.

        - **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.
        - **Schedule ending** – Designate when to stop collecting the data for this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected.
        - **Export Report Settings** – Check the **Export report** checkbox. The **Export Report Settings** configuration area appears. Select the desired **Report Format** and **Export Location**, and then click **View** to access the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions provided in the Export Location section of this guide.
            - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

4. Choose one of the following options to run the Content Type Usage reports:

    - Click **Run Report**, and then select **Run Report only** to run job or select **Save profile and run report** from the drop-down menu to save the configuration and then run job. After the job finishes, the report is displayed in the pane. You can click **Show Report** to view

the history data collected before. However, if this profile has no running job record, the **Show Report** is grayed out.

- Click the save button ( ) to save the report profile, and then click **Export Now** in the **Report Actions** group on the ribbon. The **Export to Datasheet** window appears. Complete the following steps to generate the report:
    - **Report Format** – Select the desired report format from the drop-down menu.
    - **Export Settings** – Choose whether to export the report now. Check the **Export to local immediately** checkbox and click **OK** to export the report immediately, or check the **Export to a different location** checkbox, and then configure the following settings:
        - **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location**, then follow the instructions provided in the Export Location section of this guide.
        - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile and click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

5. Click **OK** to save the configurations and to export report. Click **Cancel** to go back to the **Content Type** Usage report interface without saving the configurations.

Viewing Content Type Usage Reports

Once you have generated a report, the Report Display pane has a number of configurable settings available to customize how to display the reports. The following settings can be configured in the Report Display pane:

- **Content Type** column – Click the link listed in the **Content Type** column to access the detailed information of the specified content type.
- **Total Sites** column – Click the link listed in the **Total Sites** column to access the **Site Usage** tab to view the detailed information of the sites where the specific content type is currently used.
- **Total Lists** column – Click the link listed in the **Total Lists** column to access the **List Usage** tab to view the detailed information of the lists where the specific content type is currently used.
- **Location** column –Click the link listed in the **Location** column to access the **Content Type Information** page for the selected content type in the corresponding SharePoint site.

Information Management Policies

Information Management Policies report displays the details on the Information Management Policies that are associated with the site collection content types and lists content types within the selected Web applications, site collections, sites, and lists.

Generating Information Management Policies Reports

To configure the basic settings for the Information Management Policies report, open the **Compliance Reports** tab of Report Center, click **Information Management Policies** in the **Classification** group on the ribbon. You can configure the following settings in the **Scope** pane:

1. **Report Profile Name** –Create a new profile by entering a new name in the **Report Profile** text box or select a previously configured profile from the drop-down menu. Click the New ( ) button to clear all fields, click the Save ( ) button to save changes to the current report profile, or click the Save As ( ) button to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired object level, or enter a URL/name in the search text box above the tree to search the desired objects. Check the checkboxes next to the nodes you want to include in the report. You can select nodes of Web applications, site collections, sites, and lists.
3. **Schedule** – In the schedule configuration area, choose one of the following options:
    - **No schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must collect the data manually by clicking **Run Report Only** or **Save Profile and Run Report.**
    - **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
        - **Export report** – Choose whether or not to configure the **Export Report Settings** to store the **Information Management Policies** reports by checking the **Export report** checkbox.
        - **Start time** – Select the date and time for collecting the data.

          ***Note:** The start time cannot be earlier than the current time.

        - **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.
        - **Schedule ending** – Designate when to stop collecting the data for this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected.

- **Export Report Settings** – Check the **Export report** checkbox. The **Export Report Settings** configuration area appears. Select the desired **Report Format** and **Export Location**, and then click **View** to access the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions in Export Location.
- **Send Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the User Notification Settings section in the Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

4. Choose one of the following options to run the Information Management Policies report:

- Click **Run Report**, and then select **Run Report only** to run the job, or select **Save profile and run report** from the drop-down menu to save the configuration and then run the job. After the job finishes, the report is displayed in the Report Display pane. You can click **Show Report** to view the history data collected before. However, if this profile has no running job record, the **Show Report** is grayed out.
- Click the **Save** ( ) button to save the report profile, and then click **Export Now** in the **Report Actions** group on the ribbon. The **Export to Datasheet** window appears. Complete the following steps to generate the report:
  - **Report Format** – Select the desired report format from the drop-down menu.
  - **Export Settings** – Choose whether to export the report now. Check the **Export to local immediately** checkbox and click **OK** to run the job immediately and export the report, or check the **Export to a different location** checkbox, and then configure the following settings:
    - **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location**, then follow the instructions in Export Location.
    - **E-mail Notification** – Check the **Send Notification** checkbox and select the **Recipient of** this notification. You can select a previously configured e-mail notification profile and click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the User Notification Settings section in the Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

5. Click **OK** to save the configurations and export the report. Click **Cancel** to go back to the Information Management Policies report interface without saving the configurations.

Viewing Information Management Policies Reports

Once you have successfully 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:

- **Object Bar** – Display all of the selected nodes.
- **Scope** – Change the scope for the data shown in the report.

Upcoming Content Expiration

Upcoming Content Expiration report displays the details of the contents that have applied the retention settings of the Information Management Policy and are about to be expired in the specified time range within the selected Web applications, site collections, sites, and lists.

Generating Upcoming Content Expiration Reports

To configure the basic settings for the Upcoming Content Expiration report, open the **Compliance Reports** tab of Report Center, and then click **Upcoming Content Expiration** in the **Classification** group on the ribbon. Configure the following settings in the **Scope** pane:

1. **Report Profile Name** – Create a new profile by entering a new name in the **Report Profile** text box or select a previously configured profile from the drop-down menu. Click the New ( ) button to clear all fields, click the Save ( ) button to save changes to the current report profile, or click the Save As ( ) button to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired object level, or enter a URL/name in the search text box above the tree to search the desired objects. Check the checkboxes next to the nodes you want to include in the report. You can select nodes of Web applications, site collections, sites, and lists.
3. **Expiration Setting** – Specify the filter settings on the expiration date or period for the contents to display.
    - **Expiring on** – Select a date from the calendar to report on the contents that will be expired on the specified date.
    - **Expiring before** – Select a date from the calendar to report on the contents that will be expired before the specified date.
    - **Expiration data range** – Select a time range from the calendars to report on the contents that will be expired in the specified period.
    - **Expiring in _ days** – Select **30**, **60**, or **90** from the drop-down list to report on the contents that will be expired in the specified period.

4. **Schedule** – In the schedule configuration area, choose one of the following options:

    - **No schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must collect the data manually by clicking **Run Report Only** or **Save Profile and Run Report.**
    - **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
        - **Export report** – Choose whether or not to configure the **Export Report Settings** to store the Upcoming Content Expiration reports by checking the **Export report** checkbox.
        - **Start time** – Select the date and time for collecting the data.

          ***Note:** The start time cannot be earlier than the current time.

        - **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.
        - **Schedule ending** – Designate when to stop collecting the data for this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected.
        - **Export Report Settings** – Check the **Export report** checkbox. The **Export Report Settings** configuration area appears. Select the desired **Report Format** and **Export Location**, and then click **View** to access the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions provided in Export Location.
        - **Send Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the User Notification Settings section in the Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

5. Choose one of the following options to run the Upcoming Content Expiration report:

    - Click **Run Report**, and then select **Run Report only** to run the job, or select **Save profile and run report** from the drop-down menu to save the configuration and then run the job. After the job finishes, the report is displayed in the Report Display pane. You can click **Show Report** to view the history data collected before. However, if this profile has no running job record, the **Show Report** is grayed out.

- Click the Save ( ) button to save the report profile, and then click **Export Now** in the **Report Actions** group on the ribbon. The **Export to Datasheet** window appears. Complete the following steps to generate the report:
    - **Report Format** – Select the desired report format from the drop-down menu.
    - **Export Settings** – Choose whether to export the report now. Check the **Export to local immediately** checkbox and click **OK** to run the job immediately and export the report, or check the **Export to a different location** checkbox, and then configure the following settings:
        - **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location**, then follow the instructions provided in Export Location.
        - **E-mail Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile and click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

6. Click **OK** to save the configurations and export the report. Click **Cancel** to go back to the Upcoming Content Expiration report interface without saving the configurations.

Viewing Upcoming Content Expiration Reports

Once you have successfully 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:

- **Object Bar** – Display all of the selected nodes.
- **Scope** – Change the scope for the data shown in the report.

Auditor Reports

In Auditor Reports, you can apply pre-configured filter settings to the SharePoint objects you select to generate Auditor Reports, or customize the filter settings for Custom Reports.

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

Generating User Lifecycle Reports

User Lifecycle Reports are used to display all actions for a specified user during their entire lifecycle. These reports provide auditing and logging records to ensure data integrity and also provide availability of user activity.

To generate User Lifecycle Reports, go to the **Compliance Reports** tab of Report Center, and click **Auditor Reports** on the ribbon. Select the desired SharePoint on-premises Web applications/site collections/sites/lists under a farm or SharePoint Online site collections/sites/lists under **My Registered Sites** in the **Scope** pane, and then click **User Lifecycle** in the **Auditor Reports** group on the ribbon. You can configure the following settings in the **Scope** pane:

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired SharePoint Web applications/site collections/sites/lists, click **My Registered Sites**, to expand the SharePoint sites group to the desired site collections/sites/lists, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report.

   ***Note:** All of the selections in the **Scope** pane must be on the same SharePoint object level. For example, you can select multiple Web applications, or you can select multiple site collections within different Web applications, but you cannot select a Web application and a site collection at the same time.
3. **Scope Filter** – To filter SharePoint objects you would like to include in this profile within the selected scope, select a previously created scope filter from the **Select a scope filter** drop-down list. To create a new scope filter, click **New Scope Filter**. For details on creating a scope filter, refer to Configuring a Scope Filter.
4. **Time Range** – In the **Time Range** configuration area, choose one of the following options:
   - **Duration** – Check the **Duration** checkbox, and then select the time range as you want from the drop-down menu. There are eight durations provided, respectively **This Month**, **Last Month**, **Last 2 Months**, **This Week**, **Last Week**, **Last 2 Weeks**, **Today**, and **Yesterday**.
   - **Last __ Day(s)/Week(s)/Month(s)** – Enter an integer into the text box and select by **Day(s)/Week(s)/Month(s)** from the drop-down menu. For example, if you enter **10** in the text box, and select **Day(s)** from the drop-down menu, and then you run the job, you are allowed to collect the data of the latest 10 days.
   - **Custom** – Check the **Custom** checkbox to customize the time range.
5. **Schedule** (Optional) – In the schedule configuration area, choose one of the following options:
   - **No Schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must collect the data manually

- **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
    - **Export report** – Choose whether or not to configure the **Export Report Settings** to store the **User Lifecycle** reports by checking the **Export report** checkbox.
    - **Start time** – Select the date and time for collecting the data.

      ***Note:** The start time cannot be earlier than the current time.
    - **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.
    - **Schedule ending – Designate when to stop** collecting the data for this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after __ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected.
    - **Export Report Settings** – Check the **Export report** checkbox. The **Export Report Settings** configuration area appears. Select the desired **Report Format** and **Export Location**, and then click **View** to access the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions provided in the Export Location section of this guide.
    - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

6. **Notification** (Optional) – Select one of the configured e-mail notifications from the drop-down menu to send the job condition to the specified users. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.
7. **Filters** – The following filters are configurable in the User Lifecycle reports:
    - **URL Filter** – Click to load the **URL Filter** tab to specify the URLs.
    - **Action Filter** – Click to load the **Action Filter** tab to select the actions to be included in the reports.
    - **User Filter** – Click to load the **User Filter** tab to set the users whose activity you want to view or do not want to view.

- **Type** – Click to load the **Type** tab to set the types you want to view in the report.

8. Choose one of the following options to run the User Lifecycle Usage reports:

    - Click **Run Report**, and then select **Run Report only** to run job or select **Save profile and run report** from the drop-down menu to save the configuration and then run the job. After the job finishes, the report is displayed in the Report Display pane. You can click **Show Report** to view the history data collected before. However, if this profile has no running job record, **Show Report** is grayed out.

    - Click the save button ( ) to save the report profile, and then click **Export Now** in the **Report Actions** group on the ribbon. The **Export to Datasheet** window appears. Complete the following steps to generate the report:

        - **Report Format** – Select the desired report format from the drop-down menu.

        - **Export Settings** – Choose whether to export the report now. Check the **Export to local immediately** checkbox and click **OK** to export the report immediately, or check the **Export to a different location** checkbox, and then configure the following settings:

            - **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location**, then follow the instructions provided in the Export Location section of this guide.

            - **E-mail Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile and click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

        Click **OK** to save the configurations and export the report. Click **Cancel** to go back to the **User Lifecycle** report interface without saving the configurations.

Generating List Access Reports

You can generate List Access Reports to display who accessed a list, what changes were made, and what time those changes were made. These reports provide auditing and logging records to ensure data integrity and also provide availability of list information.

To generate List Access Reports, go to the **Compliance Reports** tab of Report Center, and click **Auditor Reports** on the ribbon to expand the tab. Select the desired SharePoint on-premises SharePoint Web applications/site collections/sites/lists under a farm or SharePoint Online site collections/sites/lists

under **My Registered Sites** in the **Scope** pane, and then click **List Access** in the **Auditor Reports** group on the ribbon. You can configure the following settings in the **Scope** pane:

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired SharePoint Web applications/site collections/sites/lists, click **My Registered Sites**, expand the SharePoint sites group to the desired site collections/sites/lists, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report.

   ***Note:** All of the selections in the **Scope** pane must be on the same SharePoint object level. For example, you can select multiple Web applications, or you can select multiple site collections within different Web applications, but you cannot select a Web application and a site collection at the same time.
3. **Scope Filter** – To filter SharePoint objects you would like to include in this profile within the selected scope, select a previously created scope filter from the **Select a scope filter** drop-down list. To create a new scope filter, click **New Scope Filter**. For details on creating a scope filter, refer to Configuring a Scope Filter.
4. **Time Range** – In the Time Range configuration area, choose one of the following options:
   - **Duration** – Check the **Duration** checkbox, and then select the desired time range from the drop-down menu. There are eight durations provided: **This Month**, **Last Month**, **Last 2 Months**, **This Week**, **Last Week**, **Last 2 Weeks**, **Today**, and **Yesterday**.
   - **Last __ Day(s)/Week(s)/Month(s)** – Enter an integer into the text box and select by **Day(s)/Week(s)/Month(s)** from the drop-down menu. For example, if you enter **10** in the text box, and select **Day(s)** from the drop-down menu, and then you run the job, you are allowed to collect the data of the latest 10 days.
   - **Custom** – Check the **Custom** checkbox to customize the time range as you want.
5. **Schedule** (Optional) – In the schedule configuration area, choose one of the following options:
   - **No Schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must collect the data manually.
   - **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
     - **Export report** – Choose whether or not to configure the **Export Report Settings** to store the **List Access** reports by checking the **Export report** checkbox.
     - **Start time** – Select the date and time for collecting the data.

       ***Note:** The start time cannot be earlier than the current time.

- **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.
- **Schedule ending** – Designate when to stop collecting the data for this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected.
- **Export Report Settings** – Check the **Export report** checkbox. The **Export Report Settings** configuration area appears. Select the desired **Report Format** and **Export Location**, and then click **View** to access the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions provided in the Export Location section of this guide.
- **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

6. **Notification** (Optional) – Select one of the configured e-mail notifications from the drop-down menu to send the job condition to the specified users. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.
7. **Filters** – The following filters are configurable in List Access reports:
   - **URL Filter** – Click to load the **URL Filter** tab to narrow the scope by specifying URLs.
   - **Action Filter** – Click to load the **Action Filter** tab to select the actions to be included in the reports.
   - **User Filter** – Click to load the **User Filter** tab to set the users whose activity you want to view or do not want to view.
   - **Type** – Click to load the **Type** tab to set the types you want to view in the report.
8. Choose one of the following options to run the List Access Report:
   - Click **Run Report**, and then select **Run Report only** to run the job or select **Save profile and run report** from the drop-down menu to save the configuration and then run the job. After the job finishes, the report is displayed in the Report Display pane. You can click **Show Report** to view the history data collected before. However, if this profile has no running job record, the **Show Report** is grayed out.

- Click the save button ( ) to save the report profile, and then click **Export Now** in the **Report Actions** group on the ribbon. The **Export to Datasheet** window appears. Complete the following steps to generate the report:
    - **Report Format** – Select the desired report format from the drop-down menu.
    - **Export Settings** – Choose whether to export the report now. Check the **Export to local immediately** checkbox and click **OK** to export the report immediately, or check the **Export to a different location** checkbox, and then configure the following settings:
        - **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location**, then follow the instructions provided in the Export Location section of this guide.
        - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile and click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

      Click **OK** to save the configurations and export the report. Click **Cancel** to go back to the **List Access** report interface without saving the configurations.

Generating Item Lifecycle Reports

Item Lifecycle Reports display information about the entire lifecycle of items in a specified list. These reports provide auditing and logging records to ensure data integrity and also provide availability of all activity for items in SharePoint.

To generate Item Lifecycle Reports, go to the **Compliance Reports** tab of Report Center, and click **Auditor Reports** on the ribbon to expand the tab. Select the desired SharePoint Web applications/site collections/site/lists under a farm or SharePoint Online site collections/sites/lists under **My Registered Sites** in the **Scope** pane, then click **Item Lifecycle** in the **Auditor Reports** group on the ribbon. You can configure the following settings in the **Scope** pane:

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button () to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired SharePoint Web applications/site collections/sites/lists, click **My Registered Sites**, expand the SharePoint sites group to the desired site collections/sites/lists, or enter a

URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report.

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

3. **Scope Filter** – To filter SharePoint objects you would like to include in this profile within the selected scope, select a previously created scope filter from the **Select a scope filter** drop-down list. To create a new scope filter, click **New Scope Filter**. For details on creating a scope filter, refer to Configuring a Scope Filter.
4. **Time Range** – In the Time Range configuration area, choose one of the following options:
    - **Duration** – Check the **Duration** checkbox, and then select the desired time range from the drop-down menu. There are eight durations provided: **This Month**, **Last Month**, **Last 2 Months**, **This Week**, **Last Week**, **Last 2 Weeks**, **Today**, and **Yesterday**.
    - **Last __ Day(s)/Week(s)/Month(s)** – Enter an integer into the text box and select by **Day(s)/Week(s)/Month(s)** from the drop-down menu. For example, if you enter **10** in the text box, and select **Day(s)** from the drop-down menu, and then you run the job, you are allowed to collect the data of the latest 10 days.
    - **Custom** – Check the **Custom** checkbox to customize the time range.
5. **Schedule** (Optional) – In the schedule configuration area, choose one of the following options:
    - **No Schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must collect the data manually.
    - **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
        - **Export report** – Choose whether or not to configure the **Export Report Settings** to store the **Item Lifecycle** reports by checking the **Export report** checkbox.
        - **Start time** – Select the date and time for collecting the data.

          ***Note:** The start time cannot be earlier than the current time.
        - **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.
        - **Schedule ending** – Designate when to stop collecting the data for this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected.

- **Export Report Settings** – Check the **Export report** checkbox. The **Export Report Settings** configuration area appears. Select the desired **Report Format** and **Export Location**, and then click **View** to access the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions provided in the Export Location section of this guide.
- **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

6. **Notification** (Optional) – Select one of the configured e-mail notifications from the drop-down menu to send the job condition to the specified users. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.
7. **Filters** – The following filters are configurable in the Item Lifecycle reports:
   - **URL Filter** – Click to load the **URL Filter** tab to narrow the scope by specifying URLs.
   - **Action Filter** – Click to load the **Action Filter** tab to select the actions to be included in the reports.
   - **User Filter** – Click to load the **User Filter** tab to set the users whose activity you want to view or do not want to view.
8. Choose one of the following options to run the Item Lifecycle reports:
   - Click **Run Report**, and then select **Run Report only** to run the job or select **Save profile and run report** from the drop-down menu to save the configuration and then run the job. After the job finishes, the report is displayed in the Report Display pane. You can click **Show Report** to view the history data collected before. However, if this profile has no running job record, the **Show Report** is grayed out.
   - Click the save button ( ) to save the report profile, and then click **Export Now** in the **Report Actions** group on the ribbon. The **Export to Datasheet** window appears. Complete the following steps to generate the report:
     - **Report Format** – Select the desired report format from the drop-down menu.
     - **Export Settings** – Choose whether to export the report now. Check the **Export to local immediately** checkbox and click **OK** to export the report immediately, or check the **Export to a different location** checkbox, and then configure the following settings:

- **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location**, then follow the instructions provided in the Export Location section of this guide.
- **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile and click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

Click **OK** to save the configurations and to export report. Click **Cancel** to go back to the **Item Lifecycle** report interface without saving the configurations.

Generating Site Access Reports

You can generate Site Access Reports to display who accessed a site, what changes were made, and what time those changes were made. These reports provide auditing and logging records to ensure data integrity, track breaches in confidentiality compliance, and provide availability of site information.

To generate Site Access Reports, navigate to the **Compliance Reports** tab of Report Center, and click **Auditor Reports** on the ribbon to expand the tab. Select the desired SharePoint Web applications/site collections/sites/lists under a farm or SharePoint Online site collections/sites/lists under **My Registered Sites** in the **Scope** pane, and then click **Site Access** in the **Auditor Reports** group on the ribbon. Configure the following settings in the **Scope** pane:

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired SharePoint Web applications/site collections/sites/lists, click **My Registered Sites**, expand the SharePoint sites group to the desired site collections/sites/lists, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report.

   ***Note:** All of the selections in the **Scope** pane must be on the same SharePoint object level. For example, you can select multiple Web applications, or you can select multiple site collections within different Web applications, but you cannot select a Web application and a site collection at the same time.
3. **Scope Filter** – To filter SharePoint objects you would like to include in this profile within the selected scope, select a previously created scope filter from the **Select a scope filter** drop-down

list. To create a new scope filter, click **New Scope Filter**. For details on creating a scope filter, refer to Configuring a Scope Filter.

4. **Time Range** –In the Time Range configuration area, choose one of the following options:
    - **Duration** – Check the **Duration** checkbox, and then select the desired time range from the drop-down menu. There are eight durations provided: **This Month**, **Last Month**, **Last 2 Months**, **This Week**, **Last Week**, **Last 2 Weeks**, **Today**, and **Yesterday**.
    - **Last __ Day(s)/Week(s)/Month(s)** – Enter an integer into the text box and select by **Day(s)/Week(s)/Month(s)** from the drop-down menu. For example, if you enter **10** in the text box, and select **Day(s)** from the drop-down menu, and then you run the job, you are allowed to collect the data of the latest 10 days.
    - **Custom** – Check the **Custom** checkbox to customize the time range as you want.
5. **Schedule** (Optional) – In the schedule configuration area, choose one of the following options:
    - **No Schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must collect the data manually
    - **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
        - **Export report** – Choose whether or not to configure the **Export Report Settings** to store the **Site Access** reports by checking the **Export report** checkbox.
        - **Start time** – Select the date and time for collecting the data.

          ***Note:** The start time cannot be earlier than the current time.
        - **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.
        - **Schedule ending** – Designate when to stop collecting the data for this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected.
        - **Export Report Settings** – Check the **Export report** checkbox. The **Export Report Settings** configuration area appears. Select the desired **Report Format** and **Export Location**, and then click **View** to access the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions provided in the Export Location section of this guide.
        - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information. Or,

click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

6. **Notification** (Optional) – Select one of the configured e-mail notifications from the drop-down menu to send the job condition to the specified users. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.
7. **Filters** – The following filters are configurable in the Site Access reports:
    - **URL Filter** – Click to load the **URL Filter** tab to narrow the scope by specifying URLs.
    - **Action Filter** – Click to load the **Action Filter** tab to select the actions to be included in the reports.
    - **User Filter** – Click to load the **User Filter** tab to set the users whose activity you want to view or do not want to view.
    - **Type** – Click to load the **Type** tab to set the types you want to view in the report.
8. Choose one of the following to run the Site Access reports:
    - Click **Run Report**, and then select **Run Report only** to run the job or select **Save profile and run report** from the drop-down menu to save the configuration and then run the job. After the job finishes, the report is displayed in the Report Display pane. You can click **Show Report** to view the history data collected before. However, if this profile has no running job record, the **Show Report** is grayed out.
    - Click the save button ( ) to save the report profile, and then click **Export Now** in the **Report Actions** group on the ribbon. The **Export to Datasheet** window appears. Complete the following steps to generate the report:
        - **Report Format** – Select the desired report format from the drop-down menu.
        - **Export Settings** – Choose whether to export the report now. Check the **Export to local immediately** checkbox and click **OK** to export the report immediately, or check the **Export to a different location** checkbox, and then configure the following settings:
            - **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location**, then follow the instructions provided in the Export Location section of this guide.
            - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile and click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User**

Notification Settings section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

Click **OK** to save the configurations and to export report. Click **Cancel** to go back to the **Site Access** report interface without saving the configurations.

Generating List Deletion Reports

You can generate List Deletion Reports to display what has been deleted in a list, who made the deletions, and at what time. These reports provide auditing and logging records to ensure data integrity and also provide availability of list information.

To generate List Deletion Reports, go to the **Compliance Reports** tab of Report Center, and click **Auditor Reports** on the ribbon to expand the tab. Select the desired SharePoint Web applications/site collections/sites/lists under a farm or SharePoint Online site collections/sites/lists under **My Registered Sites** in the **Scope** pane, and then click **List Deletion** in the **Auditor Reports** group on the ribbon. You can configure the following settings in the **Scope** pane:

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired SharePoint Web applications/site collections/sites/lists, click **My Registered Sites**, expand the SharePoint sites group to the desired site collections/sites/lists, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report.

   ***Note:** All of the selections in the **Scope** pane must be on the same SharePoint object level. For example, you can select multiple Web applications, or you can select multiple site collections within different Web applications, but you cannot select a Web application and a site collection at the same time.
3. **Scope Filter** – To filter SharePoint objects you would like to include in this profile within the selected scope, select a previously created scope filter from the **Select a scope filter** drop-down list. To create a new scope filter, click **New Scope Filter**. For details on creating a scope filter, refer to Configuring a Scope Filter.
4. **Time Range** –In the Time Range configuration area, choose one of the following options:
   - **Duration** – Check the **Duration** checkbox, and then select the desired time range from the drop-down menu. There are eight durations provided: **This Month**, **Last Month**, **Last 2 Months**, **This Week**, **Last Week**, **Last 2 Weeks**, **Today**, and **Yesterday**.
   - **Last __ Day(s)/Week(s)/Month(s)** – Enter an integer into the text box and select by **Day(s)/Week(s)/Month(s)** from the drop-down menu. For example, if you enter **10** in

the text box, and select **Day(s)** from the drop-down menu, and then you run the job, you are allowed to collect the data of the latest 10 days.

- **Custom** – Check the **Custom** checkbox to customize the time range as you want.

5. **Schedule** (Optional) – In the schedule configuration area, choose one of the following options:
    - **No Schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must collect the data manually
    - **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
        - **Export report** – Choose whether or not to configure the **Export Report Settings** to store the **List Deletion** reports by checking the **Export report** checkbox.
        - **Start time** – Select the date and time for collecting the data.

          ***Note:** The start time cannot be earlier than the current time.
        - **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.
        - **Schedule ending** – Designate when to stop collecting the data for this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected.
        - **Export Report Settings** – Check the **Export report** checkbox. The **Export Report Settings** configuration area appears. Select the desired **Report Format** and **Export Location**, and then click **View** to access the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions provided in the Export Location section of this guide.
        - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.
6. **Notification** (Optional) – Select one of the configured e-mail notifications from the drop-down menu to send the job condition to the specified users. Or, click **New E-mail Notification** to

create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.

7. **Filters** – The following filters are configurable in the List Deletion reports:
    - **URL Filter** – Click to load the **URL Filter** tab to narrow the scope by specifying URLs.
    - **User Filter** – Click to load the **User Filter** tab to set the users whose activity you want to view or do not want to view.
    - **Type** – Click to load the **Type** tab to set the types you want to view in the report.
8. Choose one of the following options to run the List Deletion reports:
    - Click **Run Report**, and then select **Run Report only** to run the job or select **Save profile and run report** from the drop-down menu to save the configuration and then run the job. After the job finishes, the report is displayed in the Report Display pane. You can click **Show Report** to view the history data collected before. However, if this profile has no running job record, the **Show Report** is grayed out.
    - Click the save button ( ) to save the report profile, and then click **Export Now** in the **Report Actions** group on the ribbon. The **Export to Datasheet** window appears. Complete the following steps to generate the report:
        - **Report Format** – Select the desired report format from the drop-down menu.
        - **Export Settings** – Choose whether to export the report now. Check the **Export to local immediately** checkbox and click **OK** to export the report immediately, or check the **Export to a different location** checkbox, and then configure the following settings:
            - **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location**, then follow the instructions provided in the Export Location section of this guide.
            - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile and click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

        Click **OK** to save the configurations and to export report. Click **Cancel** to go back to the **List Deletion** report interface without saving the configurations.

Generating Permission Changes Reports

Permission Changes Reports display information on the permission changes, such as breaking permission inheritance, user permission changes, and permission levels. These reports provide auditing and logging records to ensure data integrity, display availability of permissions and their sources, and track breaches in confidentiality compliance.

To generate Permission Changes Reports, go to the **Compliance Reports** tab of Report Center, and click **Auditor Reports** on the ribbon to expand the tab. Select the desired SharePoint Web applications/site collections/sites/lists under a farm or SharePoint Online site collections/sites/lists under **My Registered Sites** in the **Scope** pane, and then click **Permission Changes** in the **Auditor Reports** group on the ribbon. You can configure the following settings in the **Scope** pane:

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired SharePoint Web applications/site collections/sites/lists, click **My Registered Sites**, expand the SharePoint sites group to the desired site collections/sites/lists, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report.

   ***Note:** All of the selections in the Scope pane must be on the same SharePoint object level. For example, you can select multiple Web applications, or you can select multiple site collections within different Web applications, but you cannot select a Web application and a site collection at the same time.
3. **Scope Filter** – To filter SharePoint objects you would like to include in this profile within the selected scope, select a previously created scope filter from the **Select a scope filter** drop-down list. To create a new scope filter, click **New Scope Filter**. For details on creating a scope filter, refer to Configuring a Scope Filter.
4. **Time Range** –In the Time Range configuration area, choose one of the following options:
   - **Duration** – Check the **Duration** checkbox, and then select the desired time range from the drop-down menu. There are eight durations provided, respectively **This Month**, **Last Month**, **Last 2 Months**, **This Week**, **Last Week**, **Last 2 Weeks**, **Today**, and **Yesterday**.
   - **Last __ Day(s)/Week(s)/Month(s)** – Enter an integer into the text box and select by **Day(s)/Week(s)/Month(s)** from the drop-down menu. For example, if you enter **10** in the text box, and select **Day(s)** from the drop-down menu, and then you run the job, you are allowed to collect the data of the latest 10 days.
   - **Custom** – Check the **Custom** checkbox to customize the time range as you want.
5. **Schedule** (Optional) – In the schedule configuration area, choose one of the following options:

- **No Schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must collect the data manually
- **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
    - **Export report** – Choose whether or not to configure the **Export Report Settings** to store the **Permission Changes** reports by checking the **Export report** checkbox.
    - **Start time** – Select the date and time for applying the rules of this profile and collecting the data.

      ***Note:** The start time cannot be earlier than the current time.
    - **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.
    - **Schedule ending** – Designate when to stop collecting the data for this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected.
    - **Export Report Settings** – Check the **Export report** checkbox. The **Export Report Settings** configuration area appears. Select the desired **Report Format** and **Export Location**, and then click **View** to access the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions provided in the Export Location section of this guide.
    - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

6. **Notification** (Optional) – Select one of the configured e-mail notifications from the drop-down menu to send the job condition to the specified users. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.
7. **Filters** – The following filters are configurable in the Permission Changes reports:
    - **URL Filter** – Click to load the **URL Filter** tab to narrow the scope by specifying URLs.

