

Aquaforest Checkpoint Cookbook



Aquaforest



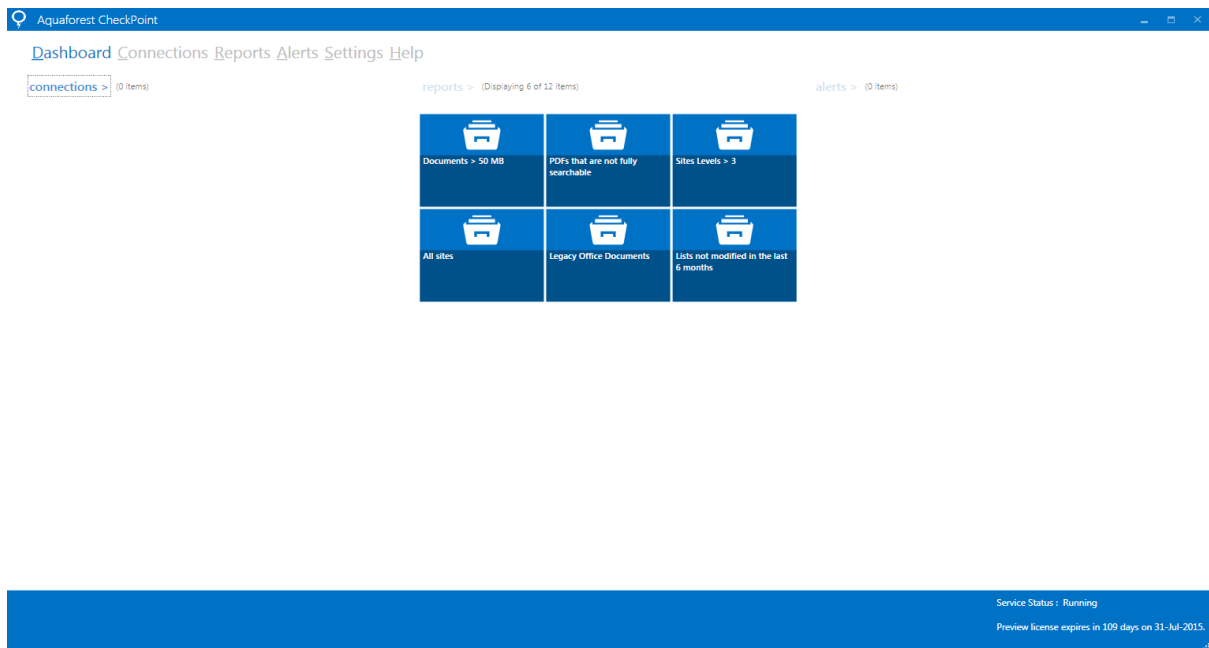
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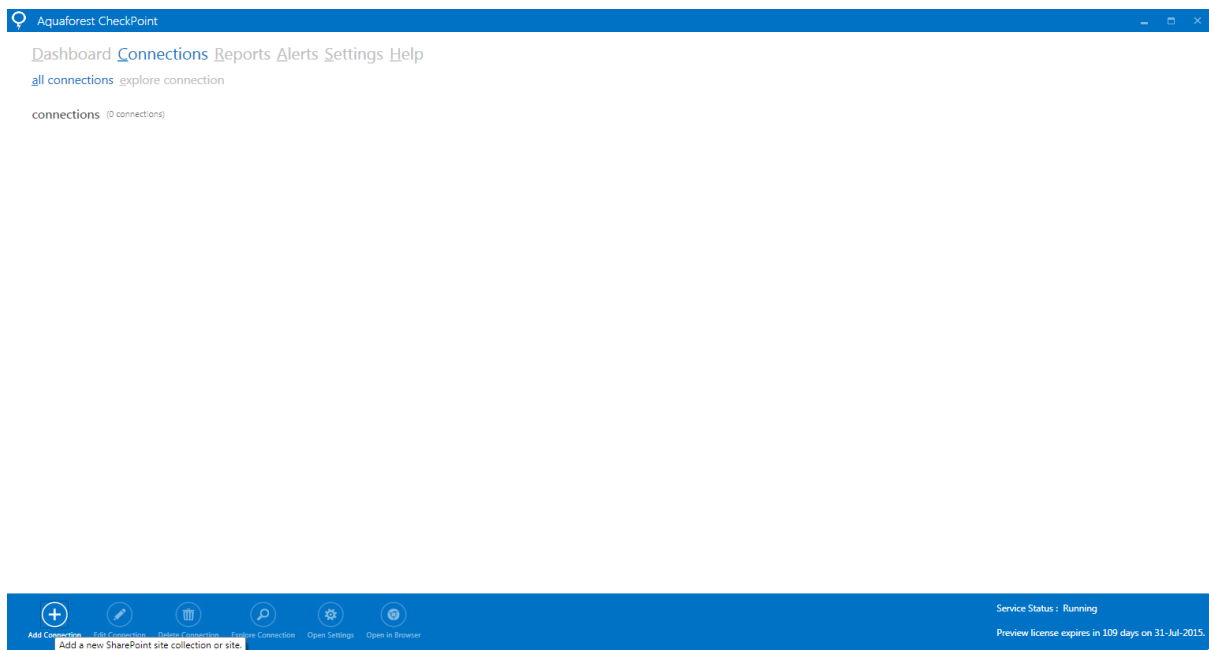
1 Adding a New Connection.

1.1 Solution

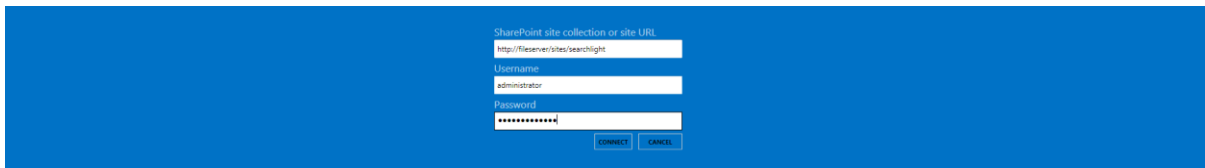
The Aquaforest CheckPoint dashboard will display your current connections along with a set of default saved reports and any alerts which may have been triggered. To add a new connection select the 'connections' tab.



