

Getting Started with Idera SharePoint enterprise manager

idera™



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Welcome to Idera SharePoint enterprise manager

Idera SharePoint enterprise manager is fast, effective enterprise management for your SharePoint environment. SharePoint enterprise manager is a complete, powerful, web-based solution that helps you refocus the time and efforts of Administrators and Site Managers on system objectives and organizational goals. With SharePoint enterprise manager, you can leave behind the time consuming, repetitive clicks and daily navigation of SharePoint management.

Key features include the following:

- Complete, enterprise-level administration.
- Site, list, and item level security management.
- Comprehensive usage, activity, and environment reporting, including scheduling of reports at user-defined times.
- Full account security management.
- Permissions replication, cloning, adding, removal, and more.
- Profile synchronization and management.
- Feature delegation.

What is Idera SharePoint enterprise manager?

Idera SharePoint enterprise manager is a complete and powerful web-based solution for all SharePoint administration and permissions management needs. SharePoint enterprise manager helps you save substantial time and money by effectively eliminating difficult and repetitive daily tasks, while enabling instant access to critical administration and security information not available with native tools. You can take control of your SharePoint Farm now with SharePoint enterprise manager.

SharePoint enterprise manager encloses the complexity of administering SharePoint in an easy to use and powerful product solution. With real-time environment analytics and security reporting, you can take complete charge of account, Site, list, and item administration in SharePoint. Be in charge with Idera SharePoint enterprise manager and effectively administer, manage, and maintain your SharePoint environment governance and compliance measures.

How does Idera SharePoint enterprise manager help me?

Microsoft SharePoint plays a vital and growing role in the success of many companies. For Administrators and Site Managers, the flexibility and expandability of SharePoint makes it possible to build mission-critical business processes around the SharePoint platform. For end users, the ease of use makes it easy to create share, find, and use information vital to their jobs.

Set against this flexibility and ease of use is the difficulty of protecting and controlling the information stored in the SharePoint Farm. Daily administration and long-term management of SharePoint can be cumbersome, complex, repetitive, and prone to mishaps. If you use only the included SharePoint pages to perform these tasks, the valuable time of Administrators, Site Managers, and helpdesk personnel is frittered away in tiny, useless packets. Those charged with planning for and executing the growth and continued well-being of the system have no time to look forward, continually putting out daily fires.

Idera SharePoint enterprise manager is designed to make SharePoint administration and security quicker and easier. Using SharePoint enterprise manager, you can accomplish in minutes the administrative tasks that used to require hours or days.

Key benefits of SharePoint enterprise manager include:

Reduced time spent on SharePoint administration

Use SharePoint enterprise manager to quickly execute administrative tasks that normally take hours or days to accomplish.

Maintain policy and compliance standards

Maintain standards and governance compliance with real-time enterprise level reports, easy administration, and complete visibility into SharePoint environments.

Farm-wide visibility and administration

Take a Farm-wide approach to administration, reporting and security management.

Use live SharePoint data

For the most up-to-date view of your SharePoint Farm, SharePoint enterprise manager lets you work with the up-to-date, complete, and accurate information that you need to execute your daily administration tasks for security, compliance, auditing, and SharePoint management.

Full permissions management and auditing

Untangle the many different scenarios in which an individual can be granted access in SharePoint with Idera SharePoint enterprise manager. Discover a plentiful set of features with complete and consistent auditing capabilities for Web Application policies, Site Collection administration rights, SharePoint groups, and direct permissions.

Safely delegate features

SharePoint user expertise and management needs vary greatly with each different environment. SharePoint enterprise manager helps accommodate all levels of management. You can safely delegate access to the many features in SharePoint enterprise manager. With feature delegation, you can control user access to the SharePoint enterprise manager features. You can also specify which Web Applications or Site Collections the users can use the features on.

Contacting Idera

Please contact us with your questions and comments. We look forward to hearing from you. For support around the world, please contact us or your local partner. For a complete list of our partners, please see our [Web site](http://www.idera.com) (www.idera.com).

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Release Notes

Idera SharePoint enterprise manager lets you monitor, manage, and analyze your Microsoft SharePoint Farms, servers, and pages.

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New features in Idera SharePoint enterprise manager

Idera SharePoint enterprise manager helps you to make SharePoint administration and security quicker and easier. It lets you view the security and compliance posture of your Farm as a single entity and lets you securely delegate tasks to users with lower privileges. It helps you to save time and money and focus on the long term, rather than responding to emergencies.

4.9.5 features

Snapshot and Revert Permissions feature	Idera SharePoint enterprise manager includes the Snapshot and Revert Permissions feature to allow you to easily create a snapshot of permissions and revert specified permissions of the snapshot, if necessary. For more information about this feature, see Using the Snapshot and Revert feature .
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Tip The new Snapshot and Revert Permissions XML file format is not compatible with the previous snapshot features in SharePoint enterprise manager. You cannot revert using a snapshot created by the previous snapshot functionality.

Snapshot Location field in General Configuration	The Snapshot Location field in the General configuration page allows you to set the location of the document library where SharePoint enterprise manager stores files related to the Snapshot and Revert Permissions feature. For more information about this feature, see Configuring general SharePoint enterprise manager settings .
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Tree level	The Tree level page size field in the General configuration page allows you to
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page size field in General Configuration	set the maximum number of objects that SharePoint enterprise manager displays for each level of a tree in the Manage Sites and Permission Audit reports. For more information about this feature, see Configuring general SharePoint enterprise manager settings .
Export the site access tree as PDF	The User Permissions Analyzer includes the Export Site Access Tree button so you can export the expanded tree as a PDF file for review or printing. For more information about this feature, see Analyzing user permissions .

