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| SharePoint Essentials Toolkit 2015™ |
| User Manual |
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| **6/20/2016** |

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This document will provide users with instructions on how to use QIPoint’s SharePoint Essentials Toolkit™.

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# Introduction

This utility is a part of the SharePoint Essentials Toolkit TM Suite. This utility is used to manage and help report on SharePoint site and list settings and permissions.

Specifications

# Supported Operating Systems

Microsoft Windows 10 (64-bit)  
Microsoft Windows 8 (64-bit)  
Microsoft Windows 7 (64-bit)  
Microsoft Windows Vista SP2 (64-bit)  
Microsoft Windows Server 2012 R2 (64-bit)  
Microsoft Windows Server 2012 (64-bit)  
Microsoft Windows Server 2008 R2 SP1 (64-bit)  
Microsoft Windows Server 2008 R2 (64-bit)

# .NET Framework Software Requirements

Requires .NET Framework 4.5  
(Will prompt user to download automatically if not already installed)

# Installation

## IMPORTANT: This program does not need to be installed on a SharePoint Server.

## Minimum Hardware Recommendations

**Processor:** Minimum Dual-Core, 3GHz. Recommended Quad-Core 3GHz or higher  
We recommend Quad-Core 3GHz processor or higher when scheduling more than 20 Jobs at one time.

**RAM:** See individual components documentation for recommended RAM.

**Hard Disk:** 300MB Available Hard Disk Space. See individual components documentation for recommended Hard Disk space.

## Supported SharePoint Versions

Microsoft SharePoint Office 365  
Microsoft SharePoint Server 2016  
Microsoft SharePoint Foundation 2013   
Microsoft SharePoint Server 2013  
Microsoft SharePoint Foundation 2010  
Microsoft SharePoint Server 2010

## Local Machine & Windows System Permissions Required

Local Administrator must install this application  
Local User can execute and run this application  
Local User must have read & modify rights to the following folders:

* C:\ProgramData\QIPoint
  + Used for licensing and scheduler component (by default the user should have read/edit rights to this folder)
* <My Documents>\QIPoint (by default the user should have read/edit rights to this folder)
  + Used for user application configuration files and reports

## SharePoint User Permissions Required

Please see component User Manual for minimum Permissions required.

## Before You Start

1. If you have not already done so, download the program from <http://www.qipoint.com>
2. Extract the contents to a local drive on any machine running Windows 7 or higher with .NET Framework version 4.5. If the .NET Framework is not installed, you will be prompted to install it during installation.

## Install

1. Run the Setup.exe file as a computer Administrator

**NOTE:** The file name of the installer ‘Setup.exe’ may be different depending on the product version. Use the installer file that you downloaded in this step.

1. If the .NET Framework version 4.5 is not installed, you will be prompted to install it.
   1. If prompted, Click Yes to install the .NET Framework 4.5
   2. This may take a few minutes to complete, please wait while the installation finishes
2. You must accept the terms of the End User License Agreement to install the application
3. Follow the prompts and complete the installation

## Uninstall

* You can uninstall the application from the Control Panel -> Programs-> Uninstall a Program
* The Program Name is “SharePoint Essentials Toolkit” Publisher is “QIPoint”
* Reports & Logs which are located by Default in the User’s My Documents directory are not deleted upon uninstallation
* If you have difficulty uninstalling the program, ensure the service located at Administrative Tools - > Services -> QIPoint Essentials Service is stopped

## Checking for Program Updates

* Click “Check for Updates” from your desktop or from the Start Menu

## Reports, Logs and Configuration File Directory Location

* Configuration files are created and stored in the following path:

%SystemDrive%\Users\%username%\Documents\QIPoint\

**Example:** C:\Users\bsmith\Documents\QIPoint\

* The path to the reports and logs can be changed in the application Settings
* The path to the configuration files and temp data cannot be moved/modified

## Local Machine & Windows System Permissions Required

Local Administrator must install this application  
Local User can execute and run this application  
Local User must have read & modify rights to the following folders:

* C:\ProgramData\QIPoint
  + Used for licensing and scheduler component (by default the user should have read/edit rights to this folder)
* <My Documents>\QIPoint (by default the user should have read/edit rights to this folder)
  + Used for user application configuration files and reports
* C:\Users\UserName\AppData\Local\Temp\QIPoint
  + By default, the current user should have read and modify rights to this directory.
  + This is used for caching of data (Enterprise Version only)

## Anti-Virus, Offline Sync Folders (i.e. Google Drive, OneDrive, Drop Box, etc) and Performance

Antivirus programs that have on-access scanning may adversely affect the performance of this tool. There are several files that this tool creates and uses to operate correctly. We recommend reviewing these files and adding them to the on-access exclusions in order to allow the program to read and write to these files efficiently. Please consult with your Network Administrator to ensure this does not violate policies and you may contact us further information on how to do this or what these files are used for.

If you are using OneDrive, Google Drive, Drop Box or any other offline syncing program, please ensure the directories below are excluded or the offline syncing is turned off when using the tool. Offline syncing when the tool is trying to access configuration and report files may cause unexpected results.

### Recommended On-Access & Offline Sync Exclusion locations:

(also exclude subfolders of directories below)

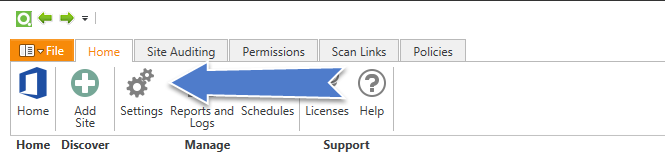
* C:\Users\UserName\AppData\Local\Temp\QIPoint
* C:\ProgramData\QIPoint
* <My Documents>\QIPoint

# Setup & Configuration

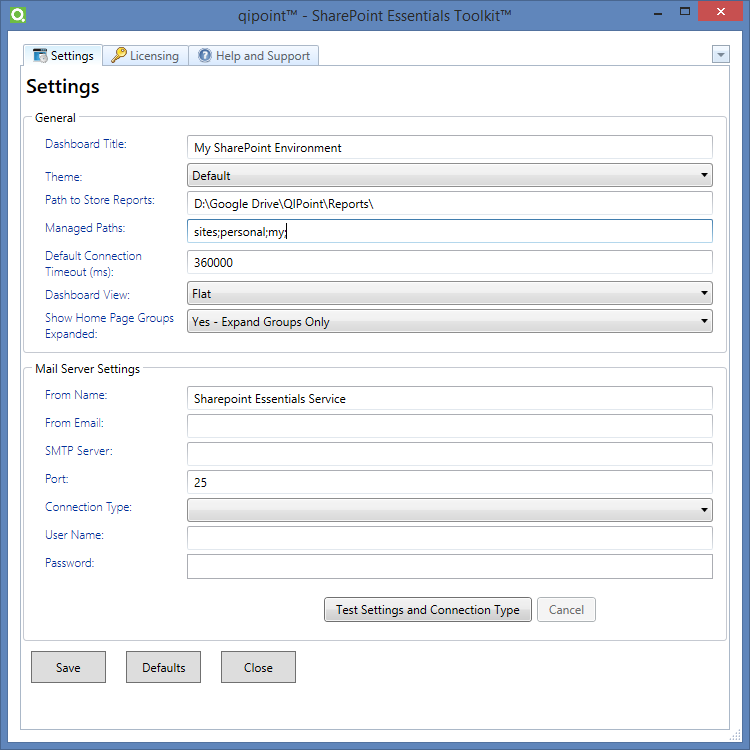
## Global Settings

To change the default configuration options for the application:

1. From the ribbon, click on the “Settings” button at the top (located in the “Home” tab)



1. The following dialog will appear:



1. Complete the form or click OK if the settings are correct. The next section will provide descriptions of the fields.

Dashboard Title

This is the label that appears on the Home page dashboard. This is only cosmetic and does not affect reports or jobs.

Theme

You may choose from several themes to change the look and feel of the application.

Path to Store Reports

This is where the reports and logs will be stored. Sub folders such as “BrokenLinks” will automatically be created at this path, all reports will be stored here, organized in Job folders.

