

# Dockit SharePoint Manager Installation Guide

## Overview

SharePoint Reports generated using Dockit SharePoint Manager provides you a comprehensive SharePoint reporting solution, covering all aspects of Microsoft SharePoint Server 2016 / 2013 / 2010 / 2007. Our SharePoint reporting software presents insights into events and activities that take place in SharePoint farms on a day-to-day basis and collates them as useful information for SharePoint Administrators, Site Administrators and Site Content Owners to take action. Dockit SharePoint Manager can help you analyze SharePoint farm events and activities from audit, usage, security, policy, & configuration changes perspective.

## System Requirements

Dockit SharePoint Manager can be installed in the any client workstation.

**Disk space:** Minimum of 28 MB of free disk space

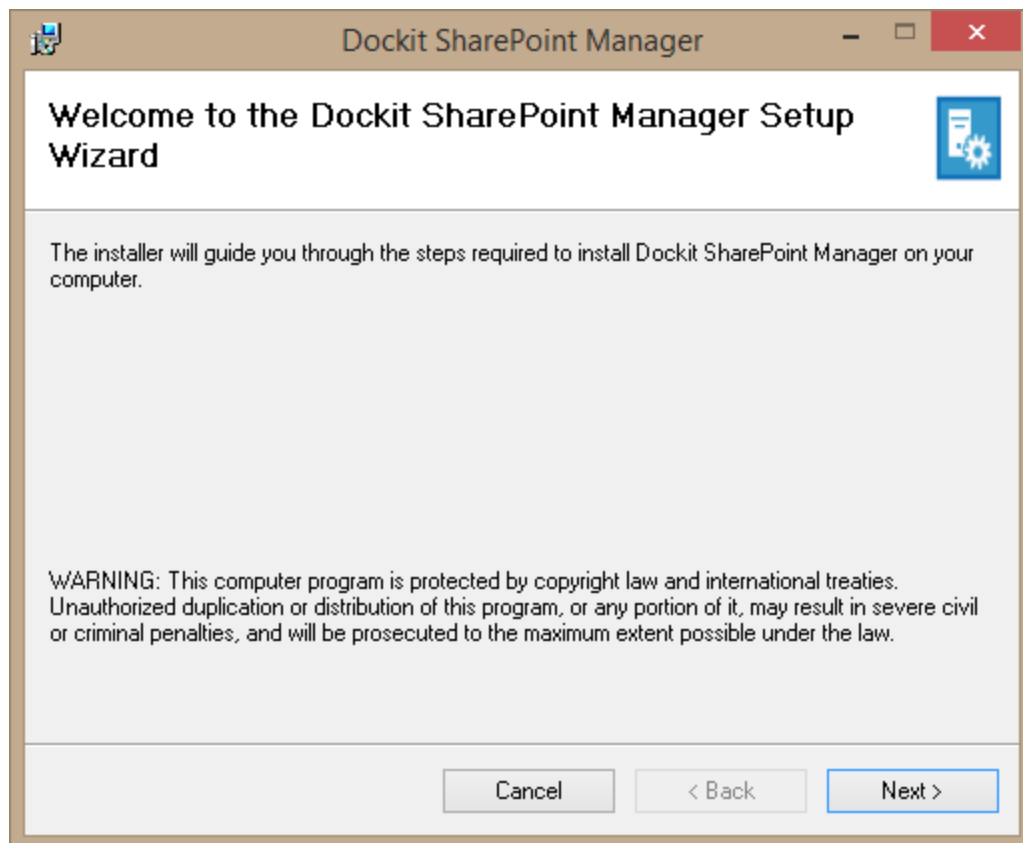
**Operating System:** Windows 7 and above.

**Database:** Microsoft SQL Server 2012 / 2008 / 2005 (Enterprise / Standard / Developer / Express edition) running in local / remote computer with latest Service Pack.

## Installation Steps

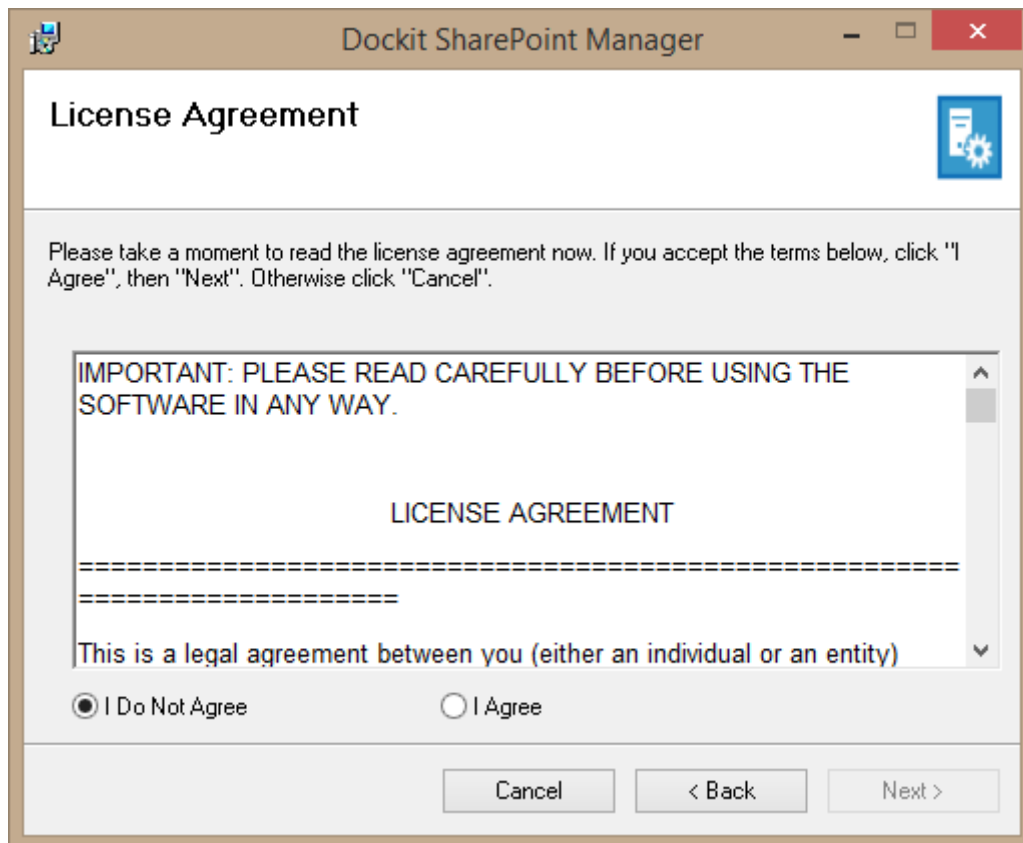
The simple setup wizard will guide you through the installation process as shown below:

**Step 1:** Once you double-click the Dockit SharePoint Manager.msi, the setup wizard will appear as shown below:



Click **Next** to proceed.