4.9 features

All-new look and feel	Idera SharePoint enterprise manager has a new look and better navigation to make it easier than ever to find and use the features you love. Now you can copy or revoke permissions, clean dead accounts, manage unique permissions and access all the great reporting with ease!
Object Permissions Report	List the user permissions to one or more objects, across the SharePoint farm or for a selected site collection, site, list or item. Know exactly who has access to what, and how those permissions are granted.

4.7 features

Unique Permission Report	You can now report on unique permissions for Sites, for Lists & Libraries, and for Folders, Documents, & Items in all or part of your SharePoint Farm.
New Report formats	Improved report formats for all reports, including improvements to reports exported to PDF. You can also export all tabs to a single PDF in the Security Audit Report and Account Access Report.
Content Database Analyzer	You can now analyze connectivity to the SharePoint Content Databases that make up the Farm.

4.5 features

Security Snapshot	You can now create, view, and save a snapshot of the permission settings for a Site, list, or item.
Security Comparison Report	The new Security Comparison report can compare the permission settings for any two objects and report on the differences in the settings. You can compare current SharePoint permissions or existing Security Snapshots. You can compare any Site, list or item that has unique permissions to any other object.
Report Scheduling	Automatically repeat any report at a preset time. Email the resulting report to one or more users, or store the report in a SharePoint library.
Improved Security	View the security audit or account access report or export in PDF format. All audit data appears in a linear format. In the security audit report, this includes

Audit and Account Access Reports	the Security Settings, Permission Levels, Security Group Membership, SharePoint Group Memberships, Site Collection Administrators and Web Application Policies. In the account access report, this includes Active Directory Members, SharePoint Group Permissions, and SharePoint Direct Permissions.
Improved Performance	Faster access, especially in Tree View lists and reports.
Enhanced Export Capabilities	Export any report to PDF, XLS, RTF, and CSV formats.

4.0.3 features

- Improved handling of Farm-wide searches and reports.
- Improved integration with complex Active Directory environments.

4.0.2 features

- Improved handling of Active Directory.

4.0.1 features

- Security reporting reliability enhancements.

4.0 features

New Home Page	The feature ribbon along the top better categorizes the many robust capabilities of SharePoint enterprise manager. These features are now available for you throughout all the features and pages in the product.
New name	Idera SharePoint security manager is now SharePoint enterprise manager.
Improved Account Security Analysis	The Account Sites Security Analyzer and the Account List & Item Security Analyzer features have been combined into a single feature. Easily analyze the access that an account has to a Site, list, or item in a single user-friendly interface.
Account Access Report	This new report provides a cumulative listing of Sites, lists, or items that a selected account has access to. You can easily export the report. The report that you generate can include Active Directory Group memberships and SharePoint Group memberships.
Improved Audit Reports	The Sites Security Auditor and the List & Item Security Auditor have been combined into a single Security Audit Report. The feature now includes an interactive tree, which makes it easier to select the item on which you want to perform an audit.

Where's my feature?

SharePoint enterprise manager 4.9 and later include significant updates to the design and layout of the interface, and to the names of the features.

Idera is also deprecating some features and moving the popular functionality to other areas. The second table in this topic lists the features deprecated in this release.

Renamed Features

Previous Feature Name	New Feature Name	Section
Account Access Report	User Access Report	View Report
Account Property Synchronizer	Synchronize User Properties	Manage Users
Account Security Analyzer	User Permissions Analyzer	View Reports
Activity Reports	User Activity Report	View Reports
Add Account Security	Grant Permissions	Manage Users
Add Users	Add Users	Administer SharePoint enterprise manager
Advanced Active Directory Configuration	Advanced Configuration for Active Directory	Administer SharePoint enterprise manager
Application Error Log	Error Log	Administer SharePoint enterprise manager
Clone Account Security	Copy Permissions	Manage Users
Content Database Analyzer	Analyze Content Databases	Administer SharePoint enterprise manager
Dead Account Cleaner	Clean Dead Accounts	Manage Users
Document Search	Documents Search	Search SharePoint
Environment Information	Environment Information	Administer SharePoint enterprise manager
Farm Reports	Farm Reports	View reports
Feature Audit Log	Feature Audit Log	Administer SharePoint enterprise manager
General Configuration	General Configuration	Administer SharePoint enterprise manager
Item Permissions Replicator	Copy Item Permissions	Manager Permissions
License Manager	Manage License	Administer SharePoint enter-

Renamed Features

Previous Feature Name	New Feature Name	Section
		prise manager
List Permissions Replicator	Copy List Permissions	Manage Permissions
List Search	List Search	Search SharePoint
Manage Users	Edit Users	Administer SharePoint enterprise manager
My Features	My Features	Administer My Options
My Profile	My Profile	Administer My Options
My Schedules	My Schedules	Administer My Options
Permission Level Access Report	Permission Levels Access Report	View Reports
Permission Level Remover	Revoke Permission Levels	Manage Permissions
Permission Level Replicator	Copy Permission Levels	Manage Permissions
Permission Level Search	Permission Level Search	Search SharePoint
Remove Account Security	Revoke Permissions	Manage Users
Schedule Manager	Manage User Schedules	Administer SharePoint enterprise manager
Security Audit Reports	Permission Audit Reports	View Reports
SharePoint Group Search	SharePoint Group Search	Search SharePoint
Site Collection Administrators Report	Site Collection Administrators Report	View Reports
Site Lookup	Lookup Sites	Administer SharePoint enterprise manager
Site Manager	Manage Sites	View Reports
Site Permissions Replicator	Copy Site Permissions	Manage Permissions
Site Reports	Site Reports	View Reports
Site Search	Site Search	Search SharePoint
Storage Reports	Storage Reports	View Reports
Unique Permissions Report	Manage Unique Permissions	Manage Permissions
Usage Reports	Usage Reports	View Reports

Renamed Features

Previous Feature Name	New Feature Name	Section
User Search	User Search	Search SharePoint

Deprecated Features

Deprecated Feature Name	New Functionality Location	Section
Compare Permissions	Now included in Snapshot and Revert Permissions	Manage Permissions
Item Security Reset	Now included in Manage Unique Permissions	Manage Permissions
List Security Reset	Now included in Manage Unique Permissions	Manage Permissions
Site Security Reset	Now included in Manage Unique Permissions	Manage Permissions
Snapshot Permissions	Most functionality is included in Snapshot and Revert Permissions	Manage Permissions

Known issues in Idera SharePoint enterprise manager

Idera strives to ensure our products provide quality solutions for your SharePoint needs. The following known issues for Idera SharePoint enterprise manager are described in this section. *If you need further assistance with any issue*, please contact [Support](http://www.idera.com/support) (www.idera.com/support).