- **User Filter** – Click to load the **User Filter** tab to set the users whose activity you want to view or do not want to view.
- **Action Filter** – This filter cannot be edited, the default actions that are filtered by Permission Changes reports are: **Add Group Member**, **Change Permission**, **Change Permission Level**, and **Break Permission Level Inheritance**.

8. Choose one of the following options to run the Permission Changes reports:

    - Click **Run Report**, and then select **Run Report only** to run the job or select **Save profile and run report** from the drop-down menu to save the configuration and then run the job. After the job finishes, the report is displayed in the Report Display pane. You can click **Show Report** to view the history data collected before. However, if this profile has no running job record, the **Show Report** is grayed out.
    - Click the save button ( ) to save the report profile, and then click **Export Now** in the **Report Actions** group on the ribbon. The **Export to Datasheet** window appears. Complete the following steps to generate the report:
        - **Report Format** – Select the desired report format from the drop-down menu.
        - **Export Settings** – Choose whether to export the report now. Check the **Export to local immediately** checkbox and click **OK** to export the report immediately, or check the **Export to a different location** checkbox, and then configure the following settings:
            - **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location**, then follow the instructions provided in the Export Location section of this guide.
            - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile and click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

        Click **OK** to save the configurations and to export report. Click **Cancel** to go back to the **Permission Changes** report interface without saving the configurations.

Generating Content Type Changes Reports

Content Type Changes Reports display all changes that have occurred to content types over a specified period of time including where the changes were made and at what time. These reports provide auditing and logging records to ensure data integrity related to the user, provide user information, and also track breaches in confidentiality compliance.

To generate Content Type Changes Reports, in the **Compliance Reports** tab of Report Center, click **Auditor Reports** on the ribbon to expand the tab. Select the desired SharePoint Web applications/site collections/sites/lists under a farm or SharePoint Online site collections/sites/lists under **My Registered Sites** in the **Scope** pane, and then click **Content Type Changes** in the **Auditor Reports** group on the ribbon. You can configure the following settings in the **Scope** pane:

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired SharePoint Web applications/site collections/sites/lists, click **My Registered Sites**, expand the SharePoint sites group to the desired site collections/sites/lists, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report.

   ***Note:** All of the selections in the **Scope** pane must be on the same SharePoint object level. For example, you can select multiple Web applications, or you can select multiple site collections within different Web applications, but you cannot select a Web application and a site collection at the same time.
3. **Scope Filter** – To filter SharePoint objects you would like to include in this profile within the selected scope, select a previously created scope filter from the **Select a scope filter** drop-down list. To create a new scope filter, click **New Scope Filter**. For details on creating a scope filter, refer to Configuring a Scope Filter.
4. **Time Range** – In the Time Range configuration area, choose one of the following options:
   - **Duration** – Check the **Duration** checkbox, and then select the desired time range from the drop-down menu. There are eight durations provided: **This Month**, **Last Month**, **Last 2 Months**, **This Week**, **Last Week**, **Last 2 Weeks**, **Today**, and **Yesterday**.
   - **Last __ Day(s)/Week(s)/Month(s)** – Enter an integer into the text box and select by **Day(s)/Week(s)/Month(s)** from the drop-down menu. For example, if you enter **10** in the text box, and select **Day(s)** from the drop-down menu, and then you run the job, you are allowed to collect the data of the latest 10 days.
   - **Custom** – Check the **Custom** checkbox to customize the time range as you want.
5. **Schedule** (Optional) – In the schedule configuration area, choose one of the following options:
   - **No Schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must collect the data manually
   - **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
     - **Export report** – Choose whether or not to configure the **Export Report Settings** to store the **Content Type Changes** reports by checking the **Export report** checkbox.

- **Start time** – Select the date and time for collecting the data.

  ***Note:** The start time cannot be earlier than the current time.

- **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.

- **Schedule ending** – Designate when to stop collecting the data for this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected.

- **Export Report Settings** – Check the **Export report** checkbox. The **Export Report Settings** configuration area appears. Select the desired **Report Format** and **Export Location**, and then click **View** to access the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions provided in the Export Location section of this guide.

6. **Notification** (Optional) – Select one of the configured e-mail notifications from the drop-down menu to send the job condition to the specified users. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.

7. **Filters** – The following filters are configurable in the Content Type Changes reports:

   - **URL Filter** – Click to load the **URL Filter** tab to narrow the scope by specifying URLs.
   - **User Filter** – Click to load the **User Filter** tab to set the users whose activity you want to view or do not want to view.

8. Choose one of the following options to run the Content Type Changes reports:

   - Click **Run Report**, and then select **Run Report only** to run the job or select **Save profile and run report** from the drop-down menu to save the configuration and then run the job. After the job finishes, the report is displayed in the Report Display pane. You can click **Show Report** to view the history data collected before. However, if this profile has no running job record, the **Show Report** is grayed out.
   - Click the save button ( ) to save the report profile, and then click **Export Now** in the **Report Actions** group on the ribbon. The **Export to Datasheet** window appears. Complete the following steps to generate the report:

     - **Report Format** – Select the desired report format from the drop-down menu.
     - **Export Settings** – Choose whether to export the report now. Check the **Export to local immediately** checkbox and click **OK** to export the report immediately, or check the **Export to a different location** checkbox, and then configure the following settings:

- **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location**, then follow the instructions provided in the Export Location section of this guide.
- **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile and click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

Click **OK** to save the configurations and to export report. Click **Cancel** to go back to the **Content Type Changes** report interface without saving the configurations.

Generating Custom Report

You can generate Custom Reports from all the collected audit records based on your demand.

To generate Custom Reports, go to the **Compliance Reports** tab of Report Center, and click **Auditor Reports** on the ribbon to expand the tab. Select the desired SharePoint nodes in the **Scope** pane, and then click **Custom Report** in the **Auditor Reports** group on the ribbon. You can configure the following settings in the **Scope** pane:

1. **Report Profile Name** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – In the **Scope** configuration area, click the farm name and expand the data tree down to the desired SharePoint Web applications/site collections/sites/lists, click **My Registered Sites**, expand the SharePoint sites group to the desired site collections/sites/lists, or enter a URL/name in the search text box above the tree. Check the checkboxes next to the nodes you want to include in the report.

   ***Note:** All of the selections in the **Scope** pane must be on the same SharePoint object level. For example, you can select multiple Web applications, or you can select multiple site collections within different Web applications, but you cannot select a Web application and a site collection at the same time.
3. **Scope Filter** – To filter SharePoint objects you would like to include in this profile within the selected scope, select a previously created scope filter from the **Select a scope filter** drop-down list. To create a new scope filter, click **New Scope Filter**. For details on creating a scope filter, refer to Configuring a Scope Filter.
4. **Time Range** –In the Time Range configuration area, choose one of the following options:

- **Duration** – Check the **Duration** checkbox, and then select the time range as you want from the drop-down menu. There are eight durations provided: **This Month, Last Month**, **Last 2 Months**, **This Week**, **Last Week**, **Last 2 Weeks**, **Today**, and **Yesterday**.
- **Last __ Day(s)/Week(s)/Month(s)** – Enter an integer into the text box and select by **Day(s)/Week(s)/Month(s)** from the drop-down menu. For example, if you enter **10** in the text box, and select **Day(s)** from the drop-down menu, and then you run the job, you are allowed to collect the data of the latest 10 days.
- **Custom** – Check the **Custom** checkbox to customize the time range as you want.

5. **Schedule** (Optional) – In the schedule configuration area, choose one of the following options:
    - **No Schedule** – Select this option if you do not want to configure a schedule for this profile. If you choose this option, you must collect the data manually
    - **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. A schedule configuration area appears. You can customize the schedule with the following options:
        - **Export report** – Choose whether or not to configure the **Export Report Settings** to store the **Custom Reports** by checking the **Export report** checkbox.
        - **Start time** – Select the date and time for collecting the data.

          ***Note:** The start time cannot be earlier than the current time.
        - **Interval** – Enter an integer into the text box and select by **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 schedules in a calendar.
        - **Schedule ending** – Designate when to stop collecting the data for this profile. Select **No end date** for the data of this profile to be collected repeatedly until you stop it manually. Select **End after ___ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected.
        - **Export Report Settings** – Check the **Export report** checkbox. The **Export Report Settings** configuration area appears. Select the desired **Report Format** and **Export Location**, and then click **View** to access the detailed information of the selected export location. If you want to configure a new export location, click **New Export Location**, and follow the instructions provided in the Export Location section of this guide.
        - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile, and then click **View** to access detailed information. Or, click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by

checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

6. **Filters** – The following filters are configurable in the Custom Reports:
    - **URL Filter** – Click to load the **URL Filter** tab to narrow the scope by specifying URLs.
    - **Action Filter** – Click to load the **Action Filter** tab to select the actions to be included in the reports.
    - **User Filter** – Click to load the **User Filter** tab to set the users whose activity you want to view or do not want to view.
    - **Type** – Click to load the **Type** tab to set the types you want to view in the report.
7. Choose one of the following options to run the Custom Reports:
    - Click **Run Report**, and then select **Run Report only** to run the job or select **Save profile and run report** from the drop-down menu to save the configuration and then run the job. After the job finishes, the report is displayed in the Report Display pane. You can click **Show Report** to view the history data collected before. However, if this profile has no running job record, the **Show Report** is grayed out.
    - Click the save button ( ) to save the report profile, and then click **Export Now** in the **Report Actions** group on the ribbon. The **Export to Datasheet** window appears. Complete the following steps to generate the report:
        - **Report Format** – Select the desired report format from the drop-down menu.
        - **Export Settings** – Choose whether to export the report now. Check the **Export to local immediately** checkbox and click **OK** to export the report immediately, or check the **Export to a different location** checkbox, and then configure the following settings:
            - **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location**, then follow the instructions provided in the Export Location section of this guide.
            - **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile and click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

      Click **OK** to save the configurations and to export report. Click **Cancel** to go back to the **Custom Reports** interface without saving the configurations.

Viewing Auditor Reports

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

Most Auditor Reports contain the following information:

Column Name	Column Name
URL	Title
Type	Time
User (Login name)	Details
User	Source IP
Action	Host Name
E-mail	N/A

Permission Changes reports also contain the Outcome and Operation information. Click the links in the **Operation** column according to the various actions and you will be brought to the permission operation interface of **Administration** > **Administrator**. Through the Permission Changes report display pane, users can undo the Break Permission Inheritance action and the Add Group Member action in the report table. Select the checkbox ahead of the items in the Permission Changes report table, and then select **Undo** on the top of the report table to directly change the permission settings in SharePoint.

Content Type Changes reports contain the following information:

Column Name	Column Name
Site	Time
Latest Name	Location
Content Type Name	Level
Changed by (Login Name)	Changed to
Changed by	E-mail

You can customize how the reports are displayed with the following methods:

- **Manage columns** ( ) – Manage which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button ( ), and then check the checkbox next to the column name to have that column shown in the list.
- **Hide the column** ( ) – Hover over the Click the hide the column button ( ) in the column title to hide the column.
- **Filter the column** ( ) – Filter which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Click the filter the column button ( ) of the column you want to filter, then check the checkbox next to the item name to have that item shown in the list.

***Note:** Job Monitor provides a shortcut to view the corresponding report by clicking the button in **Report Center Tools** group on the ribbon. For more information about using **Job Monitor**, refer to the Job Monitor User Guide.

Creating DocAve Reports

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

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 want 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.

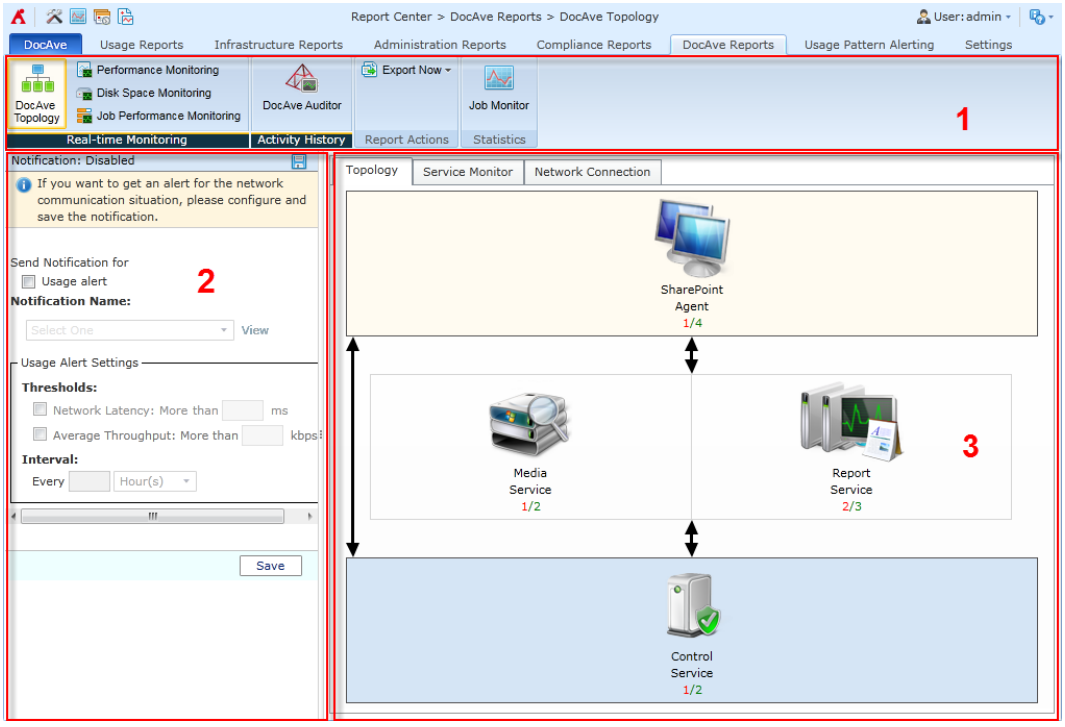


Figure 7: DocAve Reports interface.

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 service topology of the DocAve platform, as well as the statuses of the services on each server. Click a Manager or Agent Service 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.

In the Notification configuration area, check the **Usage alert** checkbox if you want to have e-mail notifications sent out when the desired criteria are met. Then configure the following options:

- **Notification Name** – Select a previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference 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, and then enter a positive integer into the text box.
    - Check the **Average Throughput: More than __ kbps** checkbox to activate this threshold, and then enter a positive integer into the text box.
- **Interval** – Specify the frequency of e-mail notifications. Enter a positive integer into the **Every** text box, then select by **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 **DocAve 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** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button () to save any changes under a new profile name.
2. **Scope** – Select the **Host** you want to have the report generated on.
3. **E-mail Notification** – Check the **Usage alert** checkbox if you want to have e-mail notifications sent out when the desired criteria are met. Then configure the following options:
    - **Notification Name** – Select a previously configured e-mail notification, or click **New E-mail Notification** to create a new e-mail notification rule. For details on creating an e-mail notification rule, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference 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, and then enter the values for **__% lasts for more than __ minute(s)**.
- Check the **Memory** checkbox to activate this threshold, and then enter the values for __% lasts for more than __ minutes.

***Note:** 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 the frequency of e-mail notifications. Enter a positive integer into the **Every** text box, then select by **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. It can only show the space usage of Net Share devices used in the selected 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** – Select a previously configured profile from the drop-down menu or create a new profile by entering a new name in the **Report Profile** text box. Click the new button ( ) to clear all fields, click the save button ( ) to save changes to the current report profile, or click the save as button ( ) to save any changes under a new profile name.
2. **Scope** – Select the **Logical Device** you want to have the report generated on.
3. **Enable Collector** – Collect data for the report. By default, this feature collects the information at midnight everyday (according to your Report Service's time zone). Click **Data Collection** to jump to the **Data Collection** page. By default, the collector schedule is enabled. To disable the

collector schedule, 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. For more information about Collector, refer to the Data Collection section of this guide.

4. **E-mail Notification** – In the e-mail notification configuration area, you can set up two types of notifications for this report. You can configure both of the **Usage Alert Settings** and **Prediction Settings**, or one of them. Check the **Usage alert** checkbox if you want to have e-mail sent out when the specified thresholds are met, and then the **Usage Alert Settings** area becomes active. Check the **Prediction** checkbox if you want to have e-mail sent out when the prediction value is met, and then the **Prediction Settings** area becomes active. Configure the following settings:

    - **Notification Name** – The two types of the notification use the same notification profile to send the e-mail. Select a previously configured e-mail notification profile, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.

    - **Usage Alert Settings** – Specify the triggers of the storage the time interval and, when the storage size exceeds the values you set up, the e-mail will be sent out. Configure the settings for the **Usage Alert** notification.

        - **Thresholds** – Specify the usage alert triggers for this notification. Enter the values for **More than __% usage**.

          ***Note:** By default, thresholds are checked depending on the interval you have configured. If these numbers exceed the thresholds set here, an e-mail notification will be sent.

        - **Interval** – Specify the time interval for sending the e-mail. Enter an integer into the **Every__** textbox, and then select the **Hour(s)**/**Day(s)**/**Week(s)**/**Month(s)**/**Year(s)** from the drop-down menu.

    - **Prediction Settings**– 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 upcoming __** text box, and select **Day(s)** or **Week(s)** from the drop-down menu.

        - **Thresholds** – Enter the value **for More than __% usage**.

        - **Interval** – Specify the frequency of e-mail notifications. Enter a positive integer into the **Every__** text box, then select by **Hour(s)**, **Day(s)**, **Week(s)**, **Month(s)** or **Year(s)** from the drop-down menu.

Click **Collect Now** to collect the data immediately. 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 date range, frequency, and type 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 the **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 date range in a calendar.
- **Filter selection** – Filter the data displayed.
- **Job Performance Monitoring** – Job performance of all of the Platform Backup/Platform Restore/Granular Backup/ Granular Restore jobs within the selected time range.
- **Details** – Job performance data per job.

DocAve Auditor

DocAve Auditor monitors the activities of each module across the DocAve system, such as creating a plan, deleting a profile, installing or uninstalling the Agents, and so on. For a table of the actions that are

audited by DocAve Auditor across the DocAve system, refer to Appendix B: DocAve Module Actions Audited by DocAve Auditor. 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 date range, frequency, and type 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.

Monitoring User Activities in SharePoint via Usage Pattern Alerting

Usage Pattern Alerting supports the ability to establish a limitation for certain user activities that have occurred in SharePoint environments. By applying the Usage Pattern Alerting plans including pre-configured rule profiles and custom action profiles to specific SharePoint nodes, Usage Pattern Alerting keeps monitoring the corresponding user activities within your SharePoint environment. It can identify and generate a report of the user activities that trigger the thresholds configured in rule profiles. It also supports either automatically handling the identified user activities. Usage Pattern Alerting ensures that all of the user activities to your SharePoint environment remain within your organization's defined governance policy and under control. Refer to the topics below for information related to Usage Pattern Alerting.

To access **Usage Pattern Alerting**, click **Usage Pattern Alerting** on the **Report Center** welcome page.

To monitor user activities within your SharePoint environment using Usage Pattern Alerting, first review Types of Usage Pattern Alerting Rules and then follow the procedures below:

1. Configuring Rule Profiles
2. Configuring Custom Action Profiles
3. Configuring Usage Pattern Alerting Plans
4. Viewing Usage Pattern Alerting Report

Types of Usage Pattern Alerting Rules

The following types of rules are available in **Usage Pattern Alerting**:

1. **Activity Measured by Audit Events** – Monitors how many times a user performs selected activities on SharePoint objects at user-defined levels within a user-defined time range. The user activities monitored by this rule type are defined by SharePoint audit events.
2. **Objects Affected by Audit Events** – Monitors the number of SharePoint objects on which a user perform selected activities at user-defined levels within a user-defined time range. The user activities monitored by this rule type are defined by SharePoint audit events.
3. **Download and Upload** – Monitors the frequency at which a user downloads items from or uploads items to SharePoint, the total size of those downloaded or uploaded items, and the number of downloaded items within a user-defined time range.

Configuring Rule Profiles

In **Rule Profile**, you can configure rule profiles to include rules as user activity thresholds. The rules in a profile can be applied in bulk by one or more Usage Pattern Alerting plans to identify user activities that

trigger the pre-configured thresholds. To access the **Rule Profile** interface, click **Usage Pattern Alerting** on the **Report Center** welcome page and click **Rule Profile** in the **Usage Pattern Alerting** interface.

Refer to the sections for instructions on creating and managing rule profiles.

Creating a Rule Profile

To create a rule profile, complete the steps below:

1. Click **Create** on the ribbon. The **Create a New Rule Profile** interface appears.
2. In the **Name** section, enter a name and an optional description for the profile you want to create into the **Name** and **Description** text boxes.
3. Configure the rules you want to add into this rule profile. For detailed instructions on configuring Usage Pattern Alerting rules, refer to Creating or Editing Usage Pattern Alerting Rules.
4. Click **Save** to save the configurations and create the rule profile or click **Cancel** to return to the **Rule Profile** interface without saving the configurations.

Creating or Editing Usage Pattern Alerting Rules

To create or edit Usage Pattern Alerting rules in the **Create a New Rule Profile** or **Edit Rule Profile** interface, complete the following steps:

1. Select the type of the rule you want to add from the drop-down list next to the **Add a Rule** link and then click the **Add a Rule** link. A new rule of the selected type is added into the table above.
2. Configure the settings of the rule by completing the following fields:
    - **Rule** – Select the user activity and metric type of the rule.
        - With the **Activity Measured by Audit Events** type selected, two drop-down lists are available in the **Rule** field. Select the user activity you want to monitor by this rule from the first drop-down list and the SharePoint object levels at which you want to monitor the selected user activities from the second drop-down list. For detailed information on the SharePoint audit events represented by each user activity option and the available SharePoint object level options for each user activity option, refer to Appendix F: Supported SharePoint Audit Events and Object Levels of Usage Pattern Alerting Rules.
        - With the **Objects Affected by Audit Events** type selected, a drop-down list is available in the **Rule** field. Select the user activity the number of SharePoint objects affected by which you want to monitor by this rule from the drop-down list. For detailed information on the SharePoint audit events represented by each user activity option, refer to Appendix F: Supported SharePoint Audit Events and Object Levels of Usage Pattern Alerting Rules.
        - With the **Download and Upload** type selected, two drop-down lists are available in the **Rule** field.

- From the first drop-down list, select **Download** or **Upload** as the type of activity you want to monitor.
- From the second drop-down list, select the metric type for selected activity from **Size**, **Times**, and **Items** (for the **Download** type only).

- **Value** – Configure the threshold for the rule you are about to add.
  - With the **Activity Measured by Audit Events** type selected, configure the threshold by entering an activity count integer into the **>= _ times** text box and then specifying a time range. If a user performs the corresponding activity the number of times entered here within the specified time range, this rule will be triggered.
  - With the **Objects Affected by Audit Events** type selected, configure the threshold by entering an object count integer into the text box next to **>=**, selecting an object level, and specifying a time range. If a user performs the corresponding activity on the entered number of objects within the specified time range, this rule will be triggered.

    ***Note**: The SharePoint object level options available in the **Value** filed depend on the user activity option selected in the **Rule** field. For detailed information on the available SharePoint object level options for each user activity option, refer to Appendix F: Supported SharePoint Audit Events and Object Levels of Usage Pattern Alerting Rules.
  - With the **Download and Upload** type selected, configure the threshold by specifying the maximum total size, activity count, item count (for the **Download** type only), and a time range. If a user downloads or uploads items of the specified size, download items of the specified number, or for the specified times, this rule will be triggered.

3. To add more rules, repeat the previous step.

   ***Note**: The logical relationship between the rules are **Or**. In the **Basic Filter Condition** section, you can view the logical relationship of the rules.

4. After configuring one rule, click **Add a Rule** to add another rule or delete a previously added rule by selecting the checkbox of the rule and clicking the **Remove** ( ) button.

Managing Rule Profiles

In the **Rule Profile** interface, all of the previously created rule profiles are displayed. You can perform the following operations to manage the rule profiles:

- **View** – To view the detailed configuration of a rule profile, select the corresponding checkbox of the desired rule profile and then click **View** on the ribbon to access the **View Details of Rule Profile** interface. If you want to make any changes to the rule profile, click **Edit** on the ribbon to access the **Edit Rule Profile** interface.

- **Edit** – To edit a previously created rule profile, select the corresponding checkbox of the desired rule profile, and then click **Edit** on the ribbon to access the **Edit Rule Profile** Interface.
- **Delete** – To delete the rule profiles you no longer need, select the corresponding checkboxes of the rule profiles and click **Delete** on the ribbon. A confirmation window pops up. Click **OK** to delete the selected rule profiles, or click **Cancel** to return to the **Rule Profile** interface without deleting the selected rule profiles.

Configuring Custom Action Profiles

In **Custom Action Profile**, you can configure custom action profiles to contain the custom actions that will be taken immediately to handle behavior defined by the rules in Usage Pattern Alerting plans. To access **Custom Action Profile**, click **Usage Pattern Alerting** on the **Report Center** welcome page and click **Custom Action Profile** in the **Usage Pattern Alerting** interface.

Refer to the sections for instructions on creating and managing custom action profiles.

Creating a Custom Action Profile

To create a custom action profile, complete the steps below:

1. Click **Create** on the ribbon. The **Create a New Custom Action Profile** appears.
2. In the **Name** section, enter a name and an optional description for the profile you want to create into the **Name** and **Description** text boxes.
3. In the **Actions to Take** section, select and configure the actions you want DocAve to take immediately after user activities are identified by the Usage Pattern Alerting plans where this custom action profile is applied.
    - **Send e-mail notifications of the identified suspicious user activities** – To send e-mail notifications of the identified user activities to desired users, select this checkbox. The **Recipients** text box, **Include the site collection administrators**, and **Include the usernames of those who triggered the rules** checkboxes appear below.
        - In the **Recipients** text box, specify the recipient who will receive the e-mail notifications by selecting a previously created e-mail notification profile or clicking **New E-mail Notification** to create a new one.
        - **Include the site collection administrators** – Select this option to deliver the e-mail notifications of the identified user activities to the site collection administrators of the site collections where the activities are identified.
        - **Include the usernames of those who triggered the rules** – Select this option to notify the users who trigger the rules in the Usage Pattern Alerting plans where this custom action profile is applied.
    - **Run a .exe file** – This option allows you to run a **.exe** application file automatically to handle the identified user activities immediately after the activities are identified by the Usage Pattern Alerting plan where this custom action profile is applied. Select this

option and click the **Browse** button to upload a desired .**exe** file. For details on how the uploaded .exe file is automatically run, and how to configure a **.exe** file, refer to Configuring a .exe File or PowerShell Script Used in Custom Action Profile.

- **Run a PowerShell script** – This option allows you to run a PowerShell script automatically to handle the user activities immediately after the activities are identified by the Usage Pattern Alerting plan where this custom action profile is applied. Select this option and click the **Browse** button to upload a desired .**ps1** file. For details on how the uploaded PowerShell script is automatically run, and how to configure a PowerShell script, refer to Configuring a .exe File or PowerShell Script Used in Custom Action Profile.

2. Click **Save** to save the configurations and create the custom action profile, or click **Cancel** to return to the **Custom Action Profile** interface without saving the configurations.

Configuring a .exe File or PowerShell Script Used in Custom Action Profile

While configuring a Usage Pattern Alerting custom action profile, you can use the **Run .exe file** or **Run a PowerShell script** option to upload a **.exe** file or a PowerShell script to handle the user activities identified by the rules in the Usage Pattern Alerting plan where this custom action profile is applied. In the **.exe** file or PowerShell script, you can configure the custom actions used for processing the

identified user activities. Every time when a rule in the Usage Pattern Alerting plan is triggered, the custom actions configured in the uploaded **.exe** file or PowerShell script will be executed immediately.

Report Center provides the following parameters that can be used in the a **.exe** file or a PowerShell script for configuring custom actions to process the user activities identified by each triggered Usage Pattern Alerting rule.

***Note**: To use the following parameters in a PowerShell script, you can declare the parameters to be used via a parameter block as below at the beginning of the PowerShell script.

```
param

(

$RuleProfileName,$RuleType,$Limit,$TimeRange,$TimeUnit,$ObjectLevel,$EventType,$Username,$StartTime,

$EndTime,$UserDisplayName,$SiteIds

)
```

Rule Type / Parameter	Activity Measured by Audit Events	Objects Affected by Audit Events	Download and Upload	Description
Username	√	√	√	The login name of the user who triggered the Usage Pattern Alerting rule.
UserDisplayName	√	√	√	The display name of the user who triggered the Usage Pattern Alerting rule.
RuleProfileName	√	√	√	The name of Usage Pattern Alerting rule profile that contains the triggered rule.
RuleType	√	√	√	The type of triggered rule. The value of this parameter can be: **Activity Measured by Audit Events**, **Audit Affected Item Count**, **Download**, or **Upload**.

Rule Type / Parameter	Activity Measured by Audit Events	Objects Affected by Audit Events	Download and Upload	Description
Limit	√	√	√	The number contained in the threshold of the triggered rule.
MetricType			√	The metric of the triggered **Download and Upload** rule. The value of this parameter can be **Items**, **Times**, or **Size**.
SizeUnit			√	The size unit of the threshold for the triggered **Download and Upload** rule whose metric type is **Size**. The value of this parameter can be **MB** or **GB**.
TimeRange	√	√	√	The number contained in the time range of the triggered rule. For example, if the time range of the triggered rule is 30 minutes, the value of this parameter is **30**.
TimeUnit	√	√	√	The time unit of the triggered rule's time range. The value of this parameter can be **minute** or **hour**.
ObjectLevel	√	√		The SharePoint object levels selected in the triggered rule of the **Activity Measured by Audit Events** or **Objects Affected by Audit Events** type. The value of this parameter can contain the following levels: **Item**,

Rule Type / Parameter	Activity Measured by Audit Events	Objects Affected by Audit Events	Download and Upload	Description
				Document, **Folder**, **List**, **Site**, and **Site Collection**.
EventType	√	√		The user activity monitored by the triggered rule of the **Activity Measured by Audit Events** or **Objects Affected by Audit Events** type. The value of this parameter can be one of the following user activities: **View**, **Delete**, **Restore**, **Update**, **Search**, **Check In**, **Check Out**, **Change Profile Settings, Change Schema Settings**, **Change Group Settings**, **Change Permissions**, and **Change Inheritance Settings**.
BreakRuleValue	√	√	√	The number of activities that the user has performed to trigger the rule within the scanned time range.
StartTime	√	√	√	The start time of the scanned time range when the user activities are identified.
EndTime	√	√	√	The end time of the scanned time range when the user activities are identified.
SiteIds	√	√	√	The IDs of site collections where the rule is triggered.

Managing Custom Action Profiles

In the **Custom Action Profile** interface, all of the previously created custom action profiles are displayed. You can perform the following operations to manage the custom action profiles:

- **View** – To view the detailed configuration of a custom action profile, select the corresponding checkbox of the desired custom action profile and then click **View** on the ribbon to access the **View Details of Custom Action Profile** interface. If you want to make any changes to the rule profile, click **Edit** on the ribbon to access the **Edit Custom Action Profile** interface.
- **Edit** – To edit a previously created custom action profile, select the corresponding checkbox of the desired custom action profile, and then click **Edit** on the ribbon to access the **Edit Custom Action Profile** Interface.
- **Delete** – To delete the custom action profiles you no longer need, select the corresponding checkboxes of the custom action profiles and click **Delete** on the ribbon. A confirmation window pops up. Click **OK** to delete the selected custom action profiles, or click **Cancel** to return to the **Custom Action Profile** interface without deleting the selected custom action profiles.

Configuring Usage Pattern Alerting Plans

Usage Pattern Alerting plans integrate the configured rule profiles and custom action profiles that are used to monitor user activities within your SharePoint environment. When a Usage Pattern Alerting plan containing a rule profile and custom action profile is enabled in a SharePoint scope, the Usage Pattern Alerting rules in the rule profile will monitor the corresponding user activities according to the configured thresholds and the custom action profile will automatically handle the user activities identified by the rules.