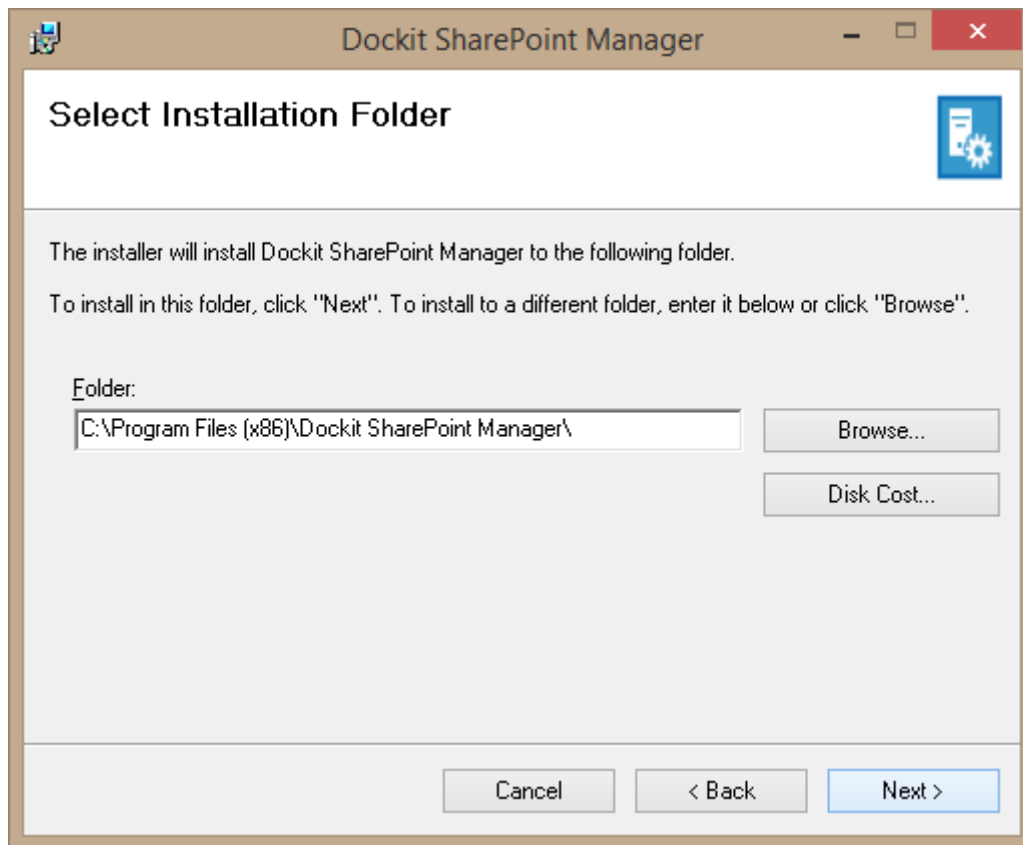
**Step 2:** License Agreement screen will be shown as below:



Please go through the License Agreement information to familiarize yourself with the contents. This will help you when purchasing the product license.

Click **I Agree** to accept the terms in the **License Agreement** screen and Click **Next** to proceed.

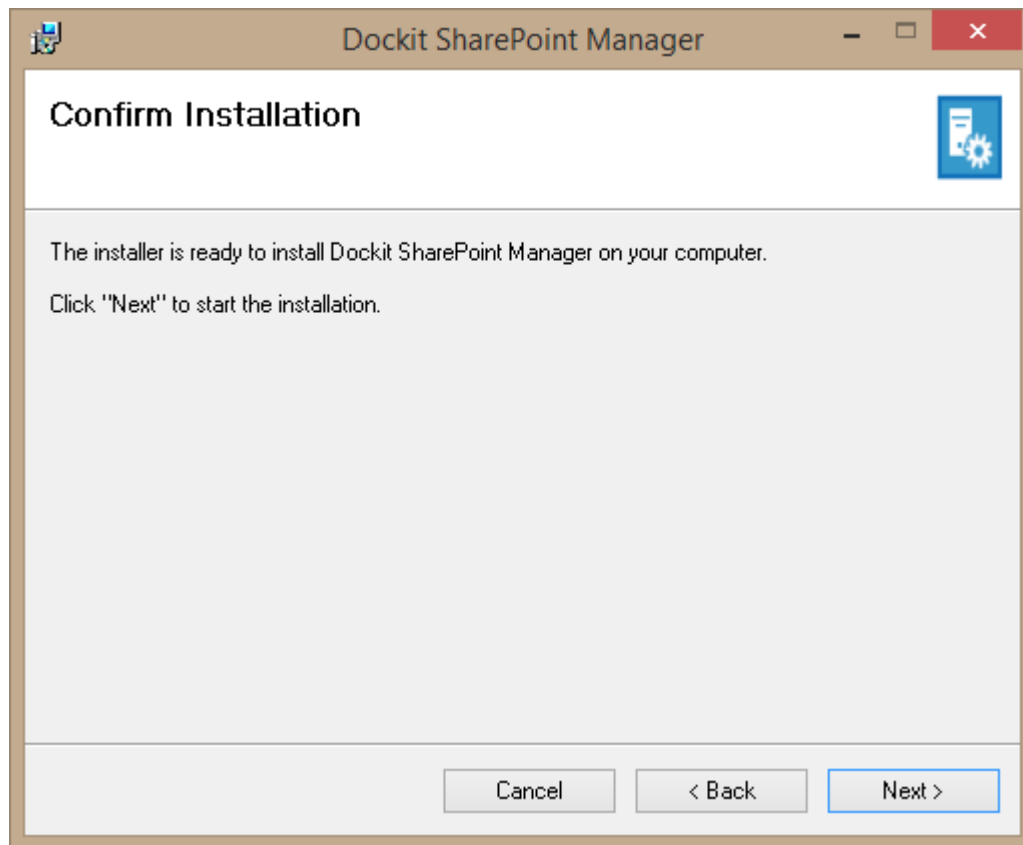
**Step 3:** Installation Location screen will be shown as below:



- You can select the default location displayed (or)
- You can specify your preferred location through the **Browse** button.

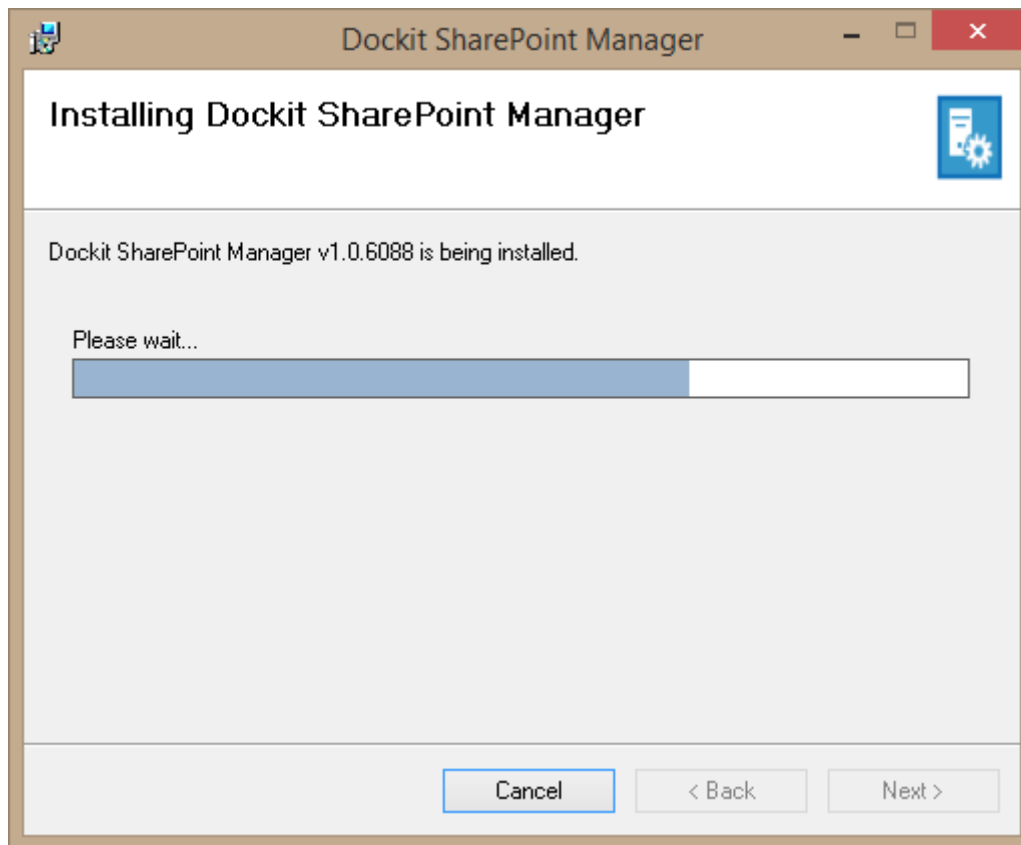
The **Disk Space** button is used to check for available free space in the partition you want to install the product. Click Next to proceed.