Installation and configuration considerations

- **Desktop shortcut on Web Front End does not connect to SharePoint enterprise manager**

Depending on how you configure the alternate access mappings, DNS settings, and load balancing settings in your SharePoint environment, the SharePoint enterprise manager installer can create an incorrect URL for the SharePoint enterprise manager in the shortcut it places on the WFE desktop. If the URL is incorrect, then when you use the shortcut, the error "404 (File Not Found)" appears. If the error appears, you should manually edit the URL in the shortcut to locate the correct WFE host for the SharePoint enterprise manager Web Application.

Known issues in version 4.9

- **Some characters display incorrectly in Microsoft Excel**

Microsoft Excel does not properly display accented characters in exported files. This issue affects the Snapshot and Revert Permissions and other features that allow the user to export to Excel.

- **User Name does not exist**

If you specify a user name that does not exist, then press **Enter** or click the Check Names icon, the message "No exact match was found. Click the item(s) that did not resolve for more options" appears, but you cannot click the underlined names. Instead, you should manually delete the name and use the Browse icon to locate the user instead.

- **Incorrect permission level names in the Copy Item Permissions feature**

Under certain circumstances, the item names may appear incorrectly in the Copy Item Permissions feature. This is a cosmetic error only, and the names of the items are not affected in SharePoint.

- **Delegate access in Farm Reports**

The entire Farm always appears in Farm Reports. In the Edit Users page, you can delegate access to part of the Farm to a user, but when the user creates Farm Reports, the entire Farm is included. If you want to allow a user access to similar information for a portion of the Farm, grant the user access to Site Reports instead, then delegate access to the relevant Sites.

Idera SharePoint enterprise manager tips

The following tips for Idera SharePoint enterprise manager can help you to install and use SharePoint enterprise manager. *If you need further assistance with any item*, please contact [Support](http://www.idera.com/support) (www.idera.com/support).

Installation and configuration considerations

- **Installation fails**

If the installation fails, please contact Idera Technical Support for assistance.

- **Default SharePoint 2010 Foundation or Windows SharePoint Services 3.0 Web Application**

If your SharePoint Farm uses SharePoint 2010 Foundation or Windows SharePoint Services 3.0, you should not select the default SharePoint Web Application that is created during the SharePoint installation as the host for SharePoint enterprise manager. If you do choose the default web Application, SharePoint enterprise manager installs successfully but will not function properly. If you deleted the default Web Application and recreated it, you may select any Web Application.

- **The Web Application where you install the SharePoint enterprise manager cannot use the NT AUTHORITY\NETWORK SERVICE account.**

You cannot install SharePoint enterprise manager to a Web Application that uses the NT AUTHORITY\NETWORK SERVICE Identity account for the application pool.

- **Forms Based Authentication**

You cannot install SharePoint enterprise manager to a Web Application that uses Forms Based Authentication.

- **Claims Based Authentication**

You cannot install SharePoint enterprise manager to a Web Application that uses Claims Based Authentication.

- **The Web Application where you install the SharePoint enterprise manager must have a top-level Site Collection**

When you install SharePoint enterprise manager, you specify the Web Application to install in. The Web Application that you select must have a top-level Site Collection.

Considerations for version 4.9

- **Resetting unique security for Items, Lists, and Sites**

In SharePoint enterprise manager 4.9 and later, you should use the Manage Unique Permissions feature to reset unique permissions for Items, Lists, and Sites. This consolidates the functionality of the previous Item Security Reset, List Security Reset, and Site Security Reset features in a single easier to use feature.

For information about the Manage Unique Permissions feature, see [Managing unique permissions](#).

- **Object Permissions Report memory requirements**

When you create an Object Permissions Report, SharePoint enterprise manager temporarily stores information about your SharePoint Farm in memory. If the Farm and the report settings are complex, the SharePoint enterprise manager could temporarily cause high memory usage on the Web Front End (WFE) that is generating the report. When the report is complete, memory usage returns to normal.

For information about the Object Permissions Report feature, see [Reporting on SharePoint object permissions](#).

- **Non-scheduled Object Permissions Report must complete in less than 55 minutes**

When you generate a non-scheduled Object Permissions Report, the report must complete in less than 55 minutes. Internet Explorer automatically cancels page requests that take more than 1 hour to complete. You can simplify the Object Permissions Report and regenerate it. You can also schedule the report to generate automatically at a time that you specify. This limit is not related to the Object Permissions Report timeout. All non-scheduled reports time out after a maximum of 55 minutes, no matter the Object Permissions Report timeout setting.

For information about the Object Permissions Report feature, see [Reporting on SharePoint object permissions](#).

Considerations for version 4.7

- **Exports to PDF or RTF can contain only 5000 rows**

When you export a report, you can only export reports with less than 5000 rows to the PDF or RTF format. You can export longer reports to CSV or XLS formats. A scheduled PDF export that contains more than 5000 rows will fail.

- **Exports to XLS or CSV can contain only 25000 rows**

When you export a report, you can only export reports with less than 25000 rows to the XLS or CSV formats.

- **Forms Based Authentication**

You cannot use the SharePoint enterprise manager Account Access Report or the Account Security Analyzer with Forms Based Authentication. In addition, you cannot install SharePoint enterprise manager to a Web Application that uses Forms Based Authentication.