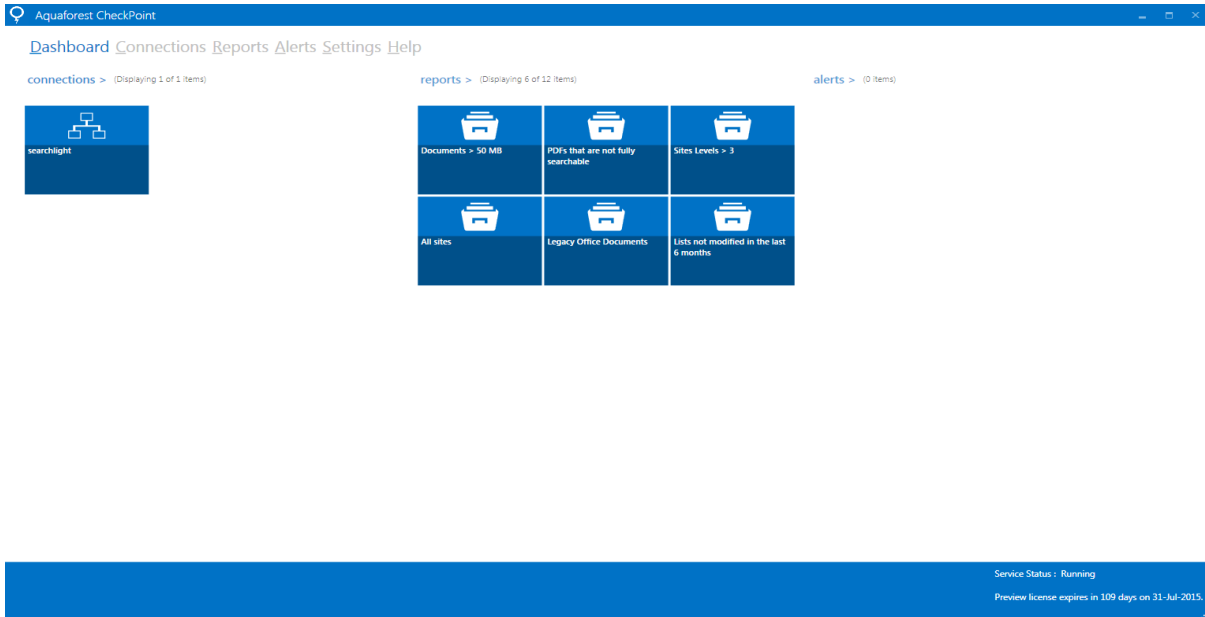
In the connections tab select the 'Add Connection' option from the bottom controls.



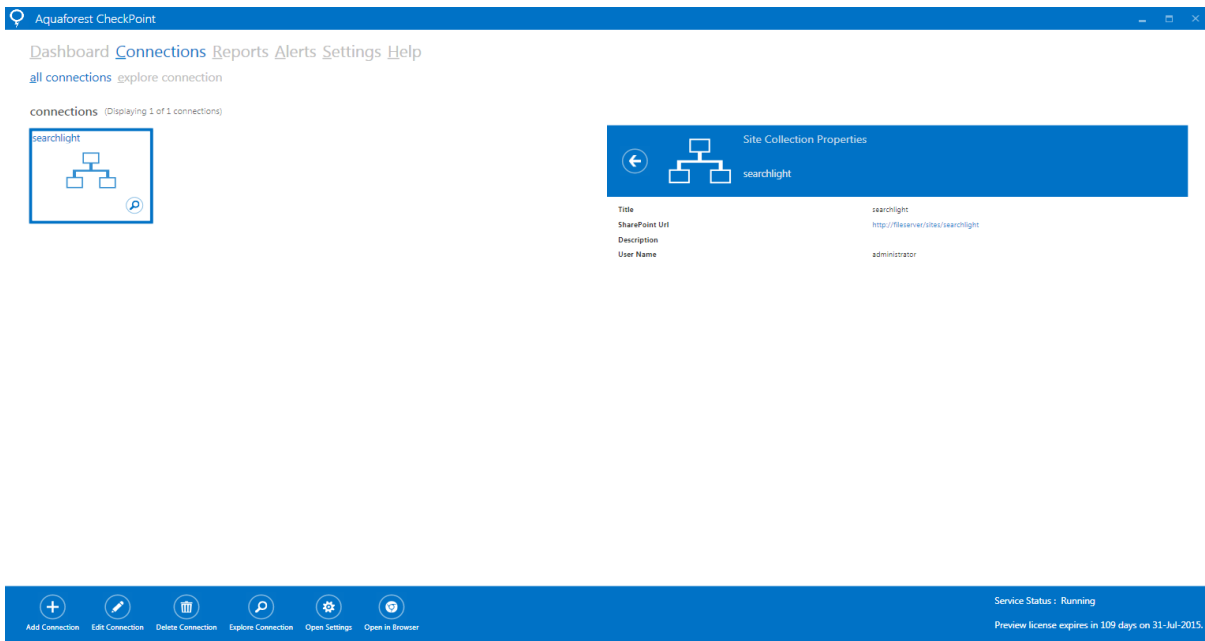
Next enter the URL of the Site or Site Collection along with a suitably privileged user and select 'Connect'.



The connections tab and Dashboard will be updated with the new connection.



A single click on the connection will display the connection properties on the right hand side



Double clicking on a connection will take you to the explore connection tab, this will display any (sub) sites, list/libraries, users, groups, permissions and content types for the connection.

The screenshot shows the Aquaforest CheckPoint interface. At the top, there is a navigation bar with the following links: [Dashboard](#), [Connections](#), [Reports](#), [Alerts](#), [Settings](#), and [Help](#). Below the navigation bar, there are links for [all connections](#) and [explore connection](#), along with a searchlight icon and a link for [\(sub\)sites > \(0 items\)](#).

The main content area is divided into several sections, each displaying a grid of items:

- lists & libraries > (Displaying 4 of 54 items)**: Contains four items: "audit status test", "audit test one", "Content and Structure Reports" (with a sub-description: "Use the reports list to customize the queries that appear in the Co..."), and "duplicate test".
- users > (Displaying 4 of 9 items)**: Contains four user profiles: "Administrator", "Administrator", "Everyone", and "FILESERVER\basicuser".
- groups > (Displaying 4 of 10 items)**: Contains four groups: "Approvers" (Members of this group can edit and approve pages, list items, and...), "Designers" (Members of this group can edit lists, document libraries, and page...), "Excel Services Viewers" (Members of this group can view pages, list items, and documents...), and "Hierarchy Managers" (Members of this group can create sites, lists, list items, and docum...).
- permissions > (Displaying 4 of 11 items)**: Contains four permissions: "Full Control" (Has full control), "Design" (Can view, add, update, delete, approve, and customize), "Edit" (Can add, edit and delete lists; can view, add, update and delete list i...), and "Contribute" (Can view, add, update, and delete list items and documents).
- content types > (Displaying 4 of 108 items)**: Contains four content types: "Fixed Value based Status Indicator" (Create a new Status Indicator using manually entered information), "SharePoint List based Status Indicator" (Create a new Status Indicator using data from SharePoint Lists), "Excel based Status Indicator" (Create a new Status Indicator using data from Excel Services), and "SQL Server Analysis Services based Status Indicator" (Create a new Status Indicator using data from SQL Server Analysis Ser...).