Managed Paths

Enter all of the managed paths used. This is primarily used in the SharePoint Broken Link Manager component.

In order to build the URLs for scanning, the system must understand which path has a managed path present.

If you do not have the correct SharePoint Managed Paths listed here, if using the SharePoint Broken Link Manager tool, you may get paths with duplicate entries and false negatives in the reports. For example, if you have a Managed Path called ‘Projects’, the utility will not be able to understand the paths correctly when relative and will appear as <http://contoso/projects/projects/tasks>, and giving a false report of that URL being broken.

If you do not know the “Managed Paths” of your environment, a SharePoint Farm Administrator may be able to retrieve all Managed Paths by using the PowerShell command below:

Get-SPManagedPath -WebApplication <http://webapplication>

Currently only the SharePoint Broken Link Manager tool relies on this setting to build reports correctly.

Default Connection Timeout (ms)

This is the default timeout for connecting to sites, lists and retrieving information such as Site or list settings or permission data. Normally this does not need to be changed.

Dashboard View

You can select the type of view used in the Home page for displaying managed sites. “Flat” will display all sites in one level. “Hierarchical” will display sites in a hierarchy with multiple levels.

Show Home Page Groups Expanded

This relates to the option above. On the Home Page, the list of Sites are displayed in groups once you have performed a scan. This will set the behavior of group and site expansion of the home page dashboard whenever it is loaded. For example, expanded sites will automatically be ‘opened’ on the home page dashboard vs. being collapsed and require clicking the plus sign to expand them.

**Mail Server Settings**

From Name

This is the display name that appears in the emails (‘From’) used to send the reports.

From Email

This is the email address used to send the reports.

SMTP Server

This is the FQDN (Fully Qualified Domain Name) of the SMTP mail server responsible for relaying emails. Example: smtp.mycompany.com

Port

This is the port used when sending email.

Connection Type

This is the authentication protocol used to communicate with the SMTP server when sending emails.

User Name

This is the username that is passed as part of the credentials when sending email as ‘From Email” address.

Password

This is the password that is passed as part of the credentials when sending email. It should correspond with the “User Name” above

Defaults (button)

You may reset values to defaults by clicking the “Defaults” button.

Don’t forget to click Save!

## Managed Paths

Be sure to enter all Managed Paths in the program Settings (from Ribbon, Home->Settings). This will ensure relative and absolute paths are resolved correctly. This is primarily used in the SharePoint Broken Link Manager component.

## Scheduler Service

This service is required to schedule audit jobs.

1. Open Windows Services (Control Panel->Administrative Tools->Services).
2. Locate the “QIPoint Essentials Service”.
3. Right click and start the service.   
   NOTE: If the service does not start, try changing the log on credentials to use your account to ensure it has adequate access to create and save scheduled job reports. This account requires edit rights to “C:\ProgramData\QIPoint”.

# Dashboard

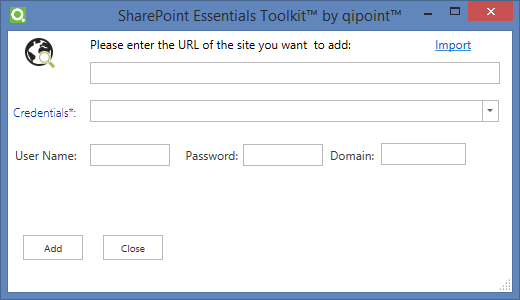
The dashboard is located on the home page and is used to organize and display information about the Sites that the user is managing. The dashboard also provides a quick way to execute tasks on a site by right clicking on them.