In **Plan Manager** of Usage Pattern Alerting, you can create new Usage Pattern Alerting plans and manage previously created Usage Pattern Alerting plans. To access **Plan Manager**, click **Usage Pattern Alerting** on the **Report Center** welcome page, and click **Plan Manager** in the **Usage Pattern Alerting** interface.

Refer to the sections for instructions on creating and managing Usage Pattern Alerting plans.

Creating a Usage Pattern Alerting Plan

To create a Usage Pattern Alerting plan, complete the following steps:

1. Navigate to **Report Center > Usage Pattern Alerting** > **Plan Manager**. The **Plan Manager** interface appears.
2. Click **Create** on the ribbon. The **Create Plan** interface appears.
3. In the left pane, select the desired scope for this plan by clicking on object names to expand the data tree or entering a URL or object name in the search text box above the tree. To narrow

down the search criteria and display fewer nodes under a particular farm/Web application level node, or a **Sites** node, on the tree, right-click the node and select **Advanced Search** to access the **Advanced Search** interface. For detailed instructions on using the **Advanced Search** feature, refer to Searching Nodes Using the Advanced Search Feature.

4. **What would you like to name this plan?** – Enter a name and an optional description for the plan you are about to create.
5. **Would you like to filter objects within the selected scope?** – To filter SharePoint objects you would like to include in this plan within the selected scope, select a scope filter from the drop-down list. To create a new scope filter, click **New Scope Filter**. For details on creating a scope filter, refer to Configuring a Scope Filter.
6. **Whose activity would you like to monitor?** – Specify the users whose activities you want to include in, or exclude from, the monitoring via this plan.
    - **Include All Users** – By default this option is selected. The activities of all users can be monitored.
    - **Users to Include** – To specify the users whose activities you want to monitor individually, select this option and enter the usernames of the desired users. Click the check names ( ) button to check the name you entered, or click the browse ( ) button to find the users you want to include.
    - **Users to Exclude** –To specify the users whose activities you do not want to monitor individually, select this option and enter the usernames of the desired users. Click the check names ( ) button to check the name you entered, or click the browse ( ) button to find the users you want to exclude.
    - **Include Anonymous Users** – To monitor the activities of anonymous users, select this option.
7. **What rules would you like to include in this plan?** – Select a rule profile for this plan. A rule profile contains the rules that you want to apply in bulk to monitor user activities within the selected scope. To create a new rule profile, click **New Rule Profile**. For details on creating a rule profile, refer to Creating a Rule Profile.
8. **How frequently would you like to scan the selected scope based on the rules in the Rule Profile? –** Select the interval for scanning user activities within the selected scope based on the rule profile selected above. There are three available scan intervals in the drop-down list: **15 Minutes**, **30 Minutes**, and **1 Hour**.
9. **Would you like to exclude objects from monitoring of the rules in this plan by URL?** – To exclude some objects from the monitoring of this plan, enter the keywords contained in the relative URLs of the desired objects into the text box. To enter multiple keywords, separate them with semicolons.
10. **What custom actions would you like to include in this plan?** – Select a previously created custom action profile for this plan. A custom action profile contains the actions that will be taken immediately to handle the user activities that trigger the rules of this plan. To create a new custom action profile, click **New Custom Action Profile**. For details on creating a custom action profile, refer to Creating a Custom Action Profile.

11. Click **Save** and choose from the following two options in the drop-down list to create this plan, or click **Cancel** to leave this page without saving any of your changes.

    - Click **Save** to create the plan. The created plan will be displayed in the **Profile Manager** interface with the Disabled status. You can enable this plan in the **Plan Manager** interface. For details on enabling a Usage Pattern Alerting plan, refer to Managing Usage Pattern Alerting Plans.
    - Click **Save and Enable** to save and enable the plan immediately. After a Usage Pattern Alerting plan is enabled, Report Center starts monitoring the user activities within the selected scope based on the rules and settings configured in the plan.

Managing Usage Pattern Alerting Plans

In the **Plan Manager** interface, all of the previously created Usage Patter Alerting plans are displayed. In the viewing pane of this interface, you can view the **Plan Name**, **Description**, **Scope Filter**, **Rule Profile**, **Custom Action Profile**, **Last Modified Time**, and **Status** of each previously created Usage Pattern Alerting plan.

***Note**: Report Center only monitors user activities according to the **Enabled** Usage Pattern Alerting plans.

In **Profile Manager**, you can perform the following operations to manage the Usage Patter Alerting plans:

- **View** – To view the detailed settings of a plan, select a plan, and then click **View Details** on the ribbon to access the **View Details** interface. You can click **Edit Plan** on the ribbon to make changes to the plan. When you are finished reviewing the plan, click **Close** to return to the **Plan Manager** interface.
- **Edit** – To edit the settings of a plan, select the plan and then click **Edit** on the ribbon to access the **Edit Plan** page. Here you can make changes to the scope and settings of the selected plan. Then, choose from the following options:
    - Click **Save** and then make a selection from the drop-down list:
        - Click **Save** to save the plan.
        - Click **Save and Enable** to save and enable the plan.
    - Click **Cancel** to close the **Edit Plan** page without saving any changes.
- **Delete** – To delete the plans you no longer need, select the corresponding checkboxes of the plans and click **Delete** on the ribbon. A confirmation window pops up. Click **OK** to delete the selected plans, or click **Cancel** to return to the **Plan Manager** interface without deleting the plans.
- **Enable** – To enable a disabled plan, select the desired plan, and click **Enable** on the ribbon. After the selected plan is enabled, the Status of this plan becomes **Enabled** and Report Center starts monitoring user activities based on the settings in this plan.

- **Disable** – To disable an enabled plan, select the desired plan, and click **Disable** on the ribbon. After the selected plan is disabled, the **Status** of this plan becomes **Disabled** and Report Center will stop monitoring user activities based on the settings in this plan.

Viewing Usage Pattern Alerting Reports

After Report Center identities user activities that trigger the thresholds of pre-defined rules according to the settings in Usage Pattern Alerting plans, you can view the following reports on the triggered rules in **Usage Pattern Alerting Report**:

- **Activity Report** – View a report of detailed information of the activities identified by the rules in the Usage Pattern Alerting plans.
- **Analysis Report** – View an analysis report on how many times the Usage Pattern Alerting rules were triggered and the distribution of triggered times of each rule based on the corresponding data metric used in rule threshold.

Follow the instructions below to view reports in **Usage Pattern Alerting Report**.

1. To access the **Usage Pattern Alerting Report** interface, click **Usage Pattern Alerting** on the **Report Center** welcome page, and click **Usage Pattern Alerting Report** in the **Usage Pattern Alerting** interface.
2. Click **Activity Report** or **Analysis Report** on the ribbon according to the report you want to view.
    - If you select **Activity Report**, the viewing pane of the report displays the records of the triggered rules that were scanned within the current month, including the rule profile that contains the triggered rule, type and detailed configuration information of the triggered rule, the user who triggered the rule, the scanned time of the triggered rule, and detailed information on the user activities that triggered the rule.

      You can perform the following operations in the **Activity Report**:

        - **Set Filter** – To limit or expand the records of the activities that triggered Usage Pattern Alerting rules displayed in the viewing pane, use Set Filter.
        - **Export Details** – By clicking the **Export Details** link in the **Action** column of a record, the **Export to Datasheet** window appears. You can export the detailed information of all user activities that triggered this rule associated with this record to a datasheet. For detailed instructions in the operations in the **Export to Datasheet** window, see Exporting to a Datasheet.
    - If you select **Analysis Report**, the viewing pane of the report displays the records of the rules that were triggered within the current month in the **Triggered Times of Rules** pane, including the rule profile that contains the triggered rule, type and detailed configuration information of the triggered rule, and the number of times that the rule was triggered during the current month.

You can perform the following operations in the **Analysis Report**:

- **Set Filter** - To limit or expand the records of triggered rules displayed in the viewing pane, use Set Filter.
- **Distribution of Triggered Times** - Select a rule's record in the **Triggered Times of Rules** pane, the **Distribution of Triggered Times** pane will display a column chart for the distribution of triggered times of the selected rule, with X-axis displaying the values of actual activities that triggered the rule and Y-axis displaying the numbers of the times that the rules were triggered.
- **Trigger Times** – Click the link in the **Trigger Times** column of a rule in the **Triggered Times of Rules** pane, the **Activity Report** page for the corresponding rule appears, displaying detailed information of each activity that triggered the rule the time range selected in **Set Filter**.

3. You can perform the following operations in the **Usage Pattern Alerting Report** interface:

- **Set Filter** – Configure the settings in the **Set Filter** area to limit or expand the records of user activities that triggered rules displayed in the **Activity Report** or trigged rules displayed in the **Analysis Report**. The default filter rule includes all of the user activities/triggered rules that were recorded within the current month. For detailed instructions on using **Set Filter**, see Setting Filter for Usage Pattern Alerting Report.
- **Export Now** – To export the **Activity Report** or **Analysis Report** to a datasheet, complete the following steps:

i. Click **Export Now** > **Export to Datasheet** on the ribbon. The **Export Datasheet** window appears.

ii. Configure the following settings:

- **Report Format** – Select the desired report format from the drop-down menu.
- **Triggered Rule Profiles** – Filter the records related to the triggered rules by selecting rule profiles that contain the triggered rules from drop-down list.
- **Triggered Rule Types** – Filter the records related to the triggered rules by selecting rule types from the drop-down list.
- **Date/Time Range** – Filter the records related to the triggered rules by selecting the scanned date/time range that the rules were triggered in the **Scanned within** field.
- **Export Settings** – Choose whether to export the report now. Check the **Export to local immediately** checkbox and click **OK** to export the report immediately, or check the **Export to a different location** checkbox, and then configure the following settings:
  - **Export Location** – Select one previously configured export location from the drop-down menu, or if you want to configure a new export location, click **New Export Location**, then follow

the instructions provided in the Export Location section of this guide.

- **Notification** – Check the **Send Notification** checkbox and select the **Recipient** of this notification. You can select a previously configured e-mail notification profile and click **View** to access detailed information, or click **New E-mail Notification** to create a new e-mail notification profile. For details on creating an e-mail notification profile, see the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide. You can choose to have the report included in the e-mail as an attachment by checking the **Attach report to the e-mail when the size of the report is less than …** checkbox, and then enter the maximum size of the report allowed in the **less than __ MB** text box.

iii. Click **OK** to save the configurations and to export the report. Click **Cancel** to go back to the **Usage Pattern Alerting** interface without exporting the report.

Setting Filter for Usage Pattern Alerting Report

To set the filter criteria to extend or limit the records associated with the triggered rules displayed in the **Activity Report** or **Analysis Report** within the **Usage Pattern Alerting Report** interface via the **Set Filter** feature, complete the following steps:

1. Click **Set Filter** above the viewing pane to access the **Set Filter** window.
2. **Filter by Rule Profile** – Filter the records by rule profile names or rule types.
   - **Triggered Rule Profiles** – Filter the records of triggered rules by rule profiles. Select the rule profiles whose triggered rules you want view from the drop-down list, or select **All Rule Profiles** to view the records of triggered rules of all rule profiles.
   - **Triggered Rule Types** – Filter the records of triggered rules by rule types. Select the types of which the trigged rules you want to view from the drop-down list, or select **All Types** to view the records of triggered rules of all types.
3. **Filter by Time Range** – Filter the records by the scanned time of the triggered rule. Specify a time range for the scanned time using either of the following methods:
   - **Scanned within** – Expand the **Scanned within** drop-down list, and select a time range from the following options: **This Month**, **Last Month**, **Last 2 Months**, **This Week**, **Last Week**, **Last 2 Weeks**, **Today**, and **Yesterday**.
   - **Customize Time Range** – To customize a time range, expand the **Scanned within** drop-down list, select **Customize Time Range**, and then select a time range using the calendar below.
4. **Click Filter** to apply the configured filter criteria. All records that meet the criteria are listed in the viewing pane. To reset all filter criteria, click **Reset** .To return to the viewing pane without applying the filter criteria, click **Cancel**.

DocAve Report Center Features in SharePoint

By deploying solutions on SharePoint farms, Report Center adds the **Document Auditing** and **Usage Activity Web Parts** site collection features in SharePoint. The section bellow offer details instructions on deploying and using these two features.

Document Auditing Feature

Report Center provides users a solution named **SP2010DocumentAuditing.wsp** for SharePoint 2010 and **SP2013DocumentAuditing.wsp** for SharePoint 2013 to view the audit history of all documents within the specific site collection in SharePoint.

Deploying Document Auditing Solution

To use the Document Auditing feature in DocAve, you must first deploy the **SP2010DocumentAuditing.wsp** or **SP2013DocumentAuditing.wsp** solution to your SharePoint farm. Once you have installed and deployed the solution, the **Document Auditing Settings** will be listed in the Site Collection Administration List.

***Note**: To deploy this solution, each Web front-end server must have DocAve Agent installed.

To deploy the Document Auditing Solution to your SharePoint 2010 farm, complete the following steps:

1. Navigate to: **DocAve** > **Control Panel** > **Solution Manager**.
2. Select the target farm from the **Farm** drop-down list.
3. Check the **SP2010DocumentAuditing.wsp** checkbox. Click **Install** in the **Actions** group on the ribbon. Once the solution is installed on the SharePoint farm, the following message will appear in the **Message** column: **Installed the solution successfully**.
4. Check the **SP2010DocumentAuditing.wsp** checkbox again, and click **Deploy** in the **Actions** group on the ribbon. After the solution is deployed successfully, the status of the solution is shown as **Deployed** in the Status column.

Follow the same steps to deploy the **SP2013DocumentAuditing.wsp** solution to your SharePoint 2013 farm as **SP2010DocumentAuditing.wsp**.

***Note**: If you want to use the Document Auditing feature in a SharePoint 2010 experience version site collection in a SharePoint 2013 farm, you must deploy both the **SP2010DocumentAuditing.wsp** solution and the **SP2013DocumentAuditing.wsp** solution to your SharePoint 2013 farm.

Refer to the **Solution Manager** section of the DocAve 6 Control Panel Reference Guide for more instructions on operating the solutions.

Proceed to the next section for information on activating the Document Auditing feature.

Activating Document Auditing Feature

Once the solution is deployed, the Document Auditing feature can be activated in SharePoint site collections or through the **Manage Feature** settings in DocAve Report Center. To activate the Document Auditing feature through DocAve, refer to Managing the Document Auditing Feature.

To activate the Document Auditing Feature in a SharePoint site collection, complete the following steps:

1. In SharePoint, access the site collection for which you want to activate Document Auditing feature. In SharePoint 2010, navigate to: **Site Actions** > **Site Settings** > **Site Collection features**. In SharePoint 2013, navigate to: Settings icon ( ) > **Site Settings** > **Site Collection features**.
2. Click **Activate** next to the **AvePoint Document Auditing** feature to enable the feature for the selected site collection.
3. After activating the Document Auditing feature, the status of the feature reads **Active** in the Status column.

***Note**: If you have configured the **Advanced Settings** on the Farm level in the **Manage Feature** function of DocAve, you must enter the activation password in the text box to activate the Document Auditing feature.

Document Auditing Settings

To configure the Document Auditing Settings to specify how to display the auditing data for the documents, complete the following steps:

1. In the SharePoint site collection where you have activated the feature for SharePoint 2010, navigate to: **Site Actions** > **Site Settings** > **Site Collection Administration** > **Document Auditing Settings**. For SharePoint 2013, navigate to Settings icon () > **Site settings** > **Site Collection Administration** > **Document Auditing Settings**.
2. Configure the following settings on the **Document Auditing Settings** page:
    - **Time Range** – Display the data for a specified length of time. Select from the options of **This Month**, **Last Month**, **Last 2 Months**, **This Week**, **Last Week**, **Last 2 Weeks**, **Today**, and **Yesterday**.
    - **Report Settings** – Set the number of the report records. The default number is 100; you can customize the number as you want, but the number of the report count must be a positive integer between 0 and 1000.
    - **User Filter** – Set the users whose activities 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 users whose activity you want to view. You can click the check names button ( ) to check the name you entered or click the browse button ( ) to find the users you want to include.

- **Users to Exclude** – Enter the users whose activity you do not wish to view. You can click the check names button ( ) to check the name you entered or click the browse button ( ) to find the users you want to exclude.

- **Action Filter** – Check the **Exclude view event** checkbox to exclude the auditing data of **View** action.

3. Click **OK** to save the Document Audit Settings, or click **Cancel** to go back without saving any changes.

Viewing Audit History

To view the document audit history, complete the following steps:

1. Select the document with the audit history you want to view in the site collection where you have activated the **Document Auditing** feature, and click the downward arrow to open the drop-down menu.
2. Click **View Audit History**. The **AvePoint Document Auditing Feature** page appears. It displays the document information and the auditing data according to the settings you have configured to the site collection where this document resides.
3. Click **Generate Excel Workbook** if you want to export the XLSX format report.

Usage Activity Web Parts Feature

Report Center provides a solution named **SP2013UsageActivityWebParts.wsp** for SharePoint 2013 and **SP2010UsageActivityWebParts.wsp** for SharePoint 2010 to add Usage Activity Web Parts in SharePoint sites. These Web parts display the reports on social activities and contents and SharePoint usage and behavior across a configurable scope. The Usage Activity Web Parts contains six social Web parts (Most Active Contributors, Most Popular Contributors, Top Documents, Top Blog Posts, Top Discussions, and Top Wiki Pages) and a dashboard Web part **Report Center Dashboard** (including ten reports: Summary, Active Users, Checked-Out Documents, Activity Ranking, Last Accessed Time, Site Traffic, Search Usage, Site Visitors, Top Documents by Social Activity, and Content Type Usage).

***Note:** The Most Popular Contributors Web Part does not support SharePoint 2010.

Deploying Usage Activity Solution

To use the Usage Activity Web Part feature in SharePoint, you must first deploy the **SP2013UsageActivityWebParts.wsp** to your SharePoint 2013 farm or **SP2010UsageActivityWebParts.wsp** to your SharePoint 2010 farm. Once you have installed and deployed the solution, the **AvePoint Usage Activity Web Parts** feature will be listed in the **Site Collection Features** List. The **AvePoint Usage Activity Web Parts** feature works to create social Web parts for ranking popular documents, discussions, blog posts, wiki pages, and content contributors, and

a dashboard Web part that contains multiple reports for analyzing SharePoint usage and behavior within a configurable SharePoint scope.

***Note**: To deploy this solution, each Web front-end server must have a DocAve Agent installed.

To deploy the Usage Activity Solution to your SharePoint 2013 farm, complete the following steps:

1. Navigate to: **DocAve** > **Control Panel** > **Solution Manager**.
2. Select the target farm from the **Farm** drop-down list.
3. Check the **SP2013UsageActivityWebParts.wsp** checkbox. Click **Install** in the **Actions** group on the ribbon. Once the solution is installed on the SharePoint farm, the following message will appear in the **Message** column: **Installed the solution successfully**.
4. Check the **SP2013UsageActivityWebParts.wsp** checkbox again, and click **Deploy** in the **Actions** group on the ribbon. After the solution is deployed successfully, the status of the solution is shown as **Deployed** in the **Status** column.

Follow the same steps to deploy the **SP2010UsageActivityWebParts.wsp** solution to your SharePoint 2010 farm as **SP2013UsageActivityWebParts.wsp**.

***Note**: If you want to use the Usage Activity Web Parts in a SharePoint 2010 experience version site collection in a SharePoint 2013 farm, you must deploy both the **SP2010UsageActivityWebParts.wsp** solution and the **SP2013UsageActivityWebParts.wsp** solution to your SharePoint 2013 farm.

Refer to the **Solution Manager** section of the DocAve 6 Control Panel Reference Guide for more instructions on operating the solutions.

Proceed to the next section for more information on activating the **Usage Activity Web Parts** feature.

Activating the Usage Activity Web Parts Feature

Once the solution is deployed, the **Usage Activity Web Parts** feature can be activated through SharePoint or through the Manage Feature function in DocAve. To activate the feature through DocAve, refer to Managing the Usage Activity Web Parts Feature.

To activate the Usage Activity Web Parts feature in a SharePoint site collection, complete the following steps:

1. In SharePoint, access the site collection for which you want to activate Usage Activity Web Parts feature. In SharePoint 2010, navigate to: **Site Actions > Site Settings > Site Collection features**. In SharePoint 2013, navigate to: Settings Icon ( ) **> Site Settings > Site Collection features**.
2. Click **Activate** next to the **AvePoint Usage Activity Web Parts** feature to enable the feature for the selected site collection.
3. After activating the **AvePoint Usage Activity Web Parts** feature, the status of the feature reads **Active** in the **Status** column.

Adding a New Usage Activity Web Part

To add a new Usage Activity Web Part in SharePoint, the feature must be active on the site collection.

1. In a SharePoint site, browse to the page where you want to add the new Web part.
2. Click **Edit** on the ribbon of the **Page** tab.
3. Left-click in the section where you want to add the Web part. The Web part will be added according to your cursor's location.
4. Click the **INSERT** tab, and then click **Web Part** on the ribbon. Select the **Custom** category in the **Categories** list.

   ***Note:** To see the Custom category, you must activate the **Usage Activity Web Parts** feature under **Site Collections Features**.
5. In the **Parts** list, select the Usage Activity Web Part you want to add.
6. Click **Add** to add the Web part. The selected Web part will appear in the page.
7. Click **Edit** on the ribbon and then select **Save** (in SharePoint 2013) or **Save & Close** (in SharePoint 2010) from the drop-down menu to save the changes. Click **Cancel** to stop editing without adding the Web part.

Editing Web Part Properties

Once a Usage Activity Web Part has been added to the site, you can configure the properties specific to the social Web parts and dashboard Web part via the **Edit Web Part**. The sections below offer detailed instructions on editing the Web part properties.

Editing Social Properties

By editing **Social Properties** of the social Web part (Most Active Contributors/Most Popular Contributors/Top Documents/Top Blog Posts/Top Discussions/Top Wiki Pages), you can customize the scope, permission checker and the maximum number of items to display at once settings in the Web part.

To edit the **Social Properties** of a social Web part, complete the following:

1. Click **Edit** on the ribbon of the **Page** tab.
2. Locate the Web part you want to edit, and click the triangle ( ) on the upper right corner of the Web part.
3. Click **Edit Web Part** to open the editing pane on the right side of the Web part.
4. In the **Social Properties** section, you can configure the following settings:
   - **Which SharePoint objects should be included in this Web part?** – You can configure the objects included in this Web part and permission checker settings for this Web part. To

configure the object selection and permission checker, click **Change Selection.** In the **Item Display Configuration** window, configure the following settings:

***Note**: To configure the object selection and permission checker settings, you must have the **Add and Customize Pages** and **Edit Items** permissions in the site where the Web part resides.

- **Object Selection** – Specify the objects included in this Web part by selecting the corresponding radio button.
  - **Current site, including subsites** – Select this option to include the current sites and its subsites in this Web part. By default, this option is selected when the Web part is added to the site.
  - **Current site collection** – Select this option to include the site collection where this Web part resides.
  - **Current Web application** –Select this option to include the Web application where this Web part resides.
  - **Current farm** –Select this option to include the entire farm where this Web part resides.
  - **Custom scope** – Select this option to customize your scope in the tree below. Click the farm name and expand the tree down to the desired level. Select the checkboxes next to the nodes you want to include in this Web part. You can also search for the specified objects using the Search Objects by URL feature. For more information, refer to the Searching Objects by URL section.

  ***Note**: To include specific SharePoint objects in a Web part by selecting the corresponding radio button or the nodes in the tree, you must have the required permission to the specified SharePoint objects. Otherwise, the corresponding radio buttons are disabled and cannot be selected. For detailed information on the required permissions for selecting SharePoint objects, refer to the Required SharePoint Permissions for Object Selection.

- **Permission Checker** – Specify whether to enable permission control for viewing the contents in the reports. By default, the **Enforce SharePoint permissions for security trimming** option is selected. If visitors do not have the **View Items** permission specific to the documents/blog post/discussions/wiki pages in the report, the contents will be hidden from the visitors when they view the list in the Report Display pane in Top Documents, Top Blog Posts, Top Discussions, and Top Wiki Pages or in the tooltips of a specified contributor in Most Active Contributors and Most Popular Contributors. If you do not select this option, all visitors can see the ranking for all of the contents in Top Documents, Top Blog Posts, Top Discussions, and Top Wiki Pages and the same contents in the tooltips in Most Active Contributors and Most Popular Contributors.

Click **OK** to save the configurations, or click **Cancel** to close the window without saving the configurations.

- **Specify the number of items display at once.** – Enter an integer between 1 and 20 into the text box as the maximum number of items displayed in the display pane of a social Web part at once.

Editing Report Center Dashboard Properties

By editing **Report Center Dashboard Properties** specific to the Report Center Dashboard Web part, you can customize the scope, permission checker, report types and usage alert settings of the Web part.

To edit the **Report Center Dashboard Properties** of the Report Center Dashboard Web part, complete the following:

1. Click **Edit** on the ribbon of the **Page** tab.
2. Locate the Web part you want to edit, and click the triangle ( ) on the upper right corner of the Web part.
3. Click **Edit Web Part** to open the editing pane on the right side of the Web part.
4. In the **Report Center Dashboard Properties** section, you can configure the following settings:
    - **Which SharePoint objects should be included in this Web part?** – You can configure the objects included in this Web part and permission checker settings for this Web part. To configure the object selection and permission checker, click **Change Selection.** In the **Item Display Configuration** window, configure the following settings:
        - **Object Selection** – Specify the objects included in this Web part by selecting the corresponding radio button.
            - **Current site, including subsites** – Select this option to include the current site and its subsites in this Web part.
            - **Current site collection** – Select this option to include the site collection where this Web part resides. By default, this option is selected when the Web part is added to the site.
            - **Custom scope** – Select this option to customize your scope in the tree below. Click the farm name and expand the tree down to the desired level. Select the checkboxes next to the site collections or sites you want to include in this Web part. You can also search for the specified objects using the Search Objects by URL feature. For more information, refer to the Searching Objects by URL section.

            ***Note**: To include specific SharePoint objects in a Web part by selecting the corresponding radio button or the nodes in the tree, you must have the required permission to the specified SharePoint objects. Otherwise, the corresponding radio buttons are disabled and cannot be selected. For detailed information on the required permissions for selecting SharePoint objects, refer to Required SharePoint Permissions for Object Selection.

        - **Permission Checker** – Specify whether to enable permission control for viewing the contents in the reports.

- By default, the **Enforce SharePoint permissions for security trimming** option is selected. In the reports of Activity Ranking, Top Documents by Social Activities, Content Type Usage, and Checked-Out Documents, the visitors can only view the contents to which they have **View Items** permission. If visitors do not have the **View Items** permission to specific contents included in these reports, the contents will be hidden from these visitors.
- If you do not select this option, all visitors can see the ranking for all of the contents in the Activity Ranking, Top Documents by Social Activities, Content Type Usage, and Checked-Out Documents reports.

Click **OK** to save the configurations, or click **Cancel** to close the window without saving the configurations.

- **Which report types would you like to include in this Web part**? – Select the report types you want to view in this web part by selecting the corresponding checkboxes.
- **Would you like to receive e-mail alerts for specific reports?** – When the **Active Users**, **Checked-Out Documents**, **Site Traffic**, **Site Visitors** reports are selected in the above field, you can configure the usage alert e-mail settings for the desired reports to have usage alert e-mail notifications sent out when the specified criteria are met. Click **Configure Usage Alerts Settings** and then configure the following settings in the **Usage Alerts Settings** pop-up window:

  ***Note**: To ensure the **Report Center Dashboard** can send e-mail alerts properly, you must configure the outgoing e-mail settings for your DocAve platform in **DocAve** > **Control Panel**. For details, refer to the **User Notification Settings** section in the DocAve 6 Control Panel Reference Guide.

  - **Active Users** – Select this checkbox to have e-mail notifications sent out when the desired criteria are met in the **Active Users** report. Then configure the following settings:
    - **Recipients** – Use the people picker to specify the recipients of the e-mail notifications or enter the e-mail addresses of the desired recipients. To enter multiple e-mail addresses, separate them by semi-colons.
    - **Time Range** – Select the time frame for this alert.
    - **Thresholds** – Configure the trigger for the notification. Enter a positive integer into the **More than __ activities** text box.

      ***Note:** By default, the threshold is checked depending on the interval you configured. If the number exceeds the threshold set here, an e-mail notification will be sent.

    - **Interval** – Select the frequency of e-mail notifications. Enter a positive integer into the **Every** text box, then select by **Days** or **Weeks** from the drop-down menu.

- **Checked-out Documents** – Select this checkbox to have e-mail notifications sent out when the desired criteria are met. Then configure the following settings:
    - **Recipients** – Use the people picker to specify the recipients of the e-mail notifications or enter the e-mail addresses of the desired recipients. To enter multiple e-mail addresses, separate them by semi-colons.
    - **Threshold** – Configure the trigger for the notification. Enter a positive integer into the **More than __ checked out documents** text box.
    - **Interval** – Select the frequency of e-mail notifications. Enter a positive integer into the **Every** text box, then select by **Days** or **Weeks** from the drop-down menu.
- **Site Traffic** – Select this checkbox to have e-mail notifications sent out when the desired criteria are met in the **Site Traffic** report. Then configure the following settings:
    - **Recipients** – Use the people picker to specify the recipients of the e-mail notifications or enter the e-mail addresses of the desired recipients. To enter multiple e-mail addresses, separate them by semi-colons.
    - **Time Range** – Select the time frame for this alert.
    - **Thresholds** – Configure the trigger for the notification. Enter a positive integer into the **More than __ activities** text box.

      ***Note:** By default, the threshold is checked depending on the interval you configured. If the number exceeds the threshold set here, an e-mail notification will be sent.

    - **Interval** – Select the frequency of e-mail notifications. Enter a positive integer into the **Every** text box, then select by **Days** or **Weeks** from the drop-down menu.
- **Site Visitors** –Select this checkbox to send out e-mail notifications when the desired criteria are met. Then configure the following options:
    - **Recipients** – Use the people picker to specify the recipients of the e-mail notifications or enter the e-mail addresses of the desired recipients. To enter multiple e-mail addresses, separate them by semi-colons.
    - **Time Range** – Select the time frame for this alert.
    - **Thresholds** – Configure the triggers for the notification. You may choose to use one or both of these thresholds:
        - Check the **More than __ activities** checkbox to activate this threshold, and then enter a positive integer into the text box.

- Check the **More than __ unique visitors** checkbox to activate this threshold, and then enter a positive integer into the text box.

- **Interval** – Select the frequency of e-mail notifications. Enter a positive integer into the **Every** text box, then select by **Days** or **Weeks** from the drop-down menu.

Click **OK** to save the configurations, or click **Cancel** to close the window without saving the configurations.

5. When you finish editing the Report Center Dashboard properties, click **OK** to save the changes and close the editing pane, click **Apply** to save the changes and stay in the editing pane, or click **Cancel** to close the editing pane without saving the configurations.

Searching Objects by URL

To search specific objects by URL under a specified node, complete the following steps:

1. Select **Custom scope** in the **Item Display Configuration** page and locate the desired node in the tree.
2. Right-click on the node, and click **Search** in the menu.
3. Enter the keyword contained in the URLs of the objects you want to search in the text box.
4. Click **Add** to add this search condition to the **Search Conditions** table below.

   After one search condition is added into the table, you can click the remove ( ) button to remove this search condition.

5. Click **OK** to save the configured search conditions and search for the objects based on the configured search conditions. Or click **Cancel** to exit the current page without saving the configurations.

***Note**: The logical relationship between the search conditions is "or." All objects that meet any one of the search conditions will be included in the scope.

Required SharePoint Permissions for Object Selection

To include specific SharePoint objects in a Web part by selecting the corresponding radio button or the nodes in the tree, you must have enough permission for the SharePoint objects of the specified levels you want to select.