**Step 4:** Confirm Installation screen is displayed as below:

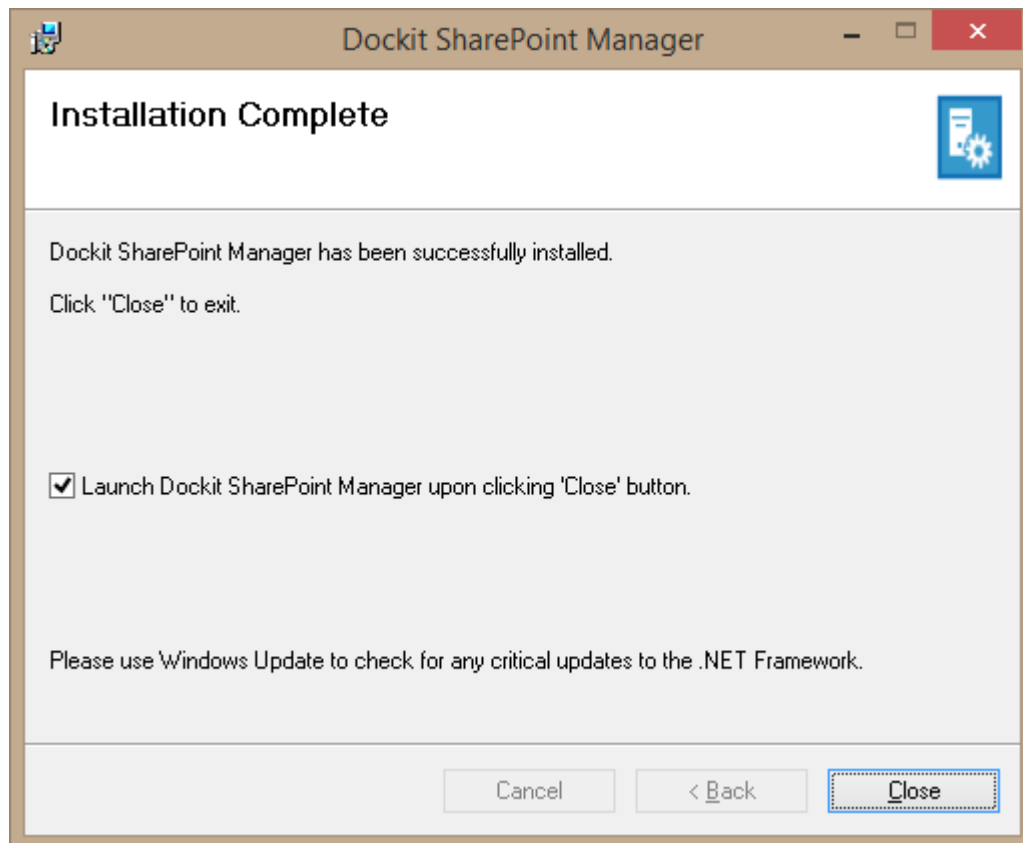


- **Back** – Click this if you want to retrace your steps and change the selected settings.
- **Next** – Click this if you want to proceed with installation.

The progress of the installation is displayed in the **Installing Dockit SharePoint Manager** screen as shown below.



Once the installation is complete, the **Installation Complete** window is displayed as below.



If the **Launch Dockit SharePoint Manager upon clicking 'Close' button** check-box is checked, then the application is launched immediately. If you do not want the application to start immediately, then uncheck this check-box.

Click **Close** to close the installation wizard.

## Configuring Dockit SharePoint Manager Application

Once the Dockit SharePoint Manager installation is complete, you must configure a few settings in Dockit SharePoint Manager product to enable you to view detailed reports about your SharePoint farm.

### Create SQL Server Settings

Dockit SharePoint Manager uses SQL Server database for its data storage to generate SharePoint reports. Dockit SharePoint Manager will connect to the specified SQL Server based on authentication mode and user credential to manage its own application databases.

Dockit SharePoint Manager will prompt for the SQL settings (Server name, authentication mode, user name and password) when the application is launched for the very first time. SQL Server Settings dialog appears as shown below. And also you can open SQL Server Settings dialog by clicking "Configure App Database" icon after launching the application.

**App Data Settings** ? X

Enter SQL Server details to store the application data.

SQL Server: Contoso-SQL

Database Name: DockitSharePointManager\_Config

Authentication mode: Sql Server Authentication ▼

Username: Contoso\SQLAdmin ▼ ...

Password: ●●●●●●●●●●●●●●●●

☒ Perform database truncation every 10 Day(s)

Save Close

### User Authentication

To connect to SQL Server, Dockit SharePoint Manager uses the relevant user accounts based on the authentication mode as listed below:



A. **Windows Authentication:**

In this method, Dockit SharePoint Manager uses the currently logged on user account while running the reports to authenticate the user in SQL Server.

B. **SQL Authentication:**

In this method, Dockit SharePoint Manager uses the specified SQL user account and password for running reports. It stores the SQL user name and password as a user profile in 'Stored User Names and Passwords' applet for its usage.