- **Search results include a very large amount of data**

If the results of one of your Storage Reports include a very large amount of data, an Out of memory error may appear in the SharePoint enterprise manager console. Depending on the configuration of the SharePoint WFE server that hosts the SharePoint enterprise manager, the error may appear when a report includes more than 2 GB of data. You can use filters to limit the size of the data returned in the report.

- **Site GUIDs appear in Usage and Activity reports**

SharePoint enterprise manager displays information in the Usage Reports and User Activity Report in exactly the same way as does SharePoint itself. As a result, deleted Sites or Site Collections may appear in reports as a GUID only.

- **Adding account security when data collection is enabled from Central Administration and Shared Services pages**

If you use the options in the General Configuration page to display data collected from the Central Administration and Shared Services, the Sites appear in the Grant Permissions page. You should not use the SharePoint enterprise manager to add account security for those Sites.

- **URL for an object in the Manage Unique Permissions feature includes "Access Denied"**

The SharePoint Application Pool Identity account must be assigned to the `Full Control` Web Application Policy for every Web Application in the Farm. If it is not assigned for a Web Application, then the URL of every object with unique permissions that is hosted by that Web Application appears as "Access Denied" in the report .

- **Site Search for fully-qualified domain name only does not locate Site**

When you perform a Site Search using SharePoint enterprise manager, it searches the internal SharePoint content database. To allow you to create alternate mappings, of inside SharePoint, the content database only stores the URL portion after the Fully Qualified Domain Name for the URL. That is, for an URL of `http://www.domainname.com/SiteName`, the content database only stores the `sitename` portion. If you only specify the Fully Qualified Domain Name in the Site Search field, the search result is blank.

- **Reports do not appear to export properly to RTF format.**

When SharePoint enterprise manager exports a report, it uses complex formatting of the tables in the report. Some applications, notably Microsoft WordPad, support a subset of the formatting options available in RTF files and are unable to properly display the formatting. An application that supports a more complete version of the RTF standard, such as Microsoft Word, displays the formatting properly. If the formatting appears incorrect in an RTF file and you are using an application that supports a subset of the RTF options, close the file without saving any changes. If you save changes, only the subset of the formatting options that the program supports will be saved, and the incorrect formatting is saved with the file.

Recommended Idera Solutions

Idera strives to ensure our products provide quality solutions for your Microsoft SharePoint needs. The following Idera Solutions have been recently added to the knowledge base at our [Customer Service Portal](http://www.idera.com/support) (www.idera.com/support).

Number	Title
0000407-7	Can I use the same License Key that's on my Production Environment for my Development Environment?

Installing and Deploying

You can install and deploy Idera SharePoint enterprise manager on any SharePoint Farm in your network environment. You must have at least one Microsoft SharePoint Farm installed to use SharePoint enterprise manager.

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Learning about the components and architecture

Idera SharePoint enterprise manager helps you to quickly and efficiently administer and secure your Microsoft SharePoint Farms and Sites.

SharePoint enterprise manager requires minimal changes to your existing SharePoint Farms.

What are the product components?

Web Application

The Idera SharePoint enterprise manager is a custom Web Application. The Web Application provides the SharePoint enterprise manager features and user interface. You install the Web Application on each Web Front End (WFE) in each SharePoint Farm where you want SharePoint enterprise manager available. The Web Application uses the SharePoint Application Programming Interface (API) to collect information from the SharePoint Farm and to make changes to the environment. The Web Application also accesses the SharePoint content database. The Web Application stores its settings and preferences in a SQL Server database. When you install the Web Application, you automatically install a SharePoint enterprise manager timer job.

Timer Job

SharePoint enterprise manager uses a SharePoint Timer Job to execute Scheduled Reports. When you install SharePoint enterprise manager, the installer automatically creates the Timer Job. The Timer Job executes every minute. When it executes, it checks the SharePoint enterprise manager database to determine if it needs to execute a scheduled report. If a report is scheduled, the Timer Job executes it. When the check is complete, the Timer Job ends and waits for the next execution. You should add the SharePoint Timer Service User as a SharePoint enterprise manager user and grant access to all SharePoint enterprise manager features to let the Timer Job execute schedules. You specify the user for the Timer Job when you install SharePoint enterprise manager.

SharePoint enterprise manager database

The SharePoint enterprise manager database stores configuration information, security information, and information about your SharePoint Farm. SharePoint enterprise manager uses a Microsoft SQL Server instance that you specify to host the database. The same SQL Server instance can host both your SharePoint Content Database and the SharePoint enterprise manager database. If you install SharePoint enterprise manager on more than one WFE, the installations share one SharePoint enterprise manager database.

What is the product architecture?

Every WFE in your SharePoint Farm hosts a copy of the SharePoint enterprise manager Web Application. All of the Web Applications share a single database. The Web Applications use the SharePoint API to retrieve information from your SharePoint Farm.

Hardware requirements

Idera SharePoint enterprise manager requires the following hardware on any computer that hosts a component.

Hardware Type	Requirement
CPU	2 GHz
Memory	1 GB
Hard Drive Space	200 MB total for all components

Software requirements

Idera SharePoint enterprise manager, components have the following general software requirements, as well as specific requirements outlined in the following sections. *If a service pack is not specified*, a service pack is not required for that version of the software.

General Software Requirements

- Internet Explorer 7.0, 8.0, or 9.0.
- Microsoft .NET 3.5.

You must have access to one or more Microsoft SharePoint Farms with one of the following installed:

- Microsoft Office SharePoint Server 2007 SP1 or later
- Windows SharePoint Services 3.0 SP1 or later
- SharePoint Foundation 2010
- SharePoint Server 2010

Tip:

If you use Internet Explorer 9.0, you must use Compatibility View with Idera SharePoint enterprise manager. You should enable compatibility with Inter-

net Explorer 8.0.