- **Current farm** – A Farm Administrator is required to select this option or the farm node in the tree.
- **Current Web Application** – You must have Full Control permission for all zones or default zone of the specified Web applications to select this option or Web application nodes in the tree.

- **Current Site Collection** – You must have at least one of the following permissions to select this option or site collection nodes in the tree:
    - Full Control permission for all zones or default zone of the Web applications where the specified site collections reside.
    - Site Collection Administrator of the specified site collections.
- **Current Site, including subsites** – You must have at least one of the following permissions to select this option:
    - Full Control permission for all zones or default zone of the Web applications where the current site resides.
    - Site Collection Administrator of the site collection when the current site resides.
    - Full Control permission for the current site and all of its subsites.
- **Specific Site Nodes** – To select specific site nodes in the tree, you must have at least one of the following permissions:
    - Full Control permission for all zones or default zone of the Web applications where the specified sites reside.
    - Site Collection Administrator of the site collection where the specified sites resides.
    - Full Control permission for the specified sites.

Data Collection for Usage Activity Web Parts

DocAve provides data collectors called **Usage Activity Web Part Collector** and **User Profile Collector** to collect the data for Usage Activity Web parts once per day at midnight by default. You can designate the schedule and the notification for these collectors in Data Collection. Refer to Data Collection for more detailed instructions. To get the latest collected data shown in the **Report Display** pane of a specified Web part, refresh the page where the Web part resides.

***Note**: On the lower right corner of each social Web part (Most Active Contributors, Most Popular Contributors, Top Documents, Top Blog Posts, Top Discussions, and Top Wiki Pages), the last time the data was updated is shown.

To collect the required data for all of the Usage Activity Web Parts via **Usage Activity Web Part Collector** and **User Profile Collector**, you must ensure that the following prerequisites are met in your SharePoint farm:

- The User Profile Service is started.
- The **Usage Data Collection** (with the **Page Requests** event selected) is enabled.
- The **Health Data Collection** is enabled.
- The **Microsoft SharePoint Foundation Usage Data Import** and **Microsoft SharePoint Foundation Usage Data Processing** timer jobs are enabled.

- SharePoint Auditor is enabled for the objects included in all of the Usage Activity Web parts.

Supported Browser Versions for Usage Activity Web Parts

See below for the supported browser versions for Usage Activity Web parts:

Browser	Version
Internet Explorer	Internet Explorer 8, 9, 10
Google Chrome	Latest publicly released version
Mozilla Firefox	Latest publicly released version

Most Active Contributors Web Part

This Web Part provides rankings of users who have contributed the most documents, blog posts and discussions within the selected scope.

Viewing the Report of Most Active Contributors

The Display pane has a number of configurable settings for customizing how the Web part displays generated reports. If desired, configure the following settings in the **Display** pane:

- **All/Last Week/ Last Month** – Select the time range for this report.
- **All/Documents/Blog Posts/Discussions** – Customize the type of data shown in the report. Select **All** to view a ranking by the sum of all documents and blog posts contributed by users. Select **Documents** to view the ranking by the number of documents created by users. Select **Blog Posts** to view a ranking by the number of blog posts created by users. Select **Discussions** to view a ranking by the number of discussions created by users.
- Page turning – Clicking the next ( ) button or the previous ( ) button to view more users of the list. Up to five users are listed per page in the Display pane.

Most Popular Contributors

This Web Part provides rankings of users who have the most document activities and/or blog post activities and/or discussion activities within the selected scope. Document activities include the followers, views and likes that users have for their documents. Blog post activities include the comments, views and likes that users have for their blog posts. Discussion activities include the views, replies and likes that users have for their discussions.

Viewing the Report of Most Popular Contributors

The Display pane has a number of configurable settings for customizing how the Web part displays generated reports. If desired, configure the following settings in the **Display** pane:

- **All/Documents/Blog Posts/Discussions** – Customize the type of data shown in the report. Select **All** to view a ranking by the sum of document activities, blog post activities and discussion activities users have for their documents, blog posts and discussions. Select **Documents** to view a ranking by the sum of followers, views and likes users have for their documents. Select **Blog Posts** to view a ranking by the number of comments, views and likes users have for their blog posts. Select Discussions to view a ranking by the number of views, replies and likes for their discussions.
- Page turning – Clicking the next ( ) button or the previous ( ) button to view more users in the list. Up to five users are listed per page in the Display pane.
- **Advanced** – Select **Documents** and hover your cursor over a row in the list, you can view a list of top five popular documents of the specified user in the popup window on the right. Select **Blog Posts** and hover your cursor over a row in the list, you can view a list of top five popular blogs of the specified user. Select **Discussions** and hover your cursor over a row in the list, you can view a list of top five popular discussions of the specified user. You can also click the title of a specific content listed in the window to view it.

Top Documents

This Web part provides rankings of documents which have been viewed the most and/or have the most followers and/or likes within the selected scope.

By default, the documents of the following types are excluded from the Top Documents Web part rankings: **master**, **aspx**, **css**, **jpg**, **png**, **js**, and **gif**. To customize the filter for excluding file types from the rankings, configure the **<FileExtensionFilter>** node in the **ReportCenterServiceCustomProperties.config** file. For detailed instructions, refer to Configuring the ReportCenterServiceCustomProperties.config File.

Viewing the Report of Top Documents

The Display pane has a number of configurable settings for customizing how the Web part displays generated reports. If desired, configure the following settings in the **Display** pane:

- **All/Followers/Views/Likes** – Customize the type of data shown in the report. Select **All** to view a ranking by the sum of followers, views and likes of the documents. Select **Followers** to view a ranking by number of followers of documents. Select **Views** to view a ranking by the number of views of documents. Select **Likes** to view a ranking by the number of likes of documents. Note that this Web part does not provide a ranking by **Followers** and **Likes** in SharePoint 2010.
- **All/Last Week/ Last Month** – Select the time range for this report. Note that this setting only supports the ranking by **Views**.

- Page turning – Clicking the next (>) button or the previous (<) button to view more items in the list. Up to five documents are listed per page in the Display pane.
- **Link** – Click the title of a specific document to view it.
- **Advanced** – Hover your cursor over a row in the list, and view the details of the specified document in the pop-up window on the right. At the bottom of the window, click **Open** to open the document and click **View Library** to jump to the library where it resides.

Top Blog Posts

This Web part provides rankings of blog posts that have been viewed the most and/or have the most likes and/or comments within the selected scope.

Viewing the Report of Top Blog Posts

The Display pane has a number of configurable settings for customizing how the Web part displays generated reports. If desired, configure the following settings in the **Display** pane:

- **All/Comments/Views /Likes** – Customize the type of data shown in the Display pane. Select **All** to view a ranking by the sum of comments, views and likes of blog posts. Select **Comments** to view a ranking by number of comments on blog posts. Select **Views** to view a ranking by the number of views of blog posts. Select **Likes** to view a ranking by the number of likes on blog posts. Note that this Web part does not provide a ranking by **Likes** in SharePoint 2010.
- **All/Last Week/ Last Month** – Select the time range for this report. Note that this setting only supports the ranking by **Views**.
- Page turning – Clicking the next (>) button or the previous (<) button to view more items in the list. Up to five blog posts are listed per page in the Display pane.
- **Link** – Click the title of a specific blog post to view it.
- **Advanced** – Hover your cursor over a row in the list, and view the details of the specified blog post in the popup window on the right You can also open this blog post by clicking **Open** at the bottom of the window.

Top Discussions

This Web part provides rankings of discussions that have been viewed the most and/or have the most replies and/or likes within the selected scope.

Viewing the Report of Top Discussions

The Display pane has a number of configurable settings for customizing how the Web part displays generated reports. If desired, configure the following settings in the **Display** pane:

- **All/Replies/Views/Likes** – Customize the type of data shown in the Display pane. Select **All** to view a ranking by the sum of replies, views and likes of discussions. Select **Replies** to view a ranking by number of replies on discussions. Select **Views** to view a ranking by the number of views of discussions. Select **Likes** to view a ranking by the number of likes of discussions. Note that this Web part does not provide a ranking by **Likes** in SharePoint 2010.
- **All/Last Week/ Last Month** – Select the time range for this report. Note that this setting only supports the ranking by **Views**.
- Page turning – Clicking the next ( ) button or the previous () button to view more items in the list. Up to five discussions are listed per page in the Display pane.
- **Link** – Click the link of the title of a specific discussion to view it.
- **Advanced**- Hover your cursor over a row in the list, and view the details of the specified discussion board in the popup window on the right, you can also open this discussion by clicking **Open** at the bottom of the window.

Top Wiki Pages

This Web part provides a ranking of wiki pages that have been viewed the most for this latest week/month within the site collection/site.

Viewing the Report of Top Wiki Pages

The Display pane has a number of configurable settings for customizing how the Web part displays generated reports. If desired, configure the following settings in the **Display** pane:

- **All/Last Week/ Last Month** – Select the time range for this report.
- Page turning – Clicking the next ( ) button or the previous () button to view more items in the list. Up to five wiki pages are listed per page in the Display pane.
- **Link** – Click the title of a specific wiki page to view it.
- **Advanced** – Hover your cursor over a row in the list, and view the details of the specified wiki page in the popup window on the right. You can also open this page by clicking **Open** at the bottom of the window

Report Center Dashboard Web Part

This Web part contains multiple reports for analyzing SharePoint usage and behavior across the selected scope within a specific time range, including Summary, Active Users, Checked-Out Documents, Activity Ranking, Last Accessed Time, Site Traffic, Site Visitors, Top Documents by Social Activity, and Content Type Usage.

Before viewing the reports included in the Dashboard Web part, select the time range for the all of the reports except the Last Accessed Time and Content Type Usage reports. To do so, select one of the

following time range options from the drop-down list on the upper-right corner: **Last 7 Days**/ **Last 14 Days**/**Last 30 Days**/**Last Month**/**Last 3 Months**/**Last 6 Months**.

See the sections below for detailed instructions on viewing each report in **Report Center Dashboard**.

Summary

This report displays a summary on the usage of the SharePoint site collections or sites selected in **Object Selection**, within a selected time range. This report displays the following contents:

- **Unique Visitors** – The total number of unique visitors who have accessed the selected scopes.
- **Checked-Out Documents** –The total number of checked-out documents within the selected scopes.
- **Activities** – The total number of user activities within the selected scopes.
- **Items** – The total number of list items and documents within the selected scopes.
- **Data Size** – The total data size of the selected scopes.

Active Users

This report displays rankings of users by the number of activities within each of the selected site collections and sites.

In the display pane of this report, there are a number of configurable settings for customizing how the report is displayed. If desired, configure the following settings in the display pane:

- **Change Scope** – In the upper-left corner of the display pane, you can view the title of site collection/site which is the current scope of the report. To change the scope for the data shown in the report, complete the following steps:
    i. Click the name of the currently selected scope in the upper-left corner, a drop-down menu appears.
    ii. Click **Change Scope**. The window for changing the scope appears.
    iii. Select the site collection/site for which you want to view the data in the report. You can also search the desired site collection/site by entering the site title in the text box.
    iv. Click **OK** to save the change and return to the display pane.
- **Export** – Export the report in **XLSX** format to a SharePoint folder/library by completing the following steps:
    i. Click **Export** in the upper-right corner. The **Export** window appears.
    ii. **Export Location** – Click **Browse** and then select a desired folder/library where you want to store the export report on the tree in the dialog window.

iii. **Date Range** – Select a desired time range for the data included in the exported report.

iv. **Active Users** – Check the **Include all** checkbox to include all of data in the exported report, or check the **Top __ users** checkbox, and then enter an integer into the text box to designate the number of the top ranking users to be included in the report.

v. Click **OK** to export the report immediately. A notification message appears, informing that the exporting has started.

vi. Click **OK** to close the window and return to the report display pane.

Checked-Out Documents

This report displays the information of checked-out documents within the selected site collections or sites. The Y-axis of the chart represents the number of checked-out documents within the each of the site collection or site. The X-axis of the chart represents the date when the data is collected.

In the display pane of this report, there are a number of configurable settings for customizing how the report is displayed. If desired, configure the following settings in the display pane:

- **Change Scope** – In the section above the chart, you can view the titles of site collections or sites which are the currently displayed scopes of the report. The chart can display the data for up to three scopes at one time. If there are more than three reporting scopes selected in **Report Center Dashboard Properties** for this Web part, you can change the displayed scopes by clicking the next ( ) button or the previous ( ) button of the **Displayed Scopes** section in the upper-right corner of the display pane.
- **Interval** – Select the interval for displaying the data in the chart by selecting the corresponding option from the **Interval** drop-down list.
- **Export** – Export the report in **XLSX** format to a SharePoint folder or library by completing the following steps:

  i. Click **Export** in the upper-right corner. The **Export** window appears.

  ii. **Export Location** – Click **Browse** and then select a desired folder or library where you want to store the export report on the tree in the dialog window.

  iii. **Date Range** – Select a desired time range for the data included in the exported report.

  iv. **Frequency** – Select the frequency for displaying the data in the exported report.

  v. Click **OK** to export the report immediately. A notification message appears, informing that the exporting has started.

  vi. Click **OK** to close the window and return to the report display pane.

Activity Ranking

This report displays rankings of sites, pages, lists, and documents by activity within each selected site collections/site.

Configure the URL filter in the Usage Activity Web Part Settings of DocAve Manager Report Center to exclude the desired pages from this report. For details, refer to Usage Activity Web Parts Settings.

In the display pane of this report, there are a number of configurable settings for customizing how the report is displayed. If desired, configure the following settings in the display pane:

- **Change Scope** – In the upper-left corner of the display pane, you can view the title of site collection/site which is the currently displayed scope of the report. To change the scope for the data shown in the report, complete the following steps:
    i. Click the name of the currently selected scope in the upper-left corner, a drop-down menu appears.
    ii. Click **Change Scope**. The window for changing the scope appears.
    iii. Select the site collection or site for which you want to view the data in the report. You can also search the desired site collection or site by entering the site title in the text box.
    iv. Click **OK** to save the change and return to the display pane.
- **Sites/Pages/Lists/Documents** – Customize the type of data shown in the display pane by clicking the corresponding link in the upper-right corner.

    ***Note**: The **Sites** link is available only when site collections are selected as the reporting scope of the Report Center Dashboard Web part.
- **Link** – Click the name of a specific site, page, list, or document in the report to access to the site, page, list, or document.
- **Export** – Export the report in **XLSX** format to a SharePoint folder/library by completing the following steps:
    i. Click **Export** in the upper-right corner. The **Export** window appears.
    ii. **Export Location** – Click **Browse** and then select a desired folder/library where you want to store the export report on the tree in the dialog window.
    iii. **Date Range** – Select a desired time range for the data included in the exported report.
    iv. **Activity Ranking** – Enter a positive integer into the **Top __** text box, and select **Select All/Sites/Pages/Documents/Lists** options below to designate the number and data types included in the exported report.

***Note**: The **Sites** option is only available when site collections are selected as the reporting scope of the Report Center Dashboard Web part.

v. Click **OK** to export the report immediately. A notification message appears, informing that the exporting has started.

vi. Click **OK** to close the window and return to the report display pane.

Last Accessed Time

This report displays when the selected site collections or sites were last accessed, and by whom. In the report display pane, you can view the last accessed time and the last visitor of each site/site collection in the **Last Accessed Time** and **Last Accessed By** columns.

Configuring Time Range and User Filter for Last Accessed Time

By default, the Last Accessed Time report displays the last accessed time data within the selected scope during the current month and the past 6 months, including the access records of all users. You can customize the time range and user filter for the Last Accessed Time report by configuring the following nodes in the **ReportCenterServiceCustomProperties** file.

- To customize the time range of the Last Accessed Time report, configure the **<LastAccessedTimeStartTime>** node in the **ReportCenterServiceCustomProperties** file.
- To customize the user filter to exclude some users from the Last Accessed Time report, configure the **<LastAccessedTimeUserFilter>** in the **ReportCenterServiceCustomProperties** file.

For details on configuring the nodes mentioned above, refer to Configuring the ReportCenterServiceCustomProperties.config File.

Exporting Last Accessed Time Reports

Using the **Export** feature of this report, you can export the report in **XLSX** format to a SharePoint folder/library by completing the following steps:

1. Click **Export** in the upper-right corner. The **Export** window appears.
2. Click **Browse** in the **Export Location** section and then select a desired folder/library where you want to store the export report on the tree in the dialog window.
3. Click **OK** to export the report immediately. A notification message appears, informing that the exporting has started.
4. Click **OK** to close the window and return to the report display pane.

Site Traffic

This report displays charts of the numbers of activities and throughput that the selected site collections or sites have received. The Y-axis of the chart represents the number of activities or throughput that

each site/site collection has received. The X-axis of the chart represents the date when the data is collected.

In the display pane of this report, there are a number of configurable settings for customizing how the report is displayed. If desired, configure the following settings in the display pane:

- **Change Scope** – In the section above the chart, you can view the titles of site collections/sites which are the currently displayed scopes of the report. The chart can display the data for up to three scopes at one time. If there are more than three reporting scopes selected in **Report Center Dashboard Properties** for this Web part, you can change the displayed scopes by clicking the next ( ) button or the previous ( ) button of the **Displayed Scopes** section in the upper-right corner of the display pane.
- **Interval** – Select the interval for displaying the data in the chart by selecting the corresponding option from the **Interval** drop-down list.
- **Activities/Throughput** – Customize the type of data shown in the chart by clicking the corresponding link above the upper-right corner of the chart.
- **Export** – Export the report in **XLSX** format to a SharePoint folder/library by completing the following steps:
    i. Click **Export** in the upper-right corner. The **Export** window appears.
    ii. **Export Location** – Click **Browse** and then select a desired folder/library where you want to store the export report on the tree in the dialog window.
    iii. **Date Range** – Select a desired time range for the data included in the exported report.
    iv. **Frequency** – Select the frequency for displaying the data in the exported report.
    v. **Site Traffic** – Select the data types included in the exported report by selecting the corresponding checkboxes: **Activities** and **Throughput**.
    vi. Click **OK** to export the report immediately. A notification message appears, informing that the exporting has started.
    vii. Click **OK** to close the window and return to the report display pane.

Search Usage

This report displays the usage data for search activities, search terms and search scopes within the selected site collections.

***Note**: This report is available only when site collections are selected in the **Object Selection** settings of this Web part.

In the chart of the display pane, you can view the numbers of search activities occurred within the selected site collections during a specific time range. The Y-axis of the chart represents the number of

search activities occurred in each site collection. The X-axis of the chart represents the date when the data is collected. Also, the display pane has a number of configurable settings for customizing how the report is displayed. If desired, configure the following settings in the display pane:

- **Change Scope** – In the section above the chart, you can view the titles of site collections which are the currently displayed scopes of the report. The chart can display the data for up to three scopes at one time. If there are more than three reporting scopes selected in **Report Center Dashboard Properties** for this Web part, you can change the displayed scopes by clicking the next ( ) button or the previous ( ) button of the **Displayed Scopes** section in the upper-right corner of the display pane.
- **Interval** – Select the interval for displaying the data in the chart by selecting the corresponding option from the **Interval** drop-down list.
- **View Details** – To view the details of the search scopes and search terms of a specific site collection, click **View Details** to access the **View Details** window. For details, see Viewing Details of Search Usage Reports.
- **Export** – Export the report in **XLSX** format to a SharePoint folder/library. For details, refer to Exporting Search Usage Reports.

Viewing Details of Search Usage Reports

The **View Details** window displays rankings of search terms and search scopes by number of search activities within a specific site collection.

To access the **View Details** window for viewing the ranking of search terms and search scopes of a specific site collection, choose either of the following methods:

- In the chart of the report display pane, click a point on the line representing the site collection for which the details you want to view. The **View Details** window for the selected site collection appears.
- Click **View Details** above the chart. The **View Details** window appears. The default displayed scope of the **View Details** window is the first displayed scope on the left above the chart. To change the scope for the data shown in the window, complete the following steps:
    i. Click the name of the currently selected scope in the upper-left corner, a drop-down menu appears.
    ii. Click **Change Scope**. The window for changing the scope appears.
    iii. Select the site collection for which you want to view the data in the report. You can also search the desired site collection by entering the site collection title in the text box.
    iv. Click **OK** to save the change and return to the **View Details** window.

In the **View Details** window, you can also perform the following operations:

- **Export** – Export the details in **XLSX** format to a SharePoint folder/library. For details, refer to Exporting Search Usage Reports.
- **Show** – Select the data range of the data displayed in the **View Details** window by selecting **Top 10**/**Top 20**/**Top 50**/**Top 100** from the **Show** drop-down list in the upper-right corner.

Exporting Search Usage Reports

To export a Search Usage report in **XLSX** format to SharePoint folder/library, complete the following steps:

1. To access the **Export** window for configuring the export report settings, choose either of the following two methods:
   - Click **Export** in the upper-right corner of the report display pane.
   - Click **Export** in the upper-left corner of the **View Details** pop-up window.
2. In the **Export** window, configure the following settings:
   - **Export Location** – Click **Browse** and then select a desired folder/library where you want to store the export report on the tree in the dialog window.
   - **Date Range** – Select a desired time range for the data included in the exported report.
   - **Search Usage** – Select how many records you want to include in the exported report by selecting the corresponding option from the drop-down list.
3. Click **OK** to export the report immediately. A notification message appears, informing that the exporting has started.
4. Click **OK** to close the window.

Site Visitors

This report displays the numbers of unique visitors and user activities of the selected site collections/sites.

In the chart of the display pane, you can view the numbers of unique visitors of the selected site collections/sites. The Y-axis of the chart represents the number of unique visitors of each site/site collection. The X-axis of the chart represents the date when the data is collected. Also, the display pane has a number of configurable settings for customizing how the report is displayed. If desired, configure the following settings in the display pane:

- **Change Scope** – In the section above the chart, you can view the titles of site collections/sites which are the currently selected as the scopes of the data shown in the chart. The chart can display the data for up to three scopes at one time. If there are more than three reporting scopes selected in **Report Center Dashboard Properties** for this Web part, you can change the displayed scopes by clicking the next ( ) button or the previous ( ) button of the **Displayed Scopes** section in the upper-right corner of the display pane.

- **Interval** – Select the interval for displaying the data in the chart by selecting the corresponding option from the **Interval** drop-down list.
- **View Details** – View the number of activities performed by each visitor within a specific site collection/site in the **View Details** window. For details, see Viewing Details of Site Visitors Reports.
- **Export** – Export the report in **XLSX** format to a SharePoint folder/library. For details, refer to Exporting Site Visitors Reports.

Viewing Details of Site Visitors Reports

The **View Details** window displays rankings of visitors by number of activities within a specific site collection/site.

To access the **View Details** window for viewing the number of activities performed by each visitor in a specific site collection/site, choose either of the following methods:

- Click a point on the line representing the site collection/site for which the details you want to view in the chart. The **View Details** window for the selected site collection/site appears.
- Click **View Details** above the chart. The **View Details** window appears. The default displayed scope of the **View Details** window is the first displayed scope on the left above the chart. To change the scope for the data shown in the window, complete the following steps:
    i. Click the name of the currently selected scope in the upper-left corner, a drop-down menu appears.
    ii. Click **Change Scope**. The window for changing the scope appears.
    iii. Select the site collection/site for which you want to view the data in the report. You can also search the desired site collection/site by entering the site title in the text box.
    iv. Click **OK** to save the change and return to the **View Details** window.

In the **View Details** window, you can also perform the following operations:

- **Export** – Export the details in **XLSX** format to a SharePoint folder/library. For details, refer to Exporting Site Visitors Reports.
- **Data Range** – Select the data range of the data displayed in the **View Details** window by selecting **All**/**Top 100**/**Top 50**/**Top 20**/**Top 10**.

Exporting Site Visitors Reports

To export a Site Visitors report in **XLSX** format to SharePoint folder/library, complete the following steps:

1. To access the **Export** window for configuring the export report settings, choose either of the following two methods:
    - Click **Export** in the upper-right corner of the report display pane.
    - Click **Export** in the upper-left corner of the **View Details** pop-up window.
2. In the **Export** window, configure the following settings:
    - **Export Location** – Click **Browse** and then select a desired folder/library where you want to store the export report on the tree in the dialog window.
    - **Date Range** – Select a desired time range for the data included in the exported report.
    - **Frequency** – Select the frequency for displaying the data in the exported report.
    - **Site Visitors** – Select the **Include all** checkbox to include all of data in the exported report, or select the **Top __ visitors** checkbox, and then enter an integer into the text box to designate the number of the top ranking visitors to be included in the report.
3. Click **OK** to export the report immediately. A notification message appears, informing that the exporting has started.
4. Click **OK** to close the window.

Top Document by Social Activities

This report provides rankings of documents which have been viewed the most and/or have the most followers and/or likes within each selected site collection/site.

The display pane has a number of configurable settings for customizing how the report is displayed. If desired, configure the following settings in the display pane:

- **All/Followers/Views/Likes** – Customize the type of data shown in the report. Select **All** to view a ranking by the sum of followers, views and likes of the documents. Select **Followers** to view a ranking by number of followers of documents. Select **Views** to view a ranking by the number of views of documents. Select **Likes** to view a ranking by the number of likes of documents. Note that this Web part does not provide a ranking by **Followers** and **Likes** in SharePoint 2010.
- **Link** – Click the title of a specific document to view it.
- **Advanced** – Click on a file name in the list, and view the details of the specified document in the pop-up window on the right. At the bottom of the window, click **Open** to open the document and click **View Library** to jump to the library where it resides.
- **Export** – Export the report in **XLSX** format to a SharePoint folder/library by completing the following steps:
    i. Click **Export** in the upper-right corner. The **Export** window appears.
    ii. **Export Location** – Click **Browse** and then select a desired folder/library where you want to store the export report on the tree in the dialog window.

iii. **Date Range** – Select a desired time range for the data included in the exported report.

iv. **Top Documents** – Select the number and data metrics for the documents you want to include in the exported report, by entering an integer between 1 and 100 into **Top_ documents by** and selecting the **Select All**/**Total Activities**/**Followers**/**Likes**/**Views** checkboxes.

v. Click **OK** to export the report immediately. A notification message appears, informing that the exporting has started.

vi. Click **OK** to close the window and return to the report display pane.

Content Type Usage

This report displays the latest content type usage details within the selected site collections or sites. In the report display pane, you can view the numbers of sites, lists, and items where each content type is currently used. The display pane has a number of settings for customizing how the report is displayed. If desired, configure the following settings:

- **Content Type** – To view the detailed information of a specific content type, click the link listed in the **Content Type** column to access the **Content Type Information** page of the selected content type in the corresponding site.
- **View Details** – To view the detailed information of the sites or lists where a specific content type is currently used, click the link in the **Total Sites**/**Total Lists** column to access the **View Details** window for the selected content type.
- **Export** – Export the report in **XLSX** format to a SharePoint folder or library by completing the following steps:

    i. Click **Export** in the upper-right corner. The **Export** window appears.

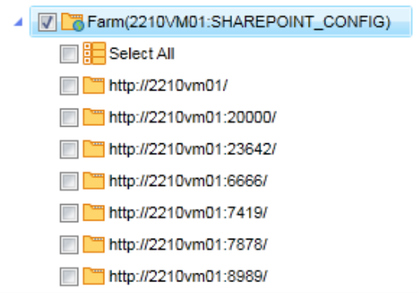
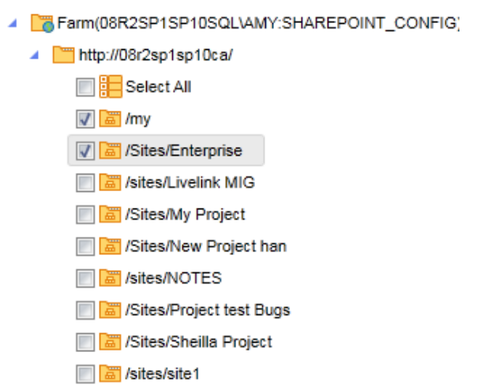
    ii. **Export Location** – Click **Browse** and then select a desired folder or library where you want to store the export report on the tree in the dialog window.

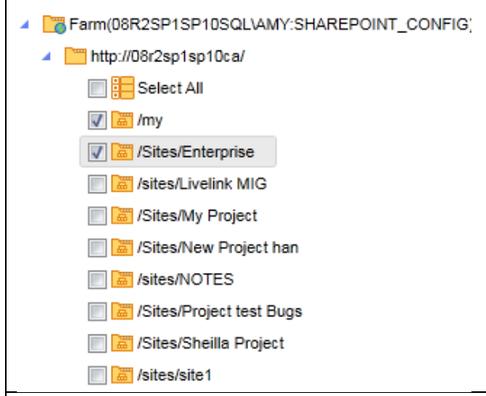
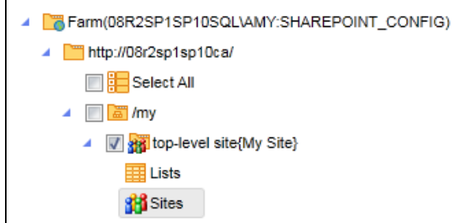
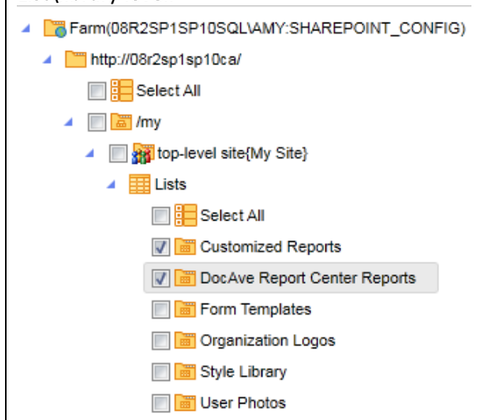
    iii. Click **OK** to export the report immediately. A notification message appears, informing that the exporting has started.

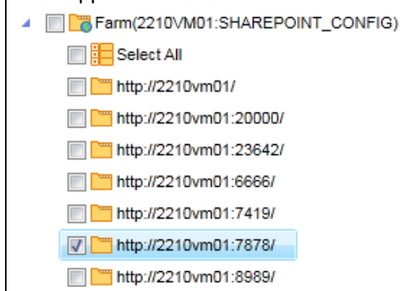
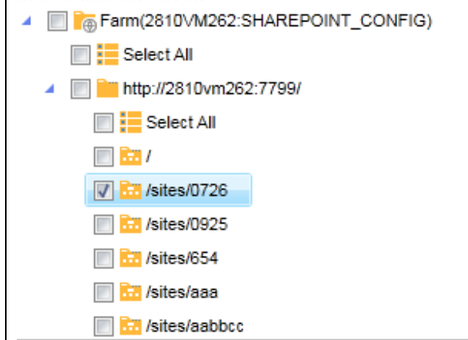
    iv. Click **OK** to close the window and return to the report display pane.

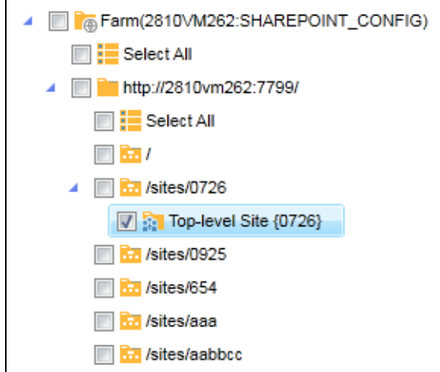
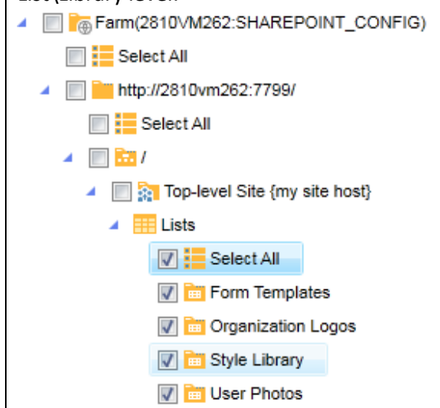
Appendix A: Supported Object Levels of DocAve Report Center Reports

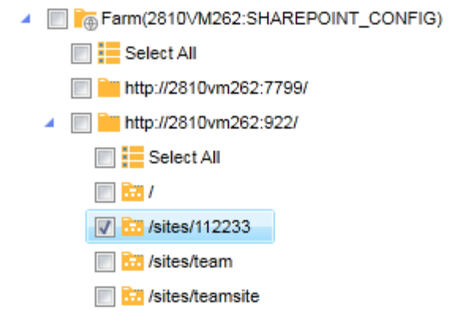
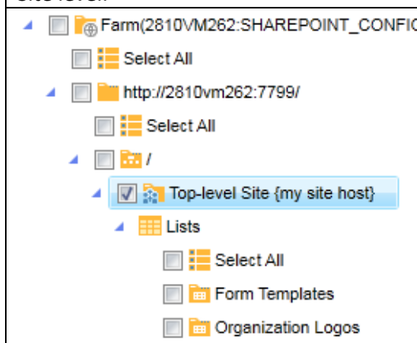
Refer to the table below to view the supported object levels of each report available in DocAve Report Center.