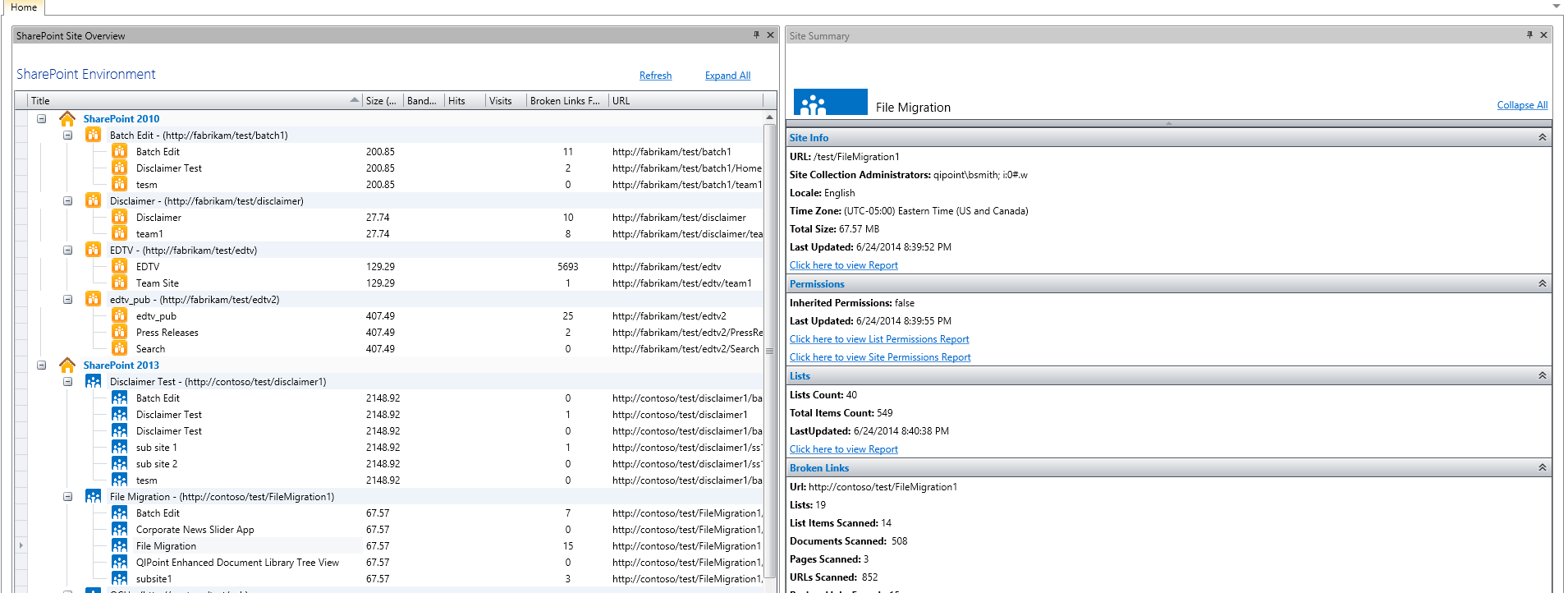
NOTE: The dashboard will only show information once a scan is successfully completed on a Site. You can also click “Add Site” from the ribbon menu to add sites to the home page dashboard.

## Adding a Managed Site

Clicking “Add Site” will allow you to add a new site to the Home Page Dashboard.

NOTE: By default, reports are not emailed, you must configure the SMTP server settings in the Settings page, then add the email address of the email recipient in the corresponding report job. To use the “Contact Email” person for the site and any sub sites that are included in the job, you may enter <Contact Email> for the Email address in the job.