Web Application

You install the SharePoint enterprise manager Web Application on every Web Front End (WFE) server in the Microsoft SharePoint Farm. The servers that make up your Farm must meet the minimum requirements that Microsoft specifies for SharePoint servers.

SharePoint enterprise manager Database

The computer that hosts the database must have the following software installed.

Software Type	Requirement
Operating System	The computer that hosts SharePoint enterprise manager Database should meet or exceed the software requirements recommended by Microsoft to run and manage SQL Server.
SQL Server	<p>The database requires one of the following Microsoft SQL Server versions:</p> <ul style="list-style-type: none">○ Microsoft SQL Server 2012 Standard and Enterprise Editions○ Microsoft SQL Server 2008 R2○ Microsoft SQL Server 2008 Standard and Enterprise Editions○ Microsoft SQL Server 2005 Standard and Enterprise Editions SP1 or later

TIP: You must use a complete installation of Microsoft SQL Server to host the repository. Windows SharePoint Services 3.0 includes SQL Server Embedded Edition. You cannot use SQL Server Embedded Edition to host the database.

Permission requirements

When you install Idera SharePoint enterprise manager, the account that you use must have specific permissions and rights. If the account that you use does not have the required permissions, the installation fails.

Tip: You cannot use the SharePoint enterprise manager User Access Report or the User Permissions Analyzer with Forms Based Authentication.

Tip: You cannot install the SharePoint enterprise manager on a Web Application that uses Forms-Based Authentication or Claims-Based Authentication.

The account that you use when you install must have the following permissions:

- Domain user account.
- Member of the Administrators group on each Web Front End (WFE) server.
- Member of the SharePoint Farm Administrators group in the SharePoint Central Administration pages.

The account that you use must also be able to access the SQL Server that hosts the content databases for the Farm. The account must have the following SQL Server roles and privileges assigned:

- Assigned to the SQL Server Security Administrators (`securityadmin`) role.
- Assigned to the SQL Server Database Creators (`dbcreator`) role.
- Assigned to the Database Owner (`db_owner`) role for every content database in the SharePoint Farm.

The users that you add must have read access to the Site Collection where you install SharePoint enterprise manager. If the user does not have access to the Site Collection, the SharePoint enterprise manager grants the user read access to the collection.

You can use feature delegation to allow SharePoint enterprise manager users to make changes to SharePoint Web Applications, Site Collections, and other elements that their native SharePoint permissions do not allow.

In addition, when you install, select the Web Application to which you want to install SharePoint enterprise manager. The Application Pool Identity account needs specific permissions to your SharePoint Farm. The Application Pool Identity account must have the following permissions:

- `db_owner` privileges in all of the SharePoint content databases for the Farm, including the Admin Content database.
- Read access to the SharePoint Logging Database to collect and display Usage Data.
- Assigned to the `Full Control` Web Application user policy in every Web Application.

You assign `db_owner` privileges in the SQL Server Management Studio. You use the SharePoint Central Administration page to configure the Web Application user policy in the Security page.

Tip: The Application Pool Identity account cannot use the NT AUTHORITY\NETWORK SERVICE account.

Installing Idera SharePoint enterprise manager

Before you can use Idera SharePoint enterprise manager, you must install it. You use the same installation procedure for both first-time installs and evaluation installs.

When you install SharePoint enterprise manager, the account you use to log in on the computer where you install must have certain permissions assigned before you begin the installation process. For more information about these permissions, see [Permission requirements](#) on page 21.

When you install, you specify a user account for the SharePoint enterprise manager administrator. The account that you supply as the SharePoint enterprise manager administrator must be a Domain User account.

Tip: When you install, the SharePoint services must be running. In addition, the SQL Server that your SharePoint Farm uses must be running. Finally, the SQL database that you specify to host the SharePoint enterprise manager database must be running.

You should install the SharePoint enterprise manager on every Web Front End (WFE) in your SharePoint Farm.

When you install SharePoint enterprise manager, specify the Web Application to which you want to bind SharePoint enterprise manager. The Web Application that you specify cannot use Forms Based Authentication or Claims Based Authentication.

Start the SharePoint enterprise manager installer

Every computer where you install SharePoint enterprise manager must meet or exceed the [Hardware requirements](#) on page 20, [Software requirements](#) on page 20, and [Permission requirements](#) on page 21

To start the Idera SharePoint enterprise manager installer

1. Log on to the computer where you want to install SharePoint enterprise manager.
2. Close all open applications.
3. Start the `SPEM_Setup.exe` application.
4. In the Welcome to the InstallShield Wizard for SharePoint enterprise manager window, click **Next**.
5. In the License Agreement page, click **I accept the terms in the license agreement**, then click **Next**.
6. In the Destination Folder page, click **Next**. You can also click **Change** to specify the location where you want to install SharePoint enterprise manager.
7. In the Ready to Install the Program page, click **Install**.
8. In the InstallShield Wizard Completed page, click **Finish**.

Configure Idera SharePoint enterprise manager

Before you can use SharePoint enterprise manager, you must configure it for your SharePoint Farm. The configuration wizard appears automatically after you install SharePoint enterprise manager.

To configure SharePoint enterprise manager

1. In the Welcome to the Idera SharePoint enterprise manager Configuration Wizard page, click **Next**.
2. In the Select the SharePoint enterprise manager Web Application page, select the SharePoint Web Application that you want to bind SharePoint enterprise manager to, then click **Next**. The Web Application that you select must have a top-level Site Collection.
3. In the Add the SharePoint enterprise manager Administrator page, specify the account that should be the first SharePoint enterprise manager Administrator account. You use this account the first time that you open the SharePoint enterprise manager Management Console. You should enter name in the format `<domain name>\<user name>`, then click **Next**.
4. In the Create the SharePoint enterprise manager Repository page, specify the SQL Server Instance and the Database Name that SharePoint enterprise manager should use to store internal data, then click **Next**.
5. In the Install the SharePoint enterprise manager Timer Job page, click **Next**.
6. In the Verify SharePoint enterprise manager configuration page, verify the SharePoint enterprise manager settings then click **Finish** to complete the installation.
7. In the SharePoint enterprise manager Installation Successful page, click **Done**. If you leave the **Open SharePoint enterprise manager with the completion of the wizard** option selected, SharePoint enterprise manager starts after you click **Done**.