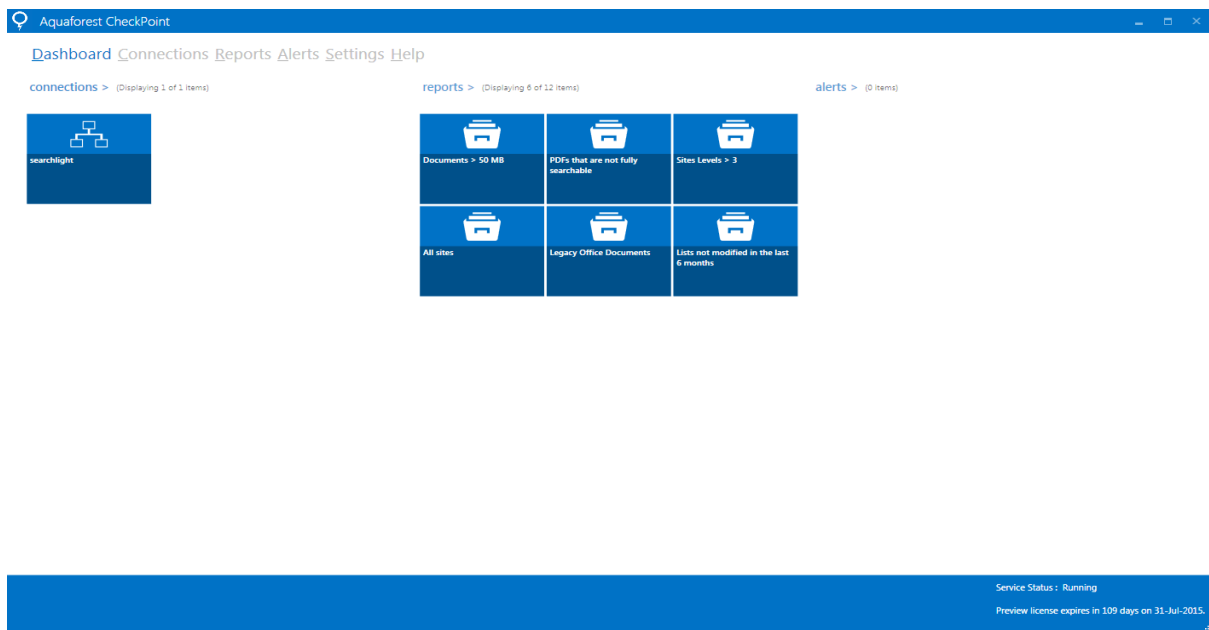
At the bottom right of the interface, there is a status bar with the text: "Service Status : Running" and "Preview license expires in 109 days on 31-Jul-2015".

2 Creating a new Report.

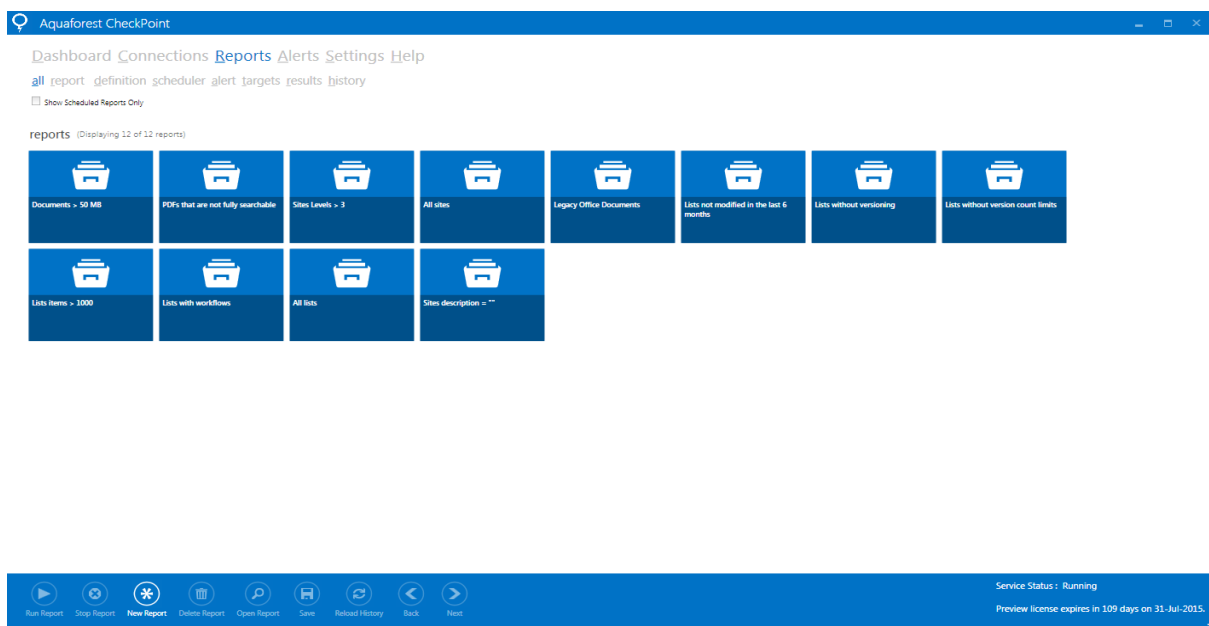
2.1 Solution

A number of default reports are provided with the product and are displayed on the dashboard. You can modify an existing report and configure the criteria to meet your own requirements or you can simply create a new report, in this example we will create a new report.

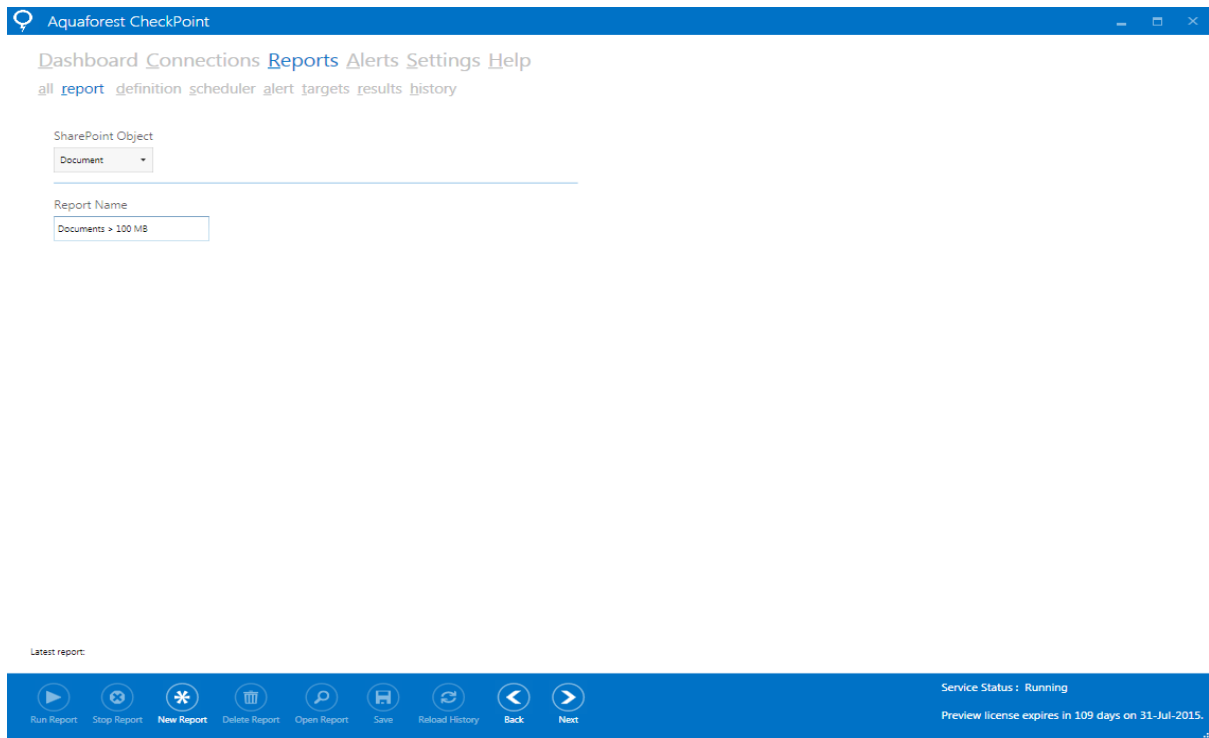
Select the Reports tab from the Dashboard



