BIND VIEW® Insight at Work

User Guide

BindView RMS® Console and Information Server

Policy Compliance | Vulnerability Management | Directory Administration & Migration

BindView RMS®

Console and Information Server v8.00

User Guide

BindView Corporation · 5151 San Felipe, Suite 2500 · Houston, TX 77056

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About BindView Corporation

BindView Corporation is a leading provider of proactive business policy, IT security and directory management software worldwide. BindView solutions and services enable customers to centralize and automate policy compliance, vulnerability management, directory administration and migration across the entire organization. With BindView insight at work™, customers benefit from reduced risk and improved operational efficiencies with a verifiable return on investment. More than 20 million licenses have shipped to 5,000 companies worldwide, spanning all major business segments and the public sector.

Online Documents

Documentation is provided in the following electronic formats on the BindView product CD:

- Adobe® Acrobat® PDF files
- HTML Release Notes files
- Online help

Using PDF Files

With Adobe Acrobat PDF files, you can navigate through a document quickly and perform full-text searches. In addition, the PDF files can be viewed online, distributed to multiple users electronically, or printed.

You must have Adobe® Reader® installed to read the PDF files.

To view PDF files, double-click PDF files to open them, and then move through the document by clicking topic headings in the left pane or green hypertext links in the text. To print copies, click **Print** from the **File** menu.

Installing Adobe Reader

Adobe Reader installation programs for common operating systems are available for a free download from the Adobe Web site at *www.adobe.com*.

User Guides

The Docs directory on the BindView product CD contains copies of the user guides and other documentation in the PDF format.

The *BindView RMS Console and Information Server User Guide* contains information about the BindView RMS Console and Information Server v8.00. If you upgrade the BindView RMS Console and Information Server, the *BindView RMS Console and Information Server User Guide* included with the update will contain information about the new version of the Console.

Release Notes

If the autorun function is enabled, a Readme HTML file for your BindView product is accessible under the Documentation menu of the BindView setup menu when you insert your CD. You also can select to view this file after the installation is completed, or by browsing to the Release Notes directory in the root directory for your program:

```
C:\Program Files\BindView\RMS\Release Notes
```

Online Help

Comprehensive help is available from the Help menu on the BindView RMS Console and the BindView RMS Web Console. Additionally, you can access help by clicking the **Help** button in any dialog, by right-clicking an item and selecting **Help** from the action menu, or by pressing **F1** in any dialog.

Typestyle Conventions

The following conventions are observed throughout this guide:

- **Bold** text is used to designate file and folder names, dialog titles, names of buttons, icons, and menus, and terms that are objects of a user selection.
- *Italic* text is used for word emphasis, defined terms, and manual titles.
- Monospace text (`Courier`) is used to show literal text as you would enter it, or as it would appear onscreen.

Alert Statements

The alerting statements are Notes, Cautions, and Warnings. These statements are formatted in the following style:

Note: Information that is incidental to the main text flow, or to an important point or tip provided in addition to the previous statement or instruction.

Caution: Advises of machine or data error that could occur should the user fail to take or avoid a specified action.

Warning: Requires immediate action by the user to prevent actual loss of data or where an action is irreversible, or when physical damage to the machine or devices is possible.

Contacting BindView

BindView has sales and support offices around the world. For information on contacting BindView, please refer to the information below or to the BindView Web site: ***www.bindview.com***

For Technical Support: ***www.bindview.com/support***

Technical Support is available Monday through Friday from 7:00 a.m. to 7:00 p.m. Central Time. Normal working hours for all other departments are 9:00 a.m. to 6:00 p.m.

Phone		
Sales and Customer Service	U.S. and Canada	800-813-5869
	Outside N. America	713-561-4000
Technical Support	U.S. and Canada	800-813-5867
	Outside N. America	713-561-4000
Training/Professional Service	U.S. and Canada	800-749-8439
	Outside N. America	713-561-4000

Fax	All Areas	713-561-1000

E-mail	
Sales	sales@bindview.com
Training	edu@bindview.com
Documentation	docs@bindview.com

Other	
FTP Site	ftp://ftp.bindview.com
Internet	www.bindview.com
Postal Mail	BindView 5151 San Felipe, Suite 2500 Houston, TX 77056

1 BindView RMS Console and Information Server Overview

In This Chapter

BindView RMS Suite

The BindView RMS® suite helps you secure your Enterprise and simplify the management and administration of network operating systems, directories, and related applications. The BindView RMS suite consists of the following products:

- BindView RMS Console and Information Server
- BindView RMS Web Console
- BindView RMS Decision Support Center
- bv-Control® products

The BindView RMS Console and Information Server are the principal components of the BindView RMS product family infrastructure. The BindView RMS Console is the primary user interface for bv-Control products. The BindView RMS Console provides query, ActiveAdmin®, baseline, task list, schedule, chart, report, export, and print features. The Information Server is used for all BindView RMS product query processing and data storage.

The BindView RMS Web Console (Web Console) is a Web-based user interface that provides query, baseline, scope manager, task status monitoring, enterprise browser, and real-time monitoring services.

The BindView RMS Decision Support Center provides threshold-based notification and automated actions for pre-defined conditions that threaten the integrity of your business Enterprise.

The bv-Control products allow you to query, manage, and administer specific areas of your Enterprise.

This version of the *BindView RMS Console and Information Server User Guide* describes features available in version 8.00 of the BindView RMS Console and Information Server. If you upgrade to a later version of the BindView RMS Console and Information Server, you should consult the *BindView RMS Console and Information Server User Guide* that comes with that version to learn about its new features.

The BindView RMS Console in the MMC

The BindView RMS Console is the MMC-based user interface of the BindView RMS product family. Since the BindView RMS Console is an infrastructure component, it does not provide any query, management, or administrative capabilities until you add an installed bv-Control product to it.

The BindView RMS Console installs as a Snap-in to the Microsoft Management Console (MMC). The MMC is a host application that provides a common interface for management Snap-ins, such as the BindView RMS Console. The MMC is included with Windows 2000, Windows XP, and Windows Server 2003.

For detailed information on using and configuring an MMC, consult Help Topics from the MMC Help menu, or consult the Microsoft home page at http://www.microsoft.com.

User Interface Components

You can operate the BindView RMS Console from the following views: *standard* (or *normal,* depending on the version of the MMC you have installed) and *taskpad*. The standard view gives access to all Console features. The taskpad view provides shortcuts to Console features grouped by task, and to the BindView Web site.

Standard View

Standard view includes access to all BindView RMS containers and features. The standard view is shown in Fig. 1.

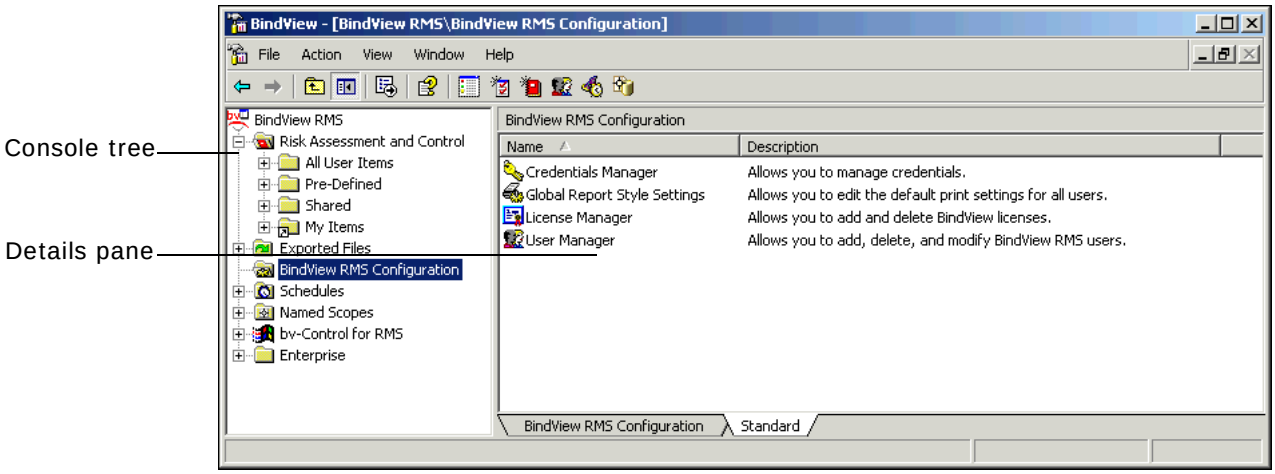


Fig. 1 Standard View User Interface Components

Taskpad View

The Console taskpad views provide shortcuts to task-related features, containers in the details pane, and the BindView Web site. The Console provides taskpad views for the BindView RMS, Risk Assessment and Control, and BindView RMS Configuration containers.

Certain Console features cannot be accessed from the taskpad views. Fig. 2 shows the Taskpad view for the BindView RMS Configuration Container. This is the taskpad view of the same container shown in the standard view in Fig. 1.

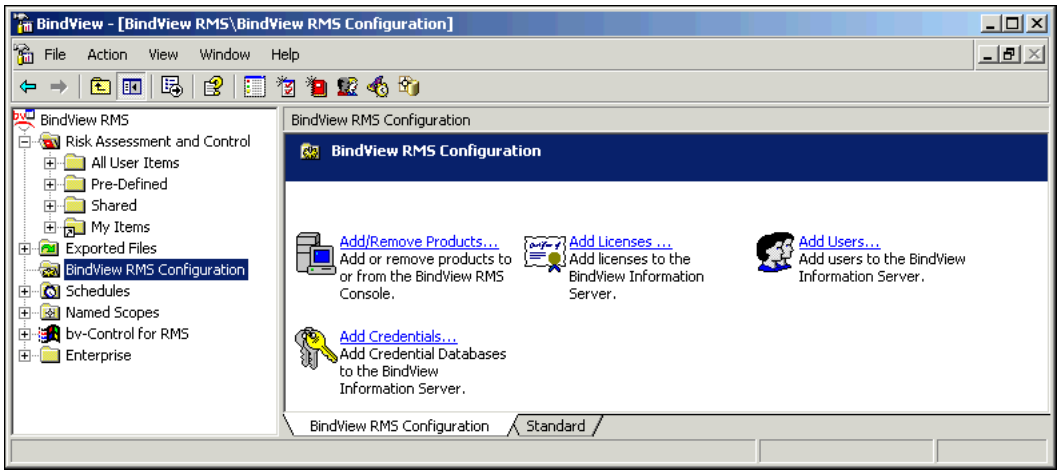


Fig. 2 BindView RMS Taskpad View

Console Features

The Console provides the following types of features:

- Administrative
- Query-related

Some bv-Control products do not use all of the features provided by the Console. Refer to your bv-Control product user guide to learn which features the product uses.

Administrative Features

The Console provides the following administrative features:

- Credential database management
- License management
- User management
- Scope management

Credential Database Management

A *credential database* is a collection of information that gives assigned users the right to query resource objects. You use the credential database feature to perform the following credential database management activities:

- Create credential databases
- Remove credential databases
- Manage the names, passwords, and credentials of credential databases

The credential database feature is described in detail in “Credential Databases” on page 54.

License Management

Licenses are required for you to use installed BindView RMS products and the ActiveAdmin feature. You use the license management feature to perform the following license management activities:

- View stored licenses
- Add licenses
- Remove licenses

The license management feature is described in detail in “Product Licenses” on page 57.

User Management

You use the user management feature to perform the following user management activities:

- Add users to an Information Server
- Assign user properties (general, query-related, and product-related)
- Assign credential databases to users

The user management feature is described in detail in “User Access Rights” on page 58, and “User Properties” on page 59.

Scope Management

The scope management feature enables you to create and manage named and default scopes. A *named scope* is a group of saved

scope items stored on the Information Server. A *scope item* is a single resource object or a container that holds several resource objects. A *default scope* is a user-selected named scope that can be easily applied to specific query definitions.

The scope management feature is described in detail in "Scopes" on page 59.

Query-Related Features

The Console provides the following query-related features:

- Query
- ActiveAdmin
- Baseline
- Task list
- Schedules
- Grid
- Chart
- Report
- Export

Query Feature

You use the query feature to define and run queries, and to manage query-related information. *Queries* are questions you ask to gain information about resource objects in your Enterprise.

When creating a query, you define a specific set of criteria that are used to examine the specified resource objects. When you run a query, the Information Server gathers a dataset of resource object records that match the query definition criteria. You view datasets in the following view types: grids, charts, and reports.

The query feature is described in Chapter 4 on page 65.

ActiveAdmin Feature

You use the ActiveAdmin feature to edit or delete the following items:

- Resource objects in your Enterprise
- Historical datasets stored on the Information Server
- Session logs stored on the Information Server

The ActiveAdmin feature is described in detail in Chapter 5 on page 93.

Baseline Feature

The baseline feature enables you to perform a one-to-one comparison of two historical datasets. A *historical dataset* is a saved dataset that is linked to a query binder. You can determine how many recent datasets are stored in a query binder and select a single dataset to never delete. Baselining helps you detect changes in your resource objects over time.

The baseline feature is described in detail in Chapter 6 on page 101.

Task List Feature

You use the task list feature to create, run, and manage task lists. A *task list* is a collection of multiple tasks in a single object.

When creating a task list, you add query tasks, baseline tasks, and post process commands. When you run a task list, the Information Server processes all tasks and performs all post process commands included in the task list.

The task list feature is described in detail in Chapter 7 on page 107.

Schedule Feature

You use the schedule feature to set up queries and task lists to automatically execute at a time you specify or on a regular basis without needing to be logged in to the Console.

The schedule feature is described in detail in Chapter 8 on page 131.

Grid Feature

The grid feature displays data sets collected by the queries in a spreadsheet-style grid on the screen. You can review the data collected by the query, change its sort method, or perform ActiveAdmin changes to the data.

Chart Feature

The chart feature enables you to graphically display datasets. You can create the following types of BindView charts:

- Series
- Histogram

The chart feature is described in detail in Chapter 9 on page 155.

Report Feature

You use the report feature to preview and print a dataset as a report, and to save report settings. A *report* is a customized, formatted version of a dataset.

The report feature is described in detail in Chapter 10 on page 167.

Export Feature

You use the export feature to create and send export files of datasets, session logs, or graphic images of charts. You can determine the format of the exported data. You can export to several popular file formats to a file on the disk or to a user via email. An *export file* contains formatted data that can be read by another application.

The export feature is described in detail in Chapter 11 on page 181.

Console Containers

You use these BindView RMS containers in the console tree (Fig. 1) to configure and use the Console and installed bv-Control products:

- Risk Assessment and Control
- Exported Files
- BindView RMS Configuration
- Schedules
- Named Scopes
- Enterprise

Risk Assessment and Control Folders

The **Risk Assessment and Control** folder contains BindView RMS query binders, task list items, and shortcuts in the following storage folders:

- All User Items
- Pre-Defined
- Shared
- My Items

Risk Assessment and Control folders store saved BindView query binders, task lists, and settings items. **Risk Assessment and Control** folders are views of data stored in the BindView database on the Information Server. The BindView RMS Information Server manages the database automatically, without the need for manual maintenance.

All User Items Folder

The **All User Items** folder contains a folder for every defined user of the BindView RMS Console. By default, queries, task lists, and settings items the user creates are saved in their folder in the **All User Items** folder. By default, only BindView Administrators can access folders belonging to other users.

When a user is deleted, their folder in the **All User Items** folder is not deleted. BindView Administrators can copy or move the contents of deleted users' folders to another location.

Pre-Defined Folder

The **Pre-Defined** folder contains pre-defined query binders and task lists for bv-Control query-based products added to the Console.

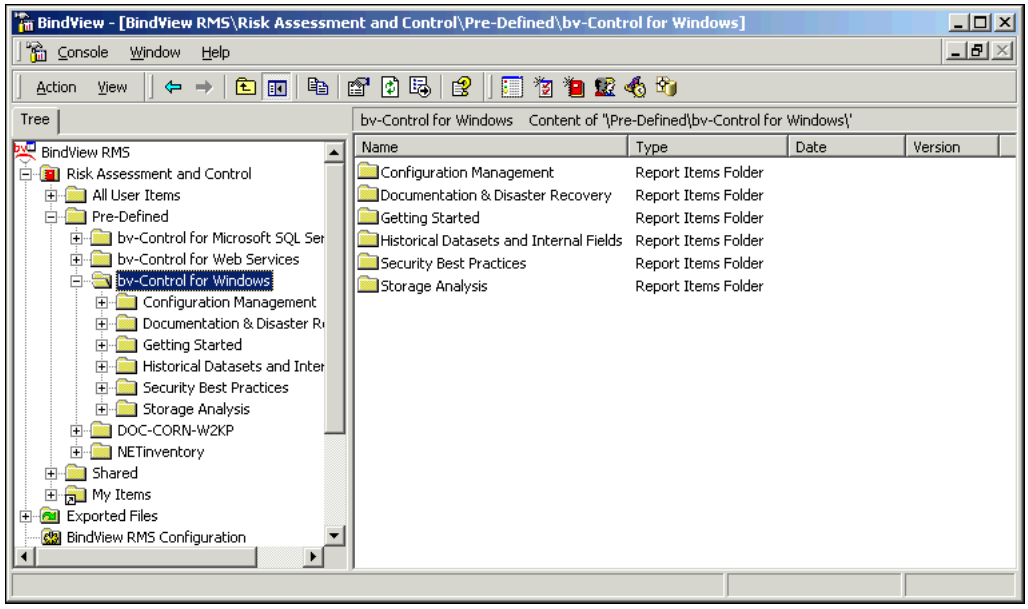


Fig. 3 BindView RMS Console User Query Folders

Each added bv-Control query-based product has its own subfolder under the **Pre-Defined** folder. These subfolders contain folders that classify pre-defined queries and task lists into categories.

The **Pre-Defined** folder is a public folder. All users of the Information Server can access the query binders and task lists stored in the **Pre-Defined** folder.

Since the **Pre-Defined** folder is public, you should copy any pre-defined query or task list that you want to modify to your **My Items** folder. Use the BindView RMS Console copy feature to copy query binders and task lists.

Shared Folder

The **Shared** folder allows users of the Information Server to share query binders and task lists. All users of the Information Server can access the query binders and task lists stored in the **Shared** folder.

My Items Folder

The **My Items** folder is the default folder for your saved query binders and task lists. The **My Items** folder is linked to the current Console user. By default, users who are not BindView Administrators cannot access or manage query binders or task lists in another user's **My Items** folder. The **My Items** folder is a shortcut to the current user's folder in the **All User Items** folder.

Exported Files Container

The **Exported Files** container is the default storage location for files you export from the BindView RMS Console. There are two folders in the **Exported Files** container. They are the **Shared** and **Personal** folders. Both the **Shared** and **Personal** folders are linked to directories on the hard disk of the machine hosting the BindView

Information Server. In addition to the BindView RMS Console, you can use the Windows Explorer to access their contents.

Shared Folder

The **Shared** folder allows users of the Information Server to share exported files. All users of the Information Server can access the exported files stored in the **Shared** folder.

Personal Folder

The **Personal** folder is the default folder for exported files. The **Personal** folder is linked to the current Console user. By default, users who are not BindView Administrators cannot access exported files in another user's **Personal** folder.

BindView RMS Configuration Container

The **BindView RMS Configuration** container applies to all BindView RMS products. The **BindView RMS Configuration** container populates the details pane with objects that launch configuration dialogs.

Schedules Container

The **Schedules** container stores schedules you have created. A schedule automatically runs one or more query items or one or more task lists at a time, or at an interval you specify. The BindView RMS Console does not need to be running to process scheduled items.

By default, users who are not BindView Administrators can only access schedules they have created. BindView Administrators can access schedules created by all users.

Named Scopes Container

The **Named Scopes** container provides access to the Named Scope Manager for viewing and managing named scopes stored on the Information Server.

Enterprise Container

You use the **Enterprise** container to quickly browse specific areas of your Enterprise. The **Enterprise** container appears in the console tree when you add a bv-Control product to the Console that supports the Enterprise browser. The shortcut menu for specific objects in the **Enterprise** container has a Filter command that you use to query an associated resource object in your Enterprise. Some bv-Control products add other commands to this shortcut menu. Refer to your specific bv-Control product user guide to learn how the product uses the **Enterprise** container.

Information Server

The Information Server is the primary server used by all BindView RMS products. The Information Server performs the following services for the Console and all bv-Control products added to it:

- Task processing
- Data storage

Your Enterprise can contain two types of Information Servers: local and remote. A *local Information Server* exists on the same machine as the Console you are using. A *remote Information Server* exists on a different machine than the one where your Console resides.

Task Processing

When you operate a bv-Control product from the Console, the selected Information Server performs all task processing. The types of tasks processed by the Information Server are queries, ActiveAdmin tasks, baselines, task lists, and scheduled items.

Since the Information Server is a behind-the-scenes component, task processing can continue after you quit the Console.

Data Storage

The Information Server stores the following types of data:

- Licenses
- Credential databases
- User properties
- Queries and Task Lists
- Query Datasets
- Schedules
- Scopes
- Global report style and export settings

Licenses, credential databases, user properties, schedules, scopes and settings items stored on one Information Server cannot be accessed by, or shared with, another Information Server. You cannot copy query binders or task lists from one Information Server to another unless you use the BindView Information Server Migration Wizard. If you need to copy query binders or task lists from one Risk Assessment and Control folder to another on the same Information Server, use the MMC copy features.

Remote Information Servers

A remote Information Server allows multiple Console users to centralize task processing and data storage on a single machine. By centralizing data storage on one remote Information Server, users and BindView Administrators can more easily share, manage, and maintain their data items.

Default Information Servers

Each user has a *default Information Server* that is automatically used when they open the Console. Initially, a user's default Information Server is the one that was installed with the Console they use, or that was connected to the Console when the Console was installed. A user can use the Information Server Selector to select a new default Information Server for their task processing and data storage (see "Changing the Default Information Server" on page 48).

User Identification

Console and Information Server users are identified by their Windows® accounts. A BindView Administrator can only assign a user access rights to Consoles and Information Servers that reside in domains or workgroups where the user has a valid Windows account with the appropriate rights.

