

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

Reduce 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 by 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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4.5 Release Notes

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

- [New features](#) on page 11
- [Known issues](#) on page 12

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New features

Idera SharePoint enterprise manager is an update to Idera SharePoint security manager 3.5. 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.

4.5 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 Audit and Account Access Reports	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 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 Idera 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 what item an audit should be performed on.

Known issues

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

- **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.

- **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 4.5

- **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.

If you perform a Storage Report and the results of the report 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 and Activity reports 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 Add Account Security page. You should not use the SharePoint enterprise manager to add account security for those sites.

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

When you perform a Site Search with 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.

- **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 Item Permissions Replicator**

Under certain circumstances, the item names may appear incorrectly in the Item Permissions Replicator. 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 Manage Users page, you can delegate access to part of the farm to a user, but when the user runs a Farm Report, 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.

- **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.

- **"Daily Hits Trend" and "User Details" graphs on the SharePoint enterprise manager Home Page have no data**

For SharePoint enterprise manager to display information in the Daily Hits Trend and User Details graphs, it must be able to read data from the SharePoint Logging Database. In addition, you must enable Usage Analysis in the Central Administration pages in your SharePoint farm. *If you use SharePoint 2007*, you must also enable the Advanced Usage Analysis option in the Shared Services in Central Administration.

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
00004077	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.

- [Learning about the components and architecture](#) on page 17
 - [Hardware requirements](#) on page 18
 - [Software requirements](#) on page 18
 - [sp1\Permission requirements](#) on page 19
- [Installing Idera SharePoint enterprise manager](#) on page 20
- [Upgrading Idera SharePoint enterprise manager](#) on page 21
- [Removing or repairing Idera SharePoint enterprise manager](#) on page 22

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 features are provided by a custom web application. 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.

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 or 8.0, or Internet Explorer 9.0 with Compatibility View enabled.
- Microsoft .NET 3.5 or later.

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.

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	The database requires one of the following Microsoft SQL Server versions: <ul style="list-style-type: none">○ 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.

sp1\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 Account Access Report or the Account Security 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 SQL Server Logins group.
- Assigned to the SQL Server Security Administrators role.
- Assigned to the SQL Server Database Creators role.
- Member of the SharePoint Farm Administrators group in the SharePoint Central Administration.

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, you select a Web Application to install SharePoint enterprise manager to. The Application Pool Identity account must have privileges to make queries in all of the SharePoint content databases for the farm. The Application Pool Identity account cannot use the NT AUTHORITY\NETWORK SERVICE account. The Application Pool Identity account must have read access to the SharePoint Logging Database to collect and display Usage Data.

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 [sp1\Permission requirements](#) on page 19.

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, you specify a web application to bind SharePoint enterprise manager to. The web application that you specify cannot use Forms Based Authentication or Claims Based Authentication.

Tip: If you uninstall SharePoint enterprise manager, you should use the same setup application that you used to install it. You should not use the Windows Add/Remove Programs Control Panel or the Uninstall or change a program Control Panel.

Start the SharePoint enterprise manager installer

Every computer where you install SharePoint enterprise manager must meet or exceed the [Hardware requirements](#) on page 18, [Software requirements](#) on page 18, and [sp1\Permission requirements](#) on page 19

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 Ready to Install the Program page, click **Install**.

Configure Idera SharePoint enterprise manager

Before you can use SharePoint enterprise manager, you must configure its settings. The configuration wizard appears when you install SharePoint enterprise manager.

To configure Idera SharePoint enterprise manager

1. In the Welcome to the Idera SharePoint enterprise manager configuration wizard page, click **Next**.
2. In the SharePoint enterprise manager Administrator page, specify the account that SharePoint enterprise manager uses to collect information from your SharePoint farm. You should enter the domain name and the user name, then click **Next**.
3. In the Database Properties page, specify the database server and the database that SharePoint enterprise manager should use to store internal data, then click **Next**.
4. In the SharePoint 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.
5. In the SharePoint enterprise manager Timer Job page, click **Next**.
6. In the SharePoint enterprise manager Installation Settings Summary, verify the settings, then copy the Application URL and make note of it, then click **Finish** to complete the installation.
7. In the SharePoint enterprise manager Installation Successful page, click **Done**.
8. In the InstallShield Wizard Completed page, click **Finish**.

Upgrading Idera SharePoint enterprise manager

Idera SharePoint enterprise manager 4.5 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 an earlier version of Idera SharePoint enterprise manager, you can install this version over the existing version. Your existing licenses, user accounts, and feature delegation settings are transferred to this new version.

How do I upgrade from SharePoint security manager?