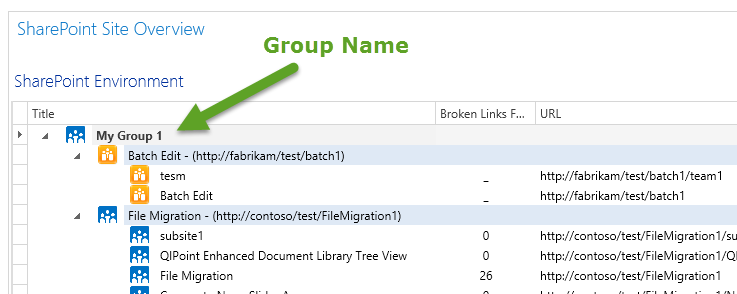
## Import Multiple Sites to Dashboard

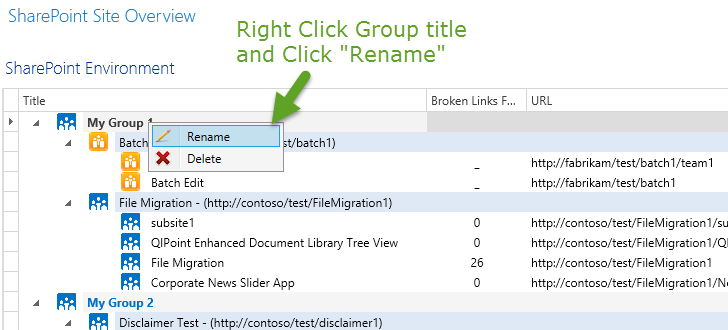
You can bulk import sites using a MS Excel spreadsheet. To do this, click Add Site from the Home tab, then click the “Import” link. Create a new MS Excel document and add 2 columns, the first column should be “Site URL” and a second column to be “Contact Email”.

“Site URL” is the URL of the site to be added to the Home Page Dashboard.   
“Contact Email” (optional, can be left blank) is the email address of the person who will receive reports for this site via email notifications.

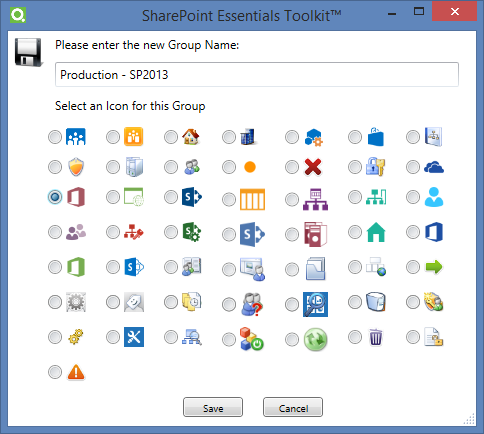
## Managing Your Sites on the Dashboard

The user can customize the group and category names, such as adding a group for “Production” and “Test Sites”.

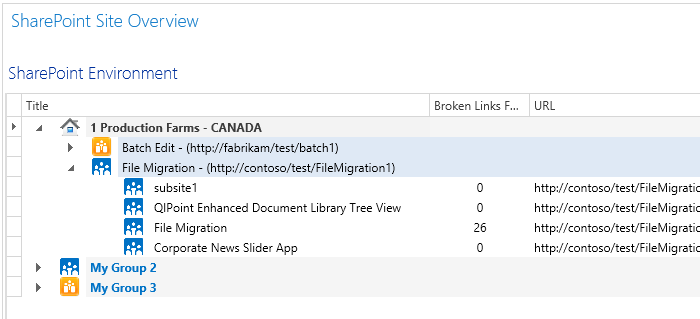


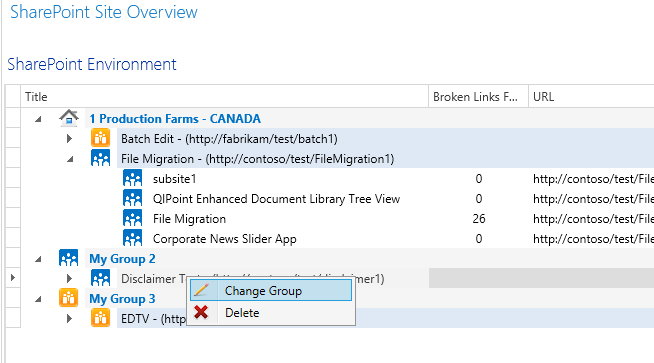


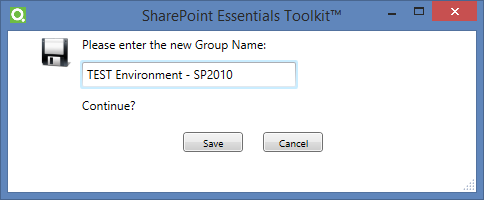
Enter the new name of the group and select an icon for the group



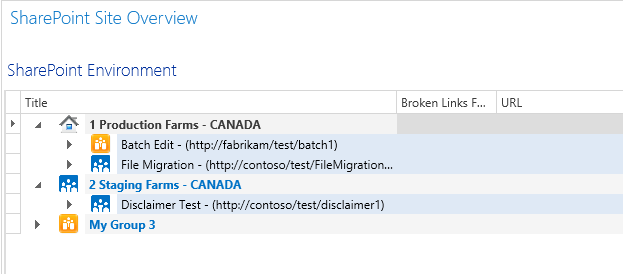
The new name and icon will now appear for that group