**Note: Dockit SharePoint Manager expects the user account to have sufficient privileges to create, add to and delete database in the SQL server.**

**Database cleanup**

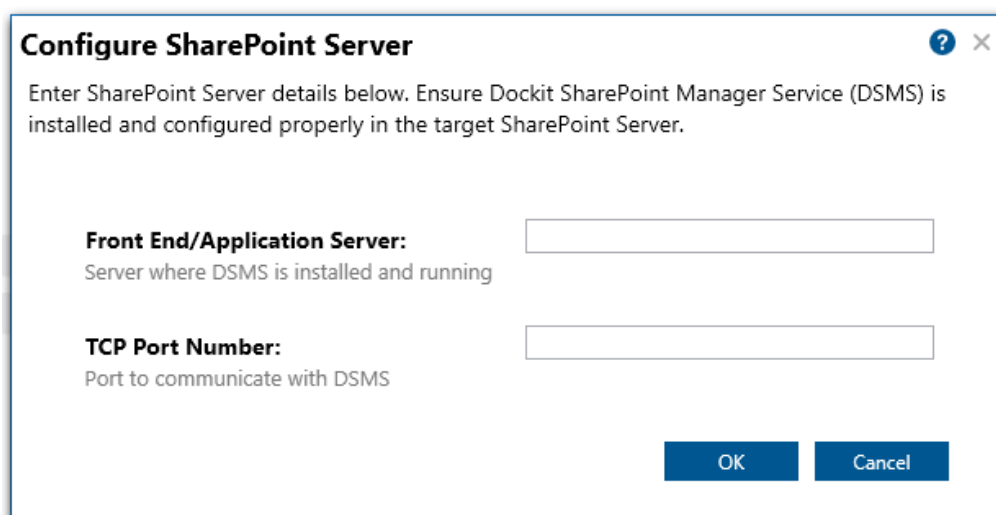
Dockit SharePoint Manager will automatically truncate the database every 10 days as a default. You can change the truncation days to any number of days as per your product usage. If you do not want to truncate the database, you can simply uncheck the "**Enable database truncation**" option which is in SQL Settings.

Once you provide SQL Server settings, Dockit SharePoint Manager will create an application database in the specified SQL Server instance and assign the specified user account as the dbowner of the newly created database. In Windows authentication, it is imperative that the user account who configures the SQL server settings will be assigned as dbowner of the application database. No other user can access the newly created database unless it is configured further. If any other user needs to use the product, you must grant them the same dbowner permission on the newly created application database manually using **SQL Management Studio**.

[Configure SharePoint Server](#)

Launch the Dockit SharePoint Manager application using an icon in desktop or using start menu.

After the application launch, click on the "Configure SharePoint Server" icon. A dialog will be shown as below.



**Configure SharePoint Server** ? X

Enter SharePoint Server details below. Ensure Dockit SharePoint Manager Service (DSMS) is installed and configured properly in the target SharePoint Server.

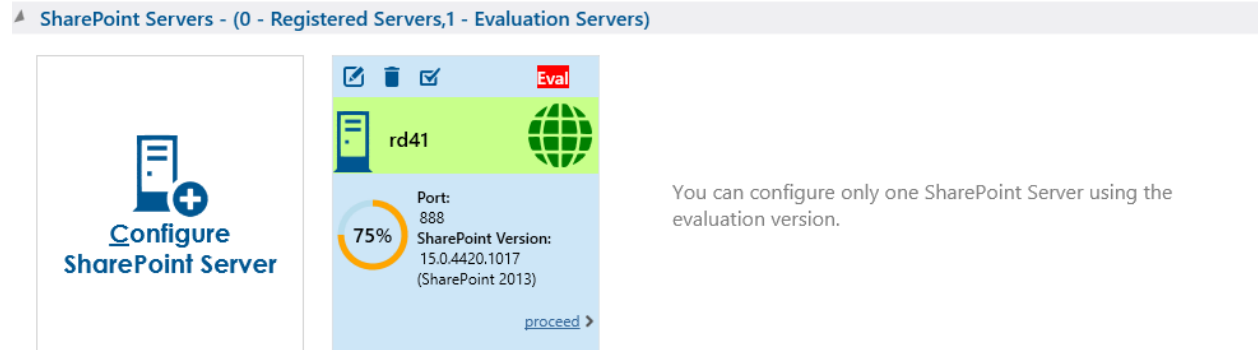
**Front End/Application Server:**   
Server where DSMS is installed and running

**TCP Port Number:**   
Port to communicate with DSMS

OK Cancel

You can enter your Front End/Application Server Name for which you want to generate reports. Enter the TCP Port Number which you provided while installing Dockit SharePoint Manager Service for the given SharePoint Server to communicate with the client application. Then click "OK".

Now you have configured your SharePoint Server and now it looks like below.

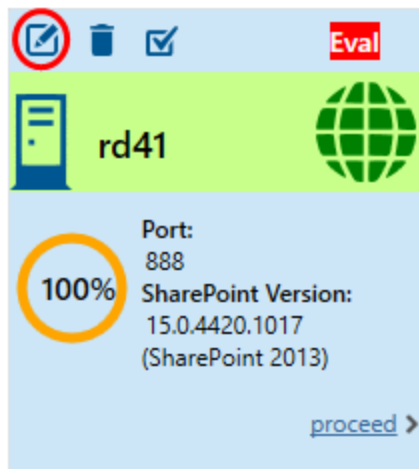


## IIS Log Settings

Dockit SharePoint Manager requires IIS Log Files Directory to be configured to generate reports such as List Visits, Page Visits, Page Hits, etc.,

### Configuration:

Once you have configured your SharePoint Server, it will be shown like below. In that top left corner you can find "**Modify**" icon.



Click on the "**Modify**" icon will show a dialog as below.

# Settings

SharePoint Server Settings

IIS Settings

AD Settings

Enter SharePoint Server details below.

Server Name:

rd41

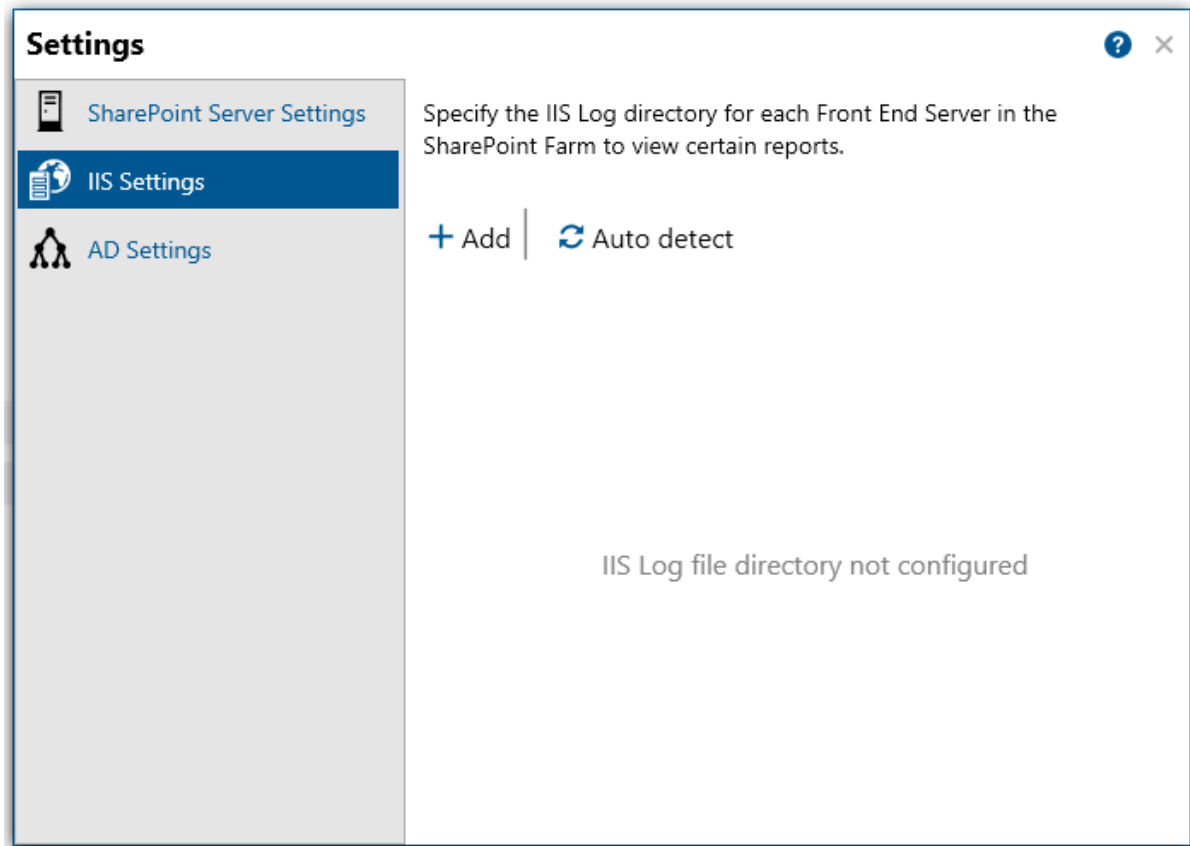
TCP Port Number:

888

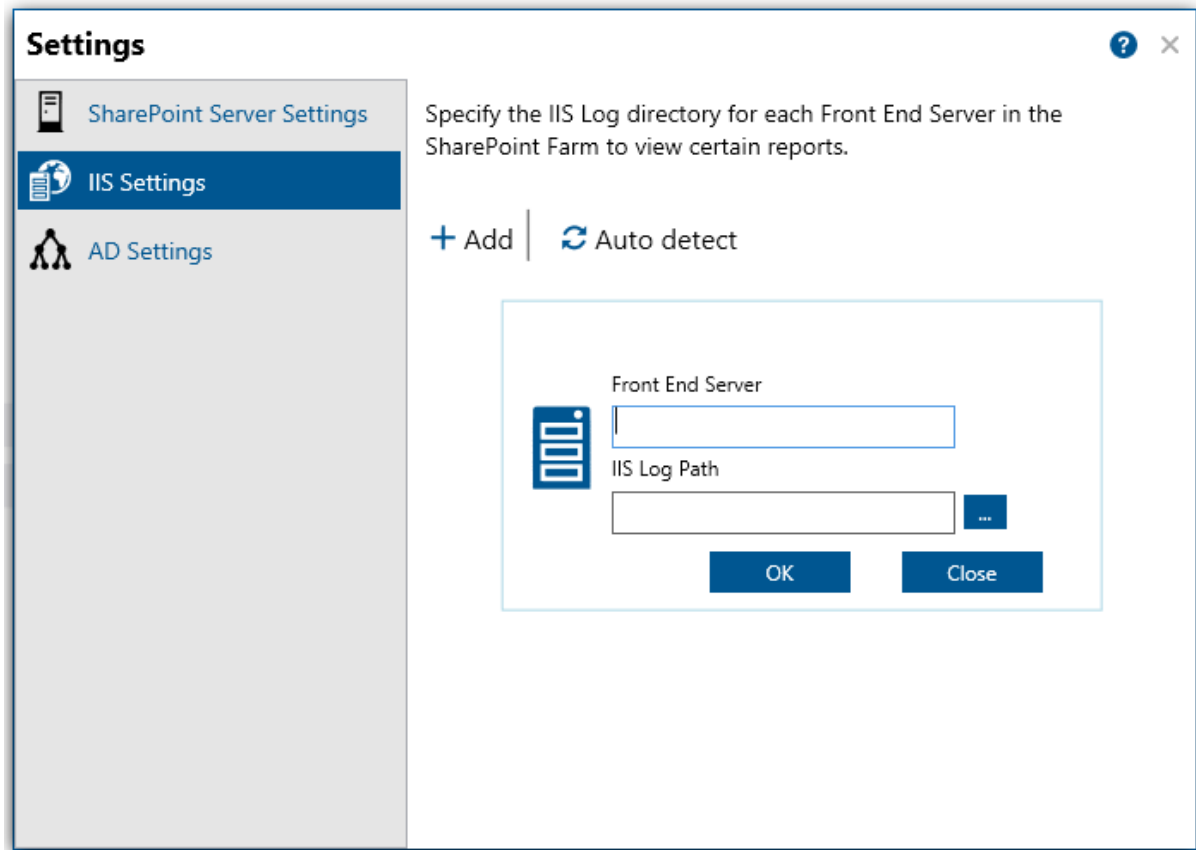
OK

Close

In that dialog, select **IIS Settings** option in the left hand side and it looks like below.



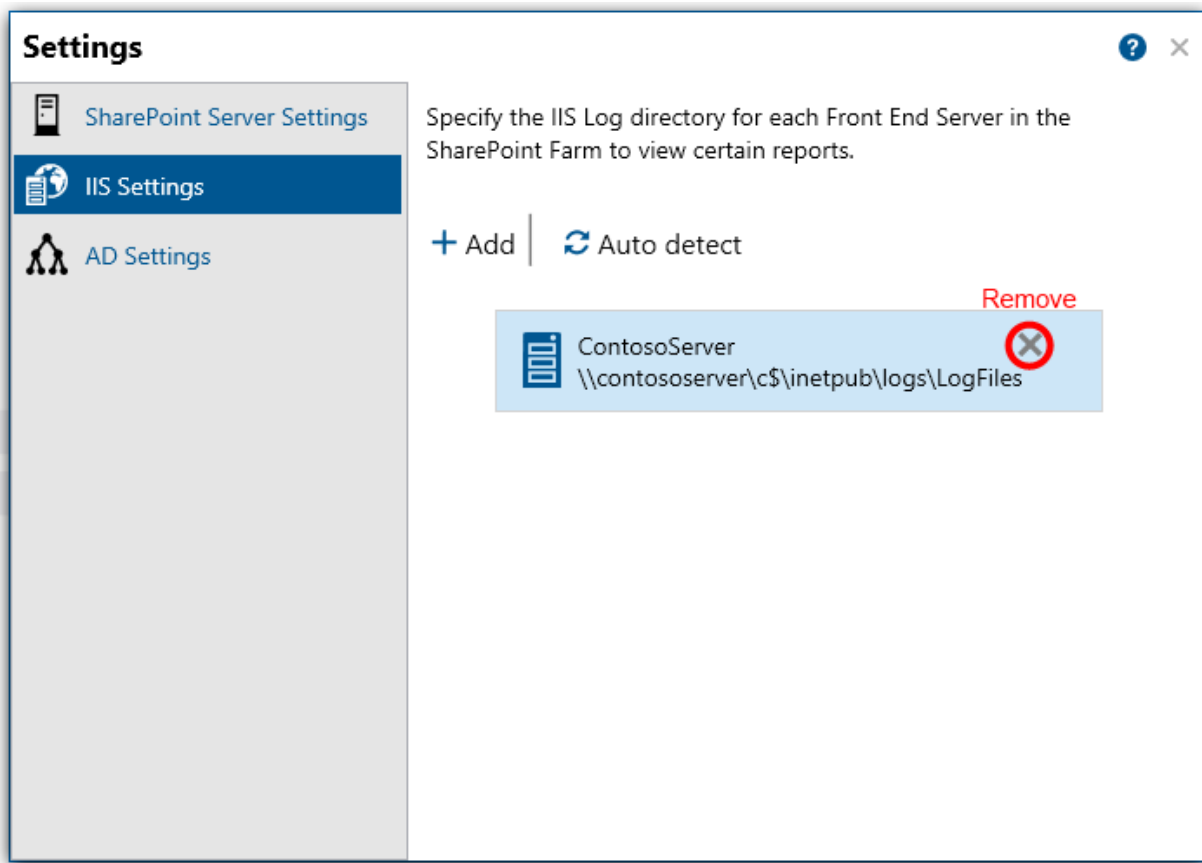
Click "**Auto Detect**" icon to configure your IIS Log file directory automatically. Else if you want to add your IIS Log file directory manually, you **click** "Add" icon. And it will show a dialog as shown below.