Upgrading Idera SharePoint enterprise manager

Idera SharePoint enterprise manager 4.9.5 is the latest version of SharePoint enterprise manager. SharePoint enterprise manager is a new version of and replaces the Idera SharePoint security manager.

How do I upgrade from an earlier version of SharePoint enterprise manager?

If you are upgrading from version 4.5 of SharePoint enterprise manager, you can install this version over the existing version 4.5 installation. Your existing licenses, user accounts, and feature delegation settings are transferred to this new version.

If you are upgrading from an earlier version of SharePoint enterprise manager, any feature delegations do not transfer to the new version. You can uninstall the existing version and recreate the settings in version 4.9.5.

How do I upgrade from SharePoint security manager?

If you are upgrading from SharePoint security manager to SharePoint enterprise manager, your existing security manager license transfers to your new SharePoint enterprise manager installation. Existing user accounts and feature delegation settings do not transfer. After installation, you must create new user accounts and delegate features to those users. For information about adding and managing users, see [Adding a user](#) on page 28 and [Editing SharePoint enterprise manager users](#) on page 30.

The SharePoint security manager Active Directory Configuration settings and Site Definition settings do not transfer to SharePoint enterprise manager. If you configured the SharePoint security manager with custom Active Directory Configuration and Site Definition settings, you should manually configure the SharePoint enterprise manager Advanced Active Directory Configuration settings.

You should uninstall your existing SharePoint security manager components, then install SharePoint enterprise manager. For information about installing, see [Installing Idera SharePoint enterprise manager](#) on page 22.

Removing or repairing SharePoint enterprise manager

If you need to remove or repair SharePoint enterprise manager, you use the Windows Programs and Features Control Panel to repair or remove SharePoint enterprise manager.

Normally, you install the SharePoint enterprise manager on every Windows Front End (WFE) in your SharePoint Farm. When you repair or remove it, you must do so on every WFE where you installed it.

How do I repair SharePoint enterprise manager?

You use the Windows Programs and Features Control Panel to repair your SharePoint enterprise manager installation. You should repair the SharePoint enterprise manager installation on every WFE where you installed it.

To repair the SharePoint enterprise manager installation

1. Log on to the computer where you want to repair SharePoint enterprise manager.
2. Close all open applications.
3. In the Windows Programs and Features Control Panel, click **SharePoint enterprise manager**, then click **Repair**.

How do I remove SharePoint enterprise manager?

You use the Windows Programs and Features Control Panel to remove your SharePoint enterprise manager installation. You should remove the SharePoint enterprise manager installation on every WFE where you installed it.

To remove the SharePoint enterprise manager installation

1. Log on to the computer where you want to remove the SharePoint enterprise manager.
2. Close all open applications.
3. In the Windows Programs and Features Control Panel, click **SharePoint enterprise manager**, then click **Uninstall**.
4. Windows prompts to confirm that you want to remove SharePoint enterprise manager. In the Programs and Features dialog box, click **Yes** to uninstall.
5. In the SharePoint enterprise manager Objects page, click **Remove** to remove the database and other information from the Farm.
6. In the Warning dialog box, click **Yes**.

Configuring Idera SharePoint enterprise manager

After you install Idera SharePoint enterprise manager, you must configure it for your environment before you can use it to administer your SharePoint Farm.

You must perform the following steps before you use SharePoint enterprise manager:

Add a license	See Managing licenses on page 27
Add one or more users	See Adding a user on page 28
Assign features and security delegation to users	See Editing SharePoint enterprise manager users on page 30

Viewing the SharePoint enterprise manager Home

When you open the Idera SharePoint enterprise manager, the Home page appears. The Home page lets you access top SharePoint enterprise manager features. You can click on a feature name or group name to access it.

How do I view the Home page?

You use the SharePoint enterprise manager Management Console to view the Home page.

To view the SharePoint enterprise manager Home page

- In the SharePoint enterprise manager Management Console, click **Home**.

Managing licenses

The Manage License page lets Idera SharePoint enterprise manager administrators manage the SharePoint enterprise manager license keys. You can do the following in the Manage License page:

- View the Farm Key.
- View the Farm WFE Count.
- View the License Key.
- View the License WFE Count.
- View the License Expiration Date.
- Import a License file.
- Enter a license key.

You must enter a license for each SharePoint Farm that you manage with SharePoint enterprise manager.

If the SharePoint enterprise manager license expires, you must add a new license to continue using SharePoint enterprise manager.

Tip:	Only SharePoint enterprise manager Administrators can manage licenses.
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How do I view license information?

You can view the following information about your SharePoint enterprise manager licenses:

- Farm Key
- Farm WFE Count
- License Key
- License WFE Count
- License expiration date

To view information about existing licenses

1. In the Home page, click **Administer SharePoint enterprise manager**.
2. In the Administer SharePoint enterprise manager page, click **Manage License**.
3. In the Manage License page, review the information about your license.

How do I import a license file?

You can use the Manage License page to import a license file. For information about purchasing a license key, contact your Idera account manager.

To import a license file

1. In the Home page, click **Administer SharePoint enterprise manager**.
2. In the Administer SharePoint enterprise manager page, click **Manage License**.
3. In the Manage License page, in the Add a new SharePoint enterprise manager license area, select **Import file**.
4. In the License file area, click **Browse**.
5. In the Choose File to Upload dialog box, select the license file, then click **Open**.
6. In the Manage License page, click **Import License**.