  
  
You can also change the group of a Site Collection and all sites under it by right clicking the Site Collection Title and selecting “Change Group”





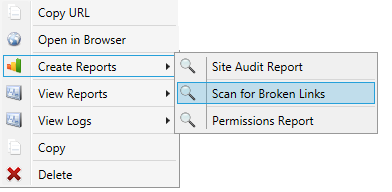
Click Save and you should now see a new group for the Site Collection



## Executing Tasks from the Dashboard

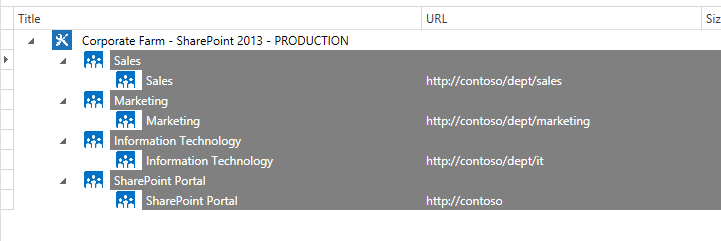
You can execute tasks from the Dashboard such as running a Scan for Broken links against a site by right clicking on the site you want to perform the task on.

*TIP: Depending on the components installed (see Licensing section), you will be presented with the options available that can be performed, in this case “Scan for Broken Links” is an option.*

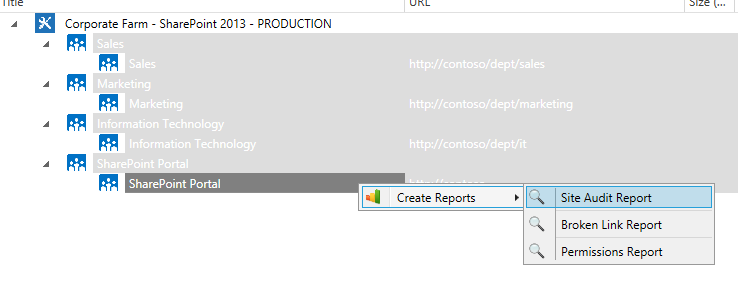


## Batch Processing Reports for Multiple Sites

In addition to bulk importing multiple sites (see [Import Multiple Sites to Dashboard](#_Import_Multiple_Sites)), you can also execute jobs against multiple sites at once. To do this, hold Ctrl or Shift and select multiple sites from the Home Page Dashboard



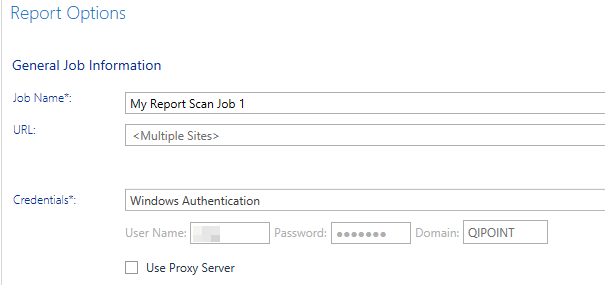
Right click and you will have the option to “Create Reports”