If you are upgrading from SharePoint security manager to Idera 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 26 and [Managing users](#) on page 27.

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.

For more information about the settings, see [Configuring the advanced Active Directory 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 20.

Removing or repairing Idera SharePoint enterprise manager

If you need to remove or repair Idera SharePoint enterprise manager, you use the SharePoint enterprise manager installer `SPEM_Setup.exe`. You can use the Windows Control Panel open the installer and 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 SharePoint enterprise manager installer 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. Do one of the following:
 - Start the `SPEM_Setup.exe` application.
 - In the Windows Programs and Features Control Panel, click **Idera SharePoint enterprise manager**, then click **Change**.
4. In the Welcome to the InstallShield Wizard for SharePoint enterprise manager window, click **Next**.
5. In the Program Maintenance page, select **Repair**, then click **Next**.
6. In the Custom Setup page, click **Next**.
7. In the Ready to Modify the Program page, click **Install**.

How do I remove SharePoint enterprise manager?

You use the SharePoint enterprise manager installer 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 repair SharePoint enterprise manager.
2. Close all open applications.
3. Do one of the following:
 - Start the `SPEM_Setup.exe` application.
 - In the Windows Programs and Features Control Panel , click **Idera SharePoint enterprise manager**, then click **Change**.
4. In the Welcome to the InstallShield Wizard for SharePoint enterprise manager window, click **Next**.
5. In the Program Maintenance page, select **Remove**, then click **Next**.
6. In the Remove the Program page, click **Remove**.
7. In the SharePoint enterprise manager Objects page, click **Remove** to remove the database and other information from the farm.
8. In the Warning dialog box, click **Yes**.
9. In the InstallShield Wizard completed page, click **Finish**.

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 25
Add one or more users	See Adding a user on page 26
Assign features and security delegation to users	See Managing users on page 27

Managing licenses

The License Manager page lets you manage your Idera SharePoint enterprise manager license keys. You can do the following:

- View the Farm Key.
- View the Farm WFE Count.
- View the License Key.
- View the License WFE Count.
- View the Maintenance Expiration Date.
- View the Product 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.

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 Email address.
- Maintenance expiration date.
- Product expiration date.

To view information about existing licenses

1. In the SharePoint enterprise manager console, click **SharePoint enterprise manager > License Manager**.
2. In the License Manager page, review the information about your license.

How do I import a license file?

You can use the License Manager 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 SharePoint enterprise manager console, click **SharePoint enterprise manager > License Manager**.
2. In the License Manager page, in the License File area, click **Import File**.
3. In the License File area, click **Browse**.
4. In the Choose File to Upload dialog box, select the license file, then click **Open**.
5. In the License Manager page, click **Import License**.

How do I enter a license key manually?

You can use the License Manager 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 SharePoint enterprise manager console, click **SharePoint enterprise manager > License Manager**.
2. In the License Manager page, in the License File area, click **Enter License Key**.
3. In the License Key (Data) field, type or paste your license key.
4. In the License Manager page, click **Validate License**.

Adding a user

Idera SharePoint enterprise manager lets you add multiple users of the SharePoint enterprise manager system. Adding multiple users lets you divide the task of managing your SharePoint farms and also lets users perform tasks with elevated privileges.

When you add a user, you can specify that the users you add have unrestricted access to all SharePoint enterprise manager features or access to specific features only. You can also choose to make any user a SharePoint enterprise manager Administrator.

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 Site Collection.

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 [Managing users](#) on page 27.

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

Tip: Any user can be assigned SharePoint enterprise manager Administrator privileges, even a user with access to specific features only. 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 SharePoint enterprise manager console, click **SharePoint enterprise manager > Add Users**.
2. 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.
3. In the Select Desired Feature Access Level area, click **All Features (Full Access)** or **Specific Features**.
4. In the SharePoint enterprise manager Administrator Privileges area, click **Users are enterprise manager administrators** to assign administrator privileges to the new users.
5. Click **Add Users/Groups**.
6. *If you chose to assign specific features*, The Manage Users page appears. You must assign the features to the new users.

How do I assign features to users?

The Manage Users page lets you manage the features assigned to SharePoint enterprise manager users. See [Managing users](#) on page 27 for additional information.

Managing users

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

If you need to, you can delete a user account from SharePoint enterprise manager. You can also temporarily deactivate a user without deleting the user account from SharePoint enterprise manager.

Feature delegation can let SharePoint enterprise manager users make changes to SharePoint web applications, site collections, and other elements that their native SharePoint permissions do not allow.

Tip: Only users with SharePoint enterprise manager administrator privileges can make changes to users. If your account does not have administrator privileges assigned, you cannot make changes to user settings.