If a Console exists in a different domain than a remote Information Server, the Console can only connect to the Information Server if the domain which contains the Information Server trusts the domain which hosts the Console User accounts.

If the remote Information Server exists in a Windows workgroup, a BindView Administrator must create local Windows user name and password accounts on the remote Information Server machine for all Console users that will remotely connect to it. They must check that each user account name and password is the same on the Console and remote Information Server machines.

Windows Administrators can use the Windows® 2000, Windows XP®, or Windows Server™ 2003 Computer Management MMC Snap-in to add users for the Console and Information Server (see Appendix B on page 199).

2 Installation

In This Chapter

System Requirements

Before you install the BindView RMS **Console**, make sure that your workstation and network environment meet the following minimum requirements:

- Pentium® II 450 MHz
- 256 MB RAM
- 300 MB of free disk space
- SVGA monitor that supports 256 colors with the display set to 800 x 600 pixels or greater
- Microsoft® Windows® 2000 SP3 (server or workstation), Windows XP® Professional SP1, or Windows Server™ 2003 or later
- Microsoft Internet Explorer v5.5 SP1 or later
- Microsoft® Outlook® 2000, Novell® GroupWise® v5.5, Lotus Notes® v5.0 or Lotus Domino (only required for e-mailing export files)
- Microsoft® Excel (required for Excel (using OLE) export files)
- Client for Microsoft® Networks

Before you install the BindView RMS **Information Server**, make sure that your workstation and network environment meet the following minimum requirements:

- Pentium III 800 MHz
- 512 MB RAM
- 500 MB of free disk space
- Microsoft Windows 2000 SP3 (server or workstation), Windows XP Professional SP1, or Windows Server 2003 or later
- Microsoft SQL Server v7.0 or 2000, or Microsoft SQL Server Desktop Engine (MSDE) v1.0 or 2000
- Microsoft Internet Explorer v5.5 SP1 or later
- Microsoft Outlook 2000, Novell GroupWise v5.5, Lotus Notes v5.0 or Lotus Domino (only required for e-mailing export files)
- Microsoft Excel (required for Excel (using OLE) export files)
- Client for Microsoft Networks

If you install a Console and Information Server on the same machine, the machine must meet all of the listed system requirements.

Version 8.00 of the BindView RMS Console and Information Server requires v8.00 or later bv-Control snap-in modules. You cannot use bv-Control snap-in modules with versions earlier than 8.00 with v8.00 of the BindView RMS Console and Information Server. If you have an earlier version of a bv-Control product, please contact your BindView representative for information about upgrading to a later version.

MSDE Installation

Your BindView RMS Console and Information Server CD includes a Microsoft installer for the Microsoft SQL Server 2000 Desktop Engine (MSDE 2000). If the BindView RMS Console and Information Server setup program determines that you need to install MSDE, a warning message will appear. Click the **3rd Party Applications** button in the **Install** panel and then the **MSDE 2000** button to start the MSDE installer.

Infrastructure Installation

Use the BindView RMS Console v8.0 CD to install the Console and Information Server. All Consoles require an Information Server to function. Most bv-Control products require a Console and Information Server to function.

Before you install the BindView RMS Console and Information Server and any other BindView products, we recommend that you read the *BindView RMS Planning and Deployment Guide*. Use the **Documentation** panel in the BindView RMS Setup program to open the *BindView RMS Planning and Deployment Guide*.

During installation, you must select the Information Server for the Console you are installing. You can choose to install a local Information Server, or you can connect the Console to an existing Information Server. The Information Server you install or connect to is the default Information Server for the Console.

After you install your infrastructure products, you use your bv-Control product CD to install the bv-Control products on the Console and Information Server machines. Refer to your bv-Control product user guide for information on installing your bv-Control product.

Pre-Installation Requirements

Before you install a Console or Information Server on a machine, you should make sure that the machine where you will install a Console or Information Server meets the minimum system requirements (see "System Requirements" on page 30).

Caution: If the selected machine does not meet the minimum requirements, the installation may fail.

In addition, ensure that:

- You are a Windows Administrator of the machine where you will install a Console or Information Server.
- You have Windows NT rights to the Microsoft SQL Server database if you want to install an Information Server on a machine that has a Microsoft SQL Server database installed on it.
- If you are installing a connecting Console in a Windows workgroup, you have an authentic user account on the machine where you want to install the Console and on the remote Information Server machine you will connect to. Your user account for both machines must have the same user name and password. If your user name and password is different for the Console and the Information Server machines, you cannot successfully install the Console.

Before you install your infrastructure, we recommend that you review the Release Notes files for the Console and Information Server and the bv-Control products. The Release Notes item on the Documentation menu of the product CD **Install** panel provides access to the product Release Notes.

Types of Installations

The BindView RMS Console v8.00 CD Setup program provides the following installation options:

- BindView RMS Console with local Information Server
- BindView RMS Console only (connecting to an existing v8.00 Information Server)
- BindView RMS Web Console (see the *BindView RMS Web Console User Guide* for more information)

When you install the Console with a local Information Server, both products are installed on the machine you are currently using. Users of other Consoles can remotely connect to the Information Server you install if they have access rights (see "Changing the Default Information Server" on page 48).

When you install only a Console, you must select an existing remote Information Server that the Console will use. If your BindView RMS network has a dedicated remote Information Server for Enterprise-wide querying, or a remote Information Server for area-specific querying, you can use this option to install your connecting Consoles. For detailed information on dedicated and area-specific Information Servers and connecting Consoles, refer to the *BindView RMS Planning and Deployment Guide*.

Installing the Console and Information Server

After you have reviewed the pre-installation requirements (see page 32), you can use the **Install** panel to install your infrastructure products. The **Install** panel automatically appears when you insert the BindView RMS Console v8.00 CD.

Before you install your infrastructure, we recommend that you review the Release Notes files for the Console and Information Server and the bv-Control products. The Release Notes item on the Documentation menu of the product CD **Install** panel provides access to the product Release Notes.

You can use Windows 2000 Terminal Services or Windows XP Remote Desktop to install the BindView RMS Console and Information Server on a remote machine. If you do so, the BindView RMS Console installer cannot be on a mapped drive.

▶ *To install BindView RMS infrastructure products*

1. Insert your BindView RMS Console v8.00 CD into the CD-ROM drive for your machine. The **BindView RMS Console** panel appears.

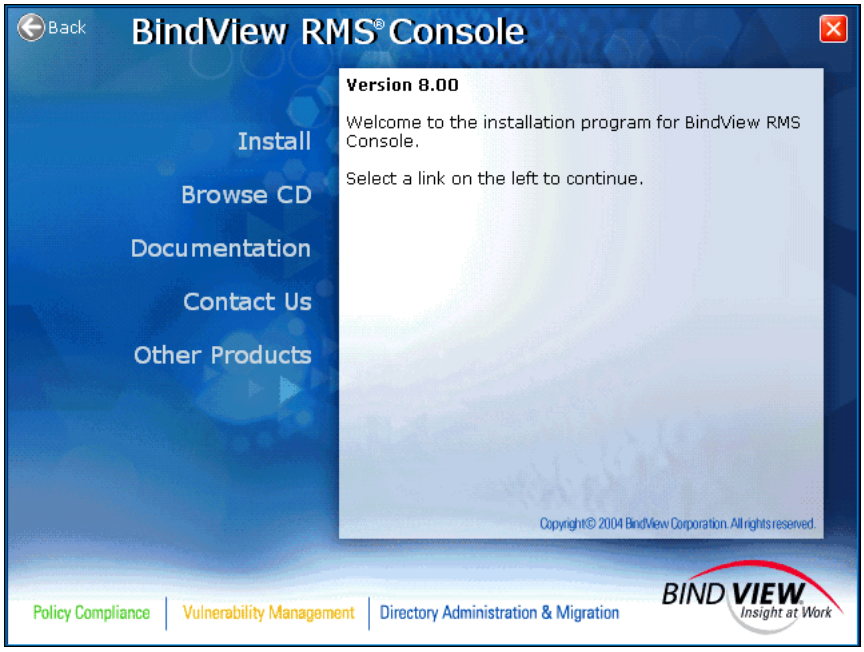


Fig. 4 BindView RMS Console Panel

2 Click **Install**. The **Install** panel appears.

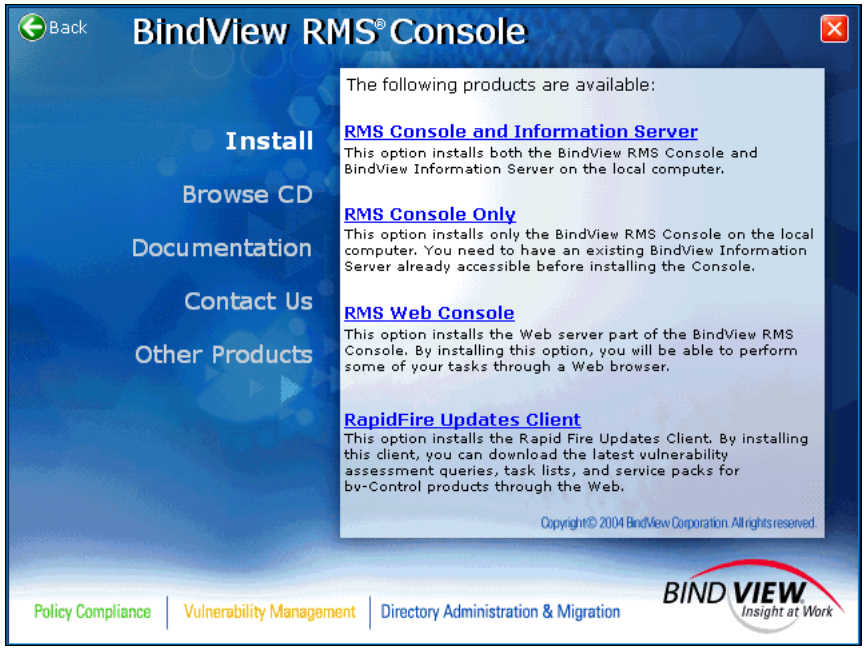


Fig. 5 Select a Component Panel

3 Select the desired option.

Select **RMS Console and Information Server** to install the Console and a local Information Server on the machine where the **Install** panel is running.

Use this option to add a local BindView Information Server to a computer which already has a BindView RMS Console-only installation.

Select **RMS Console only** if you want to only install the BindView RMS Console on your machine. We recommend using this option to add Consoles to your BindView RMS network that will connect to a remote Information Server. You can only use this option if you have already installed the remote Information Server that this Console will connect to.

Select **RMS Web Console** to install the BindView RMS Web Console. Please see the *BindView RMS Web Console User Guide* on the BindView RMS Infrastructure CD for information on installing and configuring the BindView RMS Web Console.

Select **RapidFire Updates Client** to download and install the BindView RapidFire Updates Client. The RapidFire Updates client helps you keep your BindView RMS Console and bv-Control snap-in modules up to date. Please see the information on the link for information on installing and configuring the RapidFire Updates Client.

If your machine does not have a local or remotely mounted CD-ROM drive, contact BindView Technical Support for assistance (see “Contacting BindView” on page 16).

The **RMS Console Prerequisite Checklist** appears.

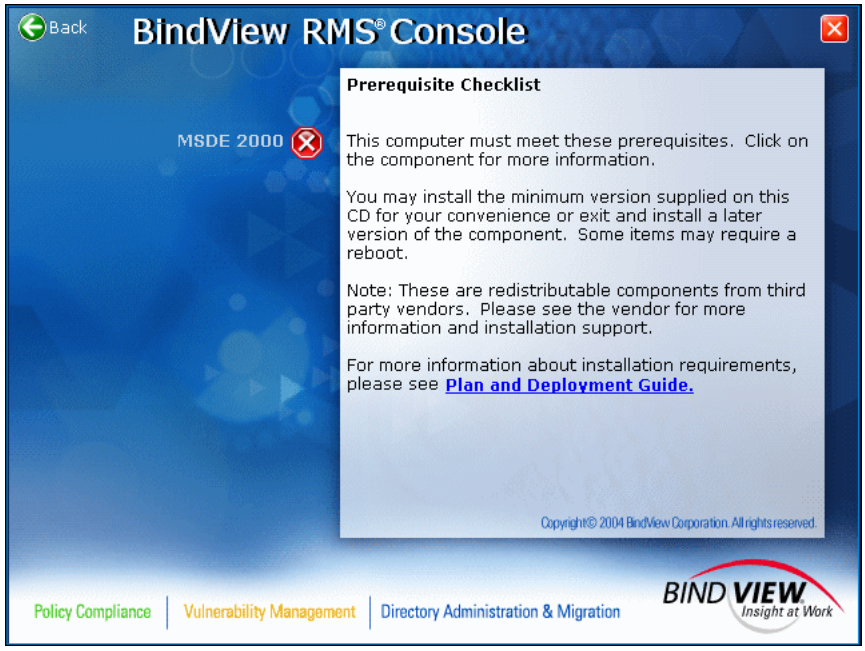


Fig. 6 RMS Console Prerequisite Checklist

4 Verify that you have the required prerequisites installed. If you do not have a prerequisite installed, click the name of the prerequisite to install it. When you are certain that your computer meets the prerequisites, click **I have satisfied all installation prerequisites and want to continue**.

The **Preparing to Install** panel of the **Setup installation** wizard appears. When installation is ready to begin, the **Welcome** panel of the **Setup installation** wizard appears.

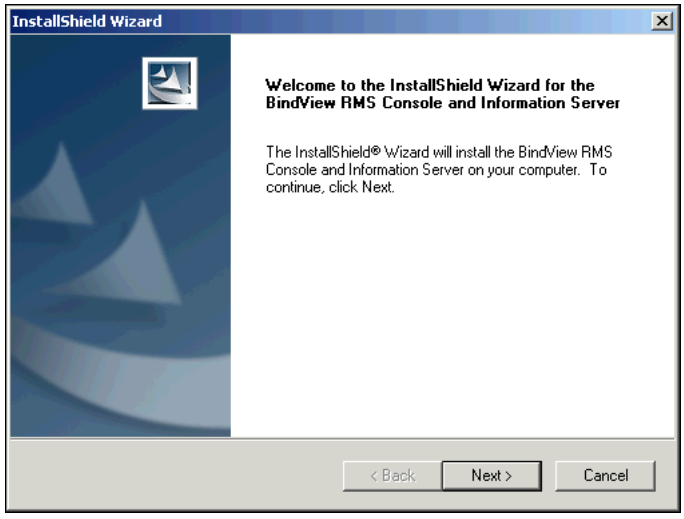


Fig. 7 Welcome Panel

5 Read the information on the panel and click **Next**.

The **License Agreement** panel appears.

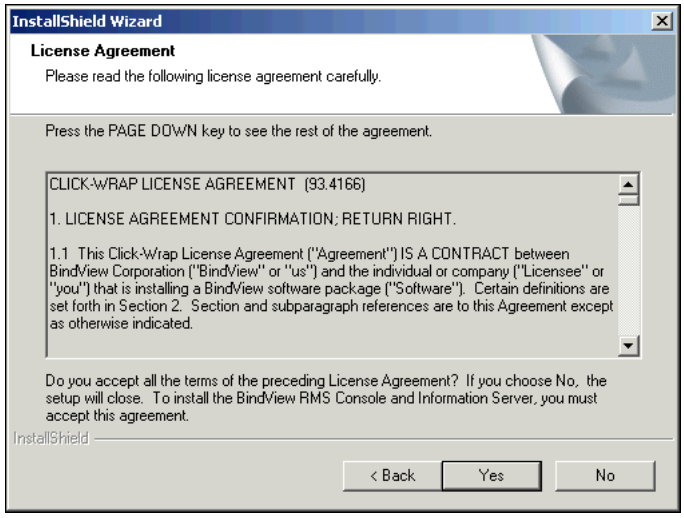


Fig. 8 License Agreement Panel

6 Read the license agreement and click **Yes** to accept the terms of the agreement.

The **Setup Type** panel appears.

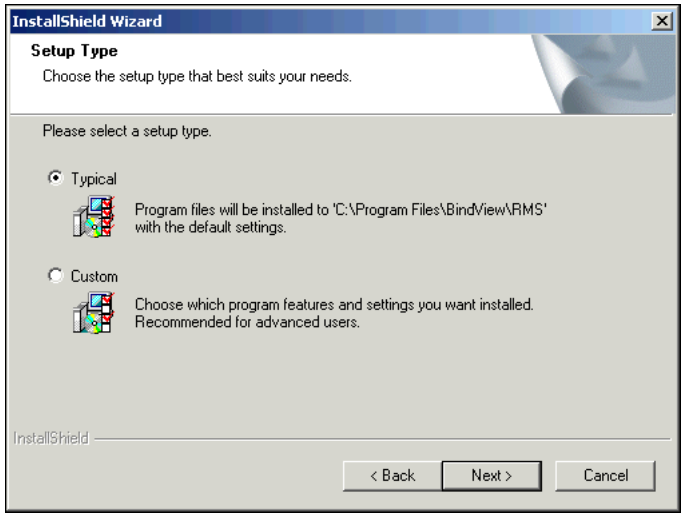


Fig. 9 Setup Type Panel

7 Select the setup type to use. To install using the default settings to C:\Program Files\BindView\RMS, select **Typical**. To customize where the files should be installed, select **Custom**.

8 Click **Next**.

If you chose the **Typical** setup, the **Start Copying Files** panel appears (Fig. 13 on page 38). Proceed to Step 12. If you chose

the **Custom** setup type, the **Choose Destination Location** panel appears.

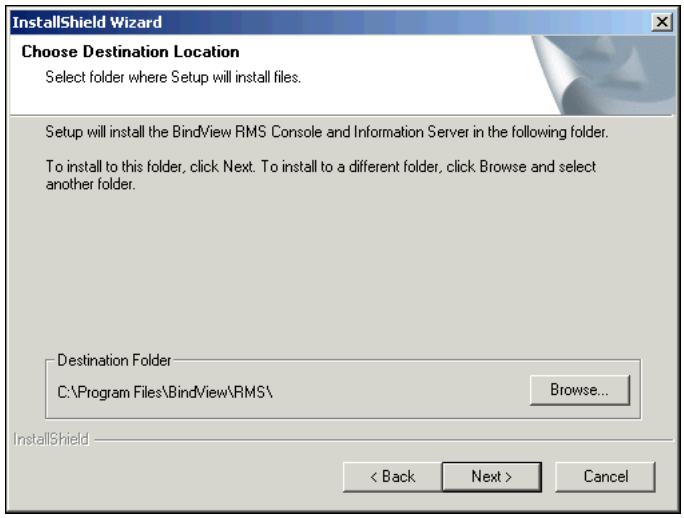


Fig. 10 Choose Destination Location Panel

9 Keep the default **Destination Folder** location, or select a different directory, and click **Next**.

The **Select Program Folder** panel appears.

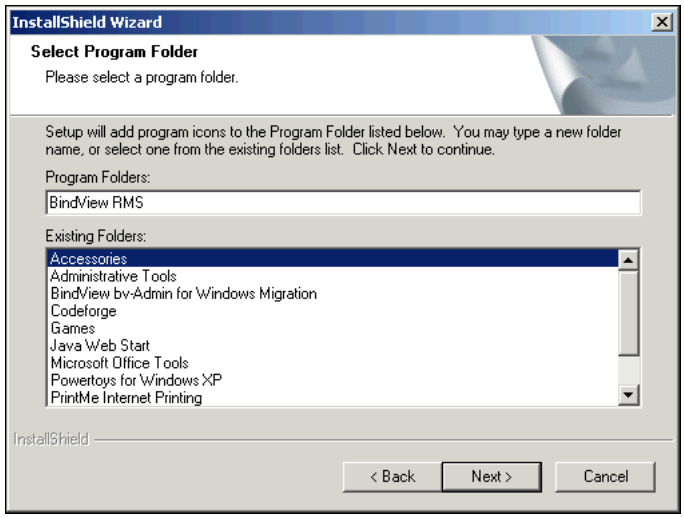


Fig. 11 Select Program Folder Panel

10 Keep the default **Program Folders** location, or select a different folder, and click **Next**.

If you are installing a local Information Server with the Console, the **Start Copying Files** panel appears. Proceed to Step 12.

If you are installing a Console only, the **Select Information Server** panel appears (Fig. 12). You use this panel to select the machine where the remote Information Server is installed. This

will be the default Information Server that the Console you are installing will use.

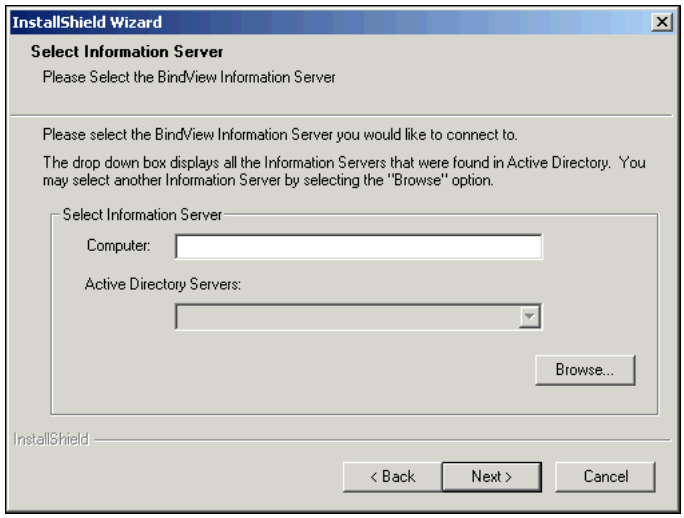


Fig. 12 Select Information Server Panel

11 Enter the desired **Computer** name or select an Active Directory® server and click **Next**.

The **Start Copying Files** panel appears.