How do I enter a license key manually?

You can use the Manage License page to enter a license key manually. For information about purchasing a license key, contact your Idera account manager.

To enter a license key manually

1. In the Home page, click **Administer SharePoint enterprise manager**.
2. In the Administer SharePoint enterprise manager page, click **Manage License**.
3. In the Manage License page, in the License File area, select **Enter license key**.
4. In the License key field, type or paste your license key.
5. In the Manage License page, click **Validate License**.
6. In the Manage License page, click **Save License Data**.

Adding a user

Idera SharePoint enterprise manager lets you add multiple users to SharePoint enterprise manager. When you add a user, you can choose to let the user perform tasks with elevated privileges. You can divide the task of managing your SharePoint Farms among the multiple SharePoint enterprise manager users without giving the users additional privileges in SharePoint.

When you add a user, you can specify that the user has unrestricted access to all SharePoint enterprise manager features. Alternately, you can grant access to specific features only. You can make any user a SharePoint enterprise manager Administrator.

Every user that you add must have read access to the Site Collection where you install SharePoint enterprise manager. If the user does not have access to the Site Collection, the SharePoint enterprise manager grants the user read access to the Site Collection automatically.

Tip: You should add the SharePoint Timer Service User as a SharePoint enterprise manager user and grant access to all SharePoint enterprise manager features to let the Timer Job execute schedules.

You can use feature delegation to allow the SharePoint enterprise manager users to make changes to SharePoint Web Applications, Site Collections, and other elements that their native SharePoint permissions do not allow.

For more information about assigning features to users, see [Editing SharePoint enterprise manager users](#) on page 30.

You can set the default state of the SharePoint Farm tree for the user in the SharePoint enterprise manager. The user can change this setting in their profile. The SharePoint enterprise manager Administrator can also override all user settings with a default setting for all users.

For more information about configuring user settings, see *Setting your profile options* in the SharePoint enterprise manager help.

For more information about configuring the default Farm tree expansion for all users, see *Configuring general SharePoint Site settings* in the SharePoint enterprise manager help.

SharePoint enterprise manager Administrators can add, delete, and change SharePoint enterprise manager users.

Tip: You can assign SharePoint enterprise manager Administrator privileges to any user, even if the user only has access to specific features. A user who is a SharePoint enterprise manager Administrator can change their own user accounts to allow access to additional features.

Use caution when you grant Administrator privileges. Generally, only users who are entrusted with access to all features should be granted Administrator privileges.

How do I add a SharePoint enterprise manager user?

You can add as many SharePoint enterprise manager users as your needs require. You do not need a SharePoint enterprise manager license for each user. You can add any Active Directory user as a SharePoint enterprise manager user.

To add a SharePoint enterprise manager user

1. In the Home page, click **Administer SharePoint enterprise manager**.
2. In the Administer SharePoint enterprise manager page, click **Add Users**.

-
3. In the Add Users page, do one of the following:
 - Type a user name in the **New users** field, then click the **Check Names** icon.
 - Click the **Browse** icon, then use the Select People – Webpage Dialog box to locate the user to add.
 4. In the Select desired feature access level area, click **All Features (Full Access)** or **Specific Features**.
 5. In the SharePoint enterprise manager administrator privileges area, click **Users are enterprise manager administrators** to assign administrator privileges to the new users.
 6. In the Default tree expansion area, click the **Default tree expansion** drop-down list to set the default state of the Farm tree for the user.
 7. Click **Add Users/Groups**.
 8. The Edit Users page appears. You must assign the features to the new users.

How do I assign features to users?

The Edit User page lets you manage the features assigned to SharePoint enterprise manager users. See [Editing SharePoint enterprise manager users](#) on page 30 for additional information.

Editing SharePoint enterprise manager users

Your deployment of Idera SharePoint enterprise manager normally supports multiple users. The administrator can assign each user a unique set of privileges and capabilities in SharePoint enterprise manager. You use the Edit Users page to configure users and to assign privileges.

Tip: The Farm Reports and the Snapshot and Revert Permissions features are full execution only, meaning that the user account has full farm access for these features.

SharePoint enterprise manager allows you to delete a user account or temporarily deactivate a user without deleting the account. Deleting or deactivating a user does not affect the status of the user in SharePoint or in your Active Directory domain, only the user status in SharePoint enterprise manager.

Feature delegation lets SharePoint enterprise manager users make changes to SharePoint Web Applications, Site Collections, and other elements that their native SharePoint permissions do not allow.

You can set the default state of the SharePoint Farm tree for the user in the SharePoint enterprise manager. The user can change this setting in their profile. The SharePoint enterprise manager Administrator can also override all user settings with a default setting for all users.

For more information about configuring user settings, see [Setting your profile options](#).

For more information about configuring the default Farm tree expansion for all users, see [Configuring general SharePoint Site settings](#).

Tip: Only users with SharePoint enterprise manager administrator privileges can make changes to user accounts. If your account does not have administrator privileges assigned, you cannot make changes to user settings or access the Edit Users page.

How do I create a new user?

The Add Users page allows you to create new users. For more information about creating a new user, see [Adding a user](#) on page 28.

How do I review the SharePoint enterprise manager users?

The Edit Users page lets you filter and sort the list of your SharePoint enterprise manager users. You can also use the page to access and change the settings for any individual user.

When you review the list, you can click any column heading to sort on that column. You can click the drop-down list icon in any column to filter on the values in the column.

To review the list of SharePoint enterprise manager users

1. In the Home page, click **Administer SharePoint enterprise manager**.
2. In the Administer SharePoint enterprise manager page, click **Edit Users**. SharePoint enterprise manager displays a list of your user accounts.

How do I make changes to user settings, add or remove features for a user, delegate access to SharePoint to a user, or grant or revoke administrator privileges?