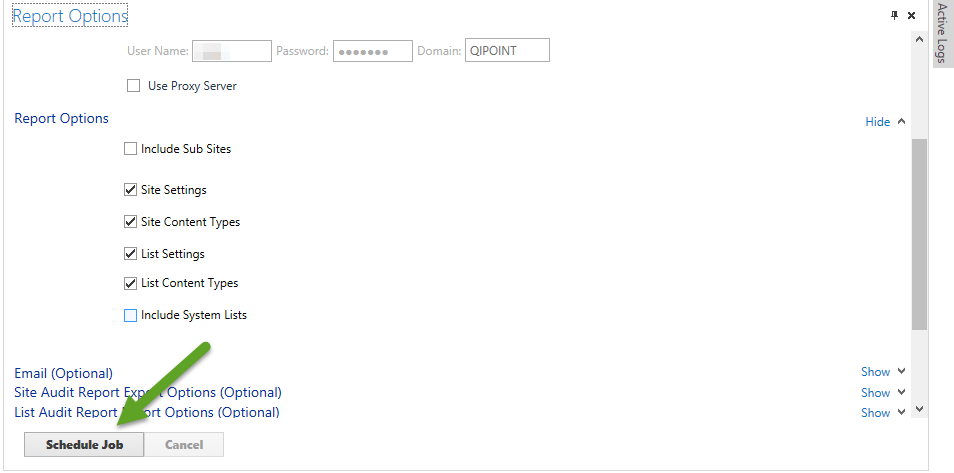
NOTE: Options above may vary depending on the components you have installed and activated.

Click to create one of the reports, you will see the Report Wizard window appear.

Below is an example of the Site Audit report that will run against multiple sites that we selected earlier, notice the URL shows <Multiple Sites>



In batch mode, you can only now click “Schedule Job” below. You may choose to Run all jobs immediately or on a schedule. Once you click “Schedule Job”, the Scheduler Window will appear for you to choose appropriate settings.



# Licensing

## Components

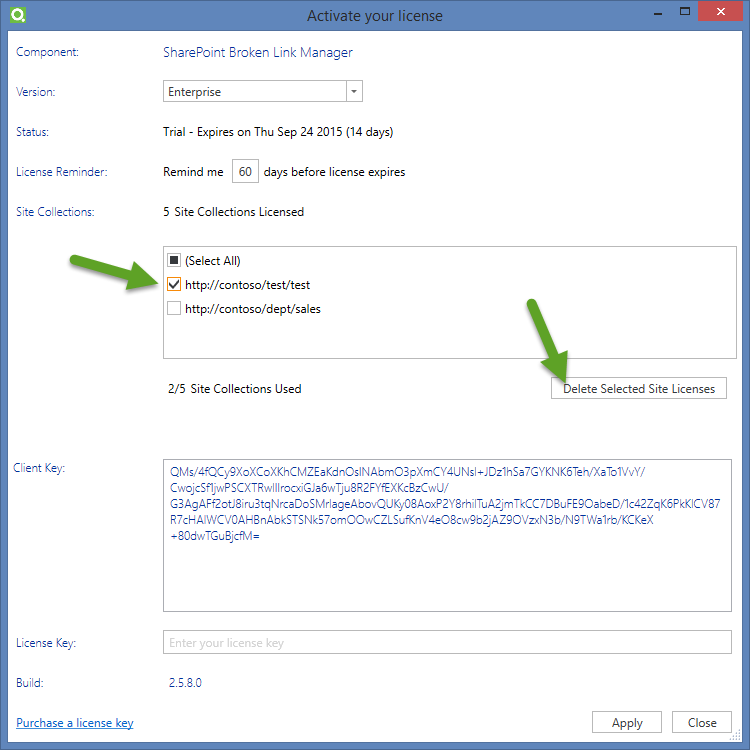
The SharePoint Essentials ToolkitTM by QIPoint may have multiple components activated to provide more functionality.

To view what components are installed, on the ribbon, click Home -> Licenses.

## Modifying the Site Collections that are licensed

You may need to change or remove a Site Collection license and may do so by going to the component license page, selecting the Site Collection you wish to remove (and free up), and click ‘Delete Site Licenses’, this will remove the Site Collection License from use. Reports and logs will not be removed but will not be accessible from the product user interface and must be opened using Windows Explorer and a compatible program such as MS Excel or Notepad.

To add a different Site Collection to the license list, simply create a Scan job/Copy Job of that site and it will automatically be added to the corresponding component.



## Changing the license type of a component

1. Start “SharePoint Essentials ToolkitTM”
2. From the “Home” Ribbon tab, click on “Licenses”
3. If you are using a Trial Version:
   * Click on “Activate Now” beside the product you want to changing licenses for

If you are using a Licensed Version:

* + Click on “Change License” beside the product you want to changing licenses for

1. Select the **Version** of the application component you would like to activate, example, change to “Enterprise” for the Enterprise version.
2. If you have a paid license key, enter it in the “License Key” text box (replace “Trial” text)
3. Click Activate
4. Close any open tabs in order for the new licensing options to become available (or hidden if downgrading the license). The new options will appear once the tab is reloaded. You do not need to shut down the application.