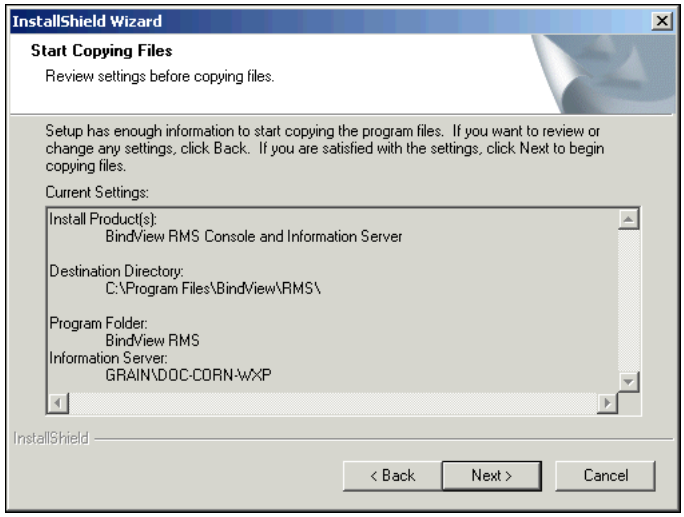


Fig. 13 Start Copying Files Panel

12 Review the **Current Settings** information and click **Next** to begin the installation of your infrastructure products.

If the MSDE or Microsoft SQL Server installation that will be used by the Information Server is not properly secured, **BindView Security Alert** dialogs appear (see "Securing the MSDE or SQL Server", next).

The **BindView RMS Console** panel appears at the end of the infrastructure installation.

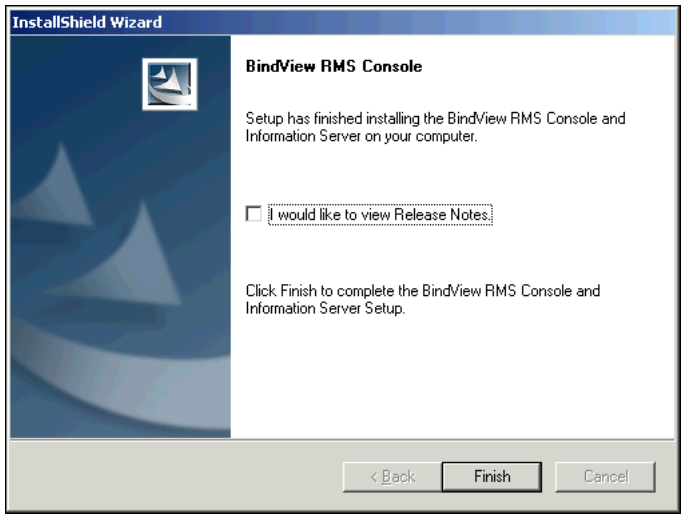


Fig. 14 BindView RMS Console Panel

13 Select **I would like to view Release Notes**, if desired, and click **Finish**.

You must now install at least one bv-Control product on your Console and Information Server machines in order to use BindView RMS to query your Enterprise. Refer to your bv-Control product user guide for detailed installation information.

Securing the MSDE or SQL Server

BindView RMS products require MSDE or Microsoft SQL Server on the Information Server machine to function.

If the machine where you are installing an Information Server has an improperly secured MSDE or Microsoft SQL Server installed on it, **BindView Security Alert** dialogs appear during installation. These dialogs explain the following steps we strongly recommend that you perform to properly secure your Microsoft SQL Server:

- Set the login mode for your database server to **Integrated Security**.
- Set the **Everyone** group rights to **Read & Execute** for the MSDE or Microsoft SQL Server installation directory.
- Remove the system stored procedure **xp_cmdshell** from your master database.
- Use the **SQL Server Password Setup** dialog that appears during installation to set a password for the database server. You can

select **Generate random password** to have a password created for you, or you can clear this option and enter a password.

Fig. 15 SQL Server Password Setup Dialog

BindView RMS Installation Log File

The first time that you install a Console or Information Server, a log file is created on the Console or Information Server machine. The log file, `bvInstall.log` is located in the `Temp` directory on your machine. The log file is created even if the installation was unsuccessful.

The log file contains install-related information such as error messages, events that occurred during installation, and user input to the installation dialogs.

Each Console or Information Server machine has only one `bvInstall.log` file. Each time you upgrade a Console or Information Server, the upgrade installation information is appended to the existing log file.

Upgrade Installations

After you review the pre-installation requirements (see page 32), you can use the **Install** panel to upgrade your infrastructure products.

Before you upgrade your BindView infrastructure, we recommend that you review the Release Notes file for the Console and Information Server. The **Release Notes** command on the **Documentation** menu of the product CD **Install** panel provides access to the Release Notes file.

Use the **BindView RMS Console and Information Server** installation option (Fig. 5) to upgrade a Console and local Information Server simultaneously.

If your Enterprise contains v7.3 Consoles that connect to a remote Information Server, you must upgrade the Consoles and remote Information Server according to the specific sequence defined in "To upgrade a remote Information Server and connecting Consoles", next.

Warning: Before upgrading a remote Information Server, make sure that all Consoles that connect to it are closed. Do not start any of the connecting Consoles while the remote Information Server is

being upgraded. This could cause the upgrade to fail, and datasets created by the BindView RMS Console could be lost.

BindView RMS v8.00 *does not* provide an Information Server-only option for installing or upgrading. If you installed a v7.1 remote Information Server on a machine that does not have a Console installed, you must use the **BindView RMS Console and Information Server** option to upgrade. The upgrade installation will upgrade the Information Server and install the BindView RMS Console on the machine. We recommend that you restrict the use of the BindView RMS Console to BindView Administrators for the occasional configuration of the Information Server.

▶ *To upgrade a remote Information Server and connecting Consoles*

1 Insert your BindView RMS Console v8.00 CD into the CD-ROM drive for your Information Server machine and select **BindView RMS Console and Information Server** from the **Install** panel (Fig. 5 on page 34).

If your machine does not have a local or remotely mounted CD-ROM drive, contact BindView Technical Support for assistance (see "Contacting BindView" on page 16).

The **Welcome** panel of the upgrade wizard appears (Fig. 7 on page 35).

You can use Windows 2000 Terminal Services or Windows XP Remote Desktop to install the BindView RMS Console and Information Server on a remote machine. If you install remotely, the BindView RMS Console installer cannot be on a mapped drive.

2 Read the information on the panel and click **Next**.

The **License Agreement** panel appears (Fig. 8 on page 36).

3 Read the license agreement and click **Yes** to accept the terms of the agreement.

The **Start Copying Files** panel appears (Fig. 13 on page 38).

4 Review the **Current Settings** information and click **Next** to begin the upgrade of your Information Server.

If the MSDE or Microsoft SQL Server that will be used by the Information Server is not properly secured, **BindView Security Alert** dialogs appear (see "Securing the MSDE or SQL Server" on page 39).

The **BindView RMS Console** panel appears at the end of the upgrade (Fig. 14 on page 39).

5 Click **Finish**.

Your remote Information Server is now upgraded to v8.00. Your machine now has a v8.00 BindView RMS Console installed on it.

6 Upgrade each Console that connects to the remote Information Server (see "To upgrade a connecting Console" on page 42).

7 On your upgraded v8.00 remote Information Server machine, upgrade any installed bv-Control products.

These are the bv-Control products that are added to, and operated from, each of your connecting Consoles.

Your BindView RMS infrastructure is now properly upgraded to v8.00.

▶ *To upgrade a connecting Console*

If you are installing only the BindView RMS Console on a machine, the Windows Remote Registry Service must be running on the BindView Information Server machine.

1 Insert your BindView RMS Console v8.00 CD into the CD-ROM drive for your connecting Console machine and select **BindView RMS Console Only** from the **Install** panel (Fig. 5 on page 34).

If your machine does not have a local or remotely mounted CD-ROM drive, contact BindView Technical Support for assistance (see "Contacting BindView" on page 16).

You can use Windows 2000 Terminal Services or Windows XP Remote Desktop to install the BindView RMS Console and Information Server on a remote machine. If you install remotely, the BindView RMS Console installer cannot be on a mapped drive.

The **Welcome** panel of the infrastructure Setup upgrade wizard appears (Fig. 7 on page 35).

2 Read the information on the panel and click **Next**.

The **License Agreement** panel appears (Fig. 8 on page 36).

3 Read the license agreement and click **Yes** to accept the terms of the agreement.

The **Start Copying Files** panel appears (Fig. 13 on page 38).

4 Review the **Current Settings** information and click **Next** to begin the upgrade of your Console.

The **BindView RMS Console** panel appears at the end of the upgrade (Fig. 14 on page 39).

5 Click **Finish**.

The Console is now upgraded to v8.00.

Configuring Installed Products

The first time a user opens the Console after it is installed or upgraded, or after a bv-Control product is installed on the Console machine, the **BindView RMS Console Configuration Wizard** appears. This wizard allows you to perform the minimum configuration required by the Console and Information Server.

You use the **BindView RMS Console Configuration Wizard** to configure the Console and Information Server with the following items:

- Installed bv-Control products
- BindView RMS licenses
- User access rights and properties

You can also access the **BindView RMS Console Configuration Wizard** from the **BindView RMS Configuration** container shortcut menu. This shortcut menu also provides access to individual configuration wizards for specific items.

▶ *To configure the Console and Information Server using the BindView RMS Console Configuration Wizard*

1 When the **BindView RMS Console Configuration Wizard** appears, click **Next** on the **Welcome** panel.

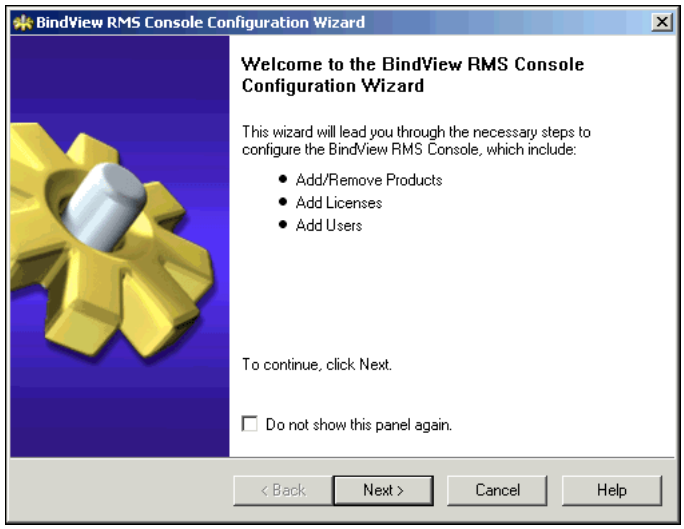


Fig. 16 BindView RMS Console Configuration Wizard - Welcome Panel

The **Add/Remove Products** panel appears (Fig. 17). All bv-Control products installed on both the Console and the

Information Server machines appear in the **Installed product list**.

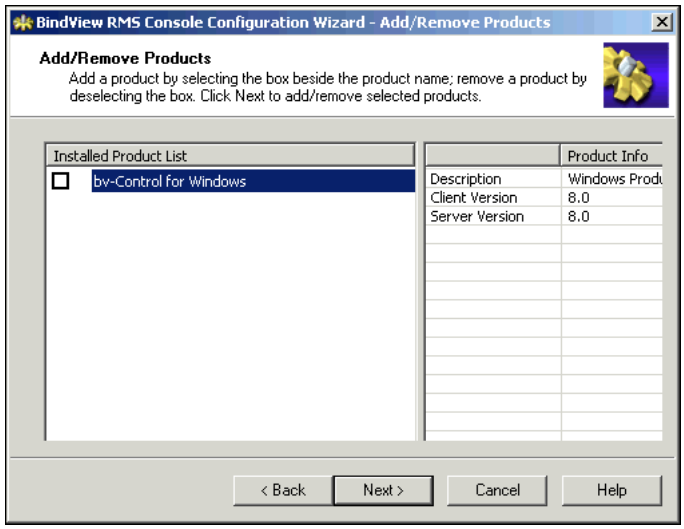


Fig. 17 Add/Remove Products Panel

2 Select the bv-Control products you want to appear on the Console, or deselect those that you do not want to appear, and click **Next**.

The **Add Licenses** panel appears (Fig. 18).

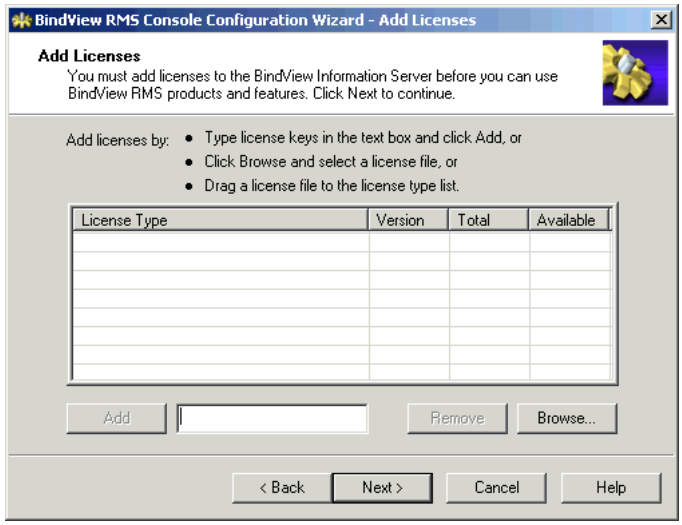


Fig. 18 Add Licenses Panel

3 Add your BindView RMS product and ActiveAdmin licenses and click **Next**.

The **License Summary** panel appears.

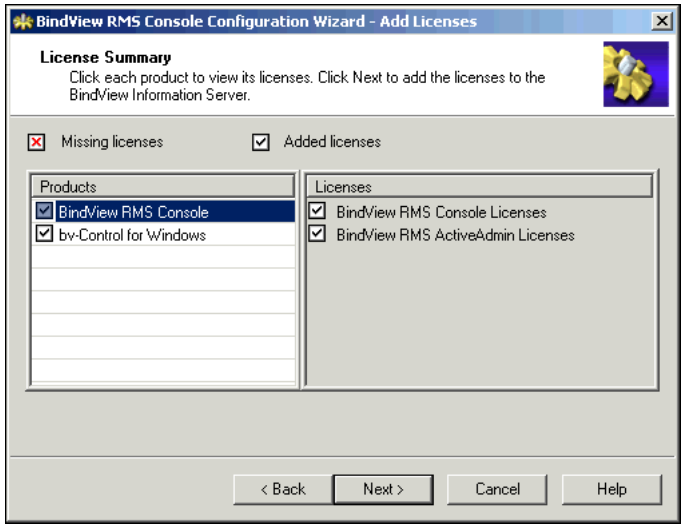


Fig. 19 License Summary Panel

If the Information Server is still missing licenses required for specific products or features, a caution message appears.

4 Review the license summary information and click **Next**.

If you are still missing licenses, click **Back** to return to the **Add Licenses** panel and add the missing licenses.

The **Add Licenses Completed** panel appears.

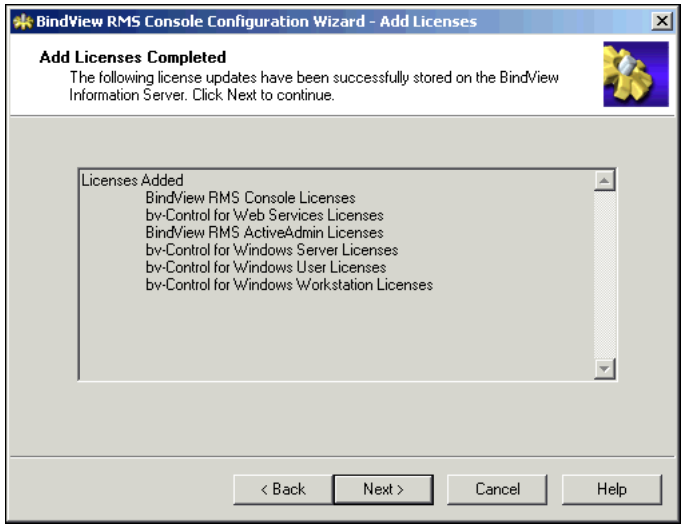


Fig. 20 Add Licenses Completed Panel

5 Review the information on the panel and click **Next**.

If the panel contains a caution message for missing licenses, click **Back** to return to the **Add Licenses** panel and add the missing licenses.

The **Add/Remove Products in progress** panel appears.

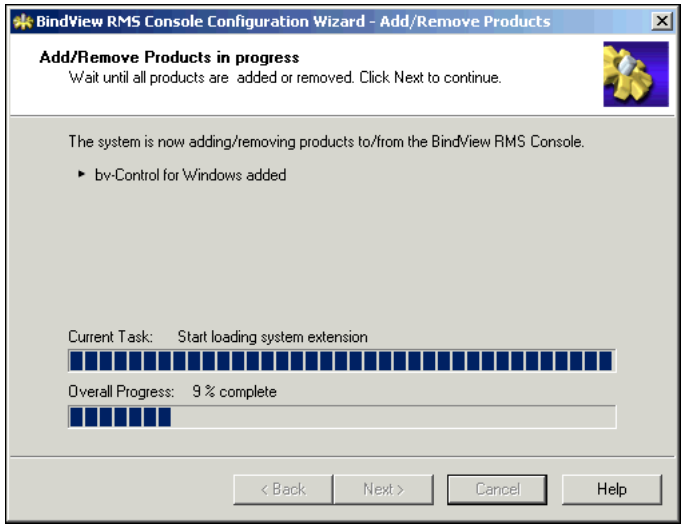


Fig. 21 Add/Remove Products in Progress Panel

6 Observe the progress bars and click **Next** after the products are added to or removed from the Console.

Adding or removing a bv-Control product to or from the Console automatically updates the .msc file (the MMC configuration file).

Each time you open the Console, the added bv-Control products appear in the console tree.

Clicking **Cancel** after the progress bar has completed does not cancel the add or remove selections you made. You must use the **Add/Remove Products Wizard** from the **BindView RMS Configuration** container shortcut menu or taskpad to make any further Add or Remove product changes.

The **Add Users** panel appears.

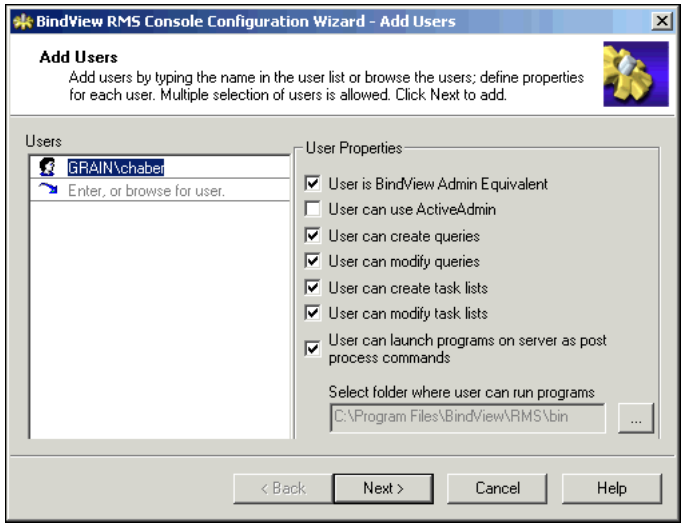


Fig. 22 Add Users Panel

7 Add users of the Information Server by typing their fully qualified path in the **Users** frame, or by using the browse (**...**) button to open a dialog for selecting the desired user.

Added users have access rights to the Information Server.

8 Assign the desired user properties for each added user and click **Next**.

The **User can use ActiveAdmin** option only appears if an ActiveAdmin license is stored on the Information Server.

Use **Select folder where user can run programs** to set the folder where the user can set a program to run in a baseline or query task list. For information on task lists, refer to Chapter 7, "Using Task Lists," on page 107.

The default folder location for **Run a Program** executables is the `BindView\RMS\bin` folder in the `BindView\RMS` directory on the Information Server. Only BindView Administrators can add programs to this directory.

Although you can select any folder location residing on the same machine as the Information Server, we recommend using the `bin` folder since it has restricted access for non-BindView Administrators.

User properties are stored on the Information Server you just upgraded or installed.

The **Add Users Summary** panel appears.

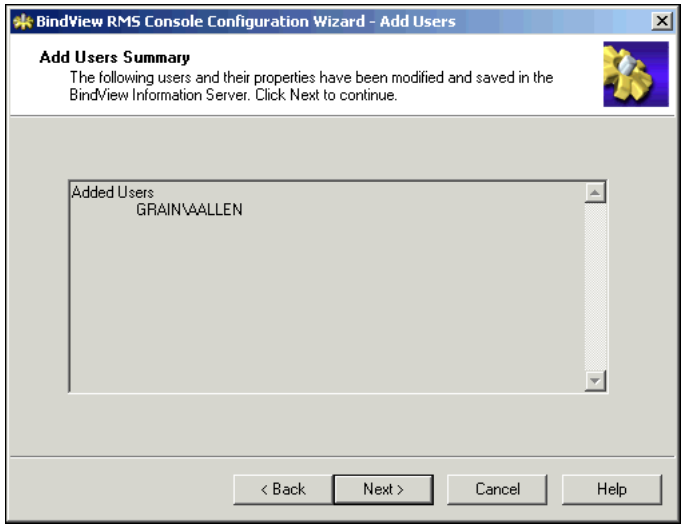


Fig. 23 Add Users Summary Panel

9 Review the summary information for the added users and click **Next**.

The **You have successfully completed the BindView RMS Console Configuration Wizard** panel appears (Fig. 24).

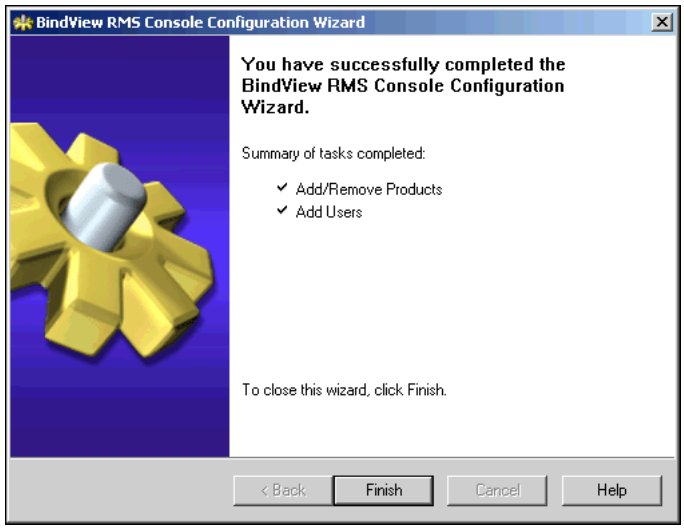


Fig. 24 You have successfully completed the BindView RMS Console Configuration Wizard Panel

10 Click **Finish**.

The Console and Information Server are configured with the items you selected in the **BindView RMS Console Configuration Wizard**.