How do I create a new user?

You use the Add Users page to create new users. For more information about creating a new user, see [Adding a user](#) on page 26.

How do I review the SharePoint enterprise manager users?

You use the Manage Users page to review the list of SharePoint enterprise manager users. The Manage Users page lets you filter and sort the list of 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 SharePoint enterprise manager console, click **SharePoint enterprise manager > Manage Users**.
2. In the Manage Users page, review the list of SharePoint enterprise manager users.

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 Manage Users page lets you access the User Information and Settings page for each user. You can use the User Information and Settings page to change user settings.

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 you SharePoint enterprise manager users administrate 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 a 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 man-

ually. 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.

Tip: The entire farm always appears in Farm Reports. 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.

To make changes to user settings

1. In the SharePoint enterprise manager console, click **SharePoint enterprise manager > Manage Users**.
2. In the Manage Users page, click the View User Details icon for the user whose settings you want to change. The View User Details icon is to the left of the user name.
3. In the User Information and Settings area, make any required changes to the user settings.
4. In the User Information and Settings page, click **Save User Settings** to save the changes and return to the User Management page.

To assign all features to a user

1. In the SharePoint enterprise manager console, click **SharePoint enterprise manager > Manage Users**.
2. In the Manage Users page, click the View User Details icon for the user whose settings you want to change. The View User Details icon is to the left of the user name.
3. In the User Information and Settings area, select the **Full Features Access** check box.
4. Click **Save User** to save the changes and return to the User Management page.

To add features for a user

1. In the SharePoint enterprise manager console, click **SharePoint enterprise manager > Manage Users**.
2. In the Manage Users page, click the View User Details icon for the user whose settings you want to change. The View User Details icon is to the left of the user name.
3. In the User Feature Assignment area, in the UnAssigned Features area, select the check boxes for the features to add, then click **Assign Selected Features**.
4. Click **Save User** to save the changes and return to the User Management page.

To remove features for a user

1. In the SharePoint enterprise manager console, click **SharePoint enterprise manager > Manage Users**.
2. In the Manage Users page, click the View User Details icon for the user whose settings you want to change.

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3. In the User Feature Assignment area, in the Assigned Features area, select the check boxes for the features to remove, then click **Remove Selected Features**.
 4. Click **Save User** to save the changes and return to the User Management page.

To delegate access to SharePoint to a user

1. In the SharePoint enterprise manager console, click **SharePoint enterprise manager > Manage Users**.
2. In the Manage Users page, click the View User Details icon for the user whose settings you want to change.
3. In the User Feature Assignment area, in the Assigned Features area, click the View User Details icon for the feature that you want to delegate access for.
4. In the Manage Users page, in the Web Application/Site Collection Feature Settings area, do one of the following:
 - Select the **Individual** option to delegate a different access level to each assigned feature.
 - Select the **Same** option to delegate the same access level to each assigned feature.
5. In the Manage Users page, in the Select Feature Delegation Settings area, do one of the following:
 - Select the Full Access option to grant the user access to the entire farm.
 - Select the Selected Access option, then use the farm tree to select the farm objects the user should have access to.
6. Click **Save** to save the changes.
7. In the Manage Users page, click **Save User** to save the changes and return to the User Management page.

To deactivate a user

1. In the SharePoint enterprise manager console, click **SharePoint enterprise manager > Manage Users**.
2. In the Manage Users page, click the View User Details icon for the user you want to deactivate.
3. Do one of the following:
 - Click **Deactivate User**, then in the confirmation dialog, click **OK**.
 - In the User Information and Settings area, clear the **Active** check box.
4. Click **Save User** to save the changes and return to the User Management page.

To delete a user

1. In the SharePoint enterprise manager console, click **SharePoint enterprise manager > Manage Users**.
2. In the Manage Users page, click the View User Details icon for the user you want to deactivate.
3. Click **Delete User**.
4. In the confirmation dialog, click **OK** to delete the user.

To assign a user SharePoint enterprise manager administrator privileges

1. In the SharePoint enterprise manager console, click **SharePoint enterprise manager > Manage Users**.
2. In the Manage Users page, click the View User Details icon for the user you want to grant administrator privileges.
3. In the User Information and Settings area, select the Administrator check box.
4. Click **Save User** to save the changes and return to the User Management page.

To revoke SharePoint enterprise manager administrator privileges

1. In the SharePoint enterprise manager console, click **SharePoint enterprise manager > Manage Users**.
2. In the Manage Users page, click the View User Details icon for the user whose administrator privileges you want to revoke.
3. In the User Information and Settings area, clear the Administrator check box.
4. Click **Save User** to save the changes and return to the User Management page.

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