The Edit Users page lets you select a user account, and then manage your user details in the User Information and Settings area. You can assign any user privileges as a SharePoint enterprise manager administrator. SharePoint enterprise manager administrators can make changes to the configuration settings and to the security settings of the SharePoint enterprise manager deployment.

Tip: SharePoint enterprise manager administrators do not necessarily have access to all SharePoint enterprise manager features, but they can change their own privileges to gain access to all features.

If you delete or deactivate a user, SharePoint enterprise manager disables any schedules that the user created. The schedules continue to appear in the Schedule Manager page. If you later reactivate a deactivated user, the schedules appear in the My Schedules page for the user.

Delegation lets you grant SharePoint enterprise manager users access within the console to SharePoint Sites, lists, folders, and items without allowing access in SharePoint itself. That is, it lets your SharePoint enterprise manager users administer parts of the SharePoint Farm that they cannot access.

You can delegate the same level of access to every SharePoint enterprise manager feature. Alternatively, every SharePoint enterprise manager feature can have a unique access level to the Farm. This is similar to inherited and unique permissions in SharePoint.

Tip: If you make changes to the feature or security delegation settings for a user, SharePoint enterprise manager permanently deletes any schedules for the relevant features. The user must recreate any needed schedules manually. Use caution when making changes to feature or security delegation.

If you change the features assigned to a user, SharePoint enterprise manager permanently deletes any schedules that the user created with those features. The schedules continue to appear in the Schedule Manager page.

If you make any changes to the security delegation settings for the features assigned to a user, SharePoint enterprise manager permanently deletes any schedules that the user created with the relevant features. If the Web Application/Site Collection Feature Settings for the user are set to Same, SharePoint enterprise manager deletes all schedules for all features if you make changes to the security settings for any feature.

In the Edit Users page, you can click the chevron (>) for any feature for information about what the feature does.

Tip:

The entire Farm always appears in the Farm Reports page. If you want to allow a user access to similar information for a portion of the Farm, grant the user access to the Site Reports page instead, then delegate access to the relevant Sites.

To make changes to user settings

1. In the Home page, click **Administer SharePoint enterprise manager**.
2. In the Administer SharePoint enterprise manager page, click **Edit Users**.
3. In the Edit Users page, click the View User Details icon adjacent to the user account whose settings you want to change.
4. Make any required changes to the user settings, and then click **Save user**.

To assign all features to a user account

1. In the Home page, click **Administer SharePoint enterprise manager**.
2. In the Administer SharePoint enterprise manager page, click **Edit Users**.
3. In the Edit Users page, click the View User Details icon adjacent to the user account to which you want to assign all features.
4. Check the **Full Features Access** check box.

To add features to a user account

1. In the Home page, click **Administer SharePoint enterprise manager**.
2. In the Administer SharePoint enterprise manager page, click **Edit Users**.
3. In the Edit Users page, click the View User Details icon adjacent to the user account to which you want to add features.
4. In the Unassigned Features area, check the box for the feature(s) you want to add, and then click **Assign Selected Features**.
5. Click **OK** to confirm.

To remove features from a user account

1. In the Home page, click **Administer SharePoint enterprise manager**.
2. In the Administer SharePoint enterprise manager page, click **Edit Users**.
3. In the Edit Users page, click the View User Details icon adjacent to the user account from which you want to remove features.
4. In the Assigned Features area, check the box for the feature(s) you want to remove, and then click **Remove Selected Features**.
5. Click **OK** to confirm.

To delegate access to SharePoint management features to a user account

1. In the Home page, click **Administer SharePoint enterprise manager**.
2. In the Administer SharePoint enterprise manager page, click **Edit Users**.
3. In the Edit Users page, click the View User Details icon adjacent to the user account from which you want to remove features.
4. In the Assigned Features area, click the View Feature Delegation Details icon adjacent to the feature for which you want to delegate access.
5. In the Feature settings area, do one of the following:
 - Select **This Feature** to apply the feature delegation settings to only this feature.
 - Select **All Features** to apply the feature delegation settings to all of your currently-assigned features.
6. In the Feature delegation settings area, do one of the following:
 - Select **Full Access** to grant the user access to the entire Farm for this or these features.
 - Select **Selected Access** to select the specific areas to which you want to grant the user access or this or these features, and then use the farm tree to select the specific objects.
7. Click **Save**, and then click **OK** to confirm.
8. In the Edit Users page, click **Save user**.

To deactivate a user account

1. In the Home page, click **Administer SharePoint enterprise manager**.
2. In the Administer SharePoint enterprise manager page, click **Edit Users**.
3. In the Edit Users page, click the View User Details icon adjacent to the user account you want to deactivate.
4. Do one of the following:
 - Click **Deactivate User**, and then click **OK** to confirm.
 - In the User Information and Settings area, clear the **Active** check box.
5. Click **Save user**.

To delete a user account

1. In the Home page, click **Administer SharePoint enterprise manager**.
2. In the Administer SharePoint enterprise manager page, click **Edit Users**.
3. In the Edit Users page, click the View User Details icon adjacent to the user account you want to delete.
4. Click **Delete User**, and then click **OK** to confirm.

To assign a user SharePoint enterprise manager administrator privileges

1. In the Home page, click **Administer SharePoint enterprise manager**.
2. In the Administer SharePoint enterprise manager page, click **Edit Users**.
3. In the Edit Users page, click the View User Details icon adjacent to the user account to which you want to grant administrator privileges.
4. Check the **Administrator** check box, and then click **Save User**.

To revoke SharePoint enterprise manager administrator privileges

1. In the Home page, click **Administer SharePoint enterprise manager**.
2. In the Administer SharePoint enterprise manager page, click **Edit Users**.
3. In the Edit Users page, click the View User Details icon adjacent to the user account whose administrator privileges you want to revoke.
4. Clear the **Administrator** check box, and then click **Save User**.

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