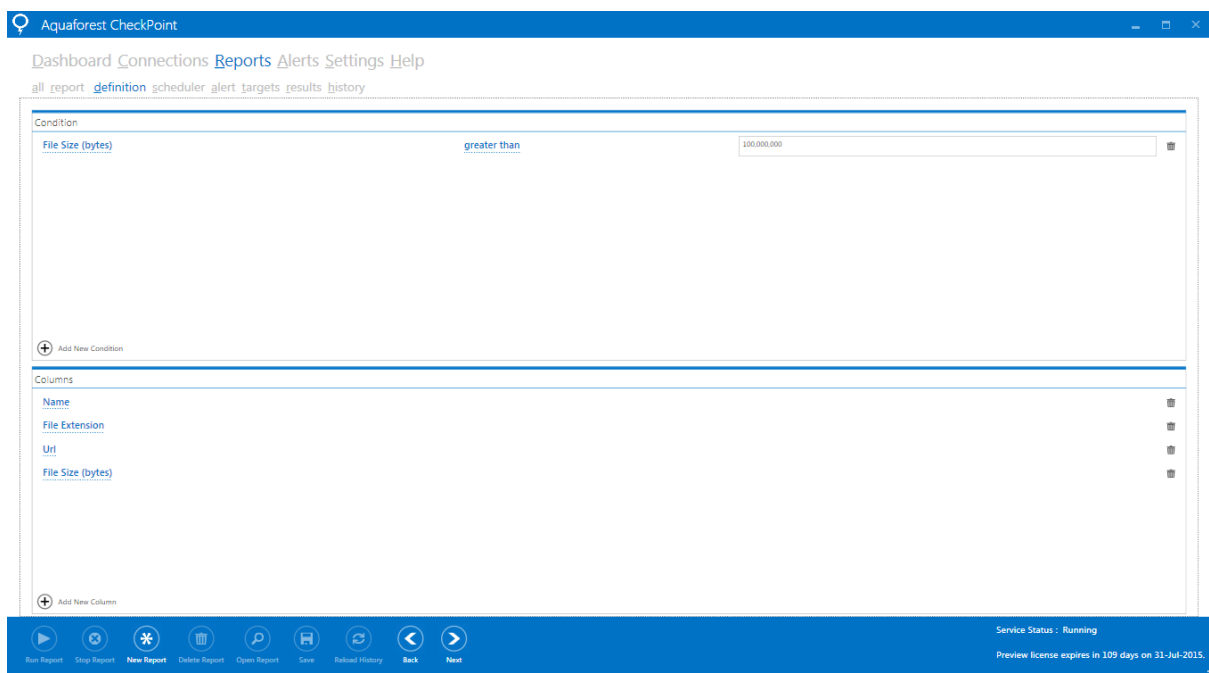
In the Reports tab select 'New Report' from the bottom controls.



Next from the SharePoint Object dropdown select the Object type you would like the report to run against and provide a name for your report, then select Next from the bottom control.

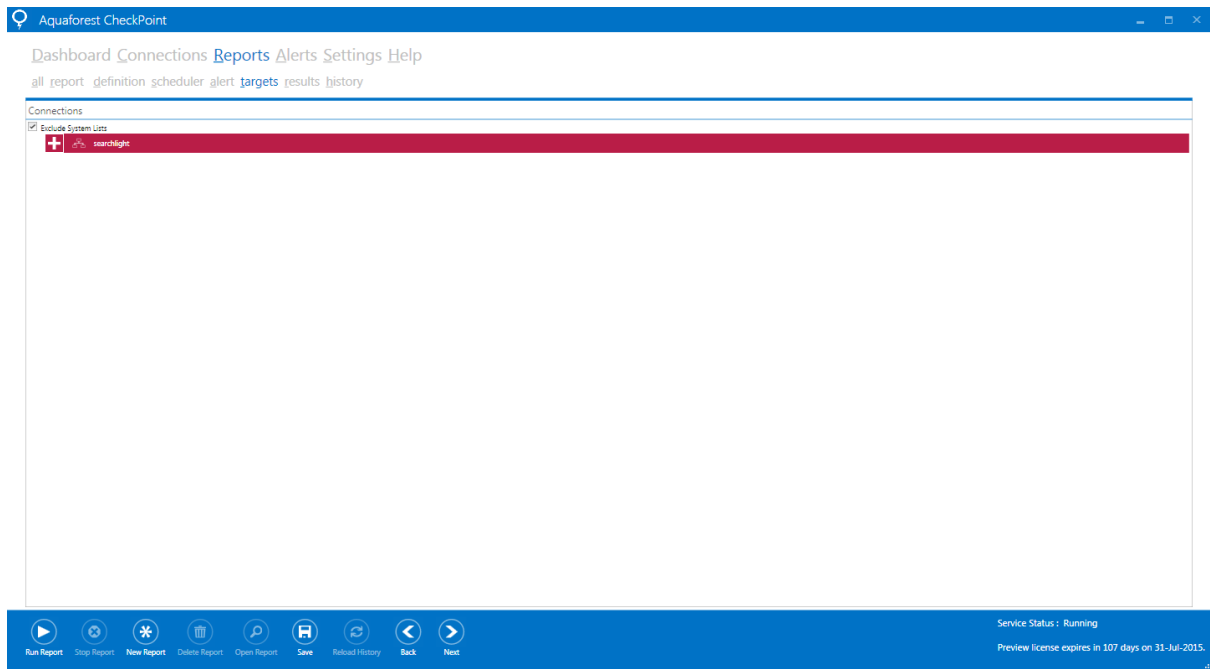


In the definition tab select 'add new condition', select the condition and operator that you require and add a relevant value in the field. A number of default columns are set for each condition however further columns can be added by selecting 'add new column'.