Since the configuration wizard only contains the minimum required configuration items, you should also configure your Information Server with additional feature-specific items (see Chapter 3, “User Properties,” on page 59).

Changing the Default Information Server

The first time you open the Console, the Information Server that was installed with the Console or the Information Server you chose to connect the Console to during installation is automatically selected and used. This is your *default Information Server*.

You can use the **Information Server Selector** to select a new default Information Server for the Console that you use. When you select a new default Information Server, it is automatically used each time you open the Console.

The default location for the **Information Server Selector** is `Programs\BindView RMS` on your Windows `Start` menu.

You cannot use the Information Server Selector if you are currently running any BindView RMS products.

You can select any local or remote Information Server as your default if you have access rights to it.

For information on using the **Information Server Selector** to choose a new Information Server, see the **Information Server Selector** Help.

In order to select an Information Server, these conditions must be met:

- You must have access rights to the local or remote Information Server.
- The Console and the Information Server are compatible versions (v8.00 Consoles can only connect to v8.00 Information Servers).
- If a machine running the Console also hosts an Information Server, the local Console must be connected to the local Information Server for remote users to connect their Consoles to the Information Server.
- No more than 15 Console users are connected to an Information Server at any one time.

Caution: When you select and use a remote Information Server with the Console, the local Information Server installed with the Console cannot be used by any remote Console users.

---

3 Console Configuration Options

In This Chapter

Understanding Console Configuration Options

The Console and Information Server must be configured properly before you can use them. You use the **BindView RMS Console Configuration Wizard** to configure these products with required items (see "Configuring Installed Products" on page 42).

You can also use the Console features to customize the Console and the Information Server you are currently using to meet your specific needs.

Most bv-Control products require additional configuration before you can use them with the Console. Refer to your bv-Control product user guide for detailed information on product-specific configuration.

Version 8.00 of the BindView RMS Console and Information Server requires v8.00 or later bv-Control snap-in modules. You cannot use bv-Control snap-in modules with versions earlier than 8.00 with v8.00 of the BindView RMS Console and Information Server. If you have an earlier version of a bv-Control product, please contact your BindView representative for information about upgrading to a later version.

Console Configuration Options

You use specific BindView RMS container shortcut menus to configure the Console with the following items:

- bv-Control products
- Subfolder directories
- Windows Explorer Access
- Child windows

bv-Control Products

The **Add/Remove Products** command on the BindView RMS Configuration container shortcut menu opens the **Add/Remove Products** Wizard. This wizard is also part of the **BindView RMS Console Configuration** Wizard (see page 42). You use this wizard to add or remove installed bv-Control products to or from the Console.

To operate a bv-Control product from the Console, you must manually add the product to the Console. If you do not add a bv-Control product to the Console immediately after installing the product, use the **Add/Remove Products** Wizard to add it later.

When you remove a bv-Control product from the Console, it is not removed from the hard drive. For detailed information on removing a bv-Control product from the hard drive, refer to the bv-Control product user guide.

Subfolder Directories

Use the **Create Subfolder** command on a file folder shortcut menu (Fig. 25) to create subfolders under the **Risk Assessment and Control** folders to store and organize queries and task lists.

Any files stored in a user-created subfolder of the **Pre-Defined** and **Shared** folders can be accessed by all users of the Information Server. Any files stored in a user-created subfolder of a **My Items** folder remain private.

You use the **Delete Subfolder** command to remove the selected subfolder from the console tree. If the selected subfolder is user-created, the subfolder and any query items, task lists, or settings items it contains are deleted from the Information Server.

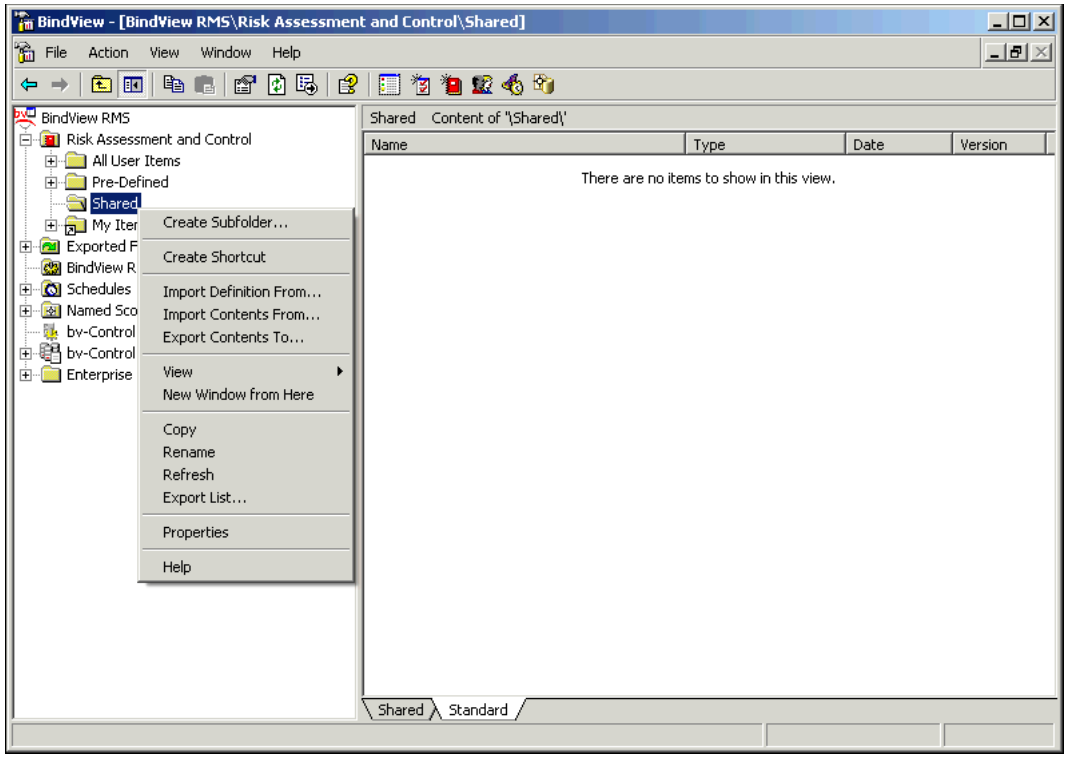


Fig. 25 File Folder Shortcut Menu

Windows Explorer Access

The shortcut menu for the subfolders of the **Exported Files** folder contains an **Explore From Here** command (Fig. 25). You use this command to invoke Windows Explorer and perform advanced file management activities.

Child Windows

The shortcut menus for all BindView RMS product containers and folders contain a **New Window from Here** command (Fig. 25). You use this command to create a child window that only displays the selected container or folder.

Information Server Configuration

Use the **BindView RMS Configuration** container objects in Standard view to open dialogs for configuring the Information Server:

- Credentials Manager
- Global Report Style Settings
- License Manager
- User Manager

Use the **Assign Default Scopes** button on the bv-Control product toolbar and the **Named Scopes** container in the console tree to configure the Information Server with scopes.

Credential Databases

Most bv-Control query-based products require you to configure the Information Server with credential databases and assign them to users. The credentials stored in a credential database allow users to retrieve information about the resource objects they query. Refer to your specific bv-Control product user guide to learn if the product requires credential databases.

All users can manage credential databases if they know the credential database password.

Caution: If a user changes a credential database password, all user assignments to the credential database must be updated with the new password. If the password is not updated in all user assignments, users cannot successfully query resource objects.

▶ *To configure an Information Server with credential databases*

1 Open the **Credentials Manager** dialog from the **Credentials Manager** object in the details pane (Standard view).

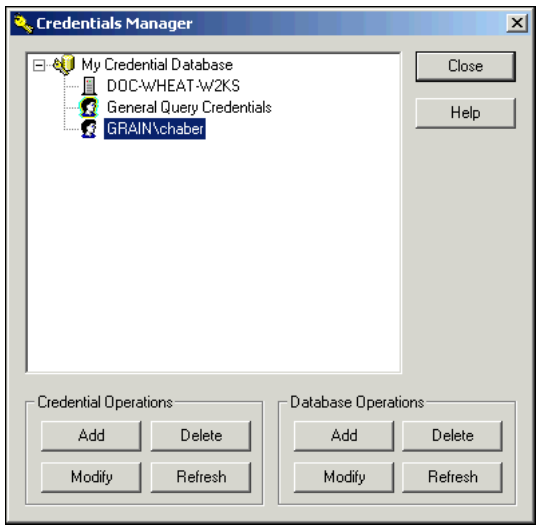


Fig. 26 Credentials Manager Dialog

2 Click **Add** in the **Database Operations** area.

The **Create New Database** dialog appears.

3 Enter a name for the credential database, assign and verify a password for it, and click **OK**.

The credential database password you assign is required for all credential database modifications and user assignments.

The credential database you created appears on the **Credentials Manager** dialog. The credential database is stored on the Information Server you are currently using.

4 Select the credential database you created and click **Add** in the **Credential Operations** area.

The **Add Credentials** dialog appears. The dialog contains tabs for each bv-Control product that requires a credential database.

5 Add the desired resource objects to the **Selected Item(s)** list.

A bv-Control product-specific **Credentials** dialog appears each time you add a resource object. Use this dialog to provide credentials for the resource object. Click **Help** for information on using the dialog.

6 Click **OK** on the **Add Credentials** dialog.

The **Credentials Manager** dialog reappears with the resource objects associated with the credentials you added listed under the credential database.

The icon beside the resource object name indicates the credential state: valid, invalid, or unknown. You can

only successfully query resource objects that have valid credentials in the credential database.

7 Assign a credential database to each bv-Control product user.

Use the **Credential Databases** tab on a user's **Properties** dialog to assign a credential database to the user. To open a user's **Properties** dialog, open the **User Manager** dialog, select the user and click **Modify**.

To open the the **User Manager** dialog, use the **User Manager** object in the details pane (Standard view) or in the bv-Control product toolbar button.

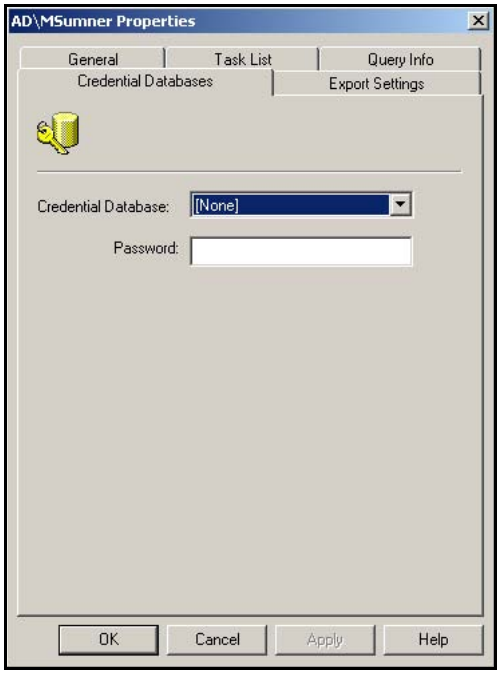


Fig. 27 Properties Dialog - Credential Databases Tab

To change a credentials database password, click **Modify** in the **Database Operations** area. To delete a credentials database, select it and click **Delete**.

Refreshing Credentials

The **Refresh** buttons on the **Credentials Manager** dialog (Fig. 26 on page 55) updates the credentials in the credential database.

The type of credential information that is updated by the refresh feature is specific to each bv-Control product. Some bv-Control products do not support the refresh feature. Refer to your bv-Control product user guide to learn more about how the product uses the refresh feature.

When you refresh credentials, the **Invalid Credentials** dialog appears if any of your credentials are invalid. You can use the dialog

to remove the resource object associated with the invalid credentials from the credential database.

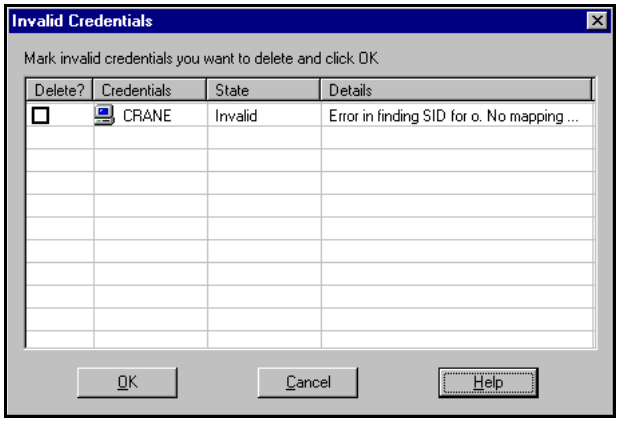


Fig. 28 Invalid Credentials Dialog

Global Default Report Style Settings

Global default report style settings automatically configure the **Report Settings** dialog with saved settings. Only BindView Administrators can create global default report style settings for users of the Information Server.

BindView Administrators use the **Global Report Style Settings** object in the details pane (Standard view) to define default report style settings for all users. For information on using this dialog, refer to "Defining Report Settings" on page 169.

An Information Server stores only one group of global default report style settings at a time. When a BindView Administrator saves new global default report style settings, the old settings are automatically deleted.

Information Servers cannot share global default report style settings.

Product Licenses

Before you can access or use any installed BindView RMS product or the ActiveAdmin feature, the associated licenses must be stored on the selected Information Server.

The **License Manager** object (Standard view) in the **BindView RMS Configuration** container opens the **License Manager** dialog (Fig. 29). The **License Manager** object is available for all BindView products and users. Since only BindView Administrators can add licenses to or remove licenses from the Information Server, most

License Manager dialog functionality is not available for non-BindView Administrator users.

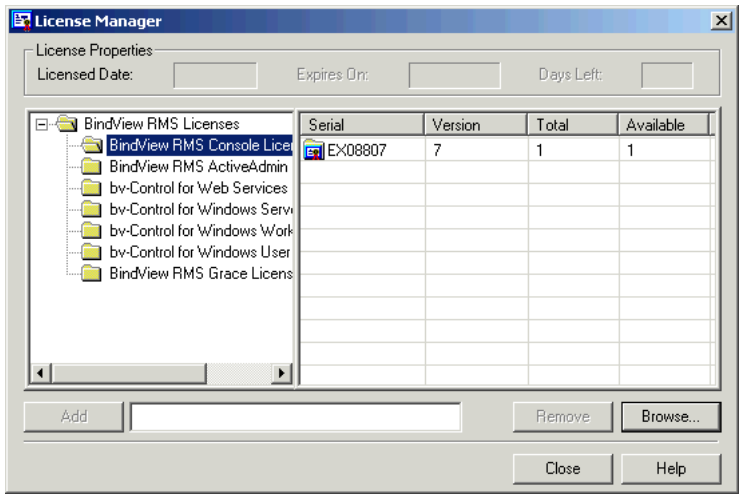


Fig. 29 License Manager Dialog

Each bv-Control product has several types of license pools. License pools contain a limited number of licenses. BindView provides extra licenses, called *grace licenses*, for each bv-Control product license pool.

When you select a license, information about its properties appears in the **License Properties** area at the top of the dialog.

User Access Rights

Before a user can open the Console and use query-related features, they must have access rights stored on the default Information Server. Only a BindView Administrator can assign access rights.

BindView Administrators can use the **Add** button in the **User Manager** dialog create BindView users.

Open the **User Manager** dialog by clicking the **User Manager** object in the details pane (Standard view) or the **User Manager** button on the bv-Control product toolbar. The **User Manager** dialog appears (Fig. 30).

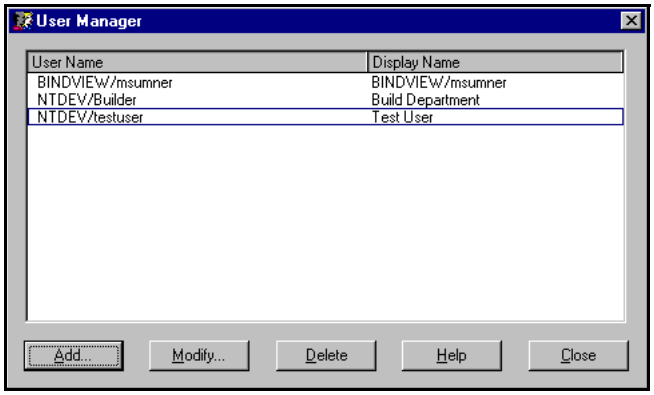


Fig. 30 User Manager Dialog

Using the **Delete** button to remove a user's access to the Information Server does not delete their exported files from the Information Server. Use the Windows Explorer to delete any exported files. For information on deleting queries and task lists, refer to "Removing User-created Files" on page 195.

BindView Administrators who are also Windows Administrators can use the Windows 2000, Windows XP, or Windows Server 2003 computer management tools to add users for the Console and Information Server (see Appendix B on page 199).

User Properties

User properties define the following items:

- Access rights to query-related features
- Default settings

Only BindView Administrators can assign access rights.

A user can define their own default settings, or a BindView Administrator can define the settings for the user.

All user properties are stored on the Information Server the user is currently connected to.

You use the **Properties** dialog to define user properties. You use the **Modify** button on the **User Manager** dialog (Fig. 30) to open the **Properties** dialog for the selected user.

The **Properties** dialog has five standard tabs for defining general, task list, query, credential database, and export settings properties. Some bv-Control products provide additional tabs. Refer to your specific bv-Control product user guide for detailed information on the tabs the product adds to the **Properties** dialog.

For information on the settings available on the five standard tabs, click the **Help** button on each tab.

Scopes

You can configure the Information Server with named and default scopes. A *named scope* is a group of saved scope items stored on the Information Server. A *scope item* is a single resource object or a

container that holds several resource objects. A *default scope* is a user-selected named scope that can be applied to specific query definitions.

You should perform any required configuration of your bv-Control products before you attempt to use the named scope feature. If you do not configure your products first, you may be unable to successfully create named scopes.

Creating Named Scopes

You should create and use named scopes if you have a static group of resource objects that you frequently query. You use named scopes by adding them to query definitions (see "Using Named Scopes" on page 75), selecting them for task lists (see "Applying a Scope for Added Query Tasks" on page 118), or selecting them as user default scopes (see "Defining Default Scopes" on page 62).

You create named scopes from the following locations:

- Named Scope Manager dialog
- Command line
- Task List dialog

Any user can apply the named scope you create to any query definition, task list, or user default scope. However, only users with modification rights can modify or delete the named scope you create.

▶ *To create a named scope using the Named Scope Manager dialog*

1 Open the **Named Scopes** container on the console tree and use the **New Named Scope** object to open the **Named Scope Manager** dialog (Fig. 31).

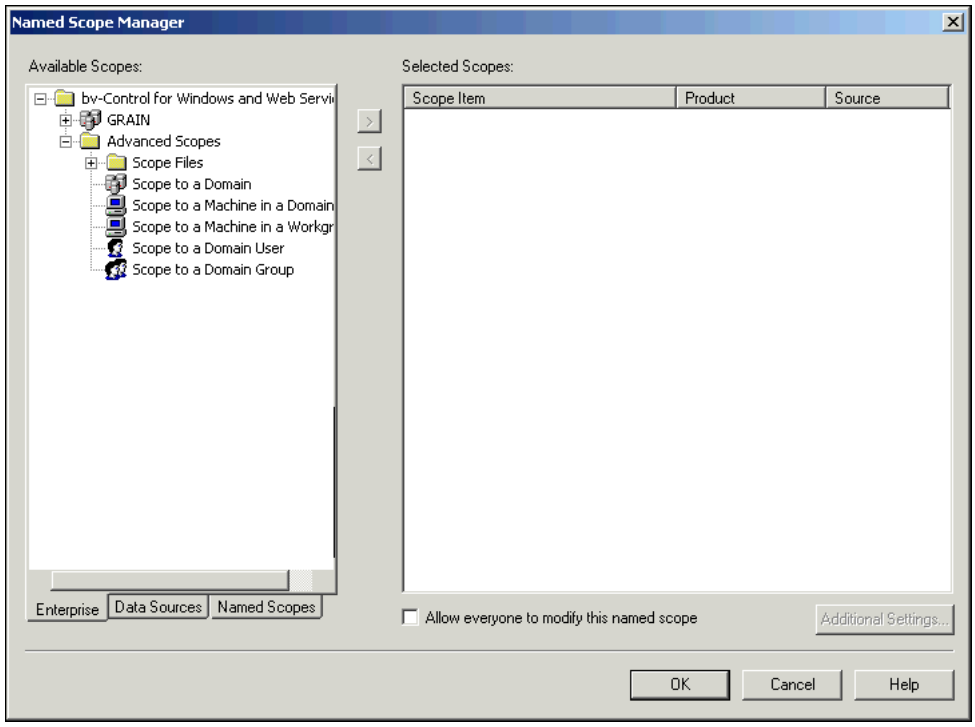


Fig. 31 Named Scope Manager Dialog

2 Add the desired scope items in the **Available Scopes** list to the **Selected Scopes** list.

You can add scope items associated with the following items:

- Resource objects in your Enterprise
- Data sources of bv-Control products added to the Console
- Named scopes currently stored on the Information Server

3 Select **Allow everyone to modify this named scope** if desired, or clear this check box if only the creator of the scope should be able to modify it.

4 Click **OK**.

The **Named Scope** dialog appears.

5 Enter a name for the named scope you are creating and click **OK**. The **Named Scope Manager** dialog closes and the named scope you created appears in the details pane.

Managing Named Scopes

You manage named scopes using their shortcut menus.