1) In that dialog, enter a front-end web server name.

2) Then enter the IIS Log Path for the specified front end server. Use UNC format (e.g., \\contososerver\c\$\inetpub\logs\LogFiles).

**Click** OK button to add the server and log directory.



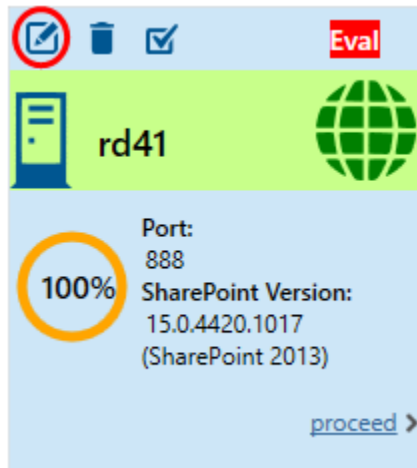
Click Remove button to remove the server and its log directory. During report generation, IIS log files from the configured directories will be processed to generate report for the entire farm.

## Directory Server Settings

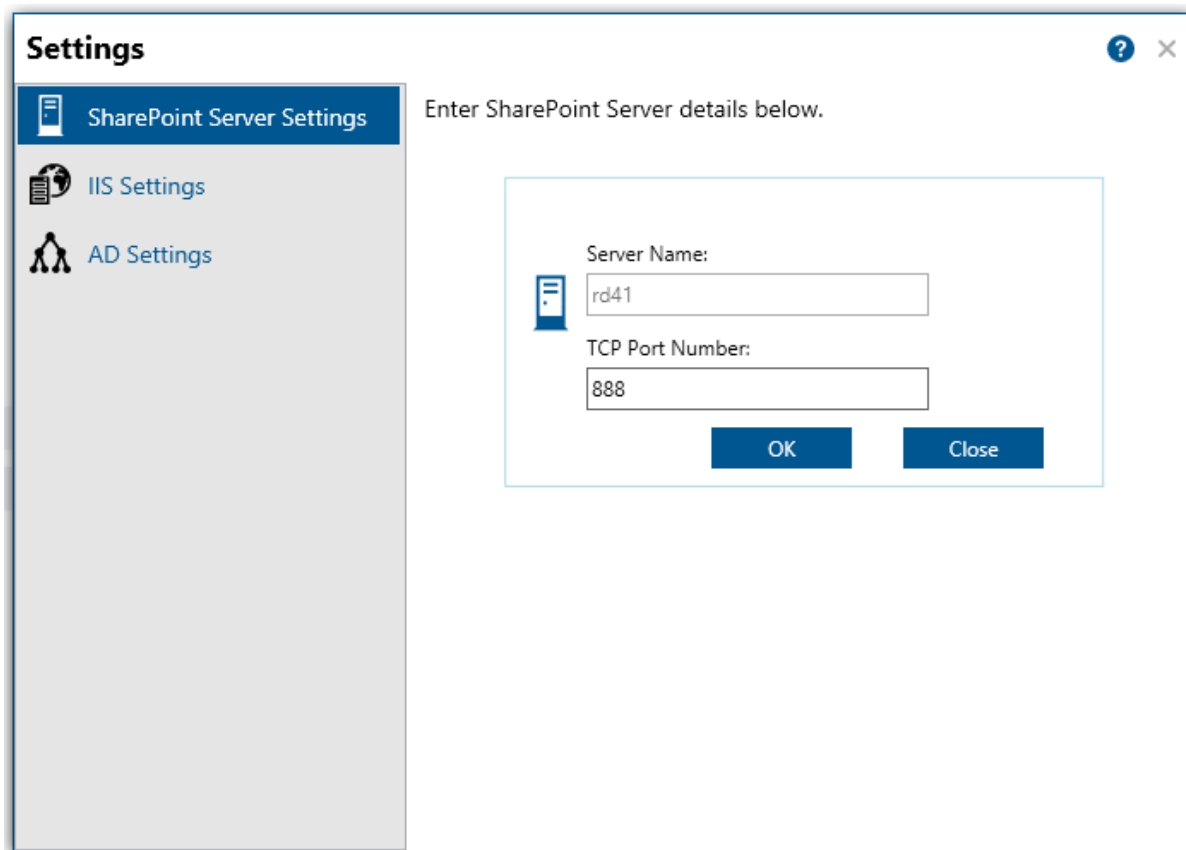
Dockit SharePoint Manager uses Directory Server to retrieve Active Directory information like group membership and user information for certain reports. Dockit SharePoint Manager expects a Global Catalog Server as input to Directory Server and a user credential to connect to the directory server. Dockit SharePoint Manager will connect based on authentication mode and user credential to the specified Directory Server to retrieve AD information.

### Configuration:

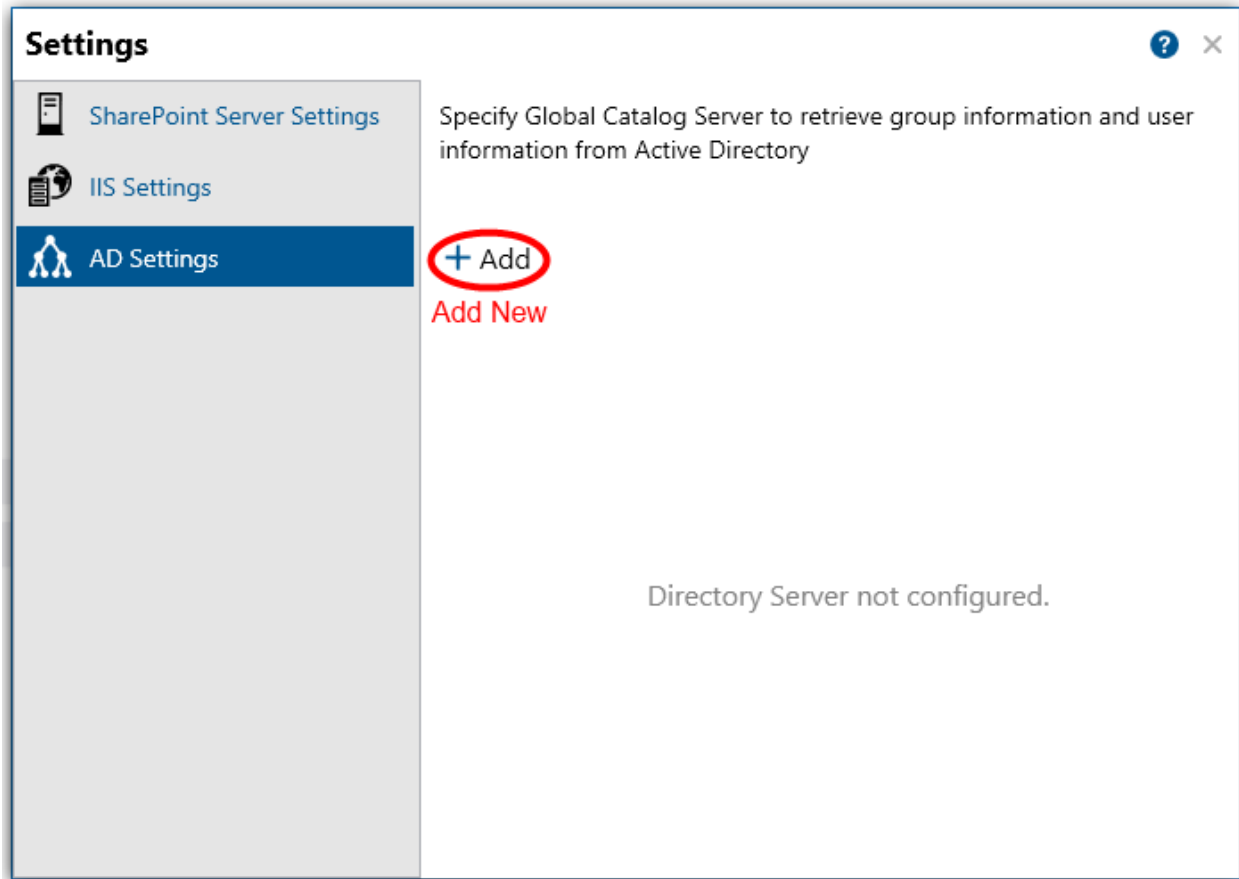
Once you have configured your SharePoint Farm, it will be shown like below. In that top left corner you can find “**Modify**” icon.