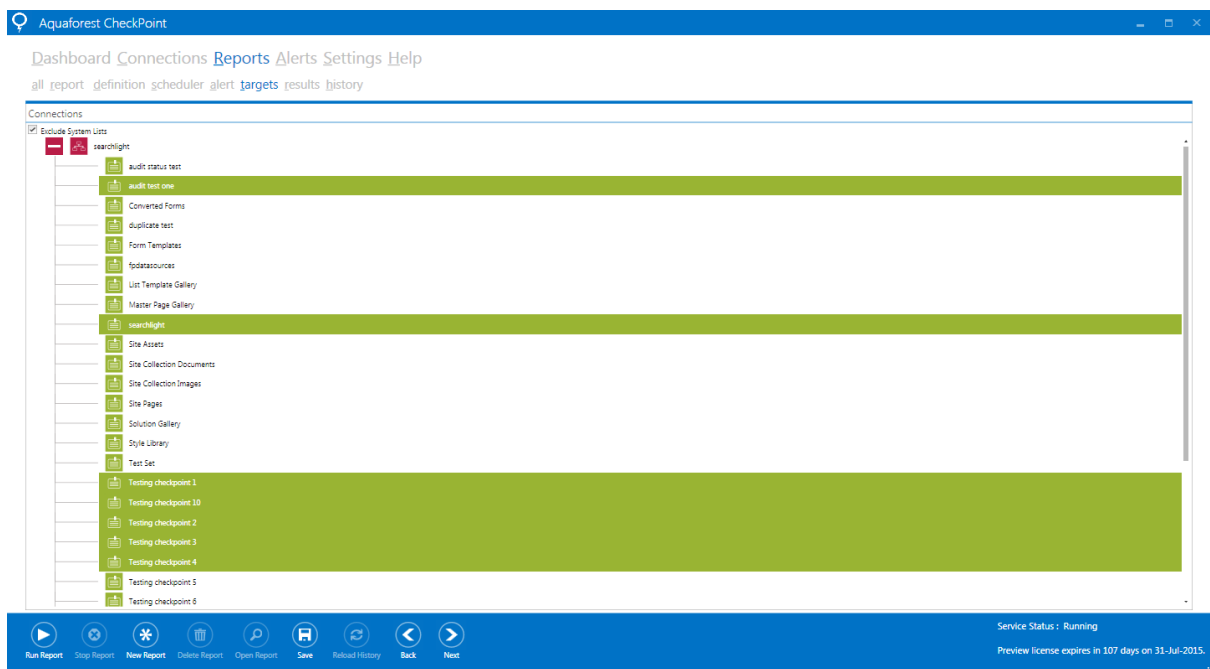


Press Next on the Scheduler and Alert tabs.

In the targets tab you will need to select the Site(s)/Library(s)/List(s) you wish the report to run against. To include all of the items under a site you can highlight the top level site as shown below.



If you would like to run the report against specific (sub) sites, list/libraries then you can highlight these individually as shown below.



Once you have made a selection you can save the report or run the report. The results will be displayed in the table on the results tab, you also have the option to save the results to a PDF or CSV format file.

The screenshot shows the Aquaforest CheckPoint Reports interface. The top navigation bar includes 'Dashboard', 'Connections', 'Reports', 'Alerts', 'Settings', and 'Help'. The 'Reports' section is active, showing a breadcrumb trail: 'all report definition scheduler alert targets results history'. Below this, there is a table with one report result. The table has columns for 'Name', 'File Extension', 'URL', and 'File Size (Bytes)'. The single row contains the following data:

Name	File Extension	URL	File Size (Bytes)
00000001.sf	sf	http://fileserver/sites/searchlight/Test%20Set/180213/00000001.sf	132,662,888

At the top right of the table area, there are buttons for 'Export to PDF' and 'Export to CSV'. Below the table, there is a large empty space. At the bottom of the interface, there is a blue toolbar with icons for 'Run Report', 'Stop Report', 'New Report', 'Delete Report', 'Open Report', 'Save', 'Reload History', 'Back', and 'Next'. On the right side of the toolbar, it says 'Service Status: Running' and 'Preview license expires in 107 days on 31-Jul-2015'.

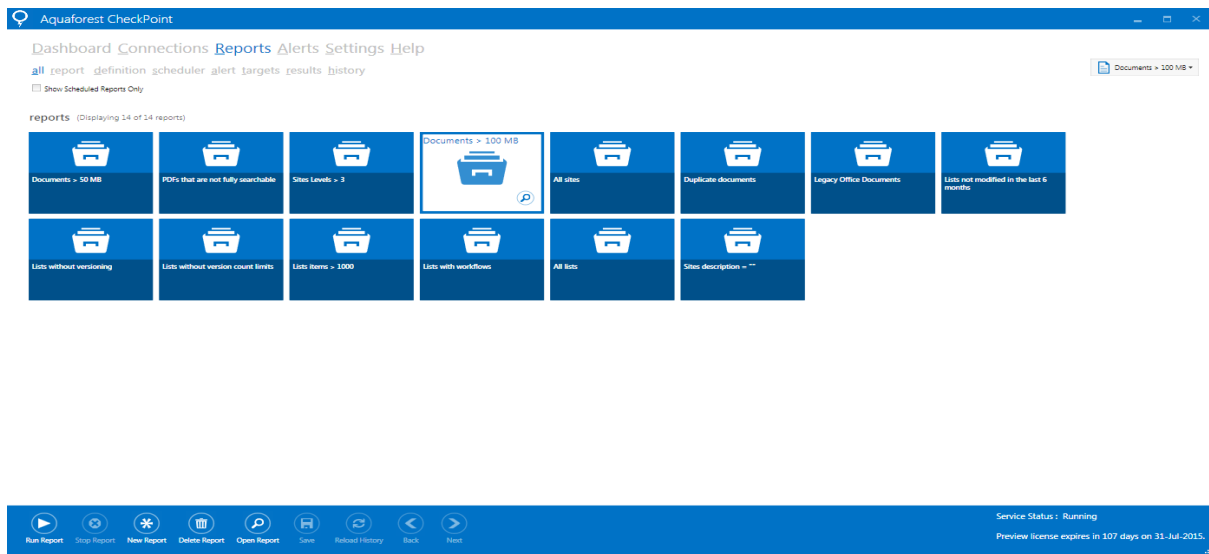
3 Scheduling a Report to run once a day.

3.1 Requirement

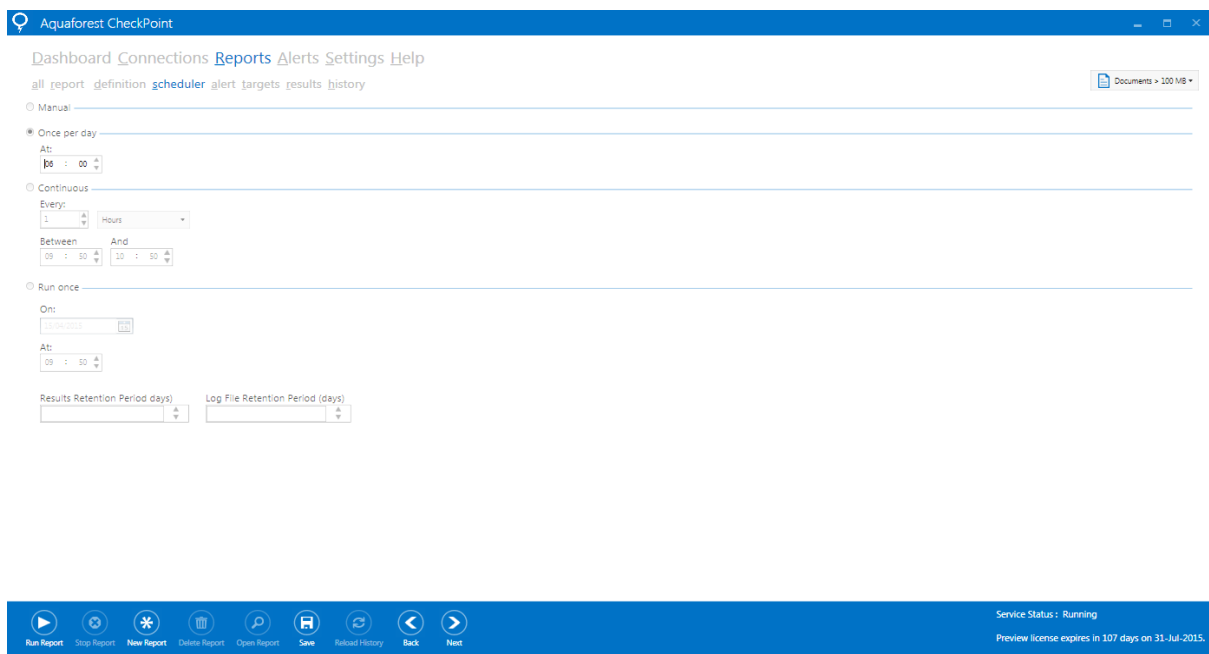
You would like to schedule a report to run once a day using the scheduler.