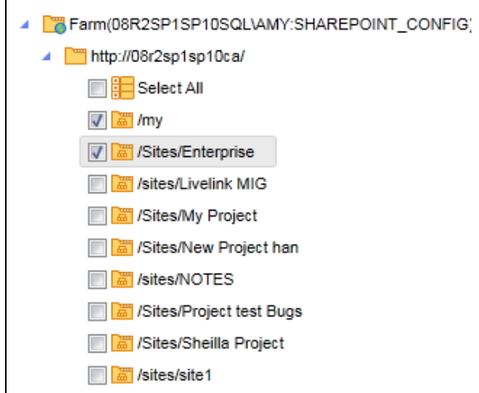
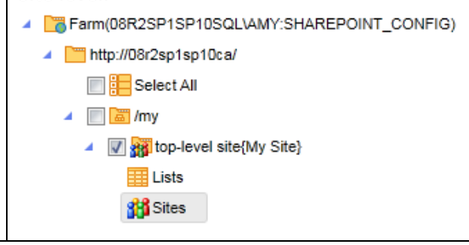
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Search Usage	√			√			The Web Analytic service in SharePoint must be started; otherwise the Search Usage Collect job will fail.	Farm level:  Site collection level: 

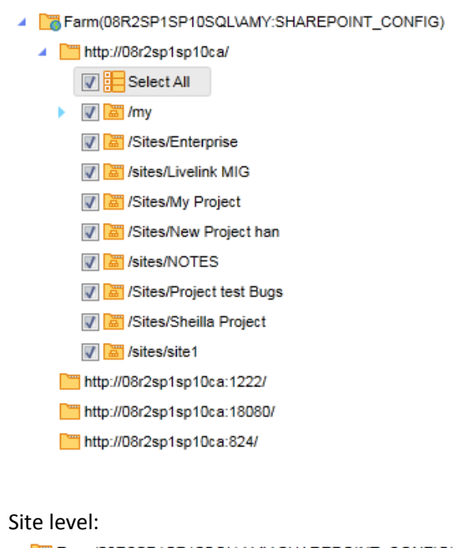
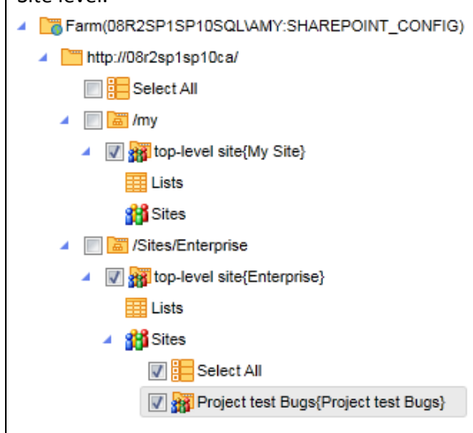
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Site Visitors and Activity				√	√	√	You can generate a **Site Visitors and Activity** report of documents and items by manually inputting the URLs. Ensure that you have collected audit data for the site collection/site where the entered URLs reside.	Site collection level:  Site level:  List\library level: 

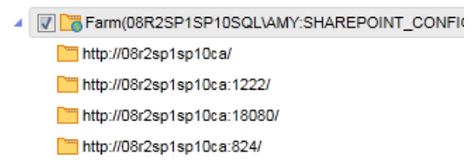
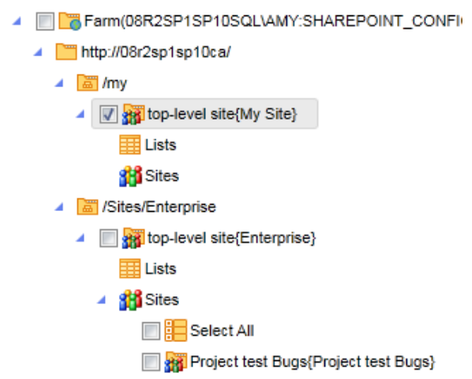
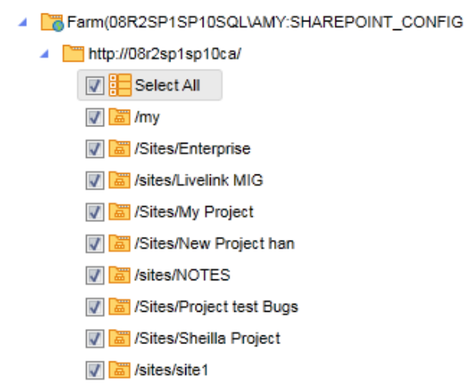
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Checked-Out Documents		√		√	√	√		Web application level:  Site collection level: 

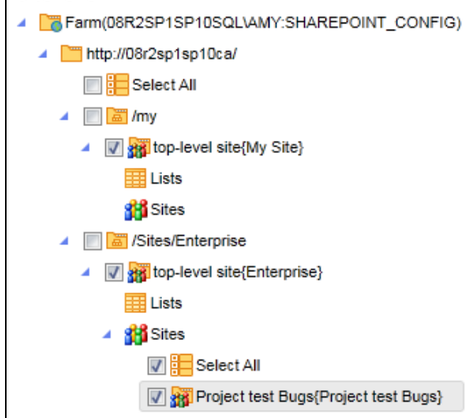
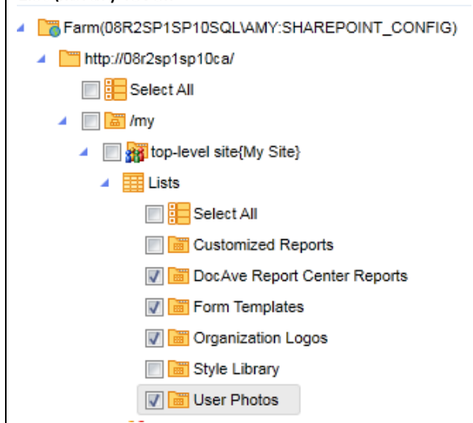
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Site level:  List\Library level: 

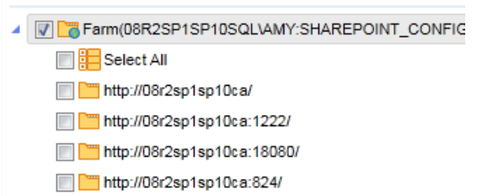
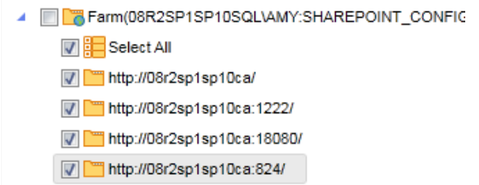
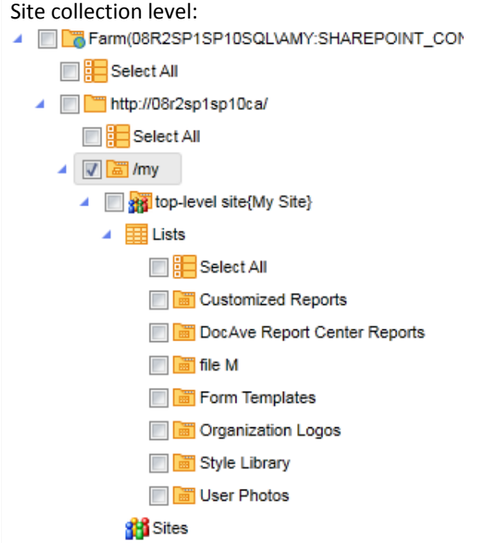
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Page Traffic				√	√			Site collection level:  Site level: 

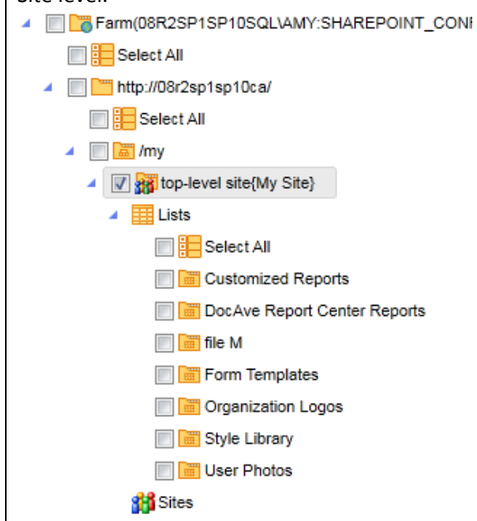
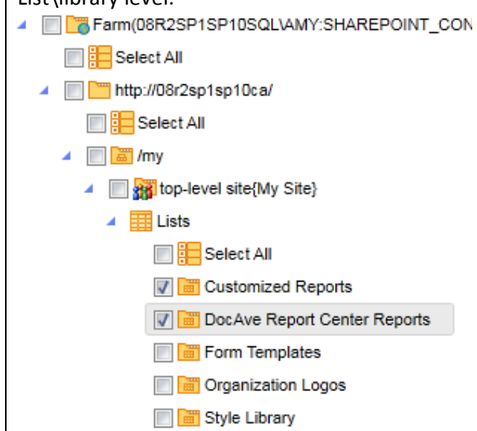
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Referrers				√	√		This feature is specific for SharePoint 2010. Before generating a referrers report, you must configure the data in SharePoint following the instructions below: 1. Go to your SharePoint 2010 environment. 2. Navigate to **Central Administration** > **Monitoring** > **Configure health data Collection**. 3. Enable Health Data Collection. Click **Log Collection Schedule,** and then enable all the log collection schedules. ***Note**: The site collections or Sites selected have to be limited within the same farm instead of multiple farms.	Site collection level: 
								Site level: 

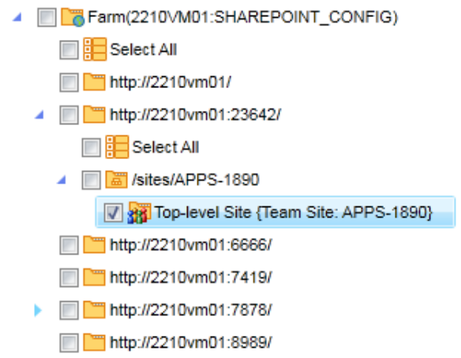
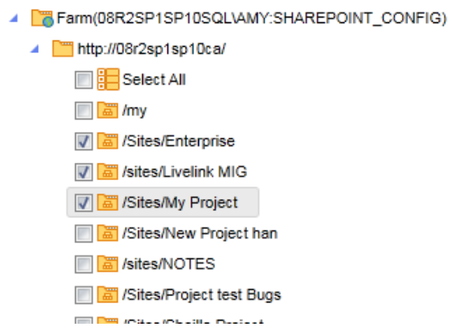
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Last Accessed Time				√	√		SharePoint Audit must be enabled for any site collection you want to generate this report for.	Site collection level:  Site level: 

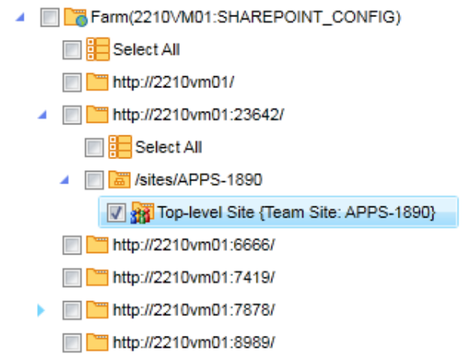
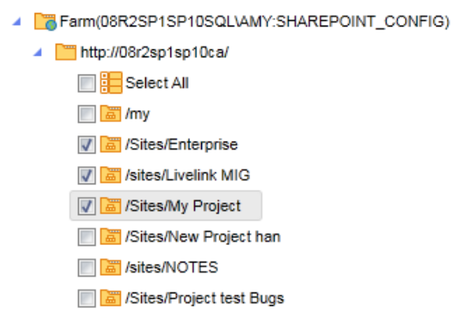
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Failed Login Attempts	√				√		To get the failed login attempts information, you must first configure IIS Logging. For details on configuring IIS Logging, see the IIS Logging section of this guide.	Farm level:  Site level: 
Workflow Status				√	√	√	Workflow Status does not support generating reports for Nintex workflows.	Site collection level: 

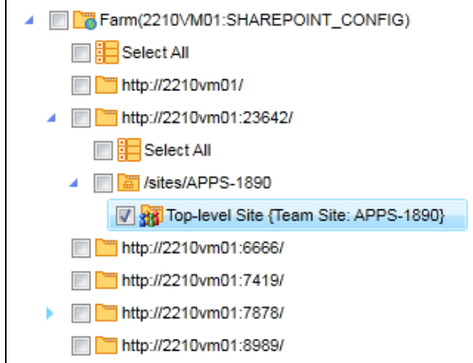
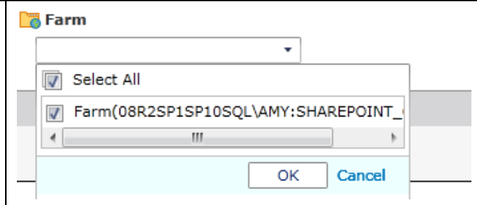
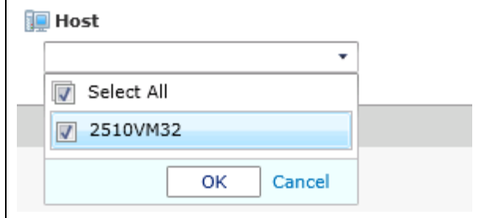
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Site level:  List\library level: 

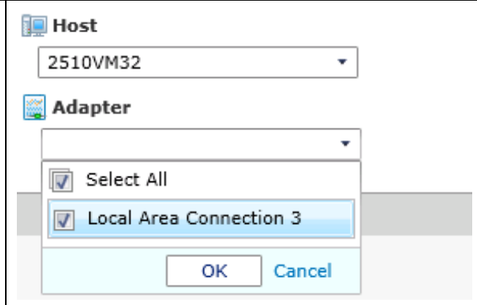
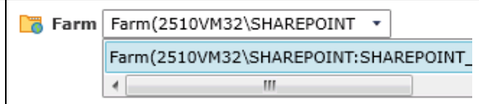
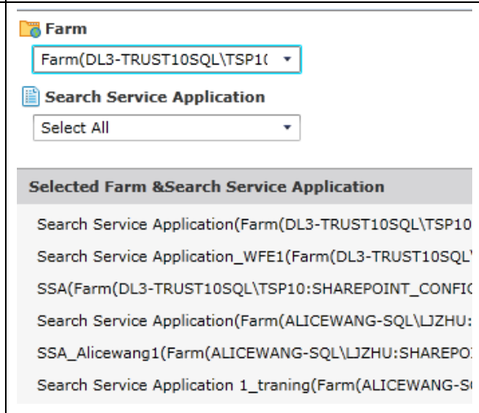
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
SharePoint Alerts	√	√		√	√	√		Farm level:  Web application level:  Site collection level: 

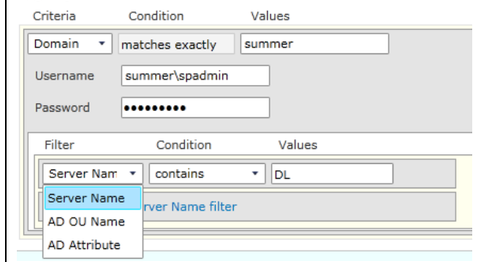
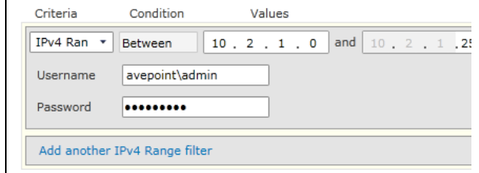
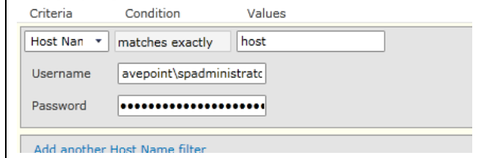
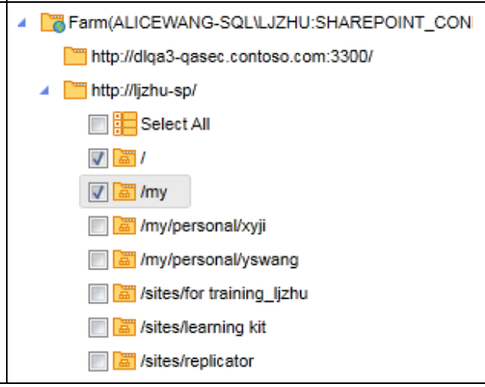
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Site level:  List\library level: 

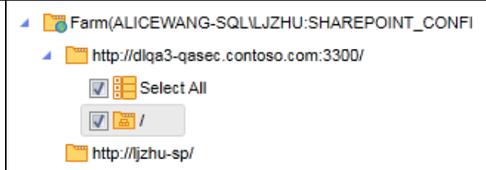
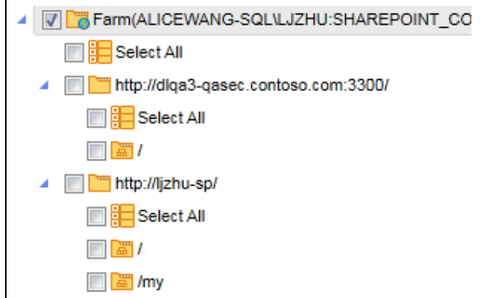
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Download Ranking					√		To get download ranking information, you must first configure IIS logging. For details on configuring IIS Logging, see the IIS Logging section of this guide.	Site level: 
Site Activity Ranking				√	√			Site collection level: 

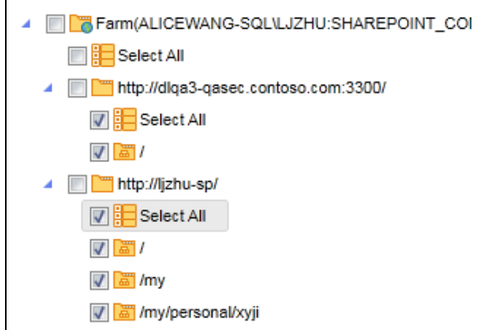
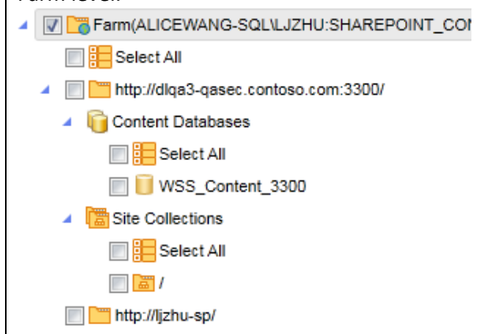
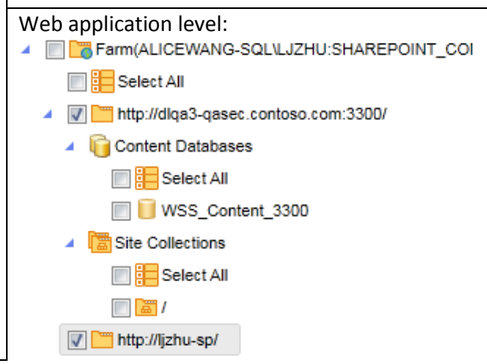
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Site level: 
Active Users		√		√	√	√		Web application level:
								Site collection level: 

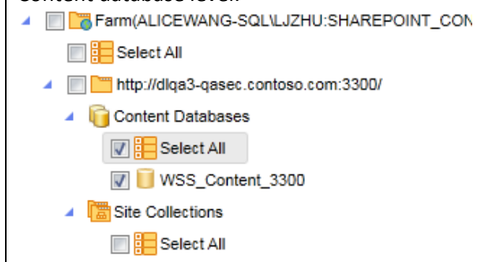
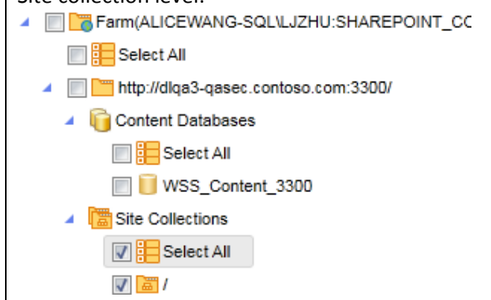
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Site level: 
SharePoint Services	√							
CPU/Memory Usage							A CPU/Memory Usage report provides a real time monitoring of the CPU and memory usage of the host machine where the DocAve Agent is located. The object you select to generate the CPU\Memory Usage report is the host machines which installed the DocAve Agents.	

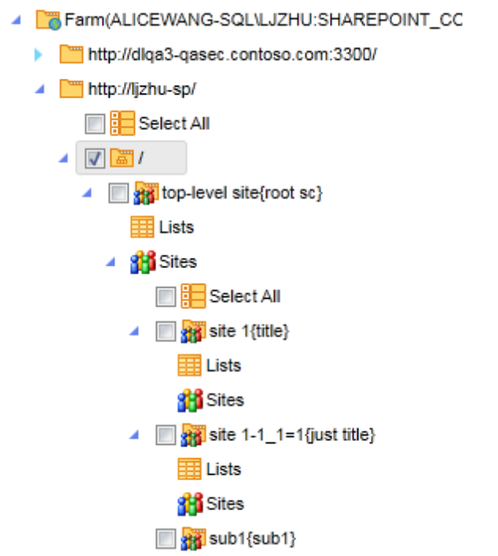
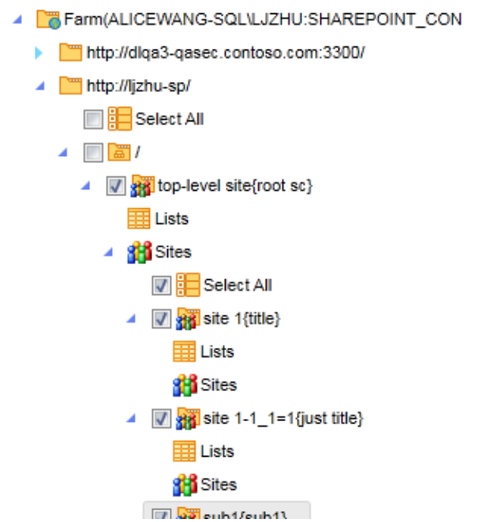
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Networking							A Networking report provides real-time information on networking usage (both wired and wireless) of DocAve Agent servers. The objects you must select to generate the Networking report are the host machine where DocAve Agent is installed and the host machine's network adapter.	
SharePoint topology	√						SharePoint Topology report is able to display information about one farm at a time.	
SharePoint Search Services	√						In the Scope configuration area, select the Farm you want to view from the drop-down menu. Then select the Search Service Application from the drop-down menu.	

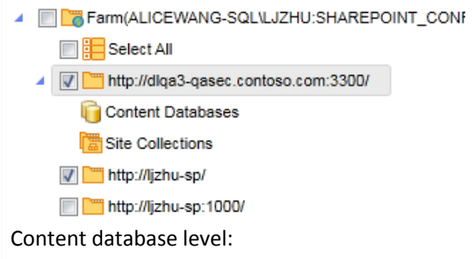
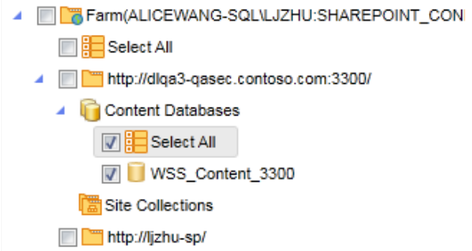
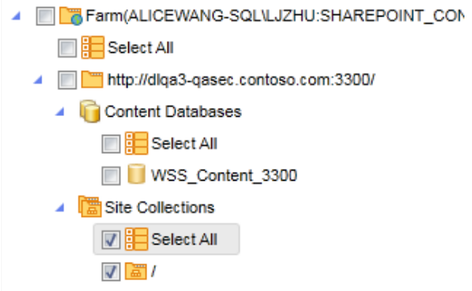
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Environment Search							Environment Search generates reports for objects in specified environments, such as host, farm as well as services, servers and their status in farm. Environment Search reports provides you three criteria to filter your desired environment information. They are respectively: Domain, IPv4 range, and Host name.	Domain:  IPv4 range:  Host name: 
Site Collection Comparison				√				

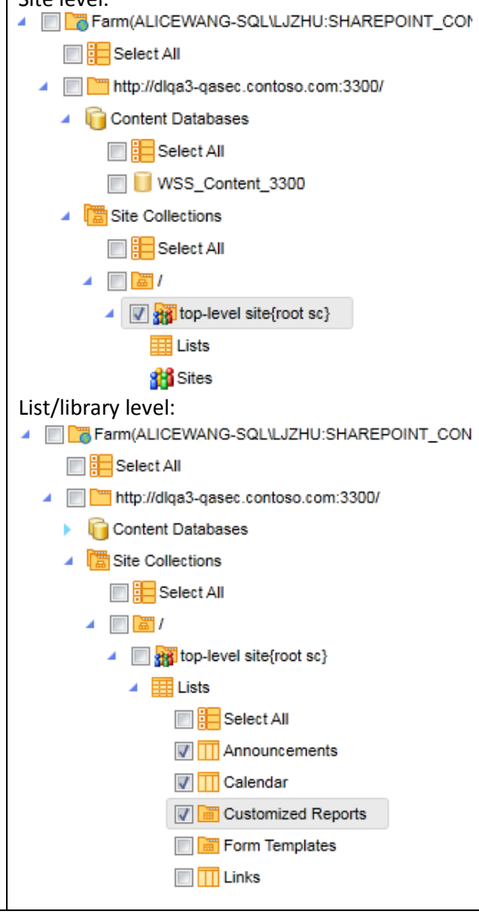
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Site Collection Load Time				√				
Storage Trends	√	√		√				Farm level:  Web application level:

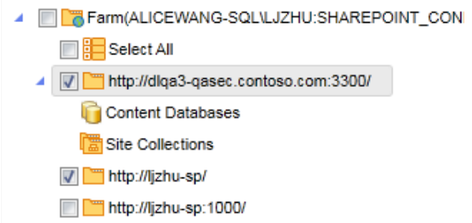
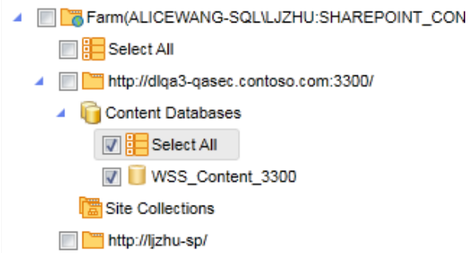
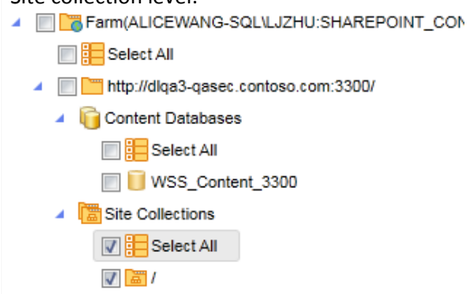
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Site collection level: 
Storage Analyzer	√	√	√	√				Farm level:  Web application level: 

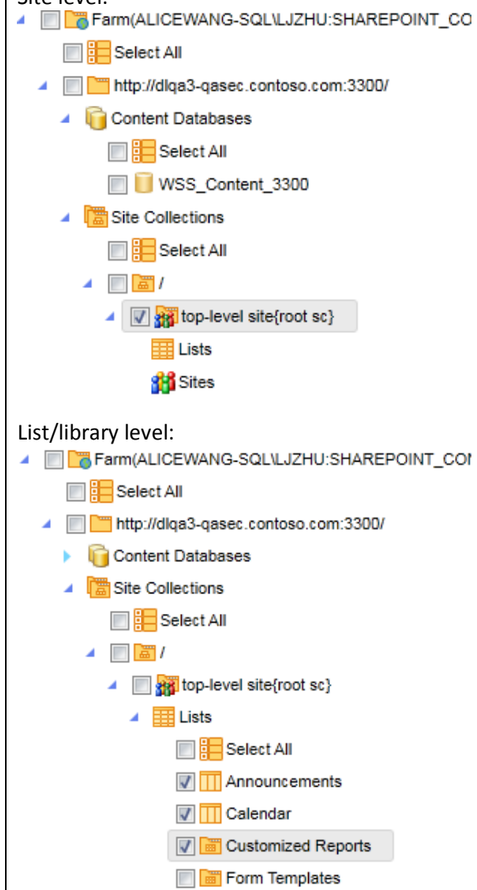
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Content database level:  Site collection level: 

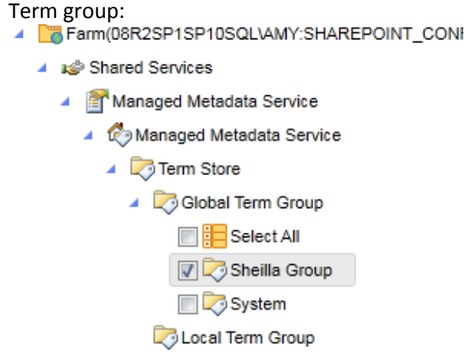
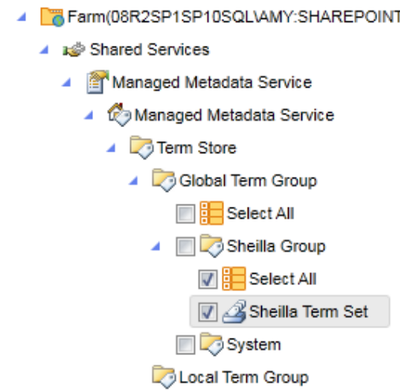
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
User Storage Size				√	√			Site collection level:  Site level: 

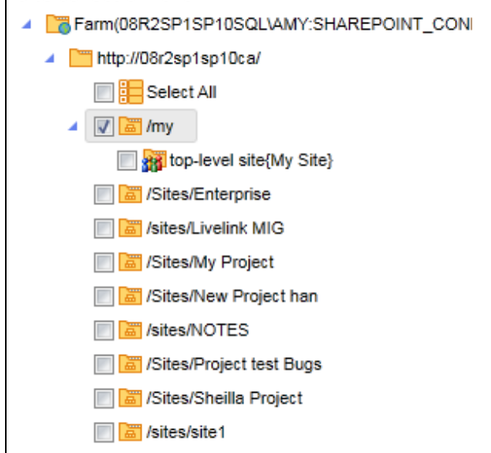
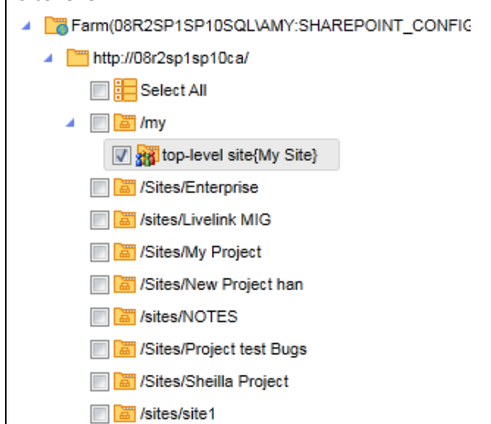
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Configuration Reports	√	√	√	√	√	√	The **Configuration Reports** do not support reporting on the **Site Collection/Site Usage** in SharePoint 2013. To include **Site Collection/Site Usage** in the **Configuration Reports**, ensure the Web Analysis service is started in SharePoint 2010.	Farm level: Web application level:  Content database level:  Site collection level: 