Click on the “**Modify**” icon will show a dialog as below.

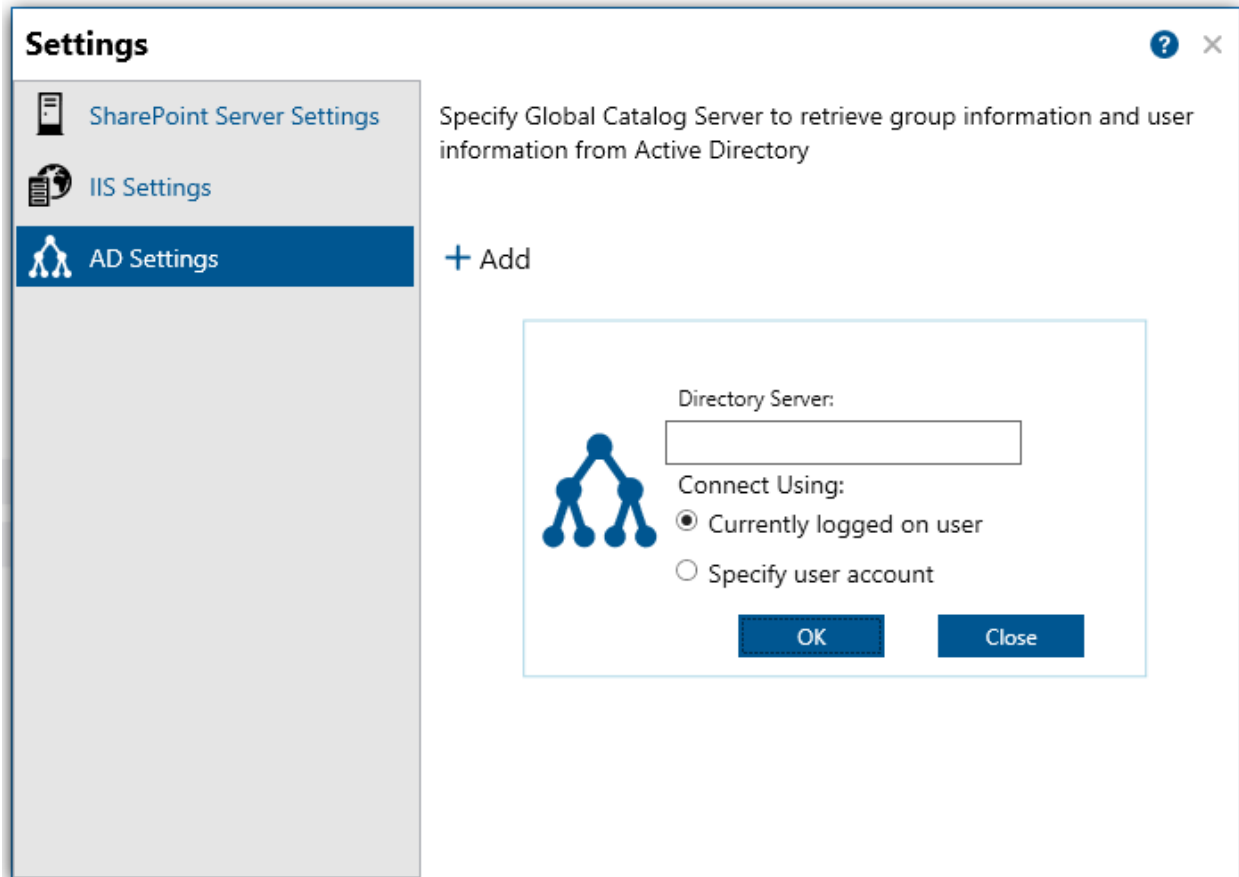


In that dialog, select **AD Settings** option in the left hand side and it looks like below.



**Click** "Add" option to show a dialog as below.





To connect to Directory Server, Dockit SharePoint Manager uses the relevant user accounts based on the connect option as listed below:

**Currently logged on user:**

In this method, Dockit SharePoint Manager uses the currently logged on user account to connect to the Directory Server to retrieve AD information while generating the reports.

**Specific user account:**

In this method, Dockit SharePoint Manager uses the specified user account and password to retrieve AD information while generating the reports. Dockit SharePoint Manager stores the user name and password as a user profile in 'Stored User Names and Passwords' applet for its usage.

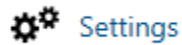
**Note: Dockit SharePoint Manager expects the user account to have sufficient privileges to connect to the Active Directory Global Catalog Server, bind to the relevant AD group / user object to retrieve its detailed information from Active Directory.**

## Email Settings

Dockit SharePoint Manager provides the option to e-mail the generated reports. For e-mailing reports, Dockit SharePoint Manager requires SMTP Server, From E-mail Address, To E-mail Addresses (recipients separated by semicolon). Dockit SharePoint Manager maintains a single SMTP Server and a From E-mail

Address for use. You can specify a separate set of To e-mail addresses (recipients), subject and body of the message for each report e-mail.

You can set SMTP Server and From Address by clicking Default Settings icon in the charms bar looks like below:



Click **e-mail server** Email settings options will be shown as below:

Dockit SharePoint Manager (Evaluation Version)

Settings

profile manager **e-mail server**

Specify SMTP Server detail to send mails to various users in the organisation.

SMTP Server:

From Address:

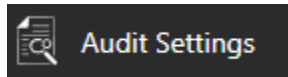
E.g. someone@example.com

Save

In that you can specify the “SMTP Server” and default “From Address” and click **Save** button.