3.2 Solution

Aquaforest CheckPoint is designed to allow reports to be run continuously, once a day or on a specific date. In this example we will take an existing report and set it to run once a day. Select reports from the dashboard and then double click on the report that you would like to schedule.



In the scheduler tab you can select from one of the following options for the report; once per day, Continuous or for the report to be run on a specific date. Select the option you require and save the report.



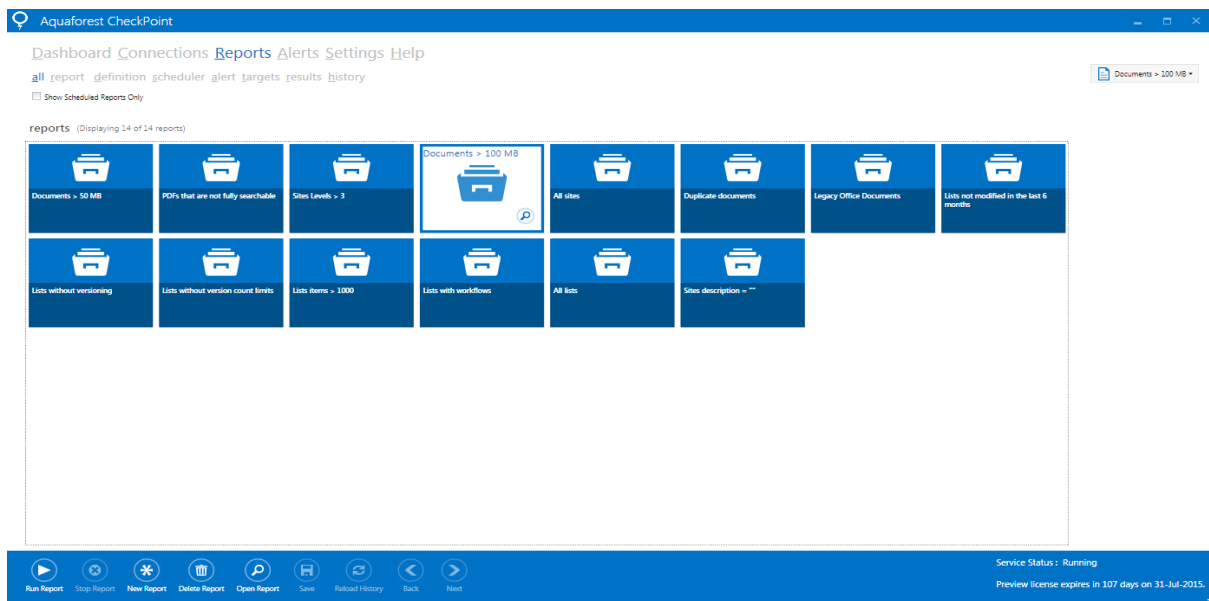
4 Enabling alerts for a Report.

4.1 Requirement

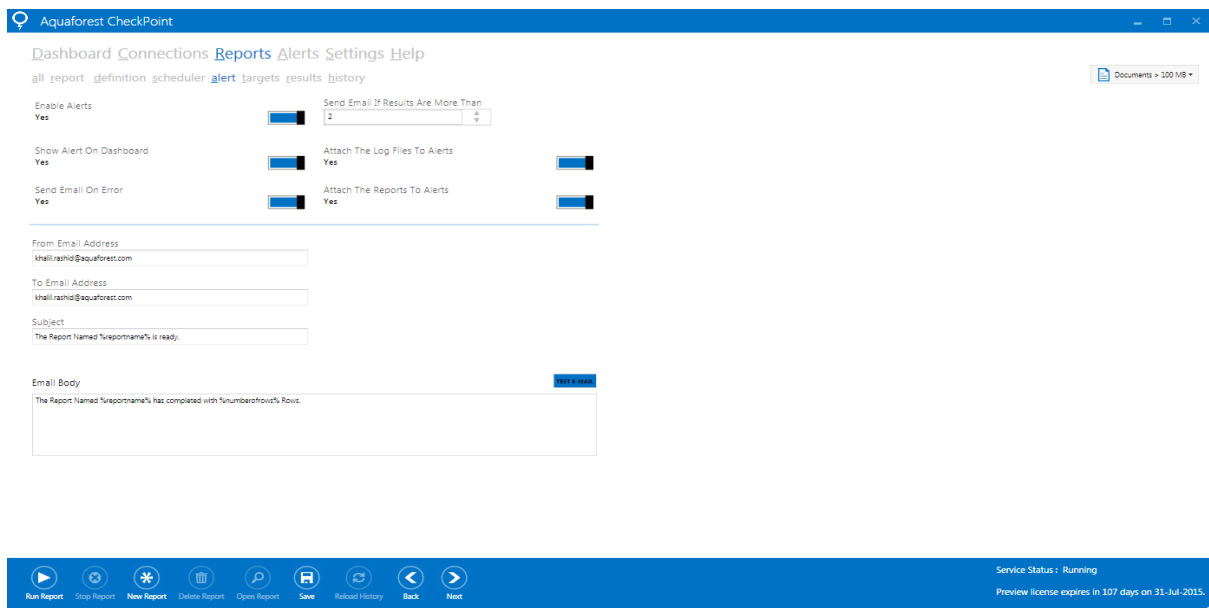
You would like to be notified if a report returns a defined number of results.

4.2 Solution

Select reports from the dashboard and then double click on the report that you would like to setup an alert for.



Next select the alerts tab and enable the alerts option, there are a number of other options which can be selected which are shown in the screen shot below.