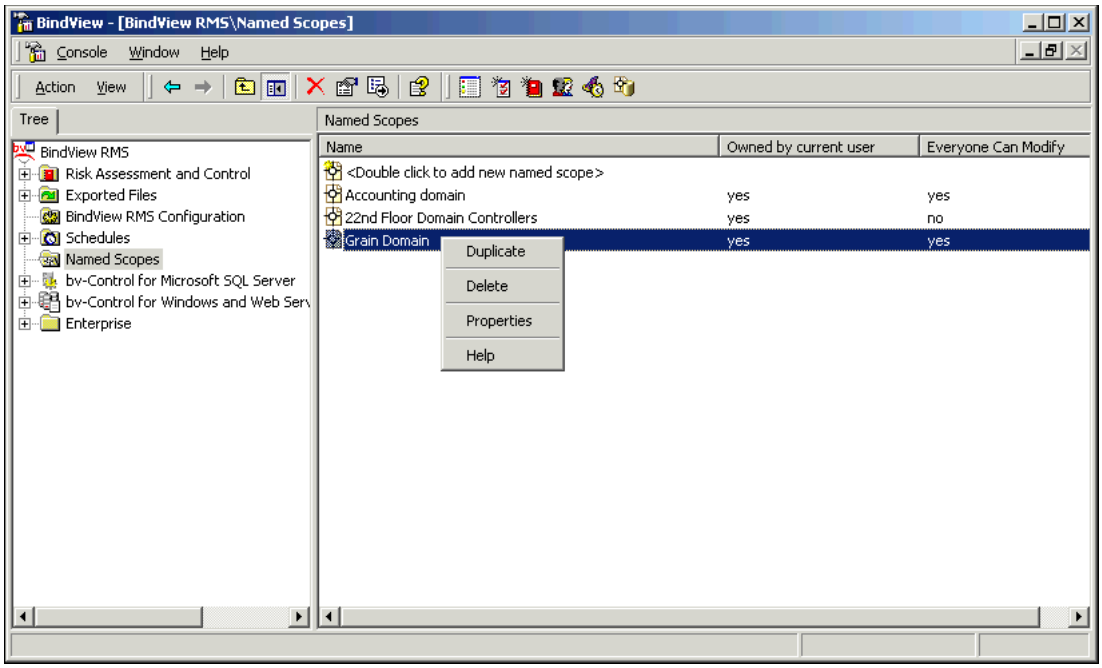


Fig. 32 Named Scope Shortcut Menu

For information about the commands on the shortcut menu, choose **Help**.

Defining Default Scopes

A BindView Administrator can define the default scopes for each Information Server user. Each user can also define their own default scopes.

User global default scopes can apply to all added bv-Control products and data sources or individual default scopes can exist for specific bv-Control products and data sources.

Default scopes are automatically applied in the following hierarchy:

- User-defined
- bv-Control product-defined

Initially, all pre-defined report items and the **Query Builder** use the bv-Control product-defined default scope. When you define a user default scope, the user default scope replaces the product-defined scope.

Default scopes are stored on the Information Server.

▶ *To assign default scopes*

1 Click the **Assign Default Scopes** button on the product toolbar. The **Default Scopes** dialog appears (Fig. 33).

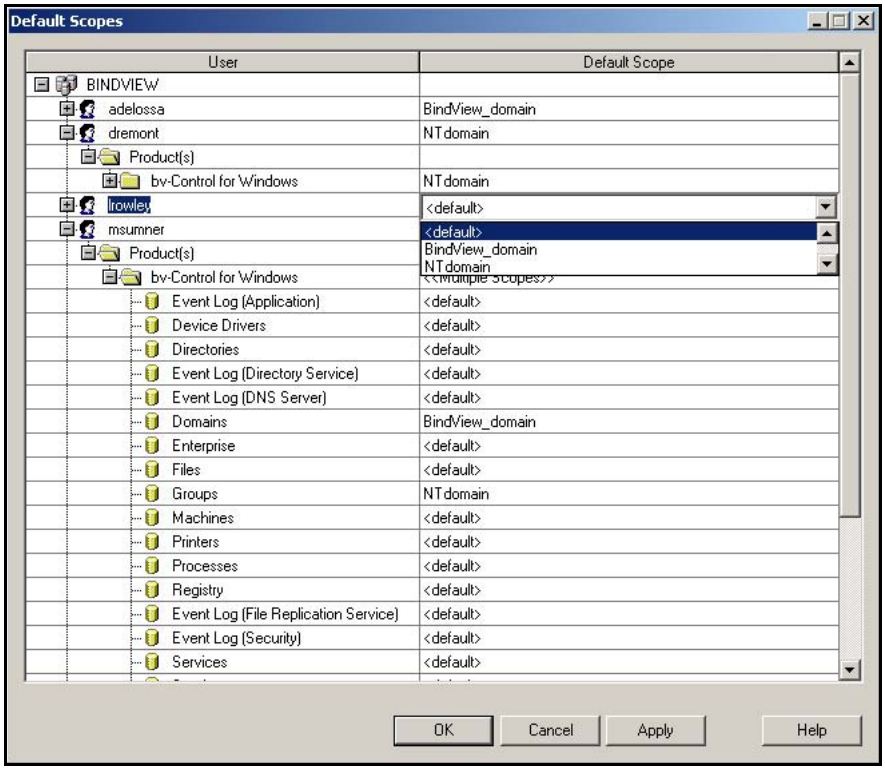


Fig. 33 Default Scopes Dialog

2 Display the named scope list for the user and select the named scope.

You can select a global default named scope for the user, or select default named scopes for each user for each added bv-Control product or data source.

The global default named scope, bv-Control product default named scope, or data source default named scope you choose applies only to the selected user.

3 Click **OK**. Use the **Apply** button to save the current selection and select additional default named scopes. The **Default Scopes** dialog closes and stores the default scopes on the Information Server.

4 Querying

In This Chapter

Understanding Queries

A *query* is a question you define and submit to the Information Server to receive specific information about resource objects. When you run a query, information about resource objects is returned as records in a dataset.

The query feature is the key functional component of the Console. Most of the features offered by the Console are dependent on the query feature.

You must have processing rights to create and modify queries. Only BindView Administrators can assign user rights for query processing. For detailed information on assigning query rights to a user, see the Help for the **Query Info** tab in the User Properties dialog.

If a bv-Control query-based product requires credential databases, you must have one assigned to you to successfully query resource objects. You can only query the resource objects whose credentials are valid in the credential database assigned to you. For detailed information on credential databases, refer to "Credential Databases" on page 54.

Creating a New Query

Use the **Select Data Source** and **Query Builder** dialogs to create a new query. The selections you make on these dialogs are collectively known as the *query definition*.

The following items are required in the query definition:

- Data source
- At least one field
- Scope (only required by some data sources)

The query definition may also contain the following items:

- Filter
- Sort

Selecting a Data Source

You must select a data source for the query definition. A *data source* contains fields that represent a resource object, or a collection of resource objects.

Each bv-Control product has its own data sources. Refer to your specific bv-Control product user guide to learn about the data sources the product uses.

▶ ***To select a data source***

1 Click the **New Query** button on the bv-Control product toolbar, or click **Create Query** on a taskpad.

The **Select Data Source** dialog appears.

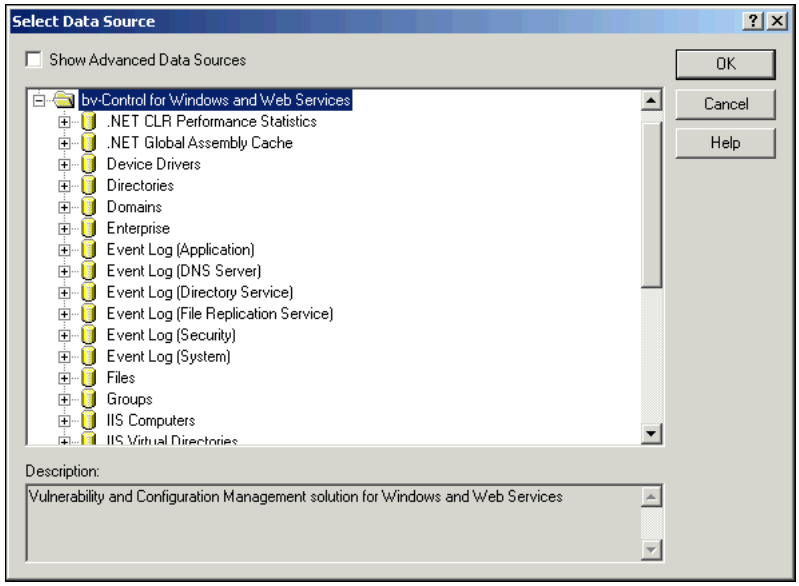


Fig. 34 Select Data Source Dialog

Each bv-Control product added to the Console appears in the **Select Data Source** dialog.

2 Select the desired bv-Control product data source and click **OK**.

You can only select one data source.

The **Query Builder** dialog appears (Fig. 35 on page 68).

Adding Fields

Fields represent the attributes, or properties, of the resource objects represented by the data source.

You use the **Field Specification** tab of the **Query Builder** dialog to add fields to the query definition. A query definition must contain at least one field.

Added fields define the types of information you receive about resource objects when you run the query.

Each bv-Control product has its own fields. Refer to your bv-Control product user guide to learn about the fields the product uses.

▶ *To add a field*

1 On the **Field Specification** tab of the **Query Builder** dialog, select a desired field in the **Available Fields** list and click **Add** (Fig. 35).

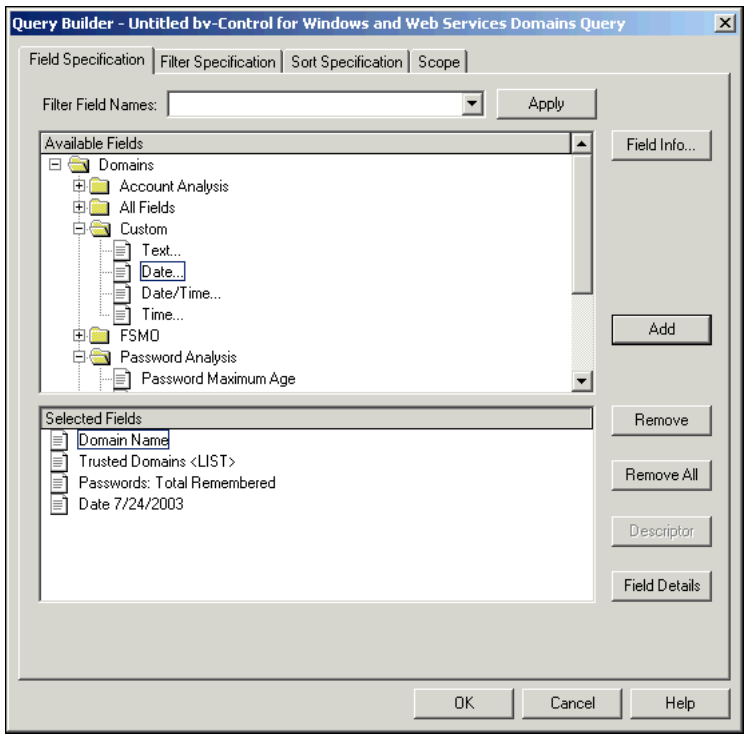


Fig. 35 Query Builder Dialog - Field Specification Tab

If you added a descriptor field, a **Descriptor** dialog appears.

2 Select a specific or prompt user value for the descriptor field and click **OK** (see "Descriptor Fields", next).

3 Continue to add the desired fields to the query definition.

The added fields appear in the **Selected Fields** list.

Fields appear in the dataset in the order they appear in the **Selected Fields** list. You change the field order by dragging fields to the desired position.

Select a field and click **Field Info** to view a description of the selected field.

Descriptor Fields

Some fields are *descriptor fields*. A descriptor field requires a user-supplied *descriptor value* that defines the specific attributes the field represents. Users must supply descriptor values before the Information Server can process a query that contains descriptor fields. Users supply descriptor values either immediately after adding a descriptor field to a query definition, or each time the query is run.

A descriptor field automatically opens a **Descriptor** dialog when you add it to a query definition. The selections you make on the

Descriptor dialog determine when the descriptor value is supplied. Fig. 36 shows a **Date/Time Descriptor** dialog.

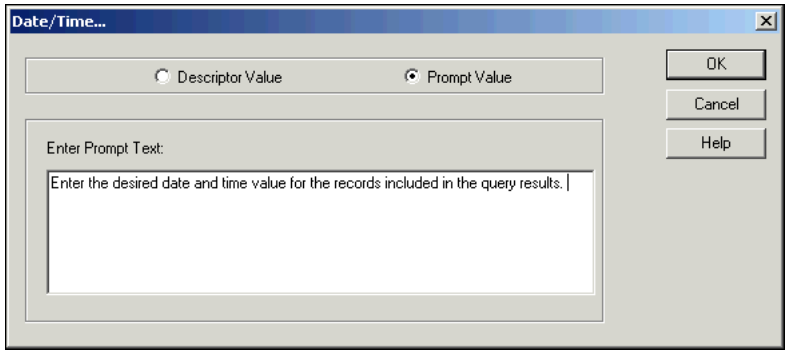


Fig. 36 Descriptor Field Dialog - Prompt Value

Select **Descriptor Value** to define the descriptor value immediately.

Select **Prompt Value** to delay the descriptor value definition until query run time. This option causes the **Query Completion Wizard** to appear each time a user runs the query. Using the wizard, the user defines the descriptor value (see "Using the Query Completion Wizard" on page 76).

You use the **Descriptor** button to modify the selections made for a descriptor field when it was added to the query definition (Fig. 35 on page 68).

Custom Fields

You add *custom fields* to a query definition when you want to annotate specific information. All bv-Control query-based products have four standard custom fields that appear on the **Query Builder** dialog: Text, Date, Date/Time, and Time (Fig. 35 on page 68). All custom fields are descriptor fields. Custom fields do not represent resource object attributes.

Report Run Time Fields

Adding *report run time fields* to a query definition allows you to include a field that contains the time the report itself was run. This labels the data included in the query. Three standard report run-time fields appear on the **Query Builder** dialog in all bv-Control query-based products: Report Run Time, Report Run Date, **Report Run Date/Time**. Like custom fields, report run-time fields are descriptor fields. Report run-time fields do not represent resource object attributes.

Filtering the Available Fields List

Use the **Filter Field Names** box and click the **Apply** button to quickly search for a specific field contained in the selected data source (Fig. 35 on page 68).

Clearing the **Filter Field Names** box and clicking **Apply** repopulates the **Available Fields** list with all fields contained in the data source.

Modifying Field Details

You use the **Field Details** button to define the default settings for the selected field. The default settings dictate how the values retrieved for the field appear in a grid, report, or export file.

▶ ***To modify field details***

1 Select the desired field in the **Selected Fields** list and click **Field Details** (Fig. 35 on page 68).

The **Field Details** dialog for the selected field appears.

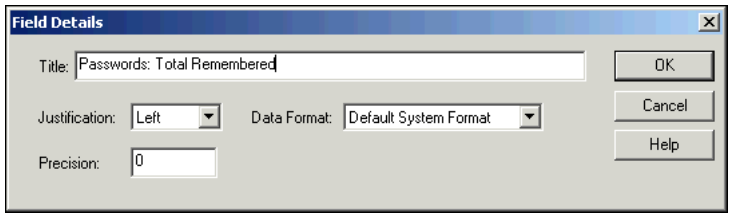


Fig. 37 Field Details Dialog

2 Enter new default settings for the Name, justification, and optionally the precision, data format, or date and time format for the field.

Not all these settings are available for all fields.

3 Click **OK** to save the changes you have made.

Adding Filters

You add a filter to a query definition to reduce the number of resource object records returned in the dataset. Filters consist of one or more filter terms. A *filter term* is a value, or group of values, selected by a user. Filter term values define the record types that will be returned in the dataset.

Users must supply all filter term values before the Information Server can process a query that contains a filter. Users supply filter term values either when adding a filter term to a query definition, or each time the query is run. If the query definition includes a prompt user command, the filter term value is defined each time the query is processed.

When the Information Server processes a query, it applies the filter to each record it gathers for the selected resource objects. Only the records that match the filter are included in the dataset.

Filters are not required in query definitions.

▶ *To add a filter term*

1 On the **Filter Specification** tab of the **Query Builder** dialog, select a field to define a filter term for and click **Add** (Fig. 38).

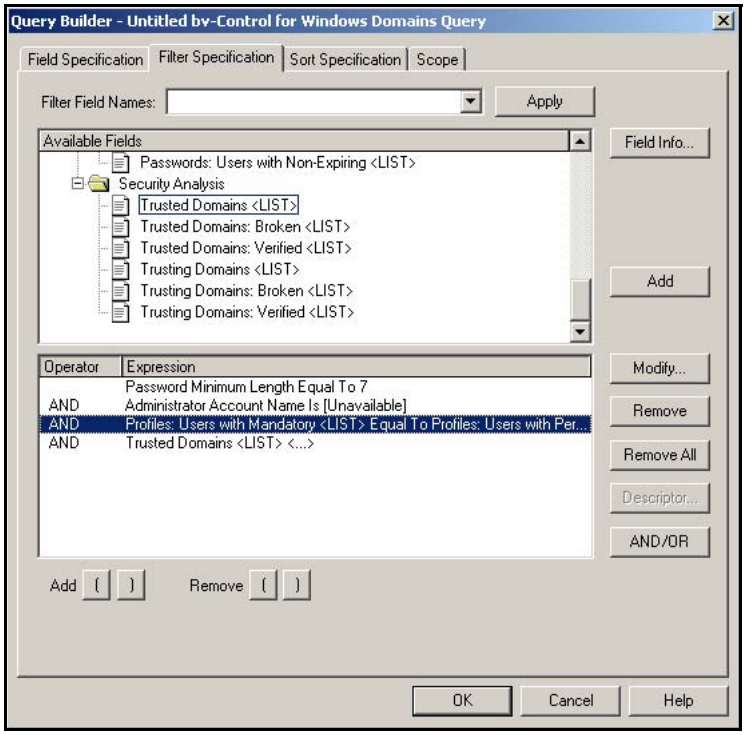


Fig. 38 Filter Specification Tab

The **AND/OR** button toggles the and/or filter operator.

Use the right and left parentheses buttons to group two or more filter terms to function as a unit.

The **Filter Term Definition** dialog appears (Fig. 39).

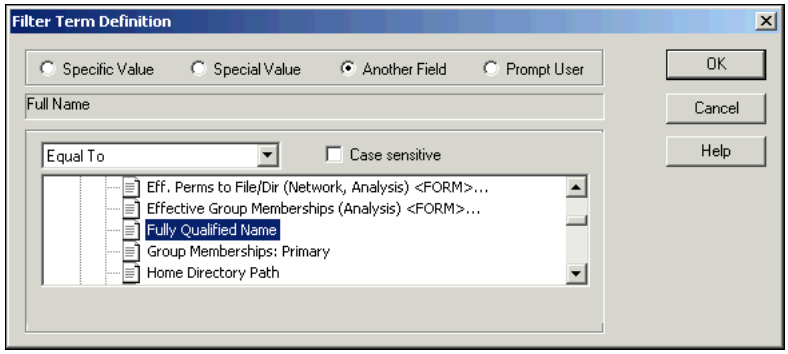


Fig. 39 Specific Value Filter Term Definition

The appearance of the **Filter Term Definition** dialog depends on the bv-Control query-based product you are using and the field you selected.

2 Select the desired value option.

Use **Specific Value** to find records that match specific criteria. For example, you can find all passwords that do not meet a minimum length requirement.

Use **Special Value** to find records that match a specific exception condition. For example, since special values appear when the requested data cannot be returned, or is not in its usual format, you can use this option to find user accounts that are no longer active.

Use **Another Field** to find records that match the target field (field you selected on the **Filter Specification** tab) and the field you selected on the **Filter Term Definition** dialog.

Use **Prompt User** to delay the filter term value definition until the query is run. All users who run the query wil be prompted for the filter term value. You can use this option if the characteristics of the records you want returned can differ for specific users.

3 Select the desired operator from the operator list.

For detailed information on the available operators and their functions, see the BindView RMS Console Help.

For some filter operators, you may be able to specify if the comparison is case sensitive. If you check the **Case sensitive** box, letters in different cases will not match.

4 Complete any remaining value definition or prompt text requirements and click **OK**.

The filter term appears in the **Expression** list on the **Filter Specification** tab (Fig. 38 on page 71).

5 Continue to add filter terms to your filter, if desired.

If you add multiple filter terms to your filter, the Information Server will apply them according to the **Expression** list order, filter **Operators** (And/Or), and grouping definitions (if used).

Adding Sorts

Sorts determine the order in which sort fields and sort field values appear in the dataset. You can only apply sorts to fields that you added to the query definition. Sorts are not required in query

definitions. Use the **Sort Specification** tab of the **Query Builder** dialog to add a sort to a query definition (Fig. 40).

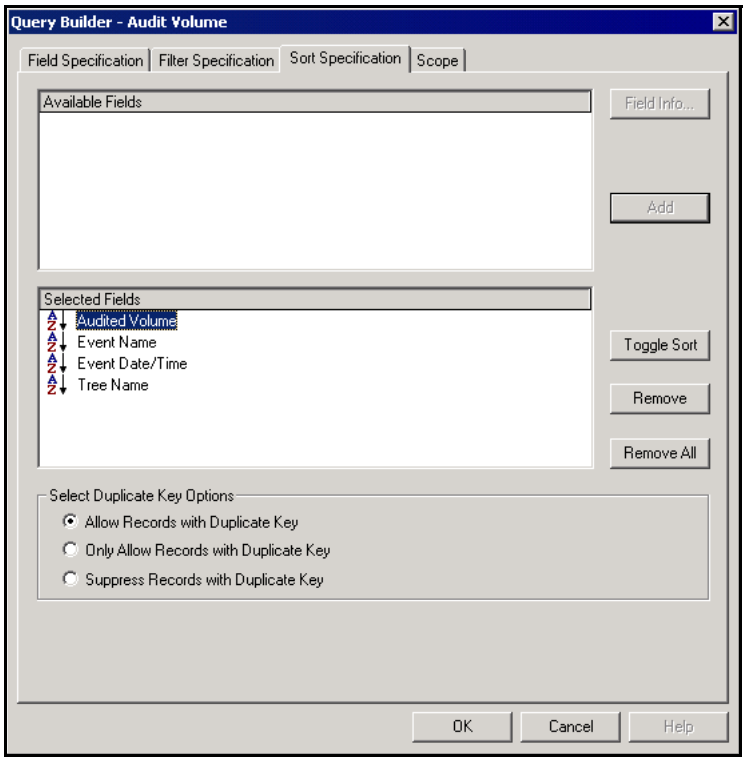


Fig. 40 Sort Specification Tab

Toggle Sort button switches between an *A* to *Z* and a *Z* to *A* sort for the values returned for the sort field. You can also change the sort direction by double-clicking the desired sort field in the Selected Fields list.