## Audit Settings

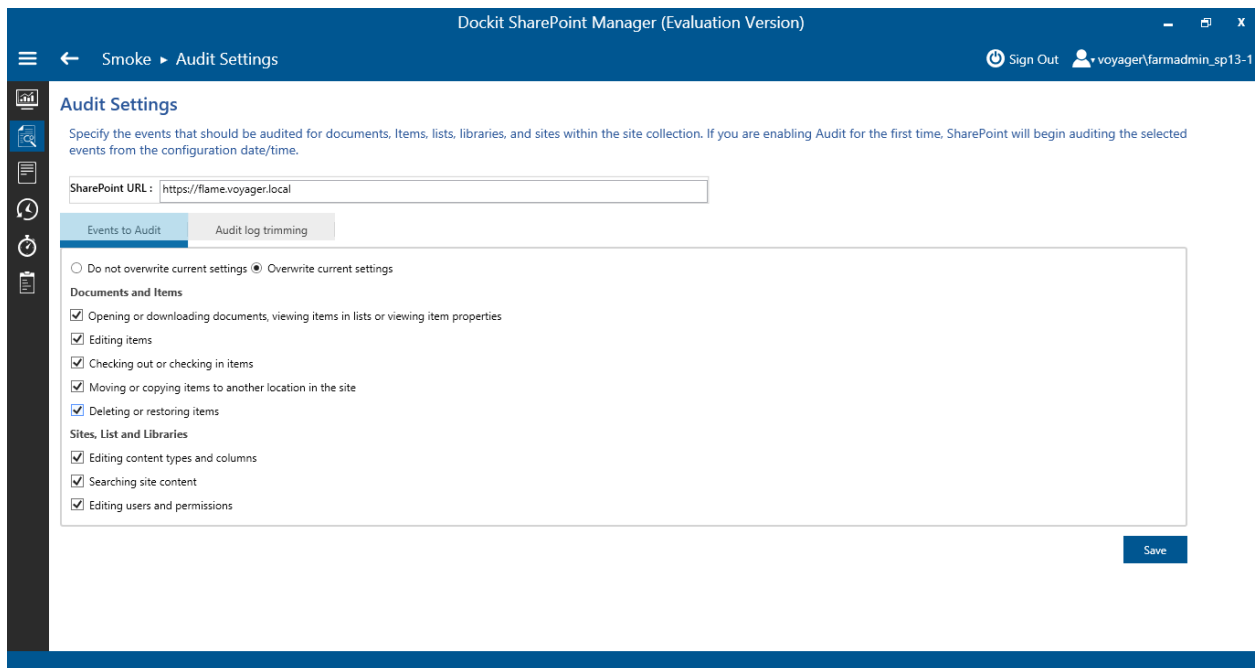
The reports like Audit Deleted Items, Audit Page Visits, etc. uses the SharePoint audit logs to generate report. You need to configure the audit settings for every site collections in SharePoint. If you haven't configured the audit settings before in the SharePoint server, you can configure audit settings once you connected to your site collection, you can find the "Audit Settings" icon on the charms bar as below.



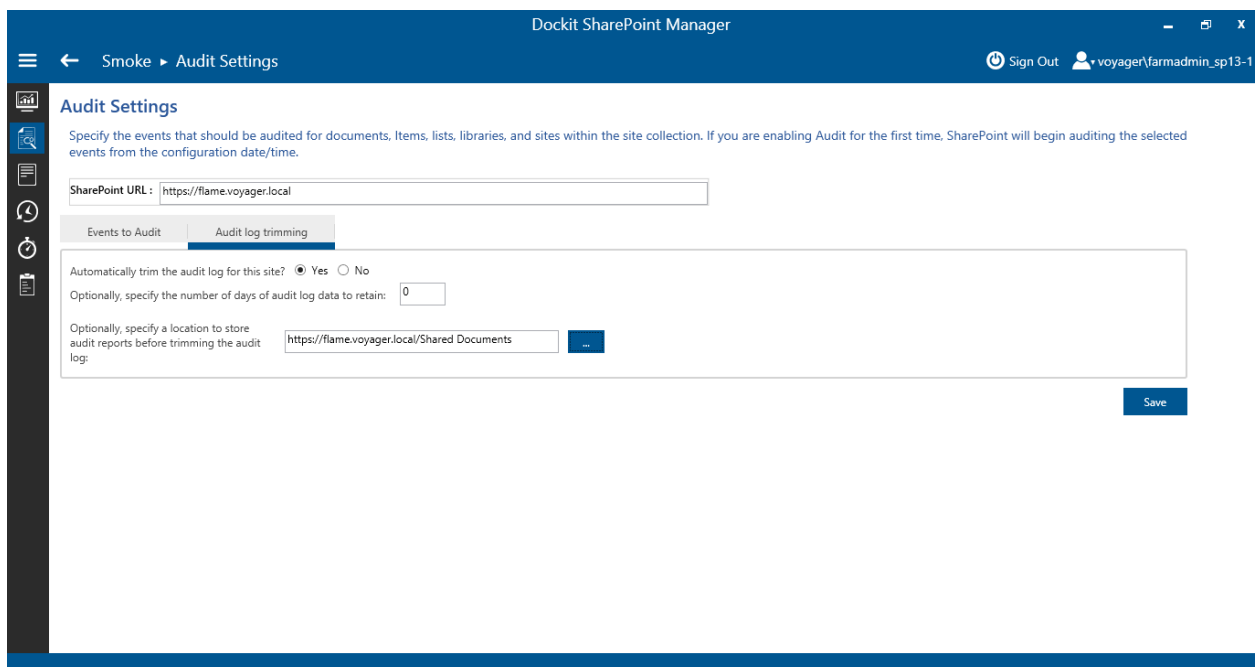
Click on this icon will show Audit settings as below.

The screenshot shows the "Docket SharePoint Manager (Evaluation Version)" application window. The title bar is blue with the application name and standard window controls. Below the title bar is a navigation bar with a back arrow, the text "Smoke", and a right arrow followed by "Audit Settings". On the right side of the navigation bar are "Sign Out" and a user profile icon labeled "voyager\farmadmin\_sp13-1". A vertical charms bar on the left contains several icons, with the "Audit Settings" icon (a document with a magnifying glass) selected. The main content area is titled "Audit Settings" and contains the following elements: a descriptive paragraph, a text field for "SharePoint URL" containing "https://flame.voyager.local", two tabs labeled "Events to Audit" and "Audit log trimming", a section with two radio buttons "Do not overwrite current settings" (selected) and "Overwrite current settings", and two sections of checkboxes. The "Documents and Items" section has five checked items: "Opening or downloading documents, viewing items in lists or viewing item properties", "Editing items", "Checking out or checking in items", "Deleting or restoring items", and "Moving or copying items to another location in the site". The "Sites, List and Libraries" section has three checked items: "Editing content types and columns", "Searching site content", and "Editing users and permissions". A blue "Save" button is located at the bottom right of the settings area.

In the URL field, it will show the connected site collection URL. Now you can specify the events that should be audited for documents, items, lists, libraries, and sites within the site collection. Then click "Save" button.



Click Audit Log trimming tab to view and configure the site collection audit log trimming settings. You can configure the settings you want and then click "**Save**".



You have configured Docket SharePoint Manager Application in your computer successfully and you are ready to use the product.

Please refer to online help documentation or click the



icon on the charms bar of the application to launch the help section.

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