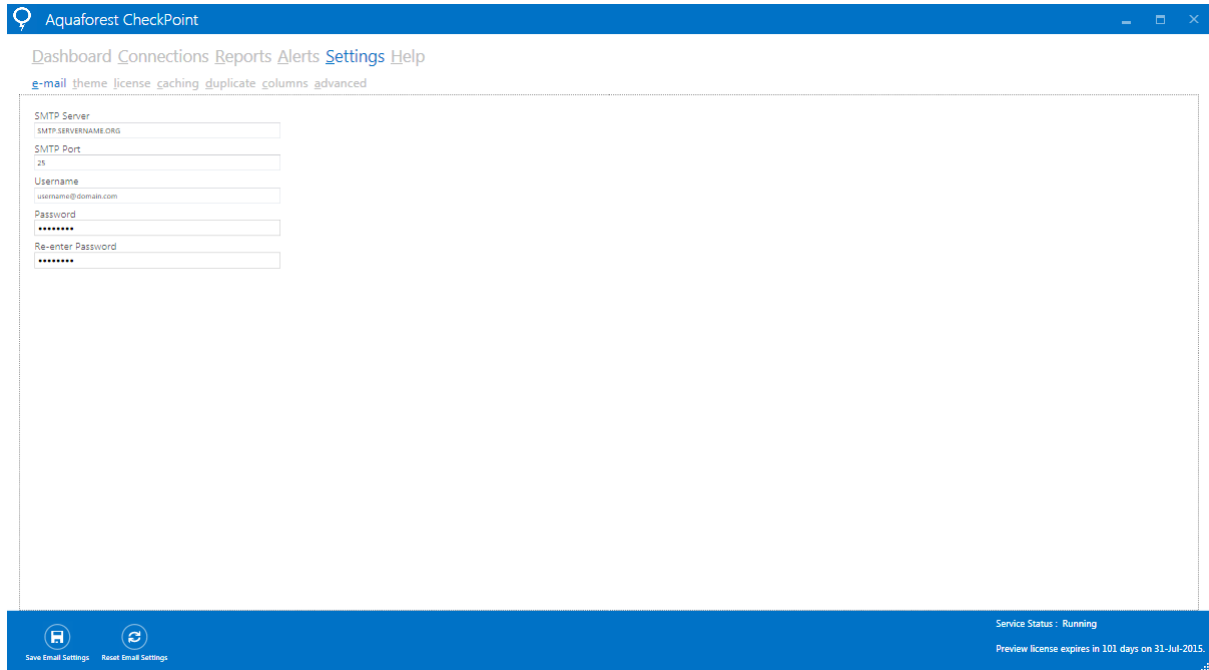


5 Settings

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

5.1 Email

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



The screenshot shows the Aquaforest CheckPoint web interface. The top navigation bar includes 'Dashboard', 'Connections', 'Reports', 'Alerts', 'Settings', and 'Help'. The 'Settings' tab is active, and the 'Email' sub-tab is selected. The main content area contains a form for SMTP server configuration with the following fields:

- SMTP Server: SMTP.SERVERNAME.ORG
- SMTP Port: 25
- Username: username@domain.com
- Password: [masked with asterisks]
- Re-enter Password: [masked with asterisks]

At the bottom of the interface, there are buttons for 'Save Email Settings' and 'Reset Email Settings'. On the right side of the bottom bar, the status is 'Service Status: Running' and a message states 'Preview license expires in 101 days on 31-Jul-2015'.