Selecting Duplicate Key Options

A *key* is a subset of the values collected for each resource object.

You use the option buttons in the **Select Duplicate Key Options** area to define how records with duplicate keys are included in the dataset (Fig. 40).

- **Allow Records with Duplicate Key** - includes all records regardless of key duplication.
- **Only Allow Records with Duplicate Key** - includes only records that have duplicate keys.
- **Suppress Records with Duplicate Key** - includes only the first record of a key.

Adding Scopes

A *scope* narrows the range of resource objects that are queried. A scope consists of user-selected scope items. A *scope item* is a single resource object or a container that holds several resource objects.

Since the Information Server only queries the resource objects indicated by the scope, you can use scopes to significantly reduce the time it takes to retrieve a dataset.

For detailed information on adding scopes to a query definition, refer to your bv-Control query-based product user guide.

Using Dynamic Indexing

Dynamic indexing reduces the display time of scope items on the **Scope** tab of the **Query Builder** dialog. Dynamic indexing alphabetically categorizes large numbers of nodes, or scope items, into several folders.

Dynamic index folders have a unique icon and are labeled with the name of the first and last scope item in the folder (Fig. 41).

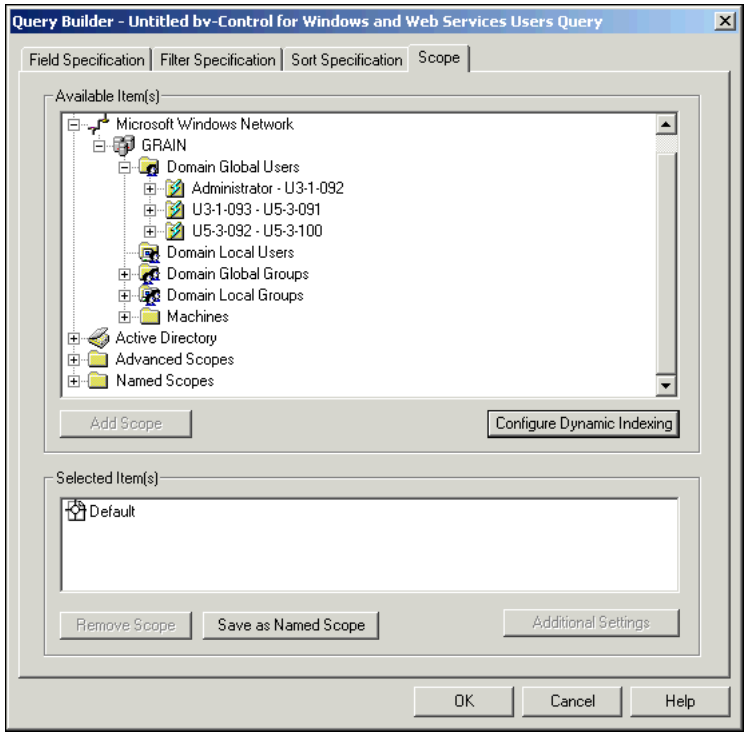


Fig. 41 Dynamic Index Folders on the Scope Tab

By default, dynamic indexing is enabled for all users. Each user has their own default dynamic indexing settings.

Use the **Configure Dynamic Indexing** dialog to disable or modify your default dynamic index settings (Fig. 42). Click **Configure Dynamic Indexing** on the **Scope** tab of the **Query Builder** dialog. to open the dialog.

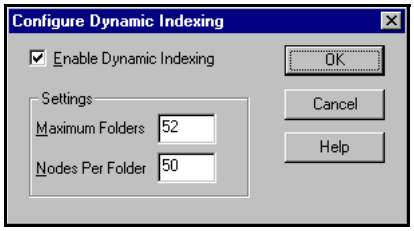


Fig. 42 Configure Dynamic Indexing Dialog

Your default dynamic index settings are stored on the Information Server you are currently using.

Using Named Scopes

A *named scope* is a group of saved scope items stored on the Information Server.

When you expand the **Named Scopes** folder on the **Scope** tab of the **Query Builder** dialog, all named scopes stored on the Information Server are displayed. You can link any named scope to your query definition.

If you save a query definition that contains a link to a named scope, any modifications made to the named scope are automatically applied to the scope in the query definition.

The **Save as Named Scope** button (Fig. 41 on page 74) opens a dialog for saving the selected scope items as a named scope on the Information Server. Initially, only the user who saved the named scope will have modification rights.

You can also create named and default scopes for a specific bv-Control product and data source (for more information, see “Scopes” on page 59).

Running Queries

When you run a query, the Information Server polls the resource objects you selected in the query definition for the information you requested. This information is returned in a dataset. You can display datasets in the following view types: grid, chart, or report. For more information on view types, refer to “Displaying Datasets” on page 79.

Locations for Running Queries

You use the following items to run a query:

- Query Options dialog
- Query binder shortcut menu
- Rerun Query button  on the grid toolbar

The **Query Options** dialog appears when you click **OK** in the **Query Builder** dialog. Use the **Query Options** dialog to select the desired view type for the dataset before you run the query.

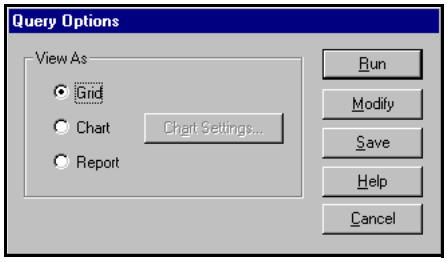


Fig. 43 Query Options Dialog

The **Run** command on the **Query Binder shortcut menu** provides several options for gathering and viewing datasets for the query

definition saved in the query binder. For information on the query binder shortcut menu commands, choose **Help** on the Query Binder shortcut menu.

Use the **Rerun Query** button on the grid toolbar to rerun the query used to create the dataset displayed on the grid. The resulting dataset is automatically displayed as a grid.

Using the Query Completion Wizard

The **Query Completion Wizard** appears when a user runs a query that contains a *prompt user* command in the query definition. Prompt user commands require the user to provide specific information for a descriptor field, filter, or scope. The user running the query must use the **Query Completion Wizard** to enter the required information before the Information Server can process the query.

▶ *To use the Query Completion Wizard*

1 Click **Next** on the **Welcome** panel of the **Query Completion Wizard**.

Fig. 44 Welcome Panel of Query Completion Wizard

A panel for defining the descriptor field, filter, or scope appears, configured with any default selections. The title of the panel

varies, depending on the data the user is being prompted to enter.

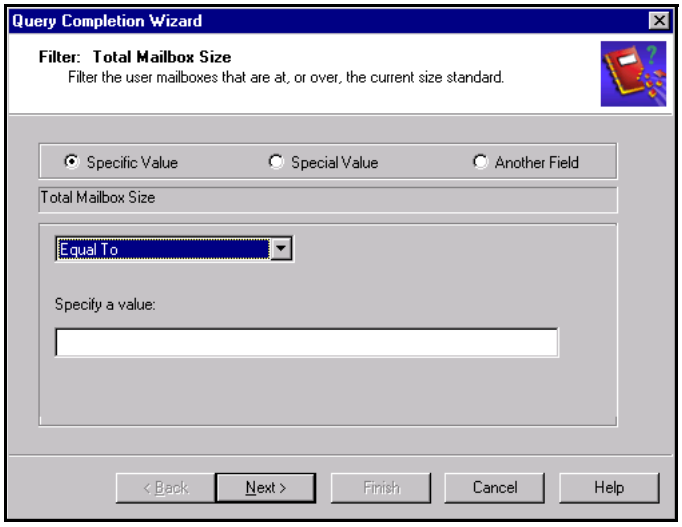


Fig. 45 Data Entry Panel of Query Completion Wizard

2 Use the options on the panel to complete the information required in the query definition.

3 Click **Next**.

If another prompt user command exists in the query definition, another definition panel appears.

After you complete all required information for the query definition, the **Completing** panel appears.

4 Click **Finish**.

The Information Server gathers the requested information from the selected resource objects and returns a dataset.

If you save the resulting dataset in the query binder, the query definition in the query binder is automatically changed. The specific value you selected in the **Query Completion Wizard** replaces the existing **Prompt User** value.

Caution: If you change the query definition, data collected by future uses of the query can differ from prior datasets stored in the query binder.

Monitoring the Status of Processed Queries

Use the **Task Status** dialog to monitor and manage query tasks processed by the Information Server. Open the **Task Status** dialog by clicking the **Task Status** button on the bv-Control product toolbar, or use the **View Task Status** option on a taskpad.

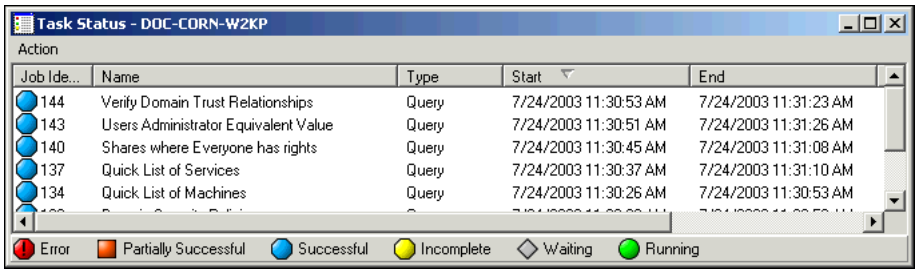


Fig. 46 Task Status Dialog

You monitor query tasks by observing their associated status icons. You manage query tasks using the **Query Task** shortcut menu commands:

- **View** – Displays the dataset gathered for the query as a grid
- **Halt** – Stops query processing and displays the gathered dataset as a grid
- **Delete** – Stops query processing and deletes the gathered dataset
- **Save** or **Save As** – Links the dataset to the query binder containing the query definition for the processed query

Saving datasets in a query binder using either the **Save** or **Save As** command removes the query task from the **Task Status** dialog because the corresponding dataset has been “moved” into a query binder.

Displaying Datasets

Datasets are displayed in three user-selectable formats: grids, charts, and reports.

Grids

A *grid* displays the dataset in a spreadsheet interface (Fig. 47). Grid columns represent the fields included in the query definition. Grid rows represent the resource object records. Grid cells contain the gathered resource object attributes.

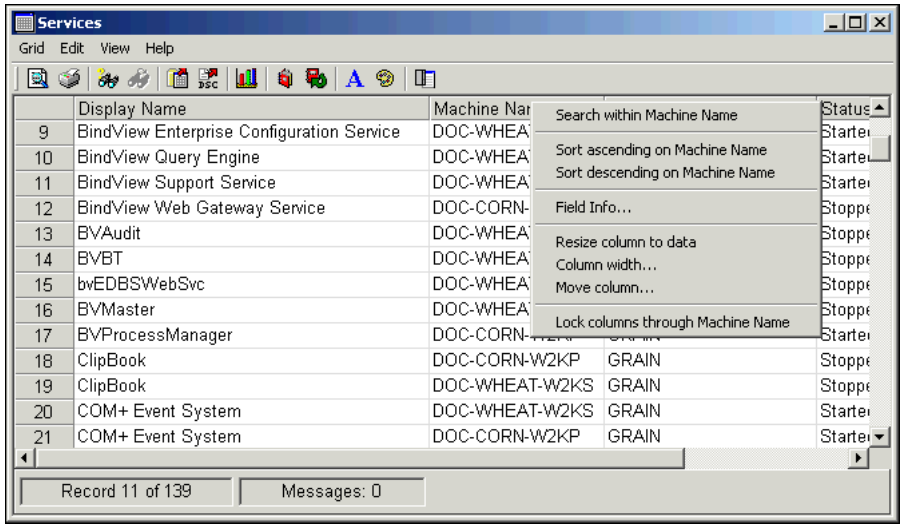


Fig. 47 Grid Displaying the Column Shortcut Menu

Changing Column Order

You can change the column order on the grid you are viewing by dragging columns to the desired position, or by using the **Move Column** command.

Changing the column order on the grid does not change the:

- Column order in the underlying dataset
- Field order in the query definition
- Column order on a report

To permanently changing the column order, see “To add a field” on page 68.

Resizing Columns and Rows

Use your mouse or the **Column Width** command on a grid **Column** shortcut menu to resize the width of a column. Grid column width settings are saved in the query binder when you save the dataset displayed on the grid.

You can use your mouse to resize the height of a row. You cannot save row height settings.

Column Shortcut Menus

You use the **Column** shortcut menu to manage how the column and the values in it appear on the grid.

The sort commands only change the field value order on the grid you are viewing.

Sort commands do not change the sort order in the following items:

- underlying dataset
- query definition
- report

For information on permanently changing the sort order for future datasets, refer to “Adding Sorts” on page 72.

The **Column width** command opens the **Column Width** dialog to define the width of the column in pixels.

The **Move Column** command invokes the **Column Placement** dialog to indicate the desired position of the column on the grid.

Anchors

An *anchor* appears on a grid cell when the displayed value exceeds the current cell width. Anchors open pop-up windows that display the entire value when you place the cursor on the cell (Fig. 48). Click the **Messages** button to display advisory messages.

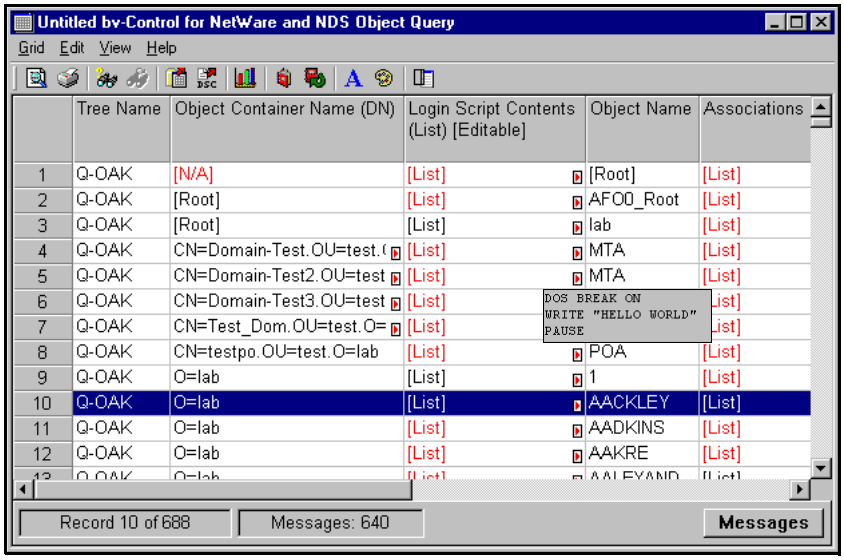


Fig. 48 Grid Displaying Pop-up Window and Messages Button

Toolbar Buttons

The following toolbar buttons allow you to perform additional activities related to the grid and the dataset:

Table 1 Toolbar Buttons

	Displays a preview of the dataset in a report format
	Prints the dataset in a report format
	Opens the **Search** dialog for locating the desired text in the dataset
	Opens the **Export Settings** dialog for creating an export file of the dataset
	Opens the dialogs for generating BindView RMS Decision Support Center (DSC) data from the dataset
	Starts the **Chart Builder Wizard** for creating a chart of the dataset
	Opens the **Query Builder** dialog for viewing the query definition used to create the dataset
	Reruns the query definition used to create the dataset displayed on the grid
	Opens the **Grid Font Settings** dialog for selecting the desired grid fonts
	Opens the **Grid Color Settings** dialog for selecting the desired grid font colors
	Displays all *[Form]* and *[List]* field values automatically in the grid cells

Charts

A *chart* is a graphic representation of a dataset. You use the **Chart Builder Wizard** to define the appearance of a chart.

For detailed information on charts, refer to Chapter 9 on page 155.

Reports

A *report* is a formatted presentation of a dataset that can be printed. You use the **Report Settings** dialog to define the appearance of a report.

For detailed information on reports, refer to Chapter 10 on page 167.

Saving Datasets

You save datasets to maintain a history of the information you collect about your resource objects. You save a dataset by linking it to a query binder. You link a dataset to a query binder by using the save options of grids, charts, reports, and the **Task Status** dialog. Saved datasets are referred to as *historical datasets*.

Each query binder has a maximum number of historical datasets that can be linked to it per user. For detailed information on defining the number of historical datasets that can be linked to a

query binder, refer to “Managing Historical Datasets” on page 87. Historical datasets are used as the basis of baseline reports. For information on baselining, see Chapter 6 on page 101.

Saving Query Binders

Query binders for store and manage query-related information. All query binders contain a query definition. Query binders can also contain chart, report, and export settings, as well as links to historical datasets.

You use the following items to save a new query binder:

- Save option in the **Query Options** dialog
- Save command on the **Grid** menu
- Warning messages invoked when you close a chart, grid, or report

The default storage location for saved query binders is your **My Items** folder. Saved query binder files have a query binder icon. When you select a query binder in the Console Tree, the details pane displays information about the query binder.

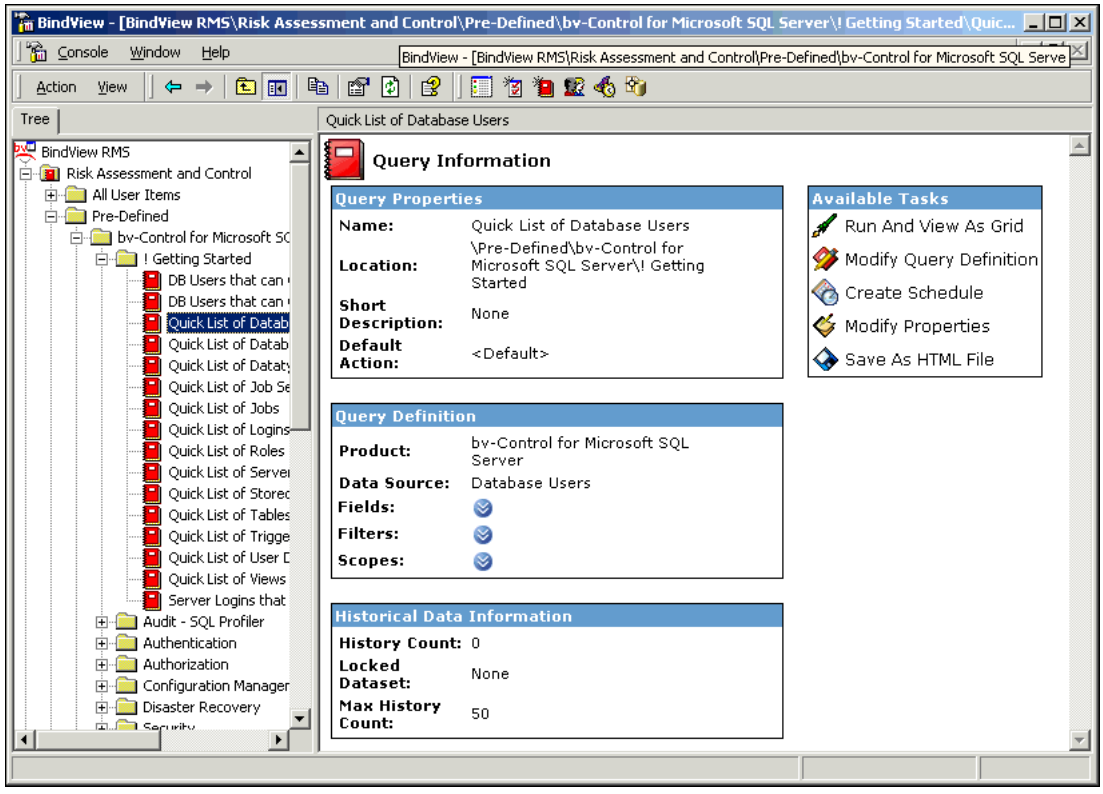


Fig. 49 Query Binder Details Pane

When you create a query, the **Query Options** dialog appears. You use the **Query Options** dialog to save query-related information in a query binder before you run the query.

When you use the **Save** button in the **Query Options** dialog to save a query binder, the query binder contains a query definition. If you defined and saved chart settings, these are also saved in the query binder.

The **Save** command on the **Grid** menu of a grid opens the **Save Query** dialog for saving a new query binder. Query binders saved from the grid **Save** command contain a query definition and a link to a historical dataset.

If you close a grid, chart, or report before saving the associated query definition and dataset, a warning message appears. The warning message provides access to the **Save Query** dialog for saving a new query binder. Query binders saved from the **Save Query** dialog accessed from a warning message contain a query definition and a link to a historical dataset. If you save a new query binder from a chart or report for which you defined settings, these settings are also saved.

Using the Query Binder Shortcut Menu

You use the **Query Binder** shortcut menu commands to manage queries and query-related information. If the query binder does not contain a link to a historical dataset, some shortcut menu commands appear dimmed.

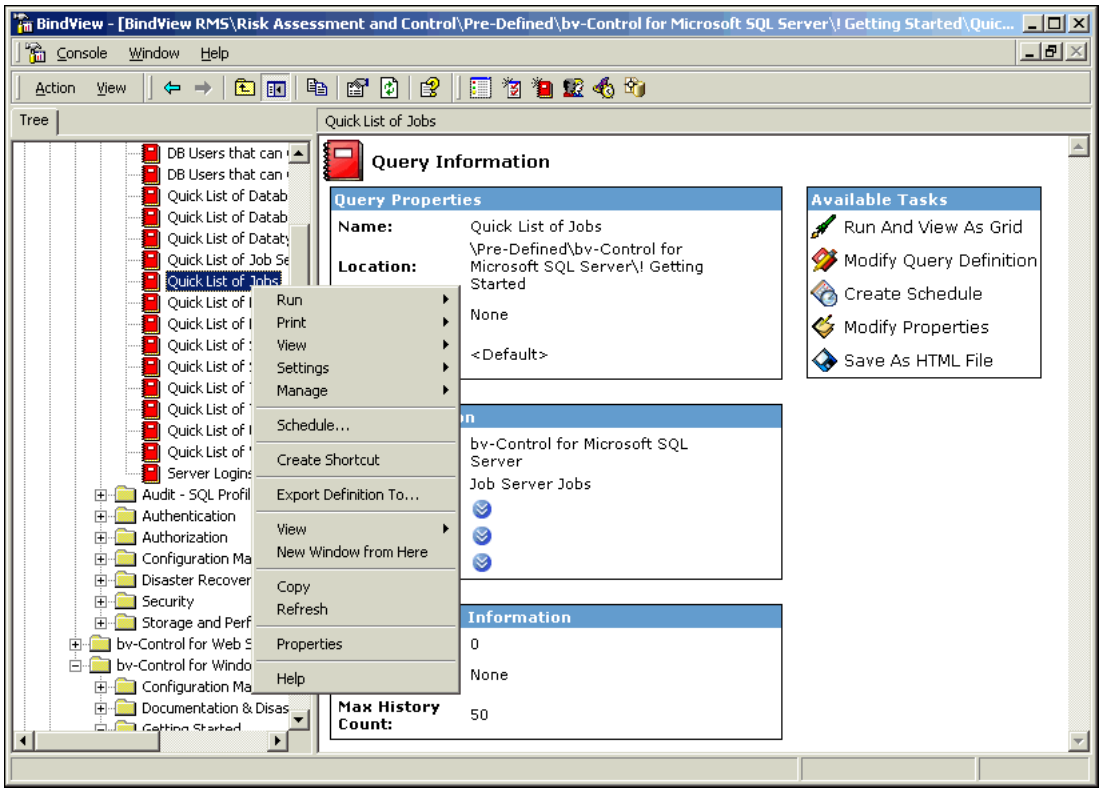


Fig. 50 Query Item Shortcut Menu

Running Queries

You use the **Run** command to submit the query definition to the Information Server for processing. The **Run** command is available on all query binder shortcut menus.

The **Run** command displays a secondary menu that you use to select the desired post process command for the dataset.

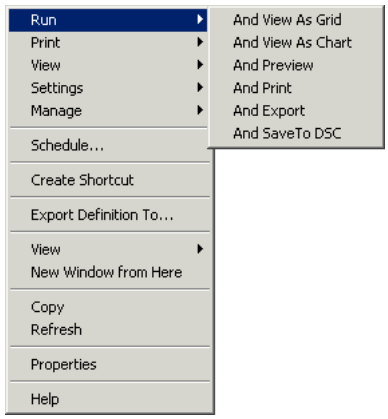


Fig. 51 Query Item Shortcut Menu - Run Submenu

Printing Historical Datasets

You use the **Print** commands to print a chart or report of the most recent historical dataset linked to the query binder. The **Print** command appears dimmed if the query binder does not contain a link to a historical dataset.

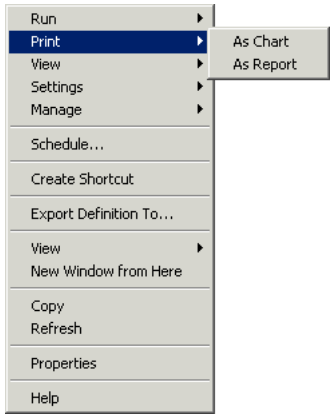


Fig. 52 Query Item Shortcut Menu - Print Submenu

The **As Chart** command appears dimmed if the query binder does not contain a saved chart template.

Viewing Historical Datasets

You use the **View** command to view the most recent historical dataset linked to the query binder. The **View** command invokes a

secondary menu that you use to select the desired view type for the historical dataset.

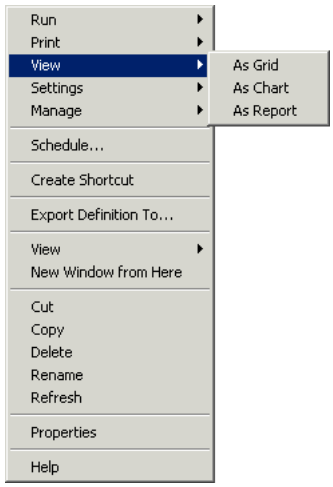


Fig. 53 Query Item Shortcut Menu - View Submenu

The **As Chart** command starts the **Chart Builder Wizard** to define the appearance of the chart.

Reports invoked with the **As Report** command are configured according to the default report style settings hierarchy.

Defining Query-Related Settings

Use the **Settings** command to view the settings saved in the query binder. The **Settings** command is available on all query binder shortcut menus.

The **Settings** command displays a secondary menu that you use to view the query definition, chart settings, or report settings saved in the query binder. If the query binder does not contain chart or report settings, the associated commands appear dimmed.

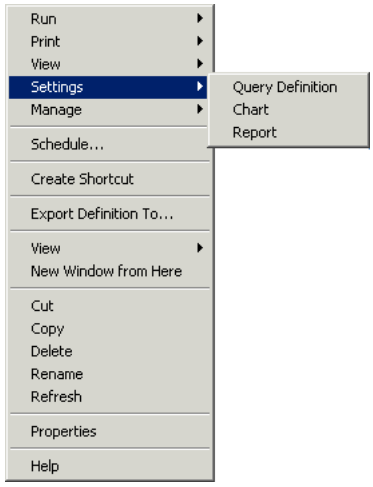


Fig. 54 Query Item Shortcut Menu - Settings Submenu

The **Query Definition** command opens the **Query Builder** dialog configured with the selections saved in the query definition.

If you modify the query definition settings in the **Query Builder** dialog, you must save the new query definition in a new query binder.

Warning: If you save the new query definition in the original query binder, any historical datasets linked to the query binder are deleted because they no longer match the query definition.

The **Chart** command starts the **Chart Builder Wizard**. You use the **Chart Builder Wizard** to define chart templates for the query binder.

The **Report** command opens the **Report Settings** dialog. You use the **Report Settings** dialog to define default report style settings for the query binder.

Managing Data

The **Manage** command displays a secondary menu to manage the following items:

- Historical datasets linked to the query binder
- Chart templates saved in the query binder

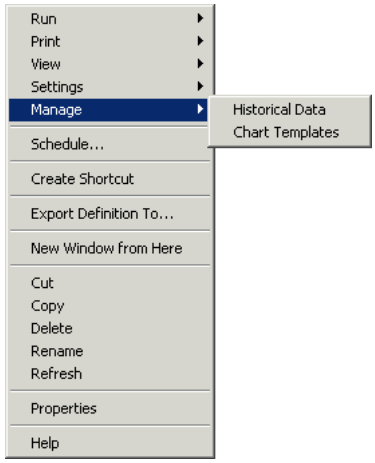


Fig. 55 Query Item Shortcut Menu - Manage Submenu

Managing Historical Datasets

The **Historical Data** command opens the **Manage Historical Data** dialog (Fig. 56). This dialog displays all historical datasets linked to the query binder by specific users.

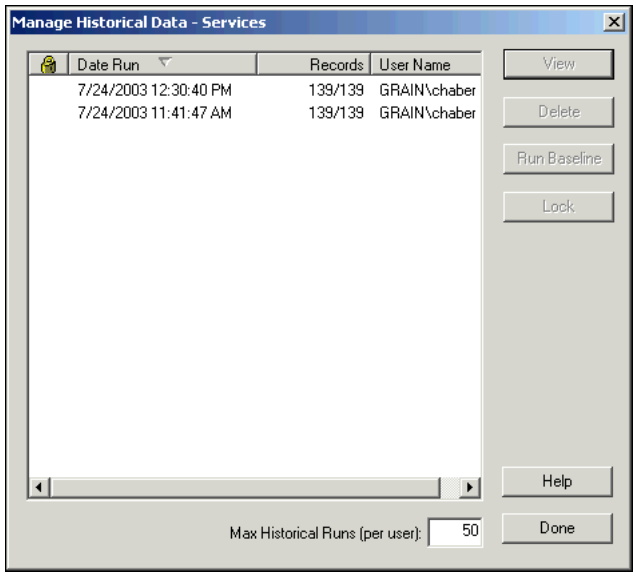


Fig. 56 Managing Historical Datasets

You use the **Manage Historical Data** dialog to:

- View the list of historical datasets linked to the query binder
- View a historical dataset as a grid
- Delete historical datasets
- Baseline historical datasets
- Lock a historical dataset so that it will not be deleted
- Designate the maximum number of historical dataset links

Use the **Chart Builder** icon  on the grid toolbar to display a historical dataset as a chart.

The **Max Historical Runs** box displays the maximum number of historical datasets that can be linked to the query binder per user. Once the maximum number of historical datasets is reached, the oldest dataset is deleted each time a new dataset is saved to the query binder. If a dataset is marked as **Locked**, it will not be deleted. Instead, the next-oldest dataset will be deleted.

Managing Chart Templates

The **Chart Templates** command opens the **Manage Chart Template** dialog. You use this dialog to view and delete chart templates saved in the query binder.

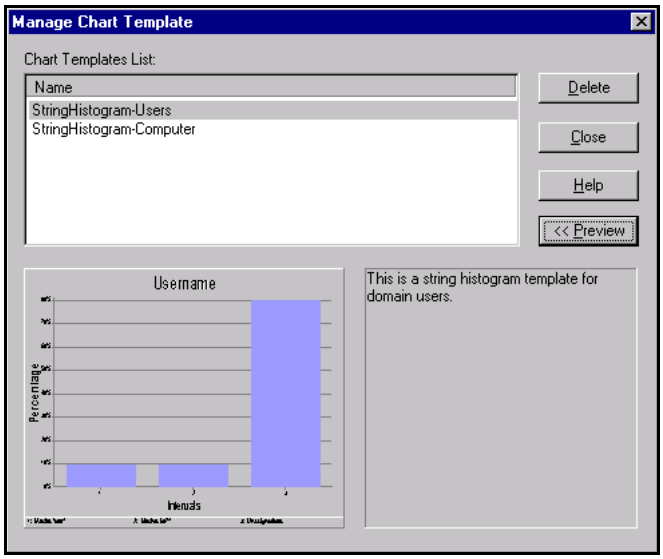


Fig. 57 Manage Chart Template Dialog

Schedule

The **Schedule** command opens the **Create Schedules Wizard** with the current item added to the schedule.

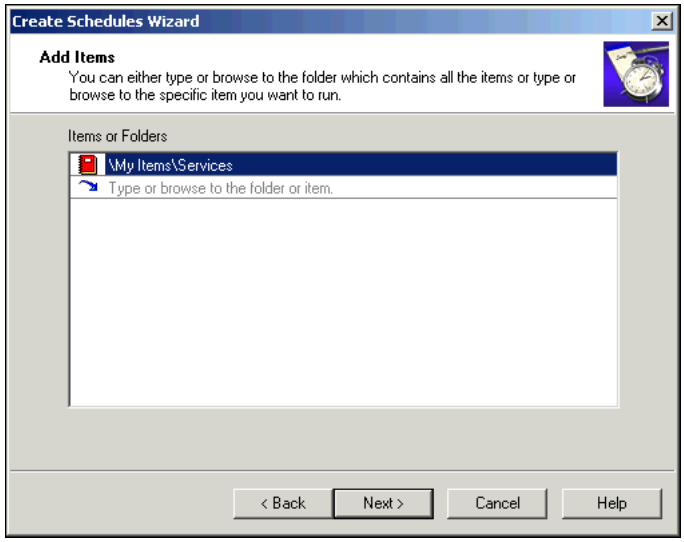


Fig. 58 Add Items Panel

Use the **Create Schedule Wizard** to create and manage schedules. For complete information on schedules, please see Chapter 8 on page 131.

Creating Shortcuts

The **Create Shortcut** command creates a shortcut to the selected item. Shortcuts allow you to place links to query items and task lists in folders in the **Risk Assessment and Control** container. You can send a shortcut to another user or place in the **Shared** folder to allow other users to access queries you create, or you can place shortcuts to items in the **Pre-Defined** folder in your **My Items** folder.

Exporting Query Definitions

The **Export Definition To** command allows you to export a query definition to a file on the Information Server's hard disk. Exporting a query definition allows you to take the query to another information server, to back up the query, or to share the query with another user. When you select the **Export Definition To** command, you will be prompted to select the folder where the definition should be saved. The query will be saved in that location with the name <Query Name>.xml.

Managing Query Binder Properties

Use the **Properties** command on the **Query Binder** shortcut menu to open the **Properties** dialog for the query binder file.

The **Properties** dialog is similar to the standard Windows file property tabs. The **General** tab contains the name of the item, its type and location, its version, creation date, default action, and a list of shortcuts to the item.

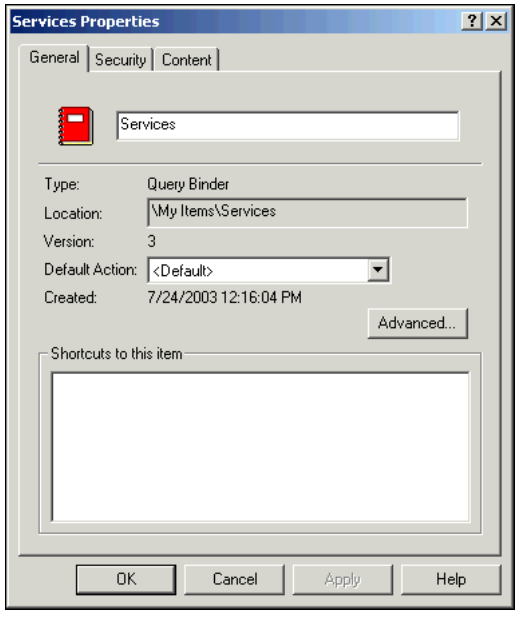


Fig. 59 Properties Dialog - General Tab

The **Security** tab of the **Properties** dialog allows you to control who can see, delete, and make changes to queries.

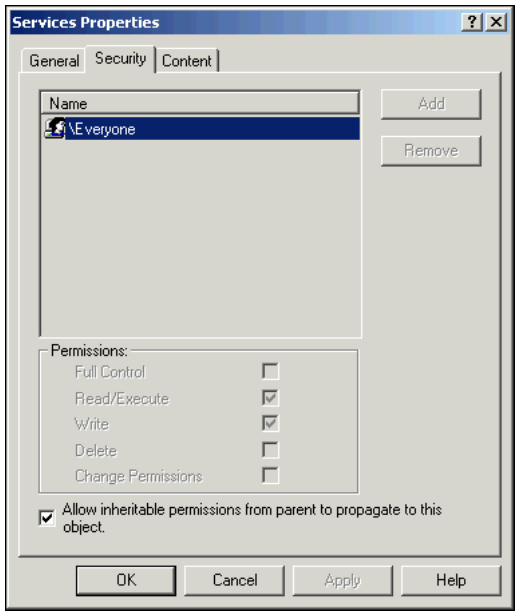


Fig. 60 Properties Dialog - Security Tab

The **Content** tab of the **Properties** dialog allows you to enter a short and a detailed description of the query that will appear on the details pane in the console when the query is selected in the console tree. It also allows you to enter a list of references that support the need for the query.

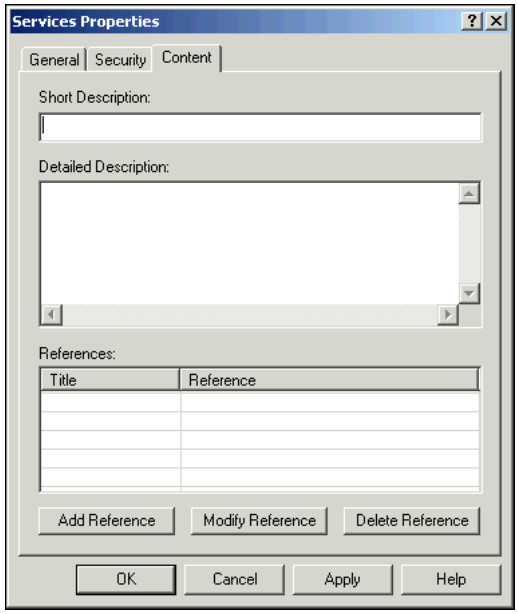


Fig. 61 Properties Dialog - Content Tab

You can enter descriptive information in the Short Reference and Detailed Reference fields. The text you enter will appear in the details pane when the query is selected in the Console Tree.

To add a reference, click **Add Reference**. The **Report Item Reference** dialog appears. Enter the reference and click OK. To change a reference, select it and click **Modify Reference**. To delete a reference, select it and click **Delete Reference**.

Advanced Data Source Queries

The **Show Advanced Data Sources** check box on the **Select Data Source** dialog populates the dialog with advanced data sources:

- BindView ActiveAdmin Session Logs
- BindView Internal Data Sources

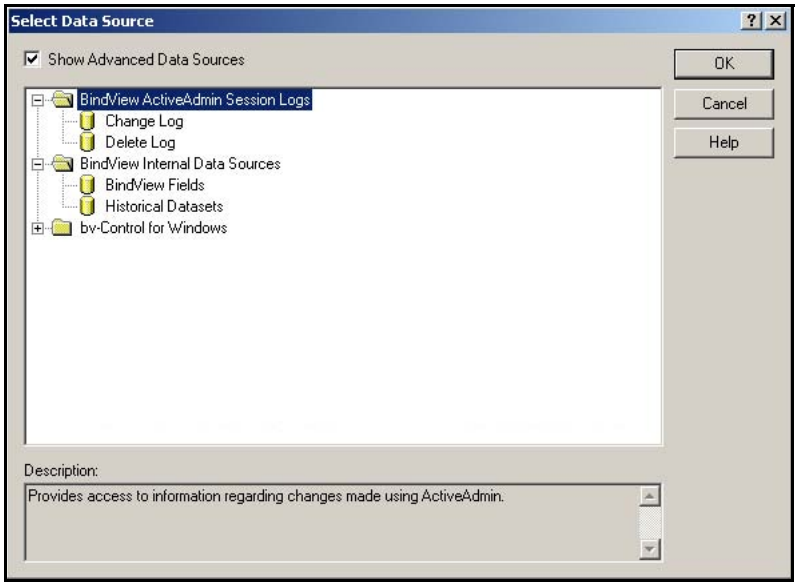


Fig. 62 Select Data Source Dialog

Use these advanced data sources to create queries that allow you to gather specific information about your BindView RMS products and files. For detailed information on creating a query, refer to "Creating a New Query" on page 66.

BindView ActiveAdmin Session Logs

ActiveAdmin® session logs have a specific set of BindView-related attributes associated with them. BindView Administrators create session log queries to view these attributes.

There are two types of session logs that BindView Administrators can query:

- **Change Log** – Lists information about the resource objects that were edited (changed) using ActiveAdmin.
- **Delete Log** – Lists information about the resource objects that were deleted (removed) from your Enterprise using ActiveAdmin.

When a BindView Administrator runs a session log query, the session logs for all ActiveAdmin tasks processed by the Information Server are queried.

BindView Internal Data Sources

There are two types of BindView internal data sources:

- BindView Fields
- Historical Datasets

BindView Fields Queries

All fields have a specific set of BindView-related attributes associated with them. You create BindView Fields queries to view these attributes. When you run a BindView Fields query, the Information Server queries each field associated with the data sources of each bv-Control query-based product added to the Console.

For example, you can create and run a BindView Fields query to quickly learn which fields support the ActiveAdmin edit feature. For detailed information on the ActiveAdmin edit feature, refer to "Changing Resource Object Attributes" on page 95.

Historical Datasets Queries

All historical datasets and session logs have a specific set of BindView-related attributes associated with them. When a BindView Administrator creates and runs a Historical Dataset query, all historical datasets and session logs stored on the Information Server are queried.

BindView Administrators create Historical Dataset queries to view the attributes of historical datasets and session logs, or to delete specific historical datasets and session logs. BindView Administrators use the ActiveAdmin delete feature to delete specific datasets from the Information Server (see "Deleting Historical Datasets and Session Logs" on page 97).

5 Using ActiveAdmin

In This Chapter

Understanding ActiveAdmin

The ActiveAdmin® feature allows you to manage the resource objects in your Enterprise, and your BindView RMS data, from the Console. You use the ActiveAdmin feature to manage:

- Resource objects
- Historical datasets
- Session logs

Managing Your Enterprise

Users with access rights can manage resource objects by deleting them, or by changing their attributes. When you use ActiveAdmin to manage resource objects, the actual resource objects in your Enterprise are deleted or changed. ActiveAdmin does not change resource object records in historical datasets.

BindView Administrators can manage historical datasets and session logs by deleting them from the Information Server.

User Processing Requirements

In order to use ActiveAdmin, you must have:

- ActiveAdmin license
- ActiveAdmin processing rights

Only BindView Administrators can assign user rights for ActiveAdmin processing. For detailed information on assigning ActiveAdmin rights to a user, see the Help for the **Query Info** tab in the **User Properties** dialog.

Deleting Resource Objects

You can delete any resource object in a data source that supports the ActiveAdmin delete feature. Access the ActiveAdmin delete feature with the **Delete** command on the shortcut menu of a grid row. When you use the **Delete** command, the Information Server deletes the resource object represented in the grid row.

Refer to your specific bv-Control product user guide to learn which data sources support the ActiveAdmin delete feature.

Warning: The ActiveAdmin delete feature permanently deletes resource objects from your Enterprise. Since you cannot undo this feature, do not use it unless you are certain that you want to remove the resource object.

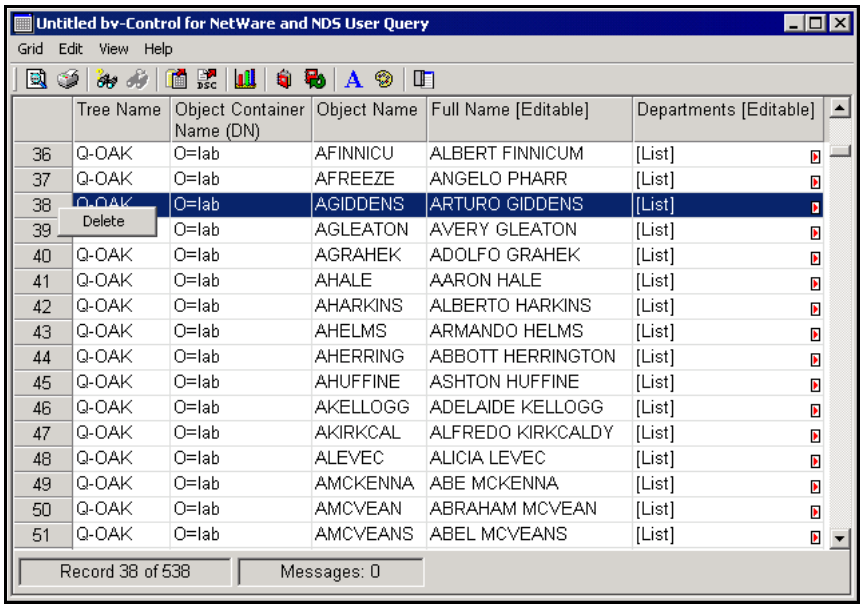
▶ ***To delete a resource object***

1 Run a query created from a data source that supports the ActiveAdmin delete feature and view the dataset as a grid.

Make sure that the data source selected for the query represents the resource objects you want to delete.

For detailed information on creating and running queries, see Chapter 4, “Querying,” on page 65.

The grid appears.



	Tree Name	Object Container Name (DN)	Object Name	Full Name [Editable]	Departments [Editable]
36	Q-OAK	O=lab	AFINNICU	ALBERT FINNICUM	[List]
37	Q-OAK	O=lab	AFREEZE	ANGELO PHARR	[List]
38	Q-OAK	O=lab	AGIDDENS	ARTURO GIDDENS	[List]
39	Q-OAK	O=lab	AGLEATON	AVERY GLEATON	[List]
40	Q-OAK	O=lab	AGRAHEK	ADOLFO GRAHEK	[List]
41	Q-OAK	O=lab	AHALE	AARON HALE	[List]
42	Q-OAK	O=lab	AHARKINS	ALBERTO HARKINS	[List]
43	Q-OAK	O=lab	AHELMS	ARMANDO HELMS	[List]
44	Q-OAK	O=lab	AHERRING	ABBOTT HERRINGTON	[List]
45	Q-OAK	O=lab	AHUFFINE	ASHTON HUFFINE	[List]
46	Q-OAK	O=lab	AKELLOGG	ADELAIDE KELLOGG	[List]
47	Q-OAK	O=lab	AKIRKCAL	ALFREDO KIRKCALDY	[List]
48	Q-OAK	O=lab	ALEVEC	ALICIA LEVEC	[List]
49	Q-OAK	O=lab	AMCKENNA	ABE MCKENNA	[List]
50	Q-OAK	O=lab	AMCVEAN	ABRAHAM MCVEAN	[List]
51	Q-OAK	O=lab	AMCVEANS	ABEL MCVEANS	[List]

Fig. 63 Grid with Active Admin Delete

2 Select the desired record, right-click the associated row number, and select **Delete** from the shortcut menu.

The **Delete** shortcut menu does not appear if you do not have an ActiveAdmin license or if the current user does not have ActiveAdmin rights in the User Manager. After you add the missing license or ActiveAdmin rights, you must rerun the query to access the **Delete** shortcut menu. The **Delete Action** confirmation dialog appears.

3 Click **OK**. If you have access rights, the session log (Fig. 67 on page 99) appears after the Information Server processes the ActiveAdmin task.

Changing Resource Object Attributes

You can change any resource object attribute collected for a field that supports the ActiveAdmin change feature. Fields that support the ActiveAdmin change feature are *editable fields*. Editable fields have the ActiveAdmin icon beside the field name in the **Query Builder** dialog. You can determine if a data source contains editable fields by creating a *BindView Fields* query that includes Editable as a selected field (see "BindView Fields Queries" on page 92).

Access the ActiveAdmin change feature from the **Edit** command on the shortcut menu of a grid cell. Only cells appearing in an editable field column have the **Edit** command.

The **Edit** command opens an **ActiveAdmin** change dialog. When you use this dialog to change the value appearing in the grid cell, the Information Server changes the associated resource object attribute. You can select more than one cell in a single column and change all their values at once.

Warning: The ActiveAdmin edit feature permanently changes resource objects in your Enterprise. Since you cannot undo this feature, do not use it unless you are certain that you want to change the resource object.

▶ *To change resource object attributes*

1. Run a query created from a data source containing the editable fields for the resource objects you want to modify and view the dataset as a grid. For detailed information on creating and running queries, see Chapter 4, “Querying,” on page 65.

   The grid appears.

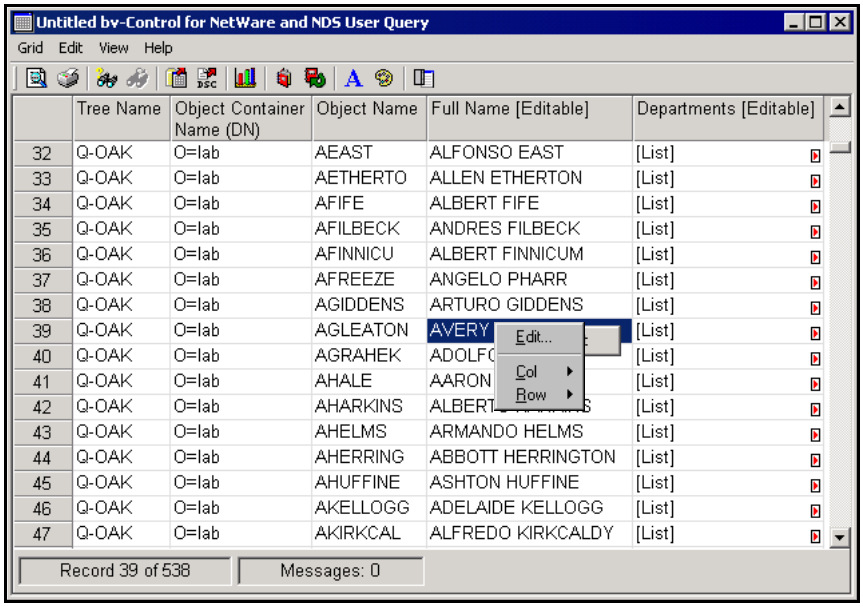


Fig. 64 Grid with ActiveAdmin Shortcut Menu

2. Right-click the desired value and select **Edit** from the shortcut menu. The selected value represents the resource object attribute that you want to change.

   The **Edit** command does not appear if you do not have an ActiveAdmin license or if the current user does not have ActiveAdmin rights in the User Manager. After you add the missing license or ActiveAdmin rights, you must rerun the query to access the **Edit** command.

   The **ActiveAdmin** change dialog appears. This dialog is bv-Control product-specific. Refer to your bv-Control product user guide for detailed information on this dialog.

3. Edit the value and click **OK**. The **Change Action** confirmation message appears.

4. Click **OK**. If you have access rights, the session log (Fig. 67 on page 99) appears after the Information Server processes the ActiveAdmin task.

Deleting Historical Datasets and Session Logs

BindView Administrators can delete any historical dataset or session log stored on the Information Server, even those created by other users. BindView Administrators use grids created from Historical Dataset queries to delete historical datasets or session logs. For detailed information on Historical Dataset queries, refer to "Historical Datasets Queries" on page 92.

▶ *To delete a historical dataset or session log*

1 Run a Historical Dataset query and view the dataset as a grid.

A grid appears that displays all historical datasets and session logs stored on the Information Server.

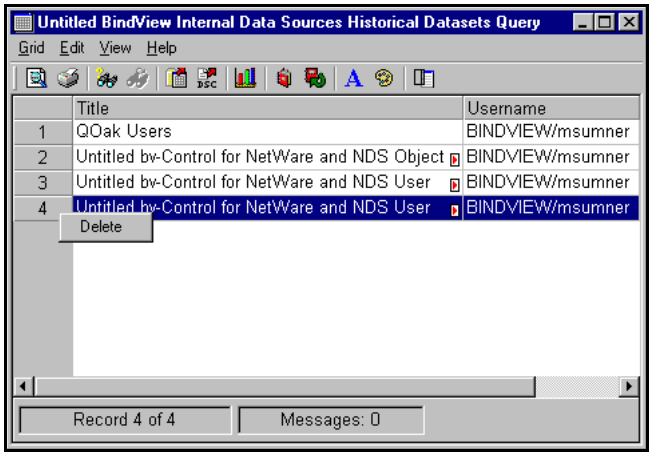


Fig. 65 Historical Dataset Query Viewed as a Grid

2 Select the desired historical dataset or session log, right-click the row number, and select **Delete** from the shortcut menu.

The selected row represents the historical dataset or session log to delete.

The **Delete** shortcut menu does not appear if you do not have an ActiveAdmin license or if the current user does not have ActiveAdmin rights in the User Manager. After you add the missing license or ActiveAdmin rights, you must rerun the query to access the **Delete** shortcut menu. The **Delete Action** confirmation dialog appears.

3 Click **OK**. If you have access rights, a session log (Fig. 67 on page 99) appears after the Information Server processes the ActiveAdmin task.

Monitoring the Status of Processed Tasks

You use the **Task Status** dialog to quickly monitor and manage ActiveAdmin tasks and session logs processed by the Information Server. You open the **Task Status** dialog with the **Task Status** button  on the bv-Control product toolbar, or from the **View Task Status** option on a taskpad.

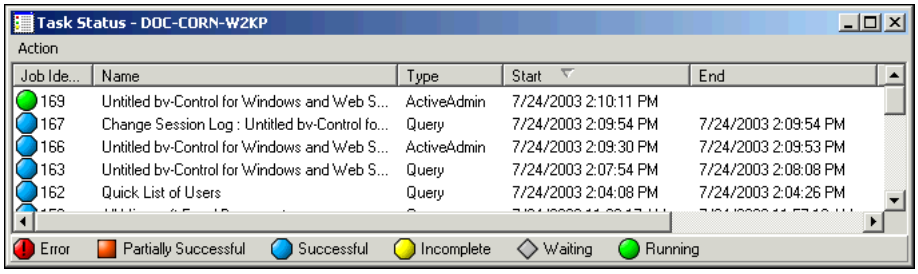


Fig. 66 Task Status Dialog

You monitor ActiveAdmin tasks and session logs by observing their associated status icons. You manage ActiveAdmin tasks using the following shortcut menu commands:

- **Halt** – Stops ActiveAdmin task processing and displays a session log
- **Delete** – Stops ActiveAdmin task processing and removes the session log from the Information Server; or, removes the completed ActiveAdmin task from the list of processed tasks

You manage session logs using the following shortcut menu commands:

- **View** – Displays the session log as a grid
- **Delete** – Removes the session log from the Information Server
- **Save** – Stores the session log as a file

Using Session Logs

A *session log* is a dataset that provides information about completed ActiveAdmin tasks. The Information Server always creates and saves a session log after it processes an ActiveAdmin task. However, you must have access rights to view session logs (see the Help for the **Query Info** tab in the User Properties dialog for more information).

A session log is initially displayed as a grid (Fig. 67). The columns of the session log grid represent the standard types of ActiveAdmin task attributes. The rows represent the ActiveAdmin tasks

processed by the Information Server. The cells contain the attributes of the ActiveAdmin tasks.

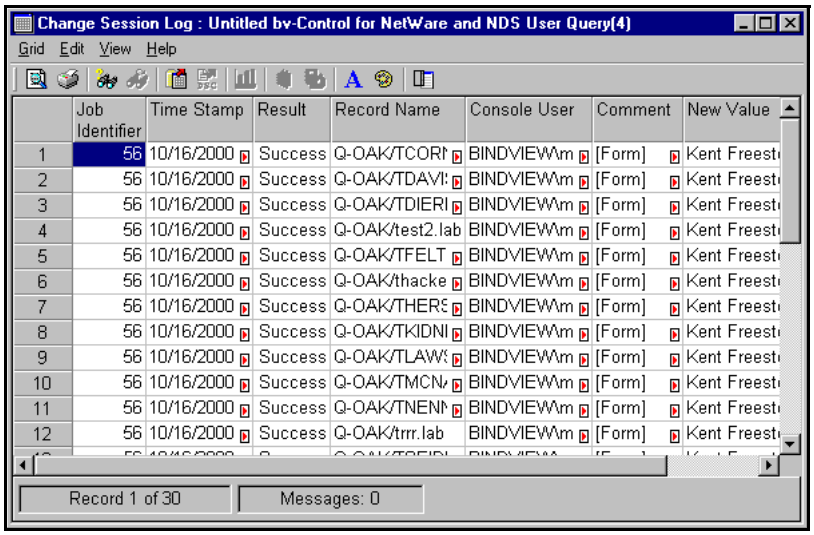


Fig. 67 Session Log Displayed as a Grid

Viewing Session Logs

Session logs appear immediately after the Information Server processes an ActiveAdmin task. You can also use the **Task Status** dialog functionality to view the session logs stored on the dialog.

You must have access rights to view session logs. For detailed information on session log access rights, refer to see the Help for the **Query Info** tab in the User Properties dialog.

Querying Session Logs

ActiveAdmin session logs have a specific set of BindView-related attributes associated with them. BindView Administrators create session log queries to view these attributes. When a BindView Administrator runs a session log query, the session logs for all ActiveAdmin tasks processed by the Information Server are queried. For more information on querying session logs, refer to “Advanced Data Source Queries” on page 91.

6 Baselining

In This Chapter

Understanding Baselines

You use the baseline feature to compare the records of two historical datasets linked to a query binder. Baselining produces a delta dataset that you can export, or display as a grid or report. You create delta datasets to view exceptions and monitor changes in your resource objects over time.

Baseline Requirements

You must have at least two historical datasets linked to a query binder to access the baseline feature. These historical datasets must be created from a query definition that contains a data source that supports baselining. Refer to your bv-Control product user guide to learn the data sources that support baselining.

Baseline Datasets

When you baseline two historical datasets, the records in the newer dataset are always compared against the records in the older dataset.

When you run a baseline, the Information Server creates a *delta dataset*. The delta dataset contains all records from both datasets that match the user-selected record status type options. Each record status type has an associated icon, as shown in Table 2.

Table 2 Baseline Record Status Types

Type	Icon
Added	
Deleted	
Changed	
Unchanged	

Creating a Delta Dataset

When you create a delta dataset, it is automatically displayed as a grid. Although you cannot save delta datasets, you can use the grid functionality to print a report of the delta dataset or export it.

▶ ***To create a delta dataset***

1 Open the **Manage Historical Data** dialog by selecting **Manage>Historical Data** from the shortcut menu of the desired query binder file.

The **Manage Historical Data** dialog appears.

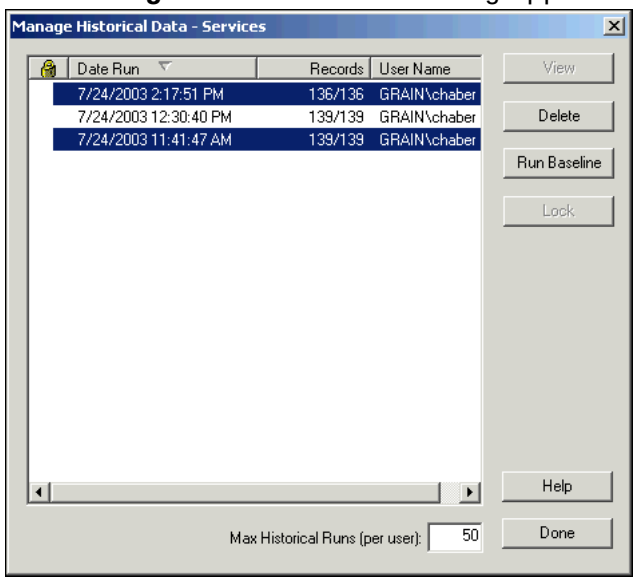


Fig. 68 Manage Historical Data Dialog

2 Select the two historical datasets that you want to baseline. The **Run Baseline** button is now active.

The **Run Baseline** button is dimmed if the data source in the query definition does not support baselining. Refer to your specific bv-Control product user guide to learn which data sources support baselining.

3 Click **Run Baseline.** The **Baseline Options** dialog appears, configured with the default settings.

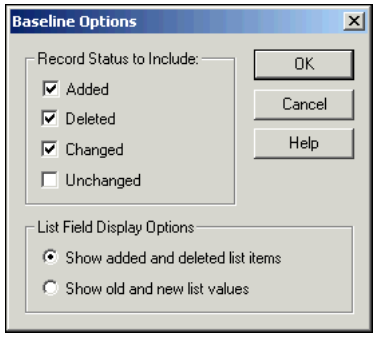


Fig. 69 Baseline Options Dialog

4 Select the desired record status and list field display options.

5 Click **OK**.

The delta dataset appears on a baseline grid, similar to the one in Fig. 70.

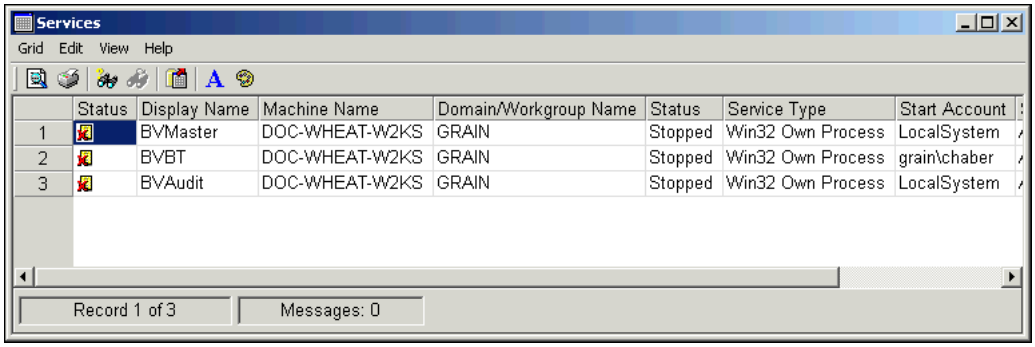


Fig. 70 Delta Dataset Appearing on a Baseline Grid

The baseline grid displays all records from the two historical datasets that match the selected record status options.

You cannot save delta datasets. However, you can use the baseline grid functionality to create a report of the delta dataset, or to export the delta dataset.

The **Manage Historical Data** dialog box only stores a limited number of the most recent datasets. The number of datasets is set in the **Max Historical Runs (per user)** field. When the limit for stored data is reached, the oldest dataset is deleted. If you wish to prevent a dataset from being deleted, select it and click **Lock**. The dataset will be locked. Only one dataset per query can be locked at any given time.

You might lock a dataset if it is the ideal for a particular query and you want to determine how far from that ideal a query has strayed.

Monitoring the Status of Processed Baseline Tasks

You use the **Task Status** dialog to quickly monitor and manage baseline tasks processed by the Information Server. You open the **Task Status** dialog from the task status button  on the bv-Control product toolbar, or from the View Task Status option on a taskpad.

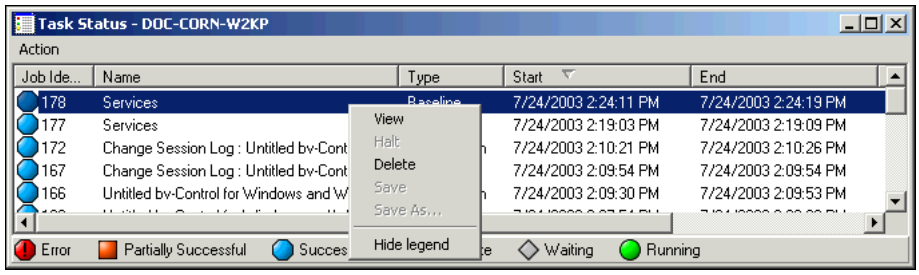


Fig. 71 Task Status Dialog

You monitor baseline tasks by observing their associated status icons. You manage baseline tasks from the following shortcut menu commands:

- **View** – Displays the delta dataset as a grid
- **Halt** – Stops baseline processing and displays the delta dataset as a grid
- **Delete** – Stops baseline processing and deletes the delta dataset

Creating a Delta Dataset Report

You create a report of a delta dataset from the grid toolbar **Print Preview**  or **Print Report**  buttons, or the **Grid** menu of the grid.

When you print or preview a report of the delta dataset, the report appears according to the default report style settings hierarchy. For detailed information on the default report style settings hierarchy, refer to "Default Report Style Settings" on page 178.

You can also open the **Report Settings** dialog from the **Grid** menu to define report settings for the delta dataset report.

Exporting a Delta Dataset

You use the export button  on the grid toolbar, or the **Export** command on the **Grid** menu to export the delta dataset. The button and command open the **Export Settings** dialog.

For detailed information on using the **Export Settings** dialog, refer to Chapter 11, "Exporting," on page 181.

7 Using Task Lists

In This Chapter

Understanding Task Lists

Task lists group several tasks to run and manage them as one task. A task list can contain the following items:

- Query tasks
- Baseline tasks
- Post process commands for added tasks
- Summary file commands

You must have processing rights to create and modify task lists. Only BindView Administrators can assign user rights for task list processing. For detailed information on assigning task list rights to a user, see the Help for the **Task List** tab in the User Properties dialog.

When you run a task list, the Information Server automatically processes each task included in the task list. The Information Server then applies the post process commands to the relevant datasets gathered for the tasks. After all processing has completed, the Information Server applies the summary file commands.

Creating Task Lists

When you create a task list, you can perform the following activities:

- Add query tasks from query binders
- Define post process commands for added query tasks
- Apply a scope for added query tasks
- Add baseline tasks from query binders
- Define post process commands for added baseline tasks
- Import query or baseline tasks from saved task lists
- Define summary file properties

Adding Query Tasks from Query Binders

When you add a query task from a query binder, you add the query task associated with the saved query definition. You can add query tasks from any pre-defined or user-created query binder that you can access.

▶ *To add a query task from a query binder*

1 Click the **New Task List** button on the bv-Control query-based product toolbar, or click **Create Task List** on a taskpad.

The **Task List** dialog appears.