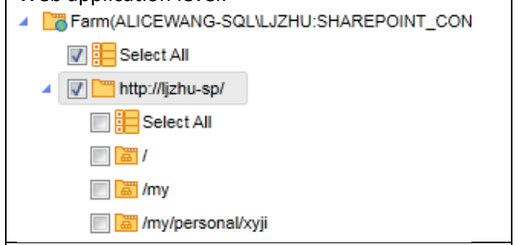
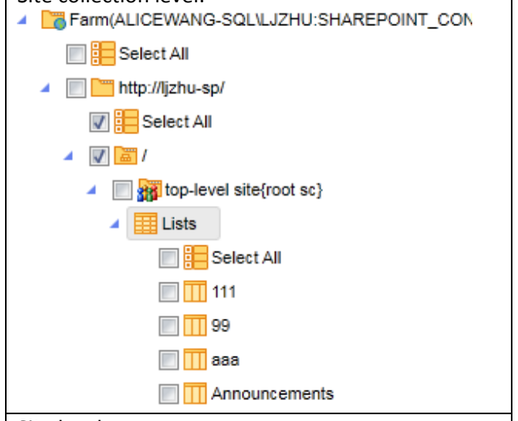
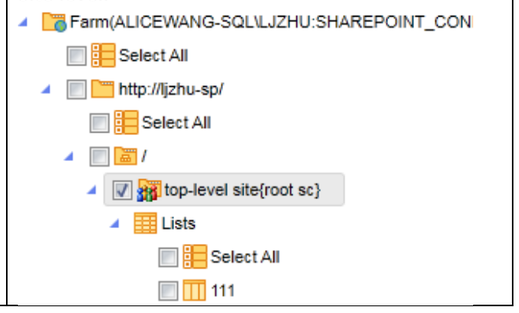
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Site level:  List/library level:

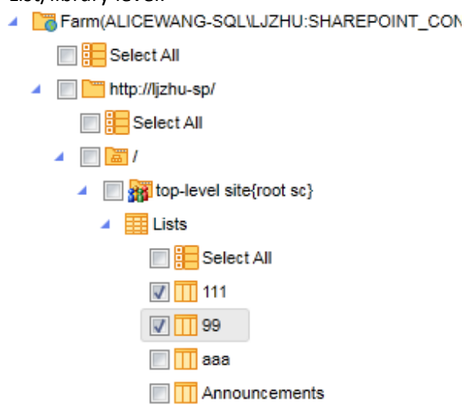
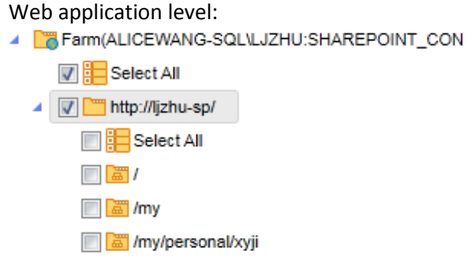
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Best Practice Reports	√	√	√	√		√	Use threshold profile as the measure to evaluate whether your SharePoint environment is healthy or not. In the farm level threshold profile, the **Social Tags, Notes and Ratings** threshold is not supported for the ratings data in SharePoint 2013.	Farm level: Web application level:  Content database level:  Site collection level: 

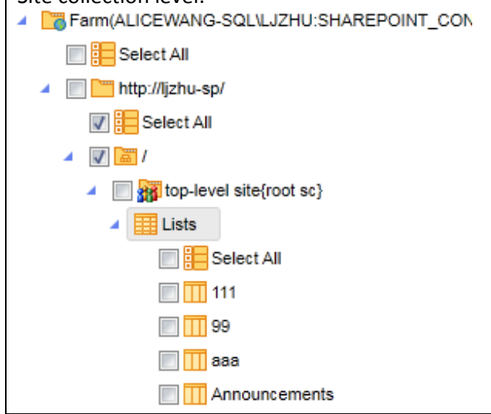
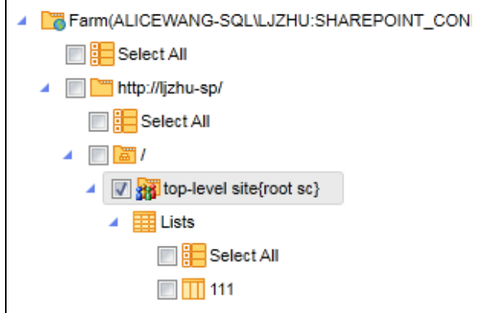
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Site level:  List/library level:

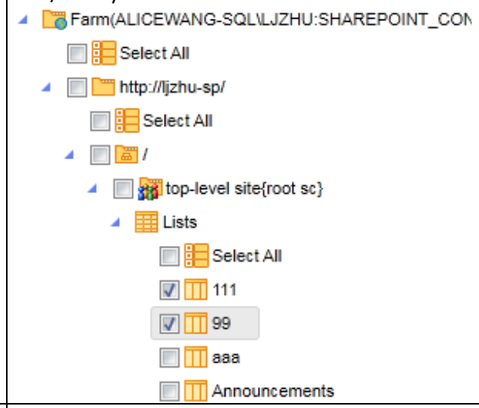
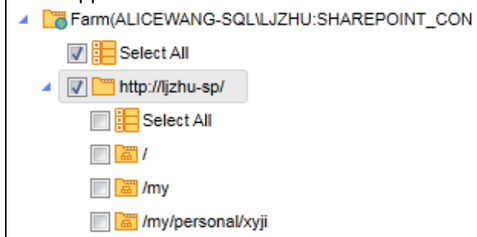
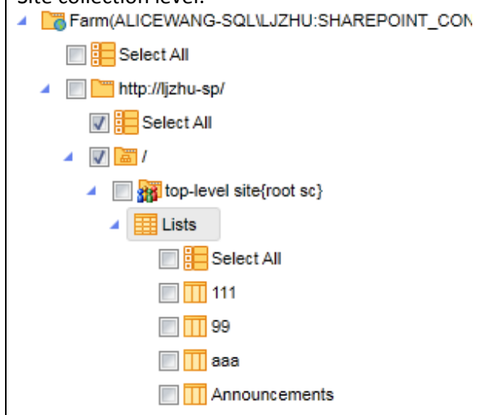
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Term Store Changes							Term Store Changes enables you to track changes of metadata across your SharePoint environment. It reports the changes of the term groups, term sets, and terms in the Managed Metadata Service Application. In order to collect the Term Store Changes records, you must select the report level of **Term Group** or **Term Set.**	Term group:  Term set: 

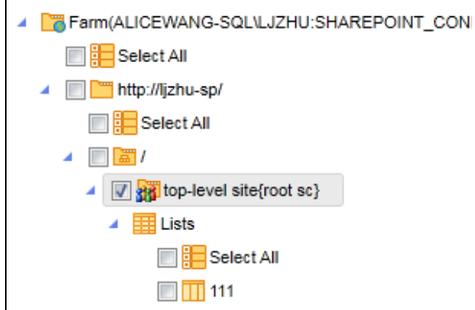
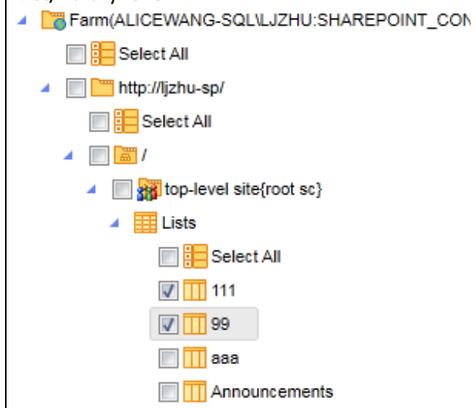
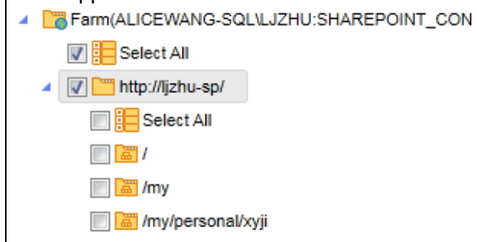
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Content Type Usage				√	√			Site collection level:  Site level: 

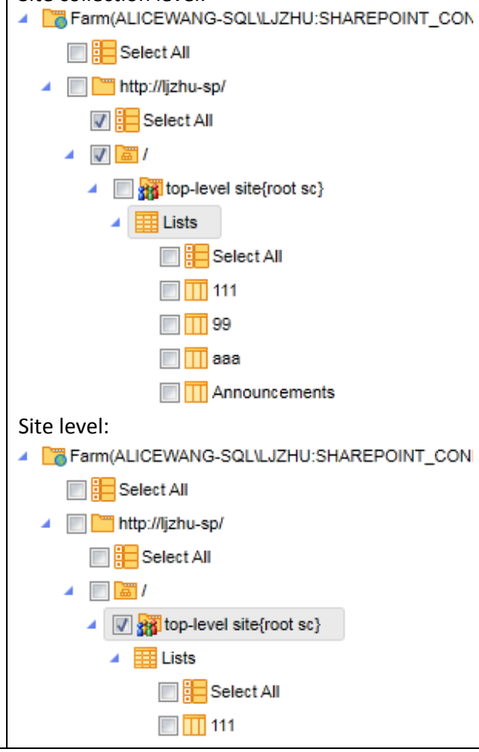
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Information Management Policies		√		√	√	√		Web application level:  Site collection level:  Site level: 

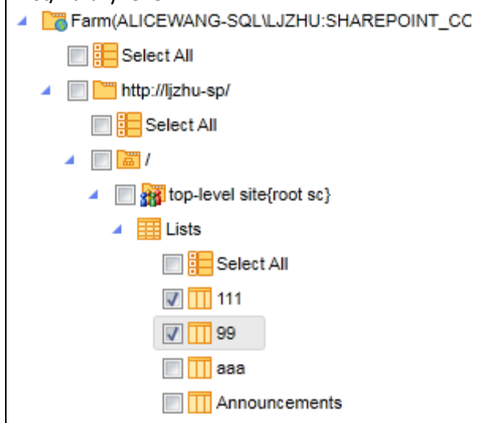
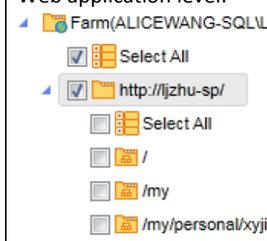
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								List/library level: 
Upcoming Content Expiration		√		√	√	√		Web application level: 

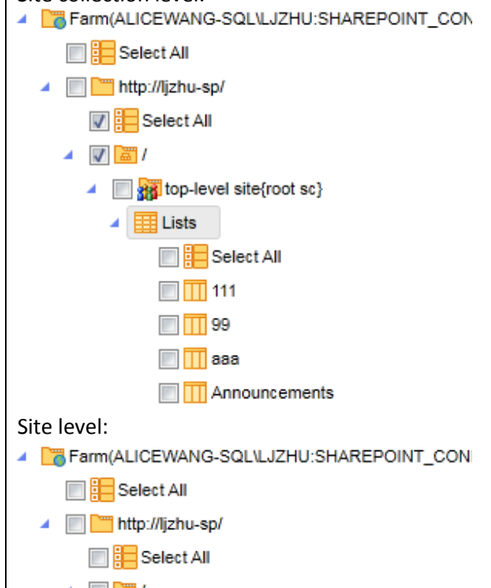
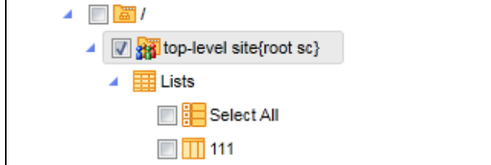
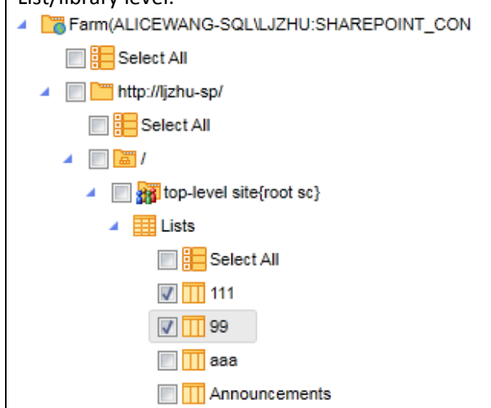
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Site collection level:  Site level: 

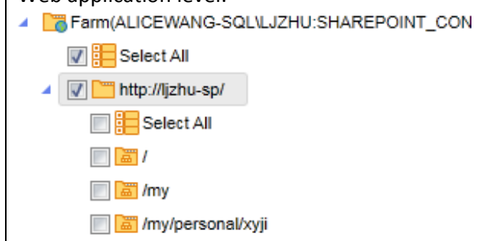
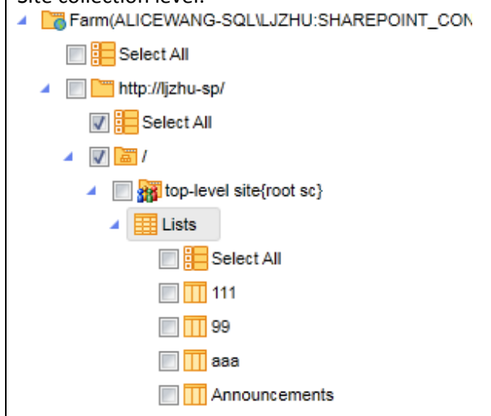
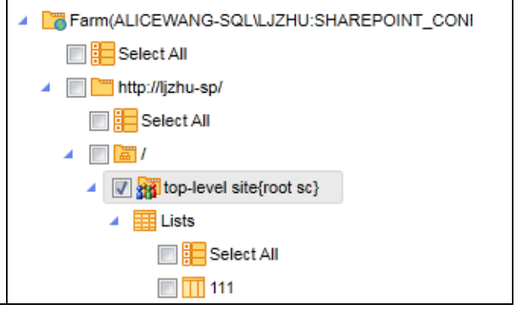
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								List/library level: 
User Lifecycle		√		√	√	√	Only the SharePoint objects with Auditor records retrieved can be displayed on the tree. Before running the report, you must collect the auditing data in Audit Controller.	Web application level:  Site collection level: 

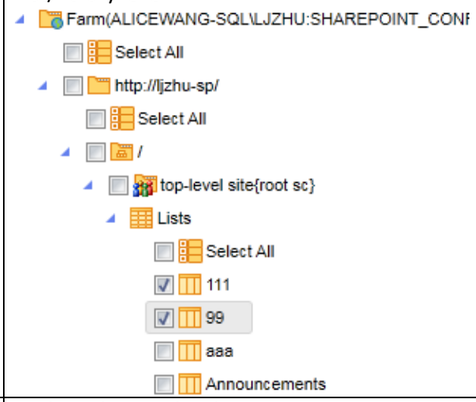
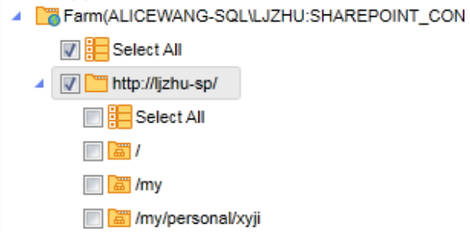
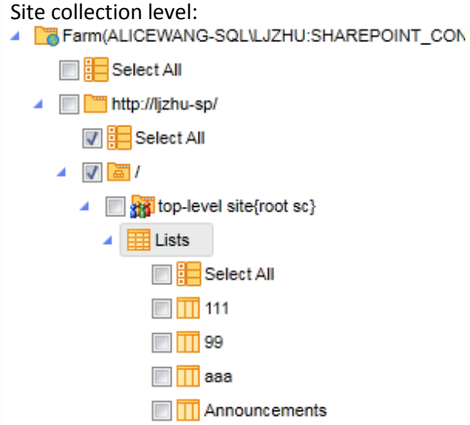
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Site level:  List/library level: 
List Access		√		√	√	√	Only the SharePoint objects with Auditor records retrieved can be displayed on the tree. Before running the report, you must collect the auditing data in Audit Controller.	Web application level: 

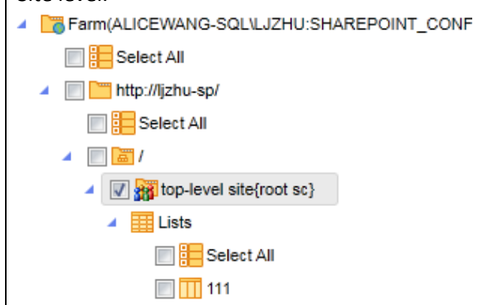
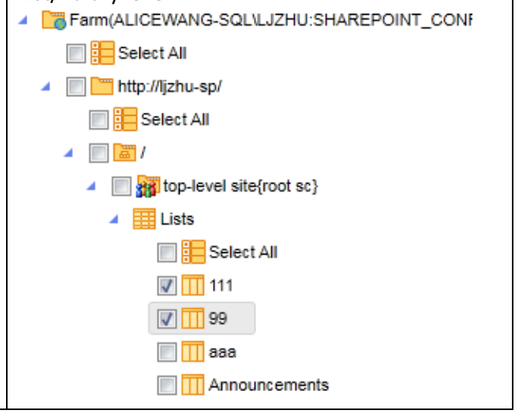
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Site collection level:  Site level:

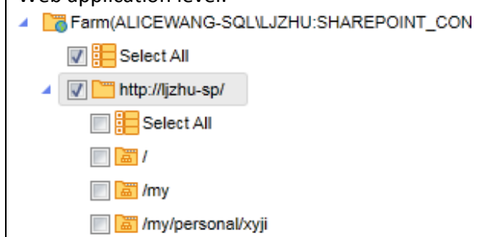
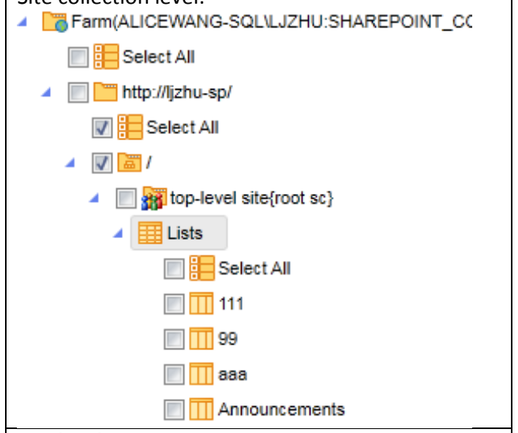
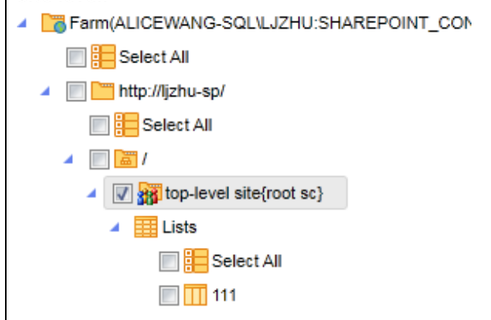
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								List/library level: 
Item Lifecycle		√		√	√	√	Only the SharePoint objects with Auditor records retrieved can be displayed on the tree. Before running the report, you must collect the auditing data in Audit Controller.	Web application level: 

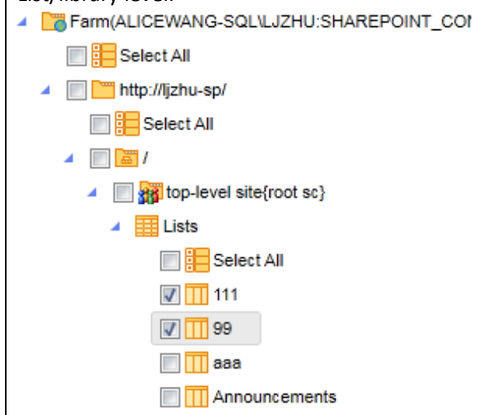
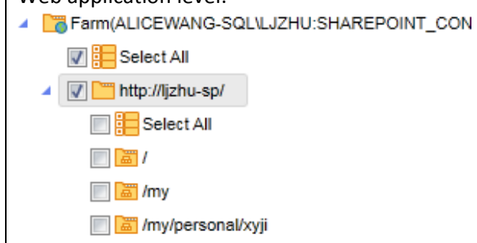
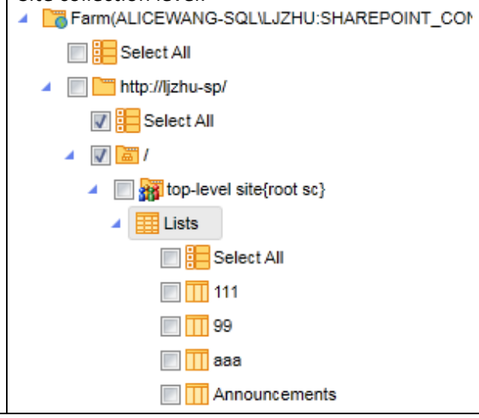
								Site collection level:  Site level:  List/library level: 

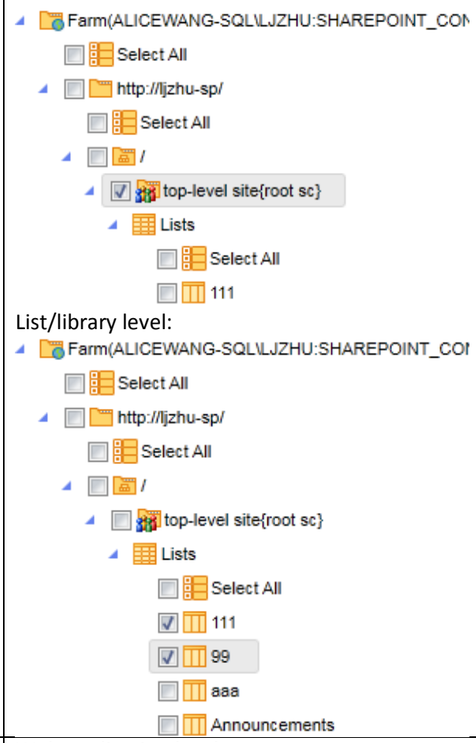
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Site Access		√		√	√	√	Only the SharePoint objects with Auditor records retrieved can be displayed on the tree. Before running the report, you must collect the auditing data in Audit Controller.	Web application level:  Site collection level:  Site level: 

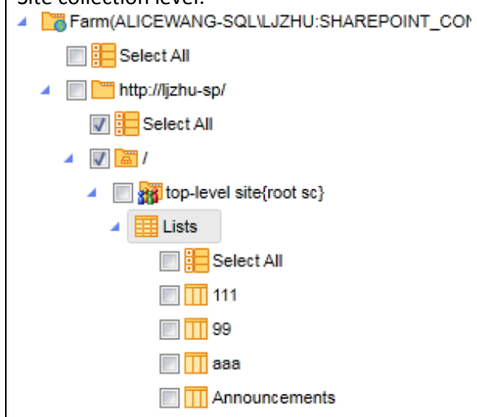
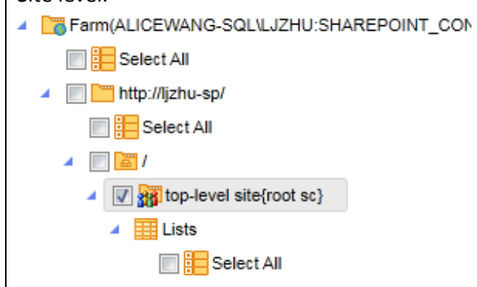
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								List/library level: 
List Deletion		√		√	√	√	Only the SharePoint objects with Auditor records retrieved can be displayed on the tree. Before running the report, you must collect the auditing data in Audit Controller.	Web application level:  Site collection level: 

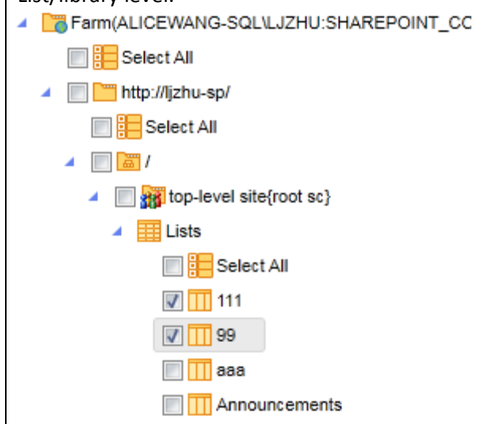
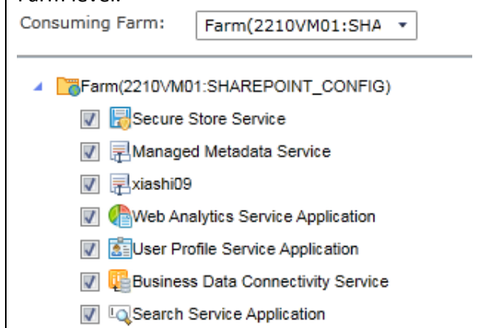
Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Site level:  List/library level: 

Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
Permission Changes		√		√	√	√	Only the SharePoint objects with Auditor records retrieved can be displayed on the tree. Before running the report, you must collect the auditing data in Audit Controller.	Web application level:  Site collection level:  Site level: 

Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								List/library level: 
Content Type Changes		√		√	√	√	Only the SharePoint objects with Auditor records retrieved can be displayed on the tree. Before running the report, you must collect the auditing data in Audit Controller.	Web application level:  Site collection level: 

Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Site level:  List/library level:
Custom Report		√		√	√	√	Only the SharePoint objects with Auditor records retrieved can be displayed on the tree. Before running the report, you must collect the auditing data in Audit Controller.	Web application level:

Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								Site collection level:  Site level: 

Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								List/library level: 
Cross-Farm Service Configuration	√							Farm level: 
Usage Activity Web Parts	√	√		√	√		The **Most Popular Contributors** web part is specific for SharePoint 2013.	Farm level:

Report Level\ What to Report	Farm	Web application	Content Database	Site Collection	Site	List/ Library	Notes	What to Select
								○ Current site, including subsites ○ Current site collection ◉ Current Web application ◉ Current farm ○ Custom scope Web application level: ○ Current site, including subsites ○ Current site collection ◉ Current Web application ○ Current farm ○ Custom scope Site collection level: ○ Current site, including subsites ◉ Current site collection ○ Current Web application ○ Current farm ○ Custom scope Site level: ○ Current site, including subsites ◉ Current site collection ○ Current Web application ○ Current farm ○ Custom scope

Appendix B: DocAve Module Actions Audited by DocAve Auditor

Product	Module	Action
Migration	SharePoint Migration, Lotus Motes Migration, File System Migration, Livelink Migration, eRoom Migration, Exchange Public Folder Migration, EMC Documentum Migration, Quickr Migration	Delete Plan
		Delete Main Profile
		Download Profile
		Run Jobs
		Save Connection
		Save Plan
		Save Main Profile
		Set as Default Profile
		Update Connection
		Update Plan
		Update Main Profile
		Delete Connection
		Save Sub-profile
		Update Sub-profile
		Delete Sub-profile
		Add to Plan Group
		Upload Profile
		Save Export Location
		Update Export Location
		Delete Export Location
		Save Import Location
		Update Import Location
		Delete Import Location
		Configure Migration Database
		Rerun with Debug Logging
Data Protection	Granular Backup and Restore	Backup Default Settings
		Save Schedule Scheme
		Delete Schedule Scheme
		Update Schedule Scheme
		Edit End User Restore
		End-User Granular Restore: Activate Feature
		End-User Granular Restore: Deactivate Feature
		End-User Granular Restore: Edit Advanced Settings
	Platform Backup and Restore	Run Job
		Update Plan
		Delete Plan
		Create Plan

		Load Plan
		Run Migration
		Run Farm Rebuild
		Run Farm Repair
		Run Maintenance
		Run Restore Job
		Load Custom Database
	SQL Server Data Manager	Staging Policy
		Filter Policy
		Analyze SQL Backup Files
		Restore SQL Server Data
		Restore Data From Database
		Analyze VHD Files
	High Availability	Create Group
		View Group
		Edit Group
		Delete Group
		Run Pre-scan Job
		Run Synchronization Job
		Run Failover Job
		Run Fallback Job
		Create Throttle Control Profile
		Edit Throttle Control Profile
		Delete Throttle Control Profile
		Edit SQL Instance Setting
		Create Script Profile
		Edit Script Profile
		Delete Script Profile
		Create Command Profile
		Edit Command profile
		Delete Command Profile
Administration	Administrator	Configuration
		Set Configuration
		Add Configuration
		Delete Configuration
		Read Configuration
		Test Configuration
		Clone Permissions
		Create Web Application
		Create Site Collection
		Create Site
		Create List or Library
		Create Folder
		Delete
		Admin Search
		Security Search

		Duplicate File Search
		Search Web Part
		Clone User Permission
		Clone Site Permission
		Import Configuration File
		Dead Account Cleaner
		Move Site Collection
		Delete Orphan Site
		Check Broken Link
		Break Inheritance
		Add Inheritance Relationship
		Delete Temporary Permission
		Online Change Column Metadata
		Offline Export Report
		Offline Change Column Metadata
		Run Policy Enforcer Job
		Policy Enforcer Fix
	Content Manager	Create Plan
		Update Plan
		Delete Plan
		Run Job
		Modify Default Settings
	Deployment Manager	Create Plan
		Update Plan
		Run Job
		Test Run
		Add to Queue
		Edit Queue
		Delete Queue
		Delete Plan
		Upload Plan
		Generate Comparison Report
		Check App Update
		Push App Update
		Solution Management
		Download Plan
		Create Plan and Run
		Create Plan and Test Run
		Update Plan and Run
		Update Plan and Test Run
	Replicator	Create Plan
		Update Plan
		Delete Plan
		Run Jobs

		Create Profile
		Update Profile
		Delete Profile
		Set as the Default Profile
		Save Replicator Publishing Template
		Update Replicator Publishing Template
		Delete Replicator Publishing Templates
Compliance	eDiscovery	Configure a Compliance Database
		Enable or Disable the Search Service Application(s)
		Save Content Source
		Delete Content Source
		Create Hold
		Delete Hold
		Save Plan
		Delete Plan(s)
		Apply Legal Hold
		Release Legal Hold(s)
		Export Search Results or Hold Information
		Save Export Location
		Delete Export Location(s)
		Perform a SharePoint or Archiver Search
		Crawl Document/Item Version
		Perform Sync Hold Action between SharePoint and DocAve
		Run Plan(s)
	Vault	Create Processing Pool
		Edit Processing Pool
		Delete Processing Pool(s)
		Create Profile
		Edit Profile
		Delete Profile(s)
		Apply Vault Profile
		Run Vault Profile
		Inherit from Parent
		Break Inheritance
		Remove Applied Profile
		Retract Applied Profile
		Create Rule

		Update Rule
		Delete Rule
Report Center		Run Collector
		Update Advanced Settings
		Activate Feature
		Deactivate Feature
		Run Auditor Apply Rule
		Run Auditor Retrieve Data
		Run Auditor Report
		Run Auditor Pruning
		Run Configuration Report
		Generate Report
		Export Report
		Create Plan
		Update Plan
		Delete Plan
		Save Profile
		Update Profile
		Delete Profile
		Update Reporting Service Configuration
		Update IIS Login Information
		Update Collector Settings
		Run Pruning Job
		Run Restore Job
		Enable Plan
		Disable Plan
Storage Optimization	Storage Manager	Create Processing Pool
		Delete Processing Pools
		Delete Processing Pool
		Update Processing Pool
		Create Stub Database
		Configure BLOB Provider
		Enable RBS Settings
		Load All Settings
		Save Sync Deletion Plans
		Delete Rules
		Get Real-time Rule Information
		Get Scheduled Rule Information
		Get Rules and Settings
		Get Real-time Rules and Settings
		Get Scheduled Rules and Settings
		Get Rule Information by Rule
		Get Rule Information by Node

		View Page Stub
		Browse Files
		Stub Restore
		Load Job
		Create Real-time Rule
		Create Scheduled Rule
		Edit Real-time Rule
		Edit Scheduled Rule
		Remove Real-time Rules
		Remove Scheduled Rules
		Remove Rules from the Node
		Inherit Real-time Rule
		Inherit Scheduled Rule
		Stop Inheriting Real-time Rule
		Stop Inheriting Scheduled Rule
		Edit Scheduled Settings
		Run Scheduled Rules
		Create Storage Manager Profile
		Edit Storage Manager Profile
		Delete Storage Manager Profiles
		Get Storage Report Profile and Job Mappings
		Save Storage Report Profile
		Validate Deleting Storage Report Profiles
		Delete Storage Report Profiles
		Save and Run Storage Report Profile
		Run Storage Report Profiles
		Process Storage Report Summary and Details
		Get Storage Report Summary
		Export Storage Report
		Configure Shred Size
		Deactivate Stub Trace Feature
		Activate Stub Trace Feature
		Deactivate Alternate File Access Feature
		Activate Alternate File Access Feature
		Configure Alternate File Access Feature Settings
	Connector	Create Common Mapping
		Create Property Mapping
		Create Security Mapping

		Create SharePoint Permission Mapping
		Edit Common Mapping
		Edit Property Mapping
		Edit Security Mapping
		Edit SharePoint Permission Level
		Delete Common Mapping
		Delete Property Mapping
		Delete Security Mapping
		Delete SharePoint Permission Level
		Delete Mapping
		Run Connector Inventory Report Job
		Run Sync Now Job
		Activate Features
		Deactivate Features
		Remove Connector Information
		Remove Sync Settings
		Configure Path Information
		Configure Sync Settings
	Cloud Connect	Create Common Mapping
		Create Property Mapping
		Edit Common Mapping
		Edit Property Mapping
		Delete Common Mapping
		Delete Property Mapping
		Delete Mapping
		Run Connector Inventory Report Job
		Run Sync Now Job
		Activate Features
		Deactivate Features
		Remove Connector Information
		Remove Sync Setting
		Configure Path Information
		Configure Sync Settings
	Archiver	Create Processing Pool
		Delete Processing Pools
		Delete Processing Pool
		Update Processing Pool
		Delete Rules
		Get Archiver Rule Information
		Get Rules and Settings
		Get Archiver Rules and Settings

		Get Rule Information by Rule
		Get Rule Information by Node
		Create Archiver Rule
		Edit Archiver Rule
		Remove Archiver Rules
		Remove Rules from the Node
		Run Archiver Rules
		Inherit Archiver Rule
		Stop Inheriting Archiver Rule
		Configure Index Device
		Get Node Calculation Summary
		Save Restore Plan
		Validate FS Destination Path Information
		Get Search Tree Result
		Run Retention Job
		Restart Retention Job
		Edit Archiver Settings
		Create Archiver Profile
		Edit Archiver Profile
		Delete Archiver Profiles
		Pre-Scan Retention
		Approval Center Export
		Configure Approval Alert Settings
Control Panel	Control Panel	Add Site Collection
		Edit Site Collection
		Delete Site Collection
		Create SharePoint Sites Group
		Edit SharePoint Sites Group
		Delete SharePoint Sites Group
		Create Column Mapping
		Update Column Mapping
		Delete Column Mapping
		Upload Column Mapping
		Create Content Type Mapping
		Update Content Type Mapping
		Delete Content Type Mapping
		Upload Content Type Mapping
		Create Group Mapping
		Update Group Mapping
		Delete Group Mapping
		Upload Group Mapping
		Create Language Mapping
		Edit Language Mapping
		Delete Language Mapping

		Upload Language Mapping
		Create List Name Mapping
		Update List Name Mapping
		Delete List Name Mapping
		Upload List Name Mapping
		Create Template Mapping
		Delete Template Mapping
		Upload Template Mapping
		Create Domain Mapping
		Edit Domain Mapping
		Delete Domain Mapping
		Upload Domain Mapping
		Create User Mapping
		Edit User Mapping
		Delete User Mapping
		Upload User Mapping
		Create Physical Device
		Update Physical Device
		Create Logical Device
		Update Logical Device
		Create Storage Policy
		Update Storage Policy
		Configure Agent
		Remove Agents
		Agent Control for Agent Monitor
		Agent Control
		Configure Configuration File
		Uninstall Agent
		Install Agent
		Delete Agent Group
		Update Agent Group
		Create Agent Group
		Add Permission Level
		Edit Permission Level
		Delete Permission Levels
		Add User to Given Group
		Edit Account
		Enable Specific Users
		Disable Specific Users
		Delete Groups
		Delete Accounts
		Add Group Member
		Edit Group
		Change Permission
		Add Account

		Update Domain
		Logoff Specific Users
		Update Pruning Settings
		Actions on Solution
		Actions on Web Application
		Delete All Language Logs
		Delete Language Package
		Change Passphrase Characters
		Backup Security Information
		Save Translation Engine
		Save System Settings
		Save Logo Image
		Reset Warning by User
		Update System Password Policy
		Update System Security Policy
		Save User Authentication
		Save Cache Settings
		Control Services
		Change All Control Services
		Save Notification Settings
		Delete Notification Settings
		Reset Notification Setting Status
		Create E-mail Notification Profile
		Update E-mail Notification Profile
		Save Log Settings
		Collect Log
		Install Update
		Save Update Settings
		Save Settings and Remove Update
		Delete Update
		Uninstall Update
		Create More Update Downloads
		Drop More Update Downloads
		Create Update Download
		Drop Update Download
		Pause Update Download
		Download Update
		Add Security Profile
		Edit Security Profile
		Deploy Solution and Reset Application Pool
		Retrieve Solution
		Retract Solution

		Reset IIS
		Repair Solution
		Remove Solution
		Upgrade Solution
		Install Solution
		Deploy Solution
		Retrieve Version
		Update Message
		Delete Managed Account Profile
		Edit Managed Account Profile
		Create Managed Account Profile
		Create Export Location
		Edit Export Location
		Delete Export Location
		Create Filter Policy
		Update Filter Policy
		Add Domain
		Create Host Profile
		Update Host Profile
		Delete Host Profile
		Configure Job Performance Alert Settings
		Remove Job Performance Alert Settings
	Plan Group	Create Plan Group
		Update Plan Group
		Delete Plan Group
		Run Plan Group
		Add Plan to Plan Group
		Remove Plan from Plan Group
		Update Plan in Plan Group
	Health Analyzer	Create Profile
		Edit Profile
		Delete Profile
		Stop Scanning Rule
		Rescan Rule
		Run Health Analyzer Job
		Export Health Analyzer Rule Details
		Configure Job Performance Alert Settings
		Remove Job Performance Alert Settings

Appendix C: Advanced Configurations

Customizing the Report Template

Report Template is used to standardize the formats of the different report types. To customize Report Template, complete the following steps:

1. From Microsoft Windows, navigate to **Start** > **All Programs** > **Microsoft SQL Server 2008 R2** > **Configuration Tools** > **Reporting Service Configuration Manager**, and then connect to your SQL Server. The Report Service Configuration Manager interface appears.
2. Click **Report Manager URL** tab in the left pane, and then click the corresponding URL link in the right pane to access it with your browser.
3. The browser displays the **SQL Server Reporting Services Home** page. In this page, double-click to open the **DocAve6RDLFolder** and find the report template you want to edit.
4. Hover your mouse over the template you want to edit, and click the downward arrow to open the drop-down menu. Click **Download** to save a local copy of the template in the specified location. After you have saved the copy of the specified template file, click **Edit in Report Builder** in the drop-down menu to edit the template file.
5. Perform the customization in **Microsoft SQL Server Report Builder** and save the modifications once you are satisfied with them.

Visualize the XLSX Report Data Using SharePoint Chart Web Part

The following configurations allow you to combine the SharePoint Chart Web Part functionality with the publishing reports to SharePoint document library function of DocAve. After you have exported XLSX report files to the SharePoint document library, you can use the chart Web part in SharePoint to generate the chart and display the exported XLSX format report data.

To generate the chart for the XLSX format report, complete the following steps:

1. In SharePoint, navigate to **Site Actions** > **Edit Page**, and then click **Insert** on the ribbon. The **Insert** tab will appear. Make sure the chart Web part and the XLSX report used by the chart Web part are in the same Web application.
2. Click **Web Part** on the ribbon, or click the **Add a Web Part** area to add a Web part.
3. Select **Business Data** in the **Categories** list, and then select the **Chart Web Part** from the **Web Parts** group. Click **Add**, and then a chart Web part appears.
4. In the **Chart Web Part** area, click **Data & Appearance** to enter the **Data Connection & Chart Appearance Wizards** page.

5. Click **Connect Chart to Data** to enter the **Data Connection Wizard** page to help you connect your chart Web part to a data source, and complete the following steps:

    - **Step 1: Choose a Data Source** – Select the **Connect to Excel Service** radio button to connect the chart Web part to the data from an Excel workbook using Excel Services. Click **Next** to go to the next step.
    - **Step 2: Connect to Data from Excel Services** – Configure the Excel Services Connection. The **Excel Web Service URL** is entered by default.

      Enter the XLSX report file's full URL into the **Excel Workbook Path** text box, for example, http://avepoint:10000/sites/docave/DocAve Report Center Reports/Site Activity Ranking.XLSX. Then, enter the valid range into the **Range Name** text box. The **First Row Contains Column Names** checkbox was checked by default. Therefore, the values in the first row will be regarded as the table header, and they are not regarded as data. Click **Next** to go to the next step.
    - **Step 3: Retrieve and Filter Data** – You can view the data that is retrieved from Excel Services being displayed in the list. Optionally, you can add parameters to filter the data in the **Filters** area. Click **Next** to go the next step.
    - **Step 4: Bind Chart to Data** – Refer to the image in the left for the associations of the various chart elements. You can perform the configurations on the right to customize your chart, such as customize the Y field and X field.

    Click **Finish**, and you can view the chart in the added chart Web part.

6. Once the latest XLSX report is exported to the specified location with the same name, the data in the chart will be refreshed. The added chart Web part always displays the newest data of the exported XLSX report.

Configuring the ReportCenterServiceCustomProperties.config File

By configuring the settings of nodes in the **ReportCenterServiceCustomProperties.config** file, you can customize the default settings of some reports. To configure settings in this file, complete the steps below:

***Note**: If you have multiple Report services in your DocAve system, you must configure the same settings in the **ReportCenterServiceCustomProperties.config** file on each Report service server.

1. Navigate to the *…\AvePoint\DocAve6\Manager\Report\bin* directory on the Report service server.
3. Locate and open the **ReportCenterServiceCustomProperties.config** using Notepad.
4. You can configure the following nodes to customize the corresponding settings:

    - **<FileExtensionFilter>** – This node allows you to configure a file extension filter to exclude the files of some types from the report of the **Top Documents** Web part. Add the file extensions of the file types you want to exclude into the value of this node, separating them with semicolons. Only when your DocAve is updated from DocAve 6 Service Pack 5, the default value of this node is **master;aspx;css;jpg;png;js;gif**;

otherwise, there will be no value for this node. For filtering what data to be displayed on Web parts, refer to Usage Activity Web Parts Settings for details.

- **<LastAccessedTimeUserFilter>** – This node allows you to filter and exclude some users from the Last Accessed Time report in the Report Center Dashboard Web part. Add the login name (in the format: **Domain\Username**) of each user you want to exclude into the value of this node, separating each login name with a semicolon. For example: **LastAccessedTimeUserFilter> Domain\User1;Domain\User2</LastAccessedTimeUserFilter>**

  ***Note**: This node only exists when your DocAve version is updated from DocAve 6 Service Pack 5, and it will not work after the update. To filter users for Last Accessed Time Web part, navigate to **Report Center** > **Settings** > **Usage Activity Web Parts Settings**. For details, refer to Usage Activity Web Parts Settings.

- **<LastAccessedTimetartTime>** – This node allows you to configure the time range (in month) covered in the Last Accessed Time report in the Report Center Dashboard Web part. The default value of this node is **6**, representing that the time range covered in the Last Accessed Time report is the current month and the last 6 months. To customize this time range, set the value to a desired integer to specify how many months in the past plus the current month you want to cover in the report. For example, if you want to report on the last accessed time data in the current month and the last 3 months, set the value of this node to 3. If today is **October 28th**, the Last Accessed Time report can report on the time range **July 1st** to **October 28th**.

- **<UserProfileCustomProperties>** – This node allows you to configure the additional user properties you want to include in the exported Active Users report of a Usage Reports plan. Add each of the desired user properties as a sub node within this node in the format: **< PropertyName>DisplayName</ PropertyName>**.

  - **PropertyName** – Enter the name of the desired user property defined in the your currently used User Profile service application.
  - **DisplayName** – Enter a display name for the user property in the exported Active Users report. The entered display name will be the column name for the column that displays the values of this user property in the exported Active Users report.

  For example, if you want to include a user property named **AccountName** in the report, and display the property values in a column named **Account Name** in the report, add the sub node **<AccountName> Account Name</AccountName>.**

5. Save the change and close the file.

Configuring the ReportCenterServiceProperties.config File

By configuring the **ReportCenterServiceProperties.config** file on each Report Service servers, you can customize some advanced settings related to the data collection. To configure settings in this file, complete the steps below:

1. Navigate to the …*AvePoint**DocAve6**Manager**Report**bin* directory on the Report service server.
2. Locate and open the **ReportCenterServiceProperties.config** file using Notepad.
3. You can configure the following nodes to customize the corresponding settings:
    - **<UserProfileSyncMode>** – This node allows you to change the mode of User Profile Collector jobs:
        - **0** – **0** is the default value, representing the default mode: **Incremental**. When the value is **0**, you can run **Incremental** User Profile Collector jobs in **Data Collection**.
        - **1** – **1** represents the **Full** mode. When the value is 1, you can run **Full** User Profile Collector jobs in **Data Collection**.
    - **<UsageCollectorSetting>** – Within the **<UrlFilter>** sub node under the **<UsageCollectorSetting>** node, you can configure a URL filter to exclude the SharePoint objects whose data you do not want to collect via the Usage Collector jobs. Add each keyword contained in the URLs of the objects you want to exclude into a **<Url>** sub node. For example: **<Url> forms/</Url>**.
    - **<PageTrafficCollectorSetting>** – This node allows you to configure the user filter and URL filter to exclude the specified users and URLs while collecting data for the Page Traffic Report.
        - **<UserFilter></UserFilter>** – Add a **<User></User>** node under this node and then enter the user's login name to exclude this user from the Page Traffic Report. To exclude multiple users, you must add one **<User></User>** node for each of the users. Refer to the following examples for entering the user's login name:
            - For Active Directory user, enter **ADName\username,** instead of **i:0#.w|ADName\username**.
            - For FBA user, enter **aspnetsqlmembershipprovider|fbauser1**, instead of i:0#.f| aspnetsqlmembershipprovider|fbauser1.
            - For ADFS user, enter **newadfs-smal|orange_shxi01@orange.org**, instead of **i:05.t|newadfs-smal|orange_shxi01@orange.org**.
4. Save the change and close the file.
5. Restart the Report service on the current server to make the configurations in the **ReportCenterServiceProperties.config** file take effect.

Appendix D: Required W3C Logging Fields for Specific Functions

To retrieve data for the Page Traffic Report, Download Ranking Report, or Failed Login Attempts Report, or retrieve IIS logs and log source IP for Audit Reports, the corresponding fields of the W3C log file format must be selected in the Logging settings of the SharePoint website.

If you do not want to use IIS Logging in Report Center to select all of the fields for retrieving data, make sure the following required fields in the table below are selected for the corresponding function.

W3C Logging Fields	Page Traffic	Download Ranking	Failed Login Attempts	Audit Controller > Retrieve IIS Logs	Audit Controller > Log Source IP
Date (date)	√	√	√	√	√
Time (time)	√	√	√	√	√
Client IP Address (c-ip)		√	√		√
User Name (cs-username)	√	√	√	√	√
Service Name (s-sitename)					
Server Name (s-computername)			√		
Server IP Address (s-ip)			√		
Server Port (s-port)					
Method (cs-method)		√		√	√
URI Stem (cs-uri-stem)	√	√	√	√	√
URI Query (cs-uri-query)		√	√	√	
Protocol Status (sc-status)		√	√	√	√
Protocol Substatus (sc-substatus)			√		
Win32 Status (sc-win32-status)		√	√		
Bytes Sent (sc-bytes)	√				
Bytes Received (cs-bytes)	√				
Time Taken (time-taken)					
Protocol Version (cs-version)					
Host (cs-host)	√	√	√	√	√
User Agent (cs(User-Agent))					
Cookie (cs(Cookie))					
Referer (cs(Referer))					

Appendix E: Examples of Scope Filters

The tables below provide example of the filter rules at each level in **Scope Filter**.

Site Collection Level

Rule	Condition	Value	Result
URL	Contains	test	The site collection whose URL contains **test** will be filtered and included in the result. For example, **http://webapp:20000/sites/test** and **http://webapp:20000/sites/testA** will be filtered and included in the result.
	Does Not Contain	test	The site collection whose URL does not contain **test** will be filtered and included in the result. For example, **http://spapp:20000/sites/AP** will be filtered and included in the result.
	Equals	http://webapp:20000/sites/test	The site collection whose URL is **http://webapp:20000/sites/test** will be filtered and included in the result.
	Does Not Equal	http://webapp:20000/sites/test	The site collection whose URL is not **http://webapp:20000/sites/test** will be filtered and included in the result.
	Matches	http://tes*collectionA	The site collection whose URL begins with **http://tes** and ends with **collectionA** will be filtered and included in the result. For example, **http://tesABC:11111/sitecollectionA** will be filtered and included in the result.
		http://test:20000/sites/sitecollecti?nA	The site collection whose URL is the same as **http://test:20000/sites/sitecollecti?nA** except character **?** will be filtered and included in the result. For example, **http://test:20000/sites/sitecollectionA** and **http://test:20000/sites/sitecollectiBnA** will both be filtered and included in the result.

Rule	Condition	Value	Result
	Does Not Match	http://tes*collectionA	All the site collections except those whose URLs begin with **http://tes and end with collectionA** will be filtered and included in the result. For example, **http://webapp:20000/sites/test** will be filtered and included in the result.
		http://test:20000/sites/sitecollecti?nA	All the site collections except those whose URLs are the same as **http://test:20000/sites/sitecollecti?nA** except character **?** will be filtered and included in the result. For example, **http://webapp:20000/sites/test** will be filtered and included in the result.
	Matches Regular Expression	http://test:20000/sites/[A-Z]+	All the site collections whose URLs that contain a string consisting of the following two parts will be filtered and included in the result: **http://test:20000/sites/** in the first part and one or more capital letters in the second part. For example, **http://test:2000/sites/A** and **http://test:2000/sites/AA** will be filtered and included in the result.
	Does Not Match Regular Expression	http://test:20000/sites/[A-Z]+	All the site collections except those whose URLs that contain a string consisting of the following two parts will be filtered and included in the result: **http://test:20000/sites/** in the first part and one or more capital letters in the second part. For example, **http://test:2000/sites/01** will be filtered and included in the result.
Title	Contains	test	The site collection whose title contains test will be filtered and included in the result.
	Does Not Contain	test	The site collection whose title does not contain test will be filtered and included in the result.
	Equals	test	The site collection whose title is test will be filtered and included in the result.

Rule	Condition	Value	Result
	Does Not Equal	test	The site collection whose title is not test will be filtered and included in the result.
	Matches	te*t	The site collection whose title begins with te and ends with t will be filtered and included in the result. For example, teABct will be filtered and included in the result.
		te?t	The site collection whose title is the same as **te?t** except character **?** will be filtered and included in the result. For example, test will be filtered and included in the result.
	Does Not Match	te*t	All the site collections except those whose titles begin with **te** and end with t will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
		te?t	All the site collections except those whose titles are the same as **te?t** except character ? will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
	Matches Regular Expression	[A-Z]+	All the site collections whose titles containing one or more capital letters will be filtered and included in the result. For example, AB will be filtered and included in the result.
	Does Not Match Regular Expression	[A-Z]+	All the site collections except those whose titles containing one or more capital letters will be filtered and included in the result. For example, 123 will be filtered and included in the result.
Modified Time	Before	11/11/2011 12:15	The site collection which is modified before **12:15:50 11/11/2011** will be filtered and included in the result.
	After	11/11/2011 12:15	The site collection which is modified after **12:15:50 11/11/2011** will be filtered and included in the result.
	On	11/11/2011 12:15	The site collection which is modified on **12:15:50 11/11/2011** will be filtered and included in the result.

Rule	Condition	Value	Result
	Within	5 Days	The site collection which is modified in last 5 days will be filtered and included in the result.
	Older Than	5 Days	The site collection which is modified 5 days ago will be filtered and included in the result.
Created Time	Before	11/11/2011 12:15	The site collection which is created before **12:15:50 11/11/2011** will be filtered and included in the result.
	After	11/11/2011 12:15	The site collection which is created after **12:15:50 11/11/2011** will be filtered and included in the result.
	On	11/11/2011 12:15	The site collection which is created on **12:15:50 11/11/2011** will be filtered and included in the result.
	Within	5 Days	The site collection which is created in last 5 days will be filtered and included in the result.
	Older Than	5 Days	The site collection which is created 5 days ago will be filtered and included in the result.
Last Accessed Time	Before	11/11/2011 12:15	The site collection which is last accessed before **12:15:50 11/11/2011** will be filtered and included in the result.
	After	11/11/2011 12:15	The site collection which is last accessed after **12:15:50 11/11/2011** will be filtered and included in the result.
	On	11/11/2011 12:15	The site collection which is last accessed on **12:15:50 11/11/2011** will be filtered and included in the result.
	Within	5 Days	The site collection which is last accessed in last 5 days will be filtered and included in the result.
	Older Than	5 Days	The site collection which is last accessed 5 days ago will be filtered and included in the result.
Primary Administrator	Contains	test\user	The site collection whose creators contain **test\user** will be filtered and included in the result.
	Equals	test\user	The site collection whose creator is **test\user** will be filtered and included in the result.

Rule	Condition	Value	Result
Template Name	Contains	Team	The site collection whose template name contains **Team** will be filtered and included in the result. For example, **Team Site** will be filtered and included in the result.
	Does Not Contain	Team	The site collection whose template name does not contain **Team** will be filtered and included in the result. For example, Blank Site will be filtered and included in the result.
	Equals	Blank Site	The site collection whose template name is **Blank Site** will be filtered and included in the result.
	Does Not Equal	Blank Site	The site collection whose template name is not **Blank Site** will be filtered and included in the result.
	Matches	B*Workspace	The site collection whose template name begins with **B** and ends with **Workspace** will be filtered and included in the result. For example, **Basic Meeting Workspace** and **Blank Meeting Workspace** will both be filtered and included in the result.
		Bl?g	The site collection whose template name is the same as **Bl?g** except character **?** will be filtered and included in the result. For example, **Blog** will be filtered and included in the result.
	Does Not Match	B*Workspace	All the site collections except those whose templates' names begin with **B** and ends with **Workspace** will be filtered and included in the result. For example, Team Site be filtered and included in the result.
		Bl?g	All the site collections except those whose templates' names are the same as **Bl?g** except character ? will be filtered and included in the result. For example, Team Site will be filtered and included in the result.
	Matches Regular Expression	[A-Z]+	All the site collections whose template names containing one or more capital letters will be filtered and included in the result. For

Rule	Condition	Value	Result
			example, AB will be filtered and included in the result.
	Does Not Match Regular Expression	[A-Z]+	All the site collections except those whose template names containing one or more capital letters will be filtered and included in the result. For example, 123 will be filtered and included in the result.
Template ID	Contains	STS#	The site collection whose template ID contains STS# will be filtered and included in the result. For example, STS#0 (Team Site) will be filtered and included in the result.
	Equals	STS#0	The site collection whose template ID is STS#0 will be filtered and included in the result. Refer to Appendix B for more detailed information of Template ID.
Custom Property: Text	Contains	test	The site collection whose Text property contains test will be filtered and included in the result.
	Does Not Contain	test	The site collection whose Text property does not contain test will be filtered and included in the result.
	Equals	test	The site collection whose Text property is test will be filtered and included in the result.
	Does Not Equal	test	The site collection whose Text property is not test will be filtered and included in the result.
	Matches	te*t	The site collection whose Text property begins with te and ends with t will be filtered and included in the result. For example, teABct will be filtered and included in the result.
		te?t	The site collection whose Text property is the same as te?t except character ? will be filtered and included in the result. For example, test will be filtered and included in the result.

Rule	Condition	Value	Result
	Does Not Match	te*t	All the site collections except those whose Text property begins with te and ends with t will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
		te?t	All the site collections except those whose Text property is the same as te?t except character ? will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
	Matches Regular Expression	[A-Z]+	All the site collections whose Text properties containing one or more capital letters will be filtered and included in the result. For example, AB will be filtered and included in the result.
	Does Not Match Regular Expression	[A-Z]+	All the site collections except those whose Text properties containing one or more capital letters will be filtered and included in the result. For example, 123 will be filtered and included in the result.
Custom Property: Number	>=	5	The site collection whose Number property is not smaller than 5 will be filtered and included in the result. For example, 8 will be filtered and included in the result.
	<=	5	The site collection whose Number property is not bigger than 5 will be filtered and included in the result. For example, 2 will be filtered and included in the result.
	=	5	The site collection whose Number property is 5 will be filtered and included in the result.
Custom Property: Yes/No	Equals	Yes	The site collection whose Choice property is Yes will be filtered and included in the result.
Custom Property: Date and Time	Before	11/11/2011 12:15	The site collection whose Date property is before 12:15:50 11/11/2011 will be filtered and included in the result.

Rule	Condition	Value	Result
	After	11/11/2011 12:15	The site collection whose Date property is after 12:15:50 11/11/2011 will be filtered and included in the result.
	On	11/11/2011 12:15	The site collection whose Date property is on 12:15:50 11/11/2011 will be filtered and included in the result.
	Within	5 Days	The site collection whose Date property is in last 5 days will be filtered and included in the result.
	Old Than	5 Days	The site collection whose Date property is 5 days ago will be filtered and included in the result.

Site Level

Rule	Condition	Value	Result
URL	Contains	test	The site whose URL contains test will be filtered and included in the result. For example, http://webapp:20000/sites/test and http://webapp:20000/sites/testA will be filtered and included in the result.
	Does Not Contain	test	The site whose URL does not contain test will be filtered and included in the result. For example, http://spapp:20000/sites/AP will be filtered and included in the result.
	Equals	http://webapp:20000/sites/test	The site whose URL is http://webapp:20000/sites/test will be filtered and included in the result.
	Does Not Equal	http://webapp:20000/sites/test	The site whose URL is not http://webapp:20000/sites/test will be filtered and included in the result.

Rule	Condition	Value	Result
	Matches	http://tes*collectionA	The site whose URL begins with http://tes and ends with collectionA will be filtered and included in the result. For example, http://tesABC:11111/sitecollectionA will be filtered and included in the result.
		http://test:20000/sites/sitecollecti?nA	The site whose URL is the same as http://test:20000/sites/sitecollecti?nA except character ? will be filtered and included in the result. For example, http://test:20000/sites/sitecollectionA and http://test:20000/sites/sitecollectiBnA will both be filtered and included in the result.
	Does Not Match	http://tes*collectionA	All the sites except those whose URLs begin with http://tes and end with collectionA will be filtered and included in the result. For example, http://webapp:20000/sites/test will be filtered and included in the result.
		http://test:20000/sites/sitecollecti?nA	All the sites except those whose URLs are the same as http://test:20000/sites/sitecollecti?nA except character ? will be filtered and included in the result. For example, http://webapp:20000/sites/test will be filtered and included in the result.
	Matches Regular Expression	http://test:20000/sites/[A-Z]+	All the sites whose URLs that contain a string consisting of the following two parts will be filtered and included in the result: **http://test:20000/sites/** in the first part and one or more capital letters as the second part. For example, **http://test:2000/sites/A** and **http://test:2000/sites/AA** will be filtered and included in the result.

Rule	Condition	Value	Result
	Does Not Match Regular Expression	http://test:20000/sites/[A-Z]+	All the sites except those whose URLs that contain a string consisting of the following two parts will be filtered and included in the result: **http://test:20000/sites/** in the first part and one or more capital letters as the second part. For example, **http://test:2000/sites/01** will be filtered and included in the result.
Title	Contains	test	The site whose title contains test will be filtered and included in the result.
	Does Not Contain	test	The site whose title does not contain test will be filtered and included in the result.
	Equals	test	The site whose title is test will be filtered and included in the result.
	Does Not Equal	test	The site whose title is not test will be filtered and included in the result.
	Matches	te*t	The site whose title begins with te and ends with t will be filtered and included in the result. For example, teABct will be filtered and included in the result.
		te?t	The site whose title is the same as te?t except character ? will be filtered and included in the result. For example, test will be filtered and included in the result.
	Does Not Match	te*t	All the sites except those whose titles begin with **te** and end with **t** will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
		te?t	All the sites except those whose titles are the same as **te?t** except character **?** will be filtered and included in the result. For example, DocAve will be filtered and included in the result.

Rule	Condition	Value	Result
	Matches Regular Expression	[A-Z]+	All the sites whose titles containing one or more capital letters will be filtered and included in the result. For example, **AB** will be filtered and included in the result.
	Does Not Match Regular Expression	[A-Z]+	All the sites except those whose titles containing one or more capital letters will be filtered and included in the result. For example, **123** will be filtered and included in the result.
Modified Time	Before	11/11/2011 12:15	The site which is modified before **12:15:50 11/11/2011** will be filtered and included in the result.
	After	11/11/2011 12:15	The site which is modified after **12:15:50 11/11/2011** will be filtered and included in the result.
	On	11/11/2011 12:15	The site which is modified on **12:15:50 11/11/2011** will be filtered and included in the result.
	Within	5 Days	The site which is modified in last 5 days will be filtered and included in the result.
	Older Than	5 Days	The site which is modified 5 days ago will be filtered and included in the result.
Created Time	Before	11/11/2011 12:15	The site which is created before 12:15:50 11/11/2011 will be filtered and included in the result.
	After	11/11/2011 12:15	The site which is created after **12:15:50 11/11/2011** will be filtered and included in the result.
	On	11/11/2011 12:15	The site which is created on **12:15:50 11/11/2011** will be filtered and included in the result.
	Within	5 Days	The site which is created in last 5 days will be filtered and included in the result.
	Older Than	5 Days	The site which is created 5 days ago will be filtered and included in the result.
Lase Accessed Time	Before	11/11/2011 12:15	The site which is last accessed before **12:15:50 11/11/2011** will be filtered and included in the result.

Rule	Condition	Value	Result
	After	11/11/2011 12:15	The site which is last accessed after **12:15:50 11/11/2011** will be filtered and included in the result.
	On	11/11/2011 12:15	The site which is last accessed on **12:15:50 11/11/2011** will be filtered and included in the result.
	Within	5 Days	The site which is last accessed in last 5 days will be filtered and included in the result.
	Older Than	5 Days	The site which is last accessed 5 days ago will be filtered and included in the result.
Created By	Contains	test\user	The site whose creators contain test\user will be filtered and included in the result.
	Equals	test\user	The site whose creator is test\user will be filtered and included in the result.
Template Name	Contains	Team	The site whose template name contains Team will be filtered and included in the result. For example, Team Site will be filtered and included in the result.
	Does Not Contain	Team	The site whose template name does not contain Team will be filtered and included in the result. For example, Blank Site will be filtered and included in the result.
	Equals	Blank Site	The site whose template name is Blank Site will be filtered and included in the result.
	Does Not Equal	Blank Site	The site whose template name is not Blank Site will be filtered and included in the result.
	Matches	B*Workspace	The site whose template name begins with B and ends with Workspace will be filtered and included in the result. For example, Basic Meeting Workspace and Blank Meeting Workspace will both be filtered and included in the result.
		Bl?g	The site whose template name is the same as Bl?g except character ? will be filtered and included in the

Rule	Condition	Value	Result
			result. For example, Blog will be filtered and included in the result.
	Does Not Match	B*Workspace	All the sites except those whose templates' names begin with B and ends with Workspace will be filtered and included in the result. For example, Team Site be filtered and included in the result.
		Bl?g	All the sites except those whose templates' names are the same as Bl?g except character ? will be filtered and included in the result. For example, Team Site will be filtered and included in the result.
	Matches Regular Expression	[A-Z]+	All the sites whose template names containing one or more capital letters will be filtered and included in the result. For example, AB will be filtered and included in the result.
	Does Not Match Regular Expression	[A-Z]+	All the sites except those whose template names containing one or more capital letters will be filtered and included in the result. For example, 123 will be filtered and included in the result.
Template ID	Contains	STS#	The site whose template ID contains STS# will be filtered and included in the result. For example, STS#0 (Team Site) will be filtered and included in the result.
	Equals	STS#0	The site whose template ID is STS#0 will be filtered and included in the result. Refer to Appendix B for more detailed information of Template ID.
Custom Property: Text	Contains	test	The site whose Text property contains test will be filtered and included in the result.
	Does Not Contain	test	The site whose Text property does not contain test will be filtered and included in the result.

Rule	Condition	Value	Result
	Equals	test	The site whose Text property is test will be filtered and included in the result.
	Does Not Equal	test	The site whose Text property is not test will be filtered and included in the result.
	Matches	te*t	The site whose Text property begins with te and ends with t will be filtered and included in the result. For example, teABct will be filtered and included in the result.
		te?t	The site whose Text property is the same as te?t except character ? will be filtered and included in the result. For example, test will be filtered and included in the result.
	Does Not Match	te*t	All the sites except those whose Text property begins with te and ends with t will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
		te?t	All the sites except those whose Text property is the same as te?t except character ? will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
	Matches Regular Expression	[A-Z]+	All the sites whose Text properties containing one or more capital letters will be filtered and included in the result. For example, AB will be filtered and included in the result.
	Does Not Match Regular Expression	[A-Z]+	All the sites except those whose Text properties containing one or more capital letters will be filtered and included in the result. For example, 123 will be filtered and included in the result.
Custom Property: Number	>=	5	The site whose Number property is not smaller than 5 will be filtered and included in the result. For example, 8 will be filtered and included in the result.

Rule	Condition	Value	Result
	<=	5	The site whose Number property is not bigger than 5 will be filtered and included in the result. For example, 2 will be filtered and included in the result.
	=	5	The site whose Number property is 5 will be filtered and included in the result.
Custom Property: Yes/No	Equals	Yes	The site whose Choice property is Yes will be filtered and included in the result.
Custom Property: Date and Time	Before	11/11/2011 12:15	The site whose Date property is before 12:15:50 11/11/2011 will be filtered and included in the result.
	After	11/11/2011 12:15	The site whose Date property is after 12:15:50 11/11/2011 will be filtered and included in the result.
	On	11/11/2011 12:15	The site whose Date property is on 12:15:50 11/11/2011 will be filtered and included in the result.
	Within	5 Days	The site whose Date property is in last 5 days will be filtered and included in the result.
	Old Than	5 Days	The site whose Date property is 5 days ago will be filtered and included in the result.

List/Library Level

Rule	Condition	Value	Result
Name	Contains	test	The list/library whose name contains test will be filtered and included in the result.
	Does Not Contain	test	The list/library whose name does not contain test will be filtered and included in the result.
	Equals	test	The list/library whose name is test will be filtered and included in the result.
	Does Not Equal	test	The list/library whose name is not test will be filtered and included in the result.

Rule	Condition	Value	Result
	Matches	te*t	The list/library whose name begins with te and ends with t will be filtered and included in the result. For example, teABct will be filtered and included in the result.
		te?t	The list/library whose name is the same as te?t except character ? will be filtered and included in the result. For example, test will be filtered and included in the result.
	Does Not Match	te*t	All the lists/libraries except those whose names begin with te and end with t will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
		te?t	All the lists/libraries except those whose names are the same as te?t except character ? will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
	Matches Regular Expression	[A-Z]+	All the lists/libraries whose names containing one or more capital letters will be filtered and included in the result. For example, AB will be filtered and included in the result.
	Does Not Match Regular Expression	[A-Z]+	All the lists/libraries except those whose names containing one or more capital letters will be filtered and included in the result. For example, 123 will be filtered and included in the result.
Modified Time	Before	Refer to the same filter rule in Site Collection Level.	
	After		
	On		
	Within		
	Older Than		

Rule	Condition	Value	Result
Created Time	Before	Refer to the same filter rule in Site Collection Level.	
	After		
	On		
	Within		
	Older Than		
Last Accessed Time	Before	Refer to the same filter rule in Site Collection Level.	
	After		
	On		
	Within		
	Older Than		
Created By	Contains	Refer to the same filter rule in Site Level.	
	Equals		
Template Name	Contains	Refer to the same filter rule in Site Collection Level.	
	Does Not Contain		
	Equals		
	Does Not Equal		
	Matches		
	Does Not Match		
	Matches Regular Expression		
	Does Not Match Regular Expression		

Rule	Condition	Value	Result
Template ID	Equals	Refer to the same filter rule in Site Collection Level.	
	Does Not Equal		
Columns	Contains	Text	The list/library that contains the column whose display name is Text will be filtered and included in the result.
	Does Not Contain	[Text]	The list/library that does not contain the column whose internal name is Text will be filtered and included in the result.
Content Type: Name	Contains	Test	The list/library that contains the content type whose name is Test will be filtered and included in the result.
	Does Not Contain	Test	The list/library that does not contain the content type whose name is Test will be filtered and included in the result.
Content Type: ID	Contains	0x007874566ED32546ABE3B1BC74A7D5F8	The list/library that contains the content type whose ID is 0x007874566ED32546ABE3B1BC74A7D5F8 will be filtered and included in the result.
	Does Not Contain	0x007874566ED32546ABE3B1BC74A7D5F8	The list/library that does not contain the content type whose ID is 0x007874566ED32546ABE3B1BC74A7D5F8 will be filtered and included in the result.
Custom Property: Text	Contains	Refer to the same filter rule in Site Collection Level.	
	Does Not Contain		
	Equals		
	Does Not Equal		
	Matches		
	Does Not Match		

Rule	Condition	Value	Result
	Matches Regular Expression		
	Does Not Match Regular Expression		
Custom Property: Number	>=	Refer to the same filter rule in Site Collection Level.	
	<=		
	=		
Custom Property: Yes/No	Equals	Refer to the same filter rule in Site Collection Level.	
Custom Property: Date and Time	Before	Refer to the same filter rule in Site Collection Level.	
	After		
	On		
	Within		
	Old Than		

Appendix F: Supported SharePoint Audit Events and Object Levels of Usage Pattern Alerting Rules

Refer to the table below to view the SharePoint audit events and SharePoint object levels supported by each user activity option available in Usage Pattern Alerting rules of the **Activities Measured by Audit Events** and **Objects Affected by Audit Events** rule types.

User Pattern Alerting User Activity	SharePoint Audit Events	Site Collection	Site	List	Folder	Document	Item
View	View	√*	√*	√		√	√
Delete	Delete		√	√	√	√	√
Restore	Restore			√	√	√	√
Update	Update			√	√	√	√
Search	Search	√					
Check In	Check In					√	
Check Out	Check Out					√	
Change Profile Settings for	Profile Change		√	√			
Change Schema Settings for	Schema Change			√			
Change Group Settings for	Create Group	√					
	Delete Group						
	Add Group Member						
	Delete Group Member						
Change Permissions for	Create Permission Level	√	√	√	√	√	√
	Change Permission						
	Change Permission Level						
	Delete Permission Level						
Change Inheritance Settings for	Break Permission Inheritance		√	√	√	√	√
	Break Permission						

User Pattern Alerting User Activity	SharePoint Audit Events	Site Collection	Site	List	Folder	Document	Item
	Level Inheritance						
	Inherit Permission Settings						

***Note**: Only the **Objects Affected by Audit Events** rule supports monitoring the **View** user activity (**View** SharePoint audit event) at site collection and site levels.

Appendix G: Supported and Unsupported List of DocAve Report Center Functions for SharePoint Online

Some of the Report Center features are unique to SharePoint on-premises environment, some features are also available to the SharePoint Online. Refer to the tables below for more information.

Summary

Refer to the table for the summary of Report Center features supported for SharePoint Online.

Features			SharePoint Online
Usage Reports	Active Users		Not Supported
	Site Activity Ranking		Not Supported
	Site Visitors and Activity		Not Supported
	Failed Login Attempts		Not Supported
	Last Accessed Time		Not Supported
	Page Traffic		Not Supported
	Checked-Out Documents		Not Supported
	Search Usage		Not Supported
	SharePoint Alerts		Not Supported
	Download Ranking		Not Supported
	Workflow Status		Not Supported
	Referrers		Not Supported
Infrastructure Reports	Infrastructure	SharePoint Services	Not Supported
		CPU/Memory Usage	Not Supported
		Networking	Not Supported
		SharePoint Topology	Not Supported
		SharePoint Search Services	Not Supported
		Environment Search	Not Supported
		Site Collection Comparison	Not Supported
		Site Collection Load Time	Not Supported
	Storage Optimization	Storage Trends	Supported
		Storage Analyzer	Not Supported
		User Storage Size	Not Supported
Administration Reports	Configuration Reports		Supported
	Best Practice Reports		Not Supported
Compliance Reports	Classification		Not Supported
	Auditor Reports		Supported
DocAve Reports	Real-time Monitoring		Supported
	Activity History (DocAve Auditor)		Supported
Usage Pattern Alerting			Not Supported
Settings	Report Settings	Data Collection	Storage Trends collector is supported

Features			SharePoint Online
		Activity History Pruning	Storage Trends report is supported
		IIS Logging	Not Supported
		Reporting Service	Not Supported
		Cross-Farm Service Configuration	Not Supported
	Compliance Report Management	Audit Controller	Supported
		Audit Pruning	Supported
		Manage Feature	Not Supported
	Common Settings	Export Location	Not Supported
		Shared Location	Not Supported
		Scope Filter	Supported
		Item Caching Service	Not Supported
		Web Part Settings	Not Supported
Usage Activity Web Parts			Not Supported

Configuration Reports

Refer to the table for the Configuration Reports features supported for SharePoint Online.

Features				SharePoint Online
Scope				Site Collection/Site/List
Schedule				Supported
Export Report Settings				Supported ***Note**: Support exporting reports in the following format XLSX, XLS, and CSV.
Email Notification				Supported
Report Settings	Summary			Supported
	Farm			Not Supported
	Web Application			Not Supported
	Content Database			Not Supported
	Site Collection	General Settings	Size	Supported
			Administrator	Supported
			Description	Supported
			Created Time	Supported
			Last Modified Time	Not Supported
			Last Accessed Time	Not Supported
			Portal Connection	Not Supported
			Owner	Not Supported
			Lock Status	Not Supported
			Quota	Supported

Features					SharePoint Online
			Bandwidth		Not Supported
			Discussion Storage		Not Supported
			Visits		Not Supported
			Primary Site Collection Administrator		Supported
			Secondary Site Collection Administrator		Not Supported
			Site Collection Administrator Contact		Supported
			Sharing Outside Your Company		Not Supported
		Site Collection Administration	Search Settings		Supported
			Site Collection Features		Supported
			Site Collection Usage		Not Supported
		Statistics	Content Analysis		Supported
			SharePoint Storage Report		Supported
	Site	General Settings	Site Title		Supported
			Site URL		Supported
			Orphan Site Status		Not Supported
			Description		Supported
			Size		Supported
			Author		Not Supported
			Created Time		Supported
			Last Modified Time		Supported
			Last Accessed Time		Not Supported
			Template		Supported
			Template ID		Not Supported
			Owner		Not Supported
			Database Name		Not Supported
			Parent Site		Supported
			Site Collection URL		Supported
			Last Modified By		Not Supported
		Security settings	Group Permission		Supported
			User Permission		Supported
		Site Administration	Search Settings		Supported
			Regional Settings		Supported
			Properties		Supported
			RSS Settings		Supported
			Alert Settings		Not Supported
			Site Features		Supported
			Site Usage		Not Supported
		Statistics	Content Analysis		Supported
			Audit Information	Number of Audit Records for the Site	Not Supported
				Approx. Size of Site Audit Records	Not Supported
			SharePoint Storage Report		Supported

Features					SharePoint Online
			Site and Page Information	Number of Subsites	Supported
				Number of Pages	Not Supported
				Number of Customs Pages	Not Supported
				Percentage of Customized Pages	Not Supported
			List and Library Information	Number of Libraries	Supported
				Number of Documents	Supported
				Number of List Attachments	Supported
				Total Documents Size	Supported
				Total Documents Version Size	Supported
				Number of Lists	Supported
				Number of List Items	Supported
				Total Lists Size	Not Supported
				Number of Files over 10MB	Supported
				Number of File Types	Supported
				Number of Lists/Libraries in Personal View	Not Supported
				Number of Lists/Libraries in Public View	Not Supported
				Number of Discussion Boards	Supported
				Number of Discussion Items	Supported
				Total Discussion Board Size	Not Supported
				Number of Surveys	Supported
				Number of Survey Responses	Supported
				Total Surveys Size	Not Supported
				Number of Lists/Libraries that Have Been Enabled to Receive E-mails	Not Supported
				Number of Lists/Libraries that Allow Requests for Access	Not Supported
		Include Subsites			Supported
	List		List Name		Supported

Features				SharePoint Online
		General Settings	List URL	Supported
			Total List Size	Supported
			Parent Site URL	Supported
		Statistics	SharePoint Storage Report	Supported
		Security	Security Settings	Supported

Auditor Reports

Refer to the table for the Auditor Reports features supported for SharePoint Online.

Features		SharePoint Online
Report Type	User Lifecycle	Supported
	List Access	Supported
	Item Lifecycle	Supported
	Site Access	Supported
	List Deletion	Supported
	Permission Changes	Supported
	Content Type Changes	Supported
	Custom Report	Supported
Scope		The tree here is made up by retrieved audit data. Supports Site Collection/Site/List Level
Scope Filter		Supported
Time Range		Supported
Schedule		Supported
Email Notification		Supported
Report Format		XLSX/CSV/PDF

Auditor Controller

Refer to the table for the Auditor Controller features supported for SharePoint Online.

Features		SharePoint Online
Scope		Site Collection
Trickle Down		Not Supported
Audit Action	View	Supported for registered SharePoint on-premises nodes
	Copy	Supported
	Move	Supported
	Update	Supported

Features			SharePoint Online
	Delete		Supported
	Restore		Supported
	Delete Child(ren)		Supported
	Check In		Supported
	Check Out		Supported
	Workflow		Not Supported
	Search		Supported
	Profile Change		Supported
	Schema Change		Supported
	Security Change		Supported
	Site Collection Deletion		Not Supported
	Site Creation		Not Supported
Apply Rule Settings	Filter	Site Collection	Not Supported
		Site	Not Supported
		List/Library	Not Supported
	Operation Settings	Overwrite	Supported
		Append	Supported
	Schedule		Supported
Retrieve Data Settings	Filter	URL	Supported
		User	Supported
		AD Profile	Not Supported
		Site Collection	Supported
	Advanced Settings	Retrieve IIS Logs	Not Supported
		Log source IP	Not Supported
		Retrieve Deleted Site Collection Data (only for web application level)	Not Supported
		Delete old auditor data in SharePoint	Supported in Apply Rule Settings
		Track object last accessed time	Not Supported
	Schedule		Supported
	Notification		Supported

Audit Pruning

Refer to the table for the Audit Pruning features supported for SharePoint Online.

Features		SharePoint Online
Scope		The tree here is made up by retrieved audit data. Supports Site Collection Level
Data to Act on (Time Range)		Supported
Action to Take	Delete Data	Supported
	Move Data	Supports UNC path as Export Location
Schedule		Supported
Notification		Supported
Advanced Data Selection	User Filter	Supported
	Action Filter	Supported
Restore		Supported

Storage Trends

Refer to the table for the Storage Trends features supported for SharePoint Online.

Feature	SharePoint Online
Scope	Site Collection
Export Schedule	Supported
Notification	Supported
Report Format	Supported ***Note**: Support exporting reports in the following format XLSX and CSV.

Appendix H: Accessing Hot Key Mode

In order to work faster and improve your productivity, DocAve supports hot key mode for you to perform corresponding actions quickly by only using keyboard. To access hot key mode from the DocAve interface, press the key combination of **Ctrl** +**Alt** + **Z** (simultaneously) on the keyboard, and then press **1** to direct to the products pane. To access the Report Center products, press **R**.

The following table provides a list of hot keys for the top level. Using the hot key listed below to access to the corresponding product interface. For example, continue pressing **S**, you will be brought to the Settings Interface.

Functionality	Hot Key
Usage Reports	UR
Infrastructure Reports	I
Administration Reports	A
Compliance Reports	C
DocAve Reports	D
Usage Pattern Alerting	UP
Settings	S

Common Access

Each time you want to access hot key mode from anywhere in the Report Center interface, press the **Ctrl** +**Alt** + **Z** key combination to go to the **Common Access** page that displays the hot keys to access the desired functions.

The following table provides a list of hot keys for common access. From anywhere in the Report Center interface, press the **Ctrl** +**Alt** + **Z** key combination to access to the **Common Access** page, and then press the specified hot key to access to the corresponding product. For example, continue pressing **I** to jump to the Infrastructure Reports interface.

Functionality Name and Hot Key	
Usage Reports	UR
Infrastructure Reports	I
Administration Reports	A
Compliance Reports	C
DocAve Reports	D
Usage Pattern Alerting	UP
Settings	S
DocAve Home Page	1
AvePoint Official Website	2
Control Panel	3
Job Monitor	4
Plan Group	5
Health Analyzer	6

Functionality Name and Hot Key	
Account Information	9
Help and About	0

Usage Reports Interface

To access the Usage Reports interface by using hot keys anywhere in the Report Center interface, press the **Ctrl** +**Alt** + **Z** key combination to access the hot key mode, and then press **UR** on the keyboard to enter the Usage Reports Interface.

The following table provides a list of hot keys for the functionalities on the ribbon of the Usage Reports Interface. For example, continue pressing **K** to jump to the Checked-Out Documents Report interface.

Functionality Name and Hot Key					
Create	C	Back		B	
		Next		N	
		Finish	F	Finish	F
				Finish and Generate Report	G
		Cancel		C	
View Details	V	Report		S	
		Plan Details		P	
		Edit Plan		EP	
		Job Monitor		J	
		Close		C	
Edit	ED	Back		B	
		Next		N	
		Finish	F	Finish	F
				Finish and Generate Report	G
		Cancel		C	
Delete		D			
Generate Report		G			
Export Now		ER			
Show Report	SP	Report		S	
		Plan Details		P	
		Edit Plan		EP	
		Collect Now		G	
		Run Report		R	
		Export Now	E	Export to Datasheet	ER
				Output Screenshot	O
		Job Monitor		J	

Functionality Name and Hot Key			
		Close	C
Job Monitor		J	

Infrastructure Reports Interface

To access the Infrastructure Reports interface by using hot keys from anywhere in the Report Center interface, press the **Ctrl** +**Alt** + **Z** key combination to access the hot key mode, and then press **I** on the keyboard to enter the Infrastructure Reports Interface.

The following table provides a list of hot keys for the functionalities on the ribbon of the Infrastructure Reports Interface. For example, continue pressing **SS** to jump to the SharePoint Services Report interface.

Functionality Name and Hot Key					
SharePoint Services			SS		
CPU/Memory Usage			C		
Networking			N		
SharePoint Topology			G		
SharePoint Search Services			F		
Environment Search			I		
Site Collection Comparison			D		
Site Collection Load Time			L		
Storage Trends			T		
Storage Analyzer			B		
User Storage Size			O		
Export Report	E	Export to Datasheet	E	OK	O
				Cancel	C
		Output Screenshot	O	Print	P
				Export	E
				Close	C
Job Monitor			J		
Show Report			SP		

Administration Reports Interface

To access the Administration Reports interface by using hot keys from anywhere in the Report Center interface, press the **Ctrl** +**Alt** + **Z** key combination to access the hot key mode, and then press **A** on the keyboard to enter the Administration Reports Interface.

The following table provides a list of hot keys for the functionalities on the ribbon of the Administration Reports Interface. For example, continue pressing **C** to jump to the Configuration Report interface.

<table>
<tr><th colspan="10">Functionality Name and Hot Key</th></tr>
<tr><td colspan="2">Configuration Reports</td><td colspan="2">C</td><td colspan="2">Save Profile and Run Report</td><td colspan="3">R</td></tr>
<tr><td colspan="2"></td><td colspan="2"></td><td colspan="2">Job Monitor</td><td colspan="3">J</td></tr>
<tr><td rowspan="8">Best Practice Reports</td><td rowspan="8">B</td><td rowspan="4">Threshold Profile</td><td rowspan="4">T</td><td rowspan="2">Create</td><td rowspan="2">N</td><td>Save</td><td>O</td></tr>
<tr><td>Cancel</td><td>C</td></tr>
<tr><td rowspan="2">Edit</td><td rowspan="2">E</td><td>Save</td><td>O</td></tr>
<tr><td>Cancel</td><td>C</td></tr>
<tr><td colspan="2">Delete</td><td colspan="3">D</td></tr>
<tr><td colspan="2">Back</td><td colspan="3">B</td></tr>
<tr><td rowspan="2">Run Report</td><td rowspan="2">R</td><td>Run Report Only</td><td colspan="4">O</td></tr>
<tr><td>Save and Run Report</td><td colspan="4">S</td></tr>
<tr><td colspan="2">Show Report</td><td colspan="5">SP</td></tr>
<tr><td rowspan="2">Export Report</td><td rowspan="2">E</td><td rowspan="2">Export to Datasheet</td><td rowspan="2">E</td><td>OK</td><td>O</td></tr>
<tr><td>Cancel</td><td>C</td></tr>
<tr><td colspan="4">Job Monitor</td><td colspan="5">J</td></tr>
</table>

Compliance Reports Interface

To access the Compliance Reports interface by using hot keys from anywhere in the Report Center interface, press the **Ctrl** +**Alt** + **Z** key combination to access the hot key mode, and then press **C** on the keyboard to enter the Compliance Reports Interface.

The following table provides a list of hot keys for the functionalities on the ribbon of the Compliance Reports Interface. For example, continue pressing **C** to jump to the Content Type Usage Report interface.

Functionality Name and Hot Key	
Term Store Changes	M
Content Type Usage	CU
Information Management Policies	I
Upcoming Content Expiration	CE
Auditor Reports	A
Job Monitor	J

Term Store Changes

Functionality Name and Hot Key			
Show Report		SP	
Run Report	R	Run Report only	O
		Save Profile and Run Report	S
Job Monitor		J	
Export Now	E	OK	O
		Cancel	C

Content Type Usage

Functionality Name and Hot Key			
Show Report		SP	
Run Report	R	Run Report only	O
		Save Profile and Run Report	S
Job Monitor		J	
Export Now	E	OK	O
		Cancel	C

Information Management Policies

Functionality Name and Hot Key			
Show Report		SP	
Run Report	R	Run Report only	O
		Save Profile and Run Report	S
Job Monitor		J	
Export Now	E	OK	O
		Cancel	C

Upcoming Content Expiration

Functionality Name and Hot Key			
Show Report		SP	
Run Report	R	Run Report only	O
		Save Profile and Run Report	S
Job Monitor		J	
Export Now	E	OK	O
		Cancel	C

Auditor Reports

Functionality Name and Hot Key					
User Lifecycle	UL	Show Report		SP	
		Run Report	R	Run Report only	O
				Save Profile and Run Report	S
		Job Monitor		J	
		Export Now	E	OK	O
				Cancel	C
List Access	LA	Show Report		SP	
		Run Report	R	Run Report only	O
				Save Profile and Run Report	S
		Job Monitor		J	
		Export Now	E	OK	O
				Cancel	C
Item Lifecycle	I	Show Report		SP	
		Run Report	R	Run Report only	O
				Save Profile and Run Report	S
		Job Monitor		J	
		Export Now	E	OK	O
				Cancel	C
Site Access	SA	Show Report		SP	
		Run Report	R	Run Report only	O
				Save Profile and Run Report	S
		Job Monitor		J	
		Export Now	E	OK	O
				Cancel	C
List Deletion	LD	Show Report		SP	
		Run Report	R	Run Report only	O
				Save Profile and Run Report	S
		Job Monitor		J	
		Export Now	E	OK	O
				Cancel	C
Permission Changes	UP	Show Report		SP	
		Run Report	R	Run Report only	O
				Save Profile and Run Report	S
		Job Monitor		J	
		Export Now	E	OK	O
				Cancel	C
	CC	Show Report		SP	

Functionality Name and Hot Key					
Content Type Changes		Run Report	R	Run Report only	O
				Save Profile and Run Report	S
		Job Monitor		J	
		Export Now	E	OK	O
				Cancel	C
Custom Report	CR	Show Report		SP	
		Run Report	R	Run Report only	O
				Save Profile and Run Report	S
		Job Monitor		J	
		Export Now	E	OK	O
				Cancel	C

DocAve Reports Interface

To access the DocAve Reports interface by using hot keys from anywhere in the Report Center interface, press the **Ctrl** +**Alt** + **Z** key combination to access the hot key mode, and then press **D** on the keyboard to enter the DocAve Reports Interface.

The following table provides a list of hot keys for the functionalities on the ribbon of the DocAve Reports Interface. For example, continue pressing **T** to jump to the DocAve Topology Report interface.

Functionality Name and Hot Key					
DocAve Topology			T		
Performance Monitoring			P		
Disk Space Monitoring			D		
Job Performance Monitoring			M		
DocAve Auditor			A		
Run Report			R		
Show Report			SP		
Export Report	E	Export to Datasheet	E	OK	O
				Cancel	C
		Output Screenshot	O	Print	P
				Export	E
				Close	C
Job Monitor			J		

Usage Pattern Alerting Interface

To access the Usage Pattern Alerting interface by using hot keys from anywhere in the Report Center interface, press the **Ctrl** +**Alt** + **Z** key combination to access the hot key mode, and then press **UP** on the keyboard to enter the Usage Pattern Alerting Interface.

The following table provides a list of hot keys for the functionalities on the ribbon of the Usage Pattern Alerting Interface. For example, continue pressing **T** to jump to the DocAve Topology Report interface.

Functionality Name and Hot Key	
Plan Manager	P
Usage Pattern Alerting Report	V
Rule Profile	R
Custom Action Profile	C
Job Monitor	J

Plan Manger

Functionality Name and Hot Key					
Create	C	Save	M	Save	S
				Save and Enable	A
		Cancel		C	
View Details	V	Edit Plan		EP	
		Job Monitor		J	
		Close		C	
Edit	ES	Save	M	Save	S
				Save and Enable	A
		Cancel		C	
Delete		DE			
Enable		EN			
Disable		DA			
Job Monitor		J			
Back		B			

Usage Pattern Alerting Report

Functionality Name and Hot Key	
Activity Report	AC
Analysis Report	AN
Export Now	E
Job Monitor	J
Back	B

Rule Profile

Functionality Name and Hot Key			
Create	N	Save	S
		Cancel	C
View	V	Edit	E
		Cancel	C
Edit	E	Save	S
		Cancel	C
Delete		D	
Close		C	

Custom Action Profile

Functionality Name and Hot Key			
Create	N	Save	S
		Cancel	C
View	V	Edit	E
		Cancel	C
Edit	E	Save	S
		Cancel	C
Delete		D	
Close		C	

Settings Interface

To access the Settings interface by using hot keys from anywhere in the Report Center interface, press the **Ctrl** +**Alt** + **Z** key combination to access the hot key mode, and then press **S** on the keyboard to enter the Settings Interface.

The following table provides a list of hot keys for the functionalities on the ribbon of the Settings Interface. For example, continue pressing **D** to jump to the Data Collection interface.

Functionality Name and Hot Key	
Data Collection	D
Active History Pruning	H
IIS Logging	IL
Reporting Service	R
Cross-Farm Service Configuration	C
Audit Controller	A
Audit Pruning	P
Manage Feature	M
Export Location	L
Shared Location	S

Functionality Name and Hot Key	
Scope Filter	F
Item Caching Service	IC
Usage Activity Web Parts Settings	WS

Data Collection

Functionality Name and Hot Key			
View Profile	V	Enable	E
		Disable	D
		View Scope	V
		Back	B
Edit	E	Save	O
		Cancel	C
Collect Now		G	
Job Monitor		J	
Back		B	

Active History Pruning

Functionality Name and Hot Key					
Create	C	Save	S	Save	O
				Save and Run Now	R
		Cancel		C	
View Details	V	Edit		E	
		Run Now		R	
		Close		C	
Edit	ES	Save	S	Save	O
				Save and Run Now	R
		Cancel		C	
Delete		DE			
Run Now		R			
Restore Pruned Data	Q	List View		L	
		Calendar View		C	
		Restore		R	
		Back		B	
Job Monitor		J			
Back		B			

IIS Logging

Functionality Name and Hot Key	
Select All Fields	S
Rollback	R
Close	c

Reporting Service

Functionality Name and Hot Key	
Save	O
Cancel	C

Cross-Farm Service Configuration

Functionality Name and Hot Key			
Configure	F	Rediscover	R
		Save	O
		Cancel	C
Rediscover All		R	
Save		O	
Cancel		C	

Auditor Controller

Functionality Name and Hot Key									
Plan Builder	P	Wizard Mode	W	Back		B			
				Next		N			
				Finish	F	Finish	F		
						Finish and Apply Rule	A		
						Finish and Retrieve Data	R		
				Cancel		C			
		Form Mode	F	Save		O			
				Cancel		C			
Plan Manager	M	View Detail	V	Settings	S	Save	S	Save	S
								Save As	SA
				Auditor	A	Save	S	Save and Apply Rule	A
								Save and	R

Functionality Name and Hot Key									
								Retrieve Data	
				Edit	E	Reset		R	
						Cancel		C	
				Close		X			
		Edit	E	Save	S	Save		S	
						Save As		SA	
						Save and Apply Rule		A	
						Save and Retrieve Data		R	
				Reset		R			
				Cancel		C			
		Delete		D					
		Apply Rule		A					
		Retrieve Data		R					
		Back		B					
		Job Monitor		J					
Job Monitor		J							
Back		B							

Audit Pruning

Functionality Name and Hot Key									
New		N		Save		O			
				Cancel		C			
Profile Manager	P	View Details	I	Edit	E	Save	S	Save	O
								Save As	A
								Save and Run Now	R
						Cancel		C	
				Close		X			
		View Jobs	V	Delete		D			
				Restore		R			
				Back		B			
		Edit	E	Save	S	Save		O	
						Save As		A	
						Save and Run Now		R	
				Cancel		C			
		Delete		D					

Functionality Name and Hot Key			
		Run Now	R
		Job Monitor	J
		Back	B
Job Monitor			J
Back			B

Manage Feature

Functionality Name and Hot Key					
Document Auditing	D	Advanced Settings	P	Save	O
				Cancel	C
		Activate	A		
		Deactivate	D		
		Back	B		
Social Activity Web Parts	S	Activate	A		
		Deactivate	D		
		Back	B		

Functionality Name and Hot Key			
Advanced Settings	P	Save	O
		Cancel	C
Activate		A	
Deactivate		D	
Back		B	

Export Location

Functionality Name and Hot Key			
Create	C	Save	O
		Cancel	C
View	V	Edit	E
		Back	B
Edit	E	Save	O
		Cancel	C
Delete		D	
Back		B	

Shared Location

Functionality Name and Hot Key	
Save	O
Cancel	C

Scope Filter

Functionality Name and Hot Key			
Create	N	Save	O
		Cancel	C
View	V	Edit	E
		Cancel	C
Edit	E	Save	O
		Cancel	C
Delete		D	
Back		X	

Item Caching Service

Functionality Name and Hot Key					
Item Caching Service Scope Settings	I	Configure	C	Save	S
				Cancel	B
		Clear All	A		
		Back	B		
Item Caching Database	D	Save	O		
		Cancel	C		
Back		B			

Usage Activity Web Parts Settings

Functionality Name and Hot Key	
Save	S
Cancel	C

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