## Obtaining a License

There are three ways you can purchase a license

1. Online: visit <https://store.qipoint.com/>
2. Call us at 1-855-747-6468
3. Email us at [sales@qipoint.com](mailto:sales@qipoint.com)

You may place your order and receive a license key with a PO# or Credit Card

## Transferring a License

You may need to transfer the license if the machine was lost, stolen, re-formatted, or if you would like to assign a license to another user. Contact us to obtain a new license activation key at [support@qipoint.com](mailto:support@qipoint.com).

# Tips, Comments & Troubleshooting

* The utility can be paused to view the active logs and re-started as needed
* Sometimes it may appear a scan/job is hanging and stuck on “Scanning”. This is because the application is waiting for a response from the server which could potentially be for a large set of data. This may potentially take up to 15 minutes at times if the dataset being retrieved is large. Typically regardless of the SharePoint environment, this ‘waiting’ should not happen often nor should it take longer than 5-10 minutes. If you encounter issues please contact us as it may be due to misconfiguration or the program is having trouble accessing files which we may be able to help resolve.
* If you have trouble accessing sites or you encounter

“The remote name could not be resolved”

Your machine may have lost connection to the site (it is having trouble resolving the site URL), you can follow these commands to get your machine to find the site again:

* + From the Start menu
  + Click Run and type “cmd” (or search for ‘Command Prompt’ from the apps page)
  + In the Command prompt window, type “ipconfig /flushdns” and press enter
  + Then, type “ipconfig /registerdns” and press enter (you may require an Administrator’s assistance with this)
  + Wait a minute and you should be able to browse and resolve the remote name (web site) correctly if it exists
  + Close the Command prompt window
* Users with READ rights get an error when trying to retrieve sub site data:

“There was a problem enumerating sub sites. Details: Access denied. You do not have permission to perform this action or access this resource.”

Users require “Browse Directories - Enumerate files and folders in a Web site using SharePoint Designer and Web DAV interfaces.” rights. You can add this permission from Permission Levels in Site Settings -> Site Permissions.

* If you encounter:

“Could not load file or assembly 'Microsoft.IdentityModel, Version=3.5.0.0, Culture=neutral, PublicKeyToken=31bf3856ad364e35' or one of its dependencies. The system cannot find the file specified.”

There may be a .NET framework component missing. Please download and install the Windows Identity Foundation component at <http://www.microsoft.com/en-us/download/details.aspx?id=17331>

* ONLY APPLIES TO Office 365: In some cases, if the Office 365 SharePoint site address/domain being resolved is using a CNAME, an error can occur in the tool “Forbidden” or “The communication object, System.ServiceModel.Channels.ServiceChannel, cannot be used for communication because it is in the Faulted state”. To resolve this issue, use the SharePoint Office 365 address for the portal when performing the scan, such as <https://myportal.sharepoint.com>
* If you receive errors of missing features when running a scan, this may be due to faulty features installed on the farm/site. The tool tries to retrieve information from a list/library and items in order to parse the contents within them. When a feature is missing or corrupted, the tool may report an error. This response is from the SharePoint API. To resolve this, find the missing/corrupt features and reinstall them or remove them from the site/farm.
* Scheduler Issues - If you encounter errors while trying to schedule jobs, you can try deleting the Scheduled Jobs folder located at “C:\ProgramData\QIPoint\Scheduled Jobs”.

NOTE: This path is hidden so you should copy and paste this path into Windows Explorer. Also, you will need to recreate scheduled jobs if you delete this folder.

# Technical Support

If you need technical assistance, not to worry! We offer several ways to get in touch with our support team.

**Email:** [support@qipoint.com](mailto:support@qipoint.com)

**Phone:** 917-633-5998 opt. 1

**Online Support Ticket System:** <http://support@qipoint.com>

We are here to help!