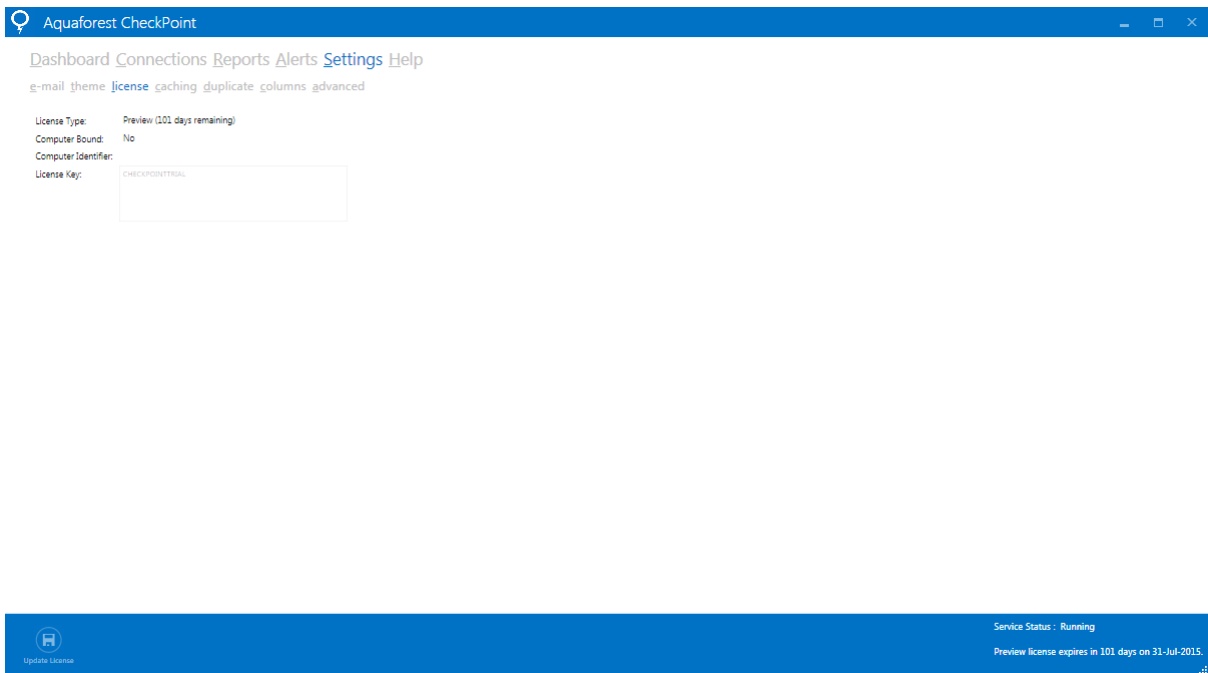
5.2 Theme

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



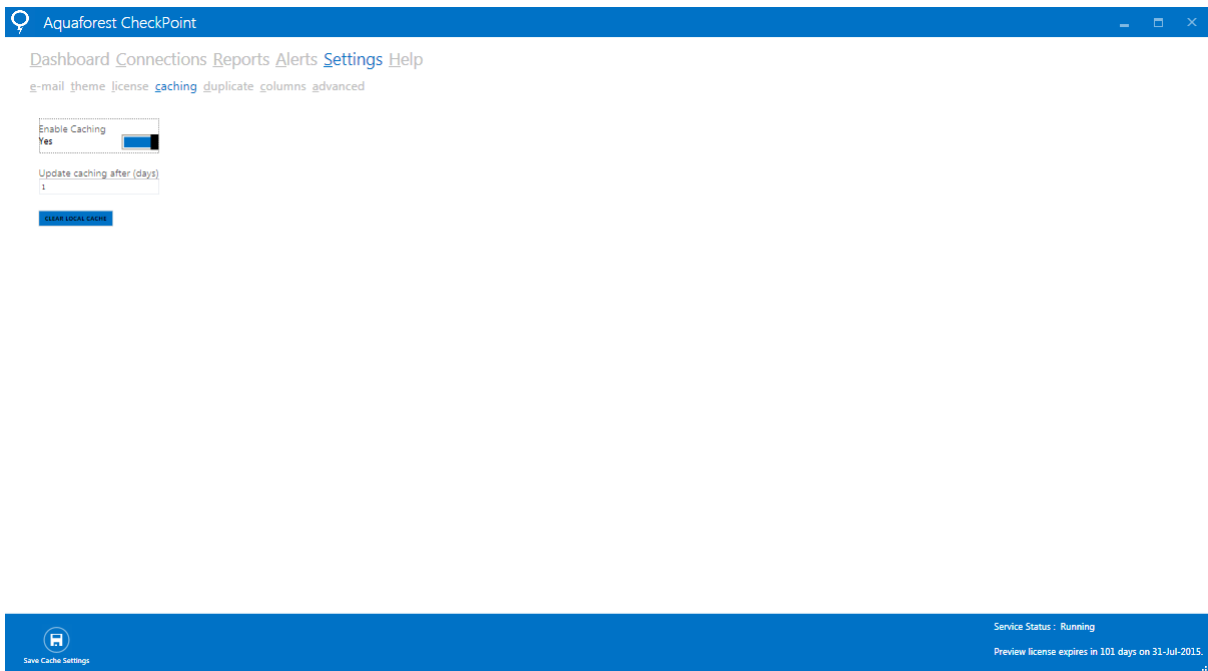
5.3 License

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



5.4 Caching

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



5.5 Duplicate

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

The screenshot shows the 'Duplicate' settings page in the Aquaforest CheckPoint application. The page has a blue header with the application name and navigation links: Dashboard, Connections, Reports, Alerts, Settings, and Help. Below the header, there are links for 'e-mail', 'theme', 'license', 'caching', 'duplicate', 'columns', and 'advanced'. The main content area contains three sections: 'Size Threshold (bytes)' with a text input field containing '10'; 'File Types to Unzip' with a list of file extensions including doc, docm, docx, etc.; and 'Folders to Exclude' with a text input field containing 'custom\test\trash'. At the bottom, there is a blue footer bar with a 'Save Duplicate Settings' button on the left and 'Service Status: Running' and 'Preview license expires in 101 days on 31-Jul-2015' on the right.

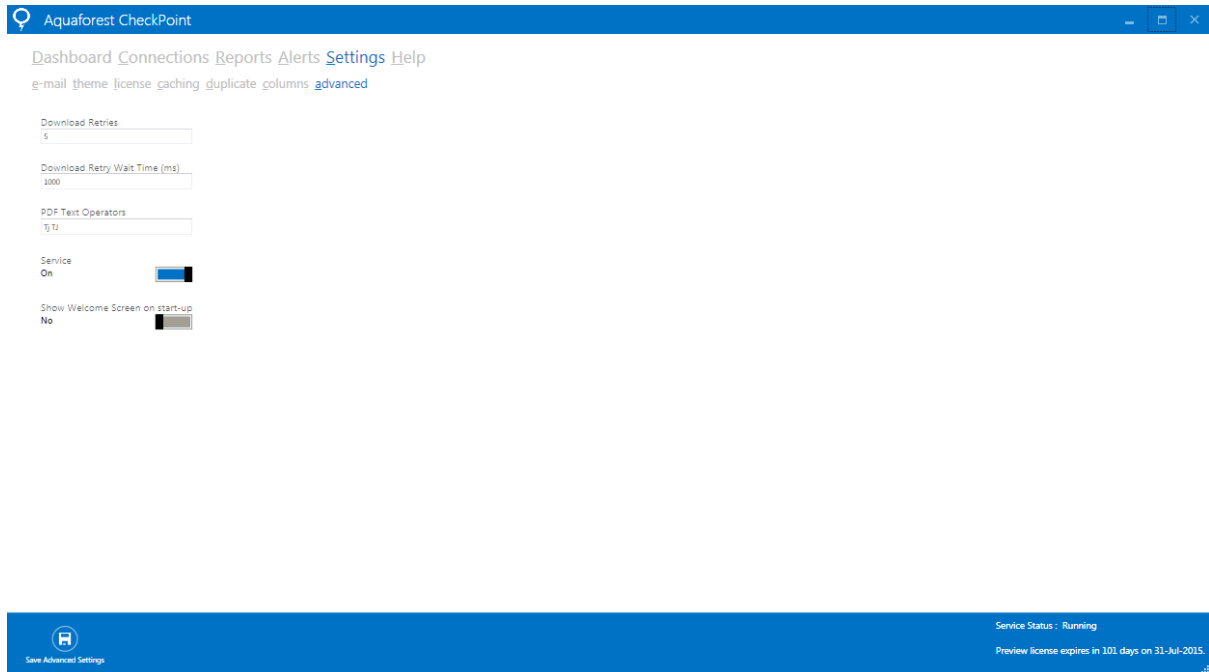
5.6 Columns

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

The screenshot shows the 'Columns' settings page in the Aquaforest CheckPoint application. The page has a blue header with the application name and navigation links: Dashboard, Connections, Reports, Alerts, Settings, and Help. Below the header, there are links for 'e-mail', 'theme', 'license', 'caching', 'duplicate', 'columns', and 'advanced'. The main content area is divided into four sections, each with a list of columns and checkboxes: 'Default Site Columns', 'Default Document Columns', 'Default List Columns', and 'Default User Columns'. 'Default Site Columns' includes Title, Created Date, Last Modified Date, Owners, Description, Language, Url, Level, Depth, Number of Subsites (child), Number of Subsites (total), and Has Unique Permissions. 'Default Document Columns' includes Name, File Extension, File Size (bytes), Created Date, Last Modified Date, Created By, Last Modified By, Version, PDF Searchability Status, Duplicate, Url, and Checked Out To. 'Default List Columns' includes Title, Created Date, Last Modified Date, Date Last Item Was Deleted, Description, Number of Items, Url, Base Type, List Template, Has Unique Permissions, Permissions Levels, and Principal Types. 'Default User Columns' includes Name, Is Site Collection Administrator, Author, Email, and Is Domain Group. At the bottom, there is a blue footer bar with a 'Save Columns Settings' button on the left and 'Service Status: Running' and 'Preview license expires in 101 days on 31-Jul-2015' on the right.

5.7 Advanced

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



The screenshot shows the Aquaforest CheckPoint web interface. The browser title bar reads "Aquaforest CheckPoint". The navigation menu includes "Dashboard", "Connections", "Reports", "Alerts", "Settings", and "Help". The "Settings" menu is expanded, showing options like "e-mail", "theme", "license", "caching", "duplicate", "columns", and "advanced". The "advanced" option is selected. The settings page contains several input fields: "Download Retries" with the value "5", "Download Retry Wait Time (ms)" with the value "1200", and "PDF Text Operators" with the value "1/1". There are two toggle switches: "Service" is set to "On" (indicated by a blue bar), and "Show Welcome Screen on start-up" is set to "No" (indicated by a grey bar). At the bottom of the page, there is a blue footer bar with a "Save Advanced Settings" button on the left and "Service Status: Running" and "Preview license expires in 101 days on 31-Jul-2015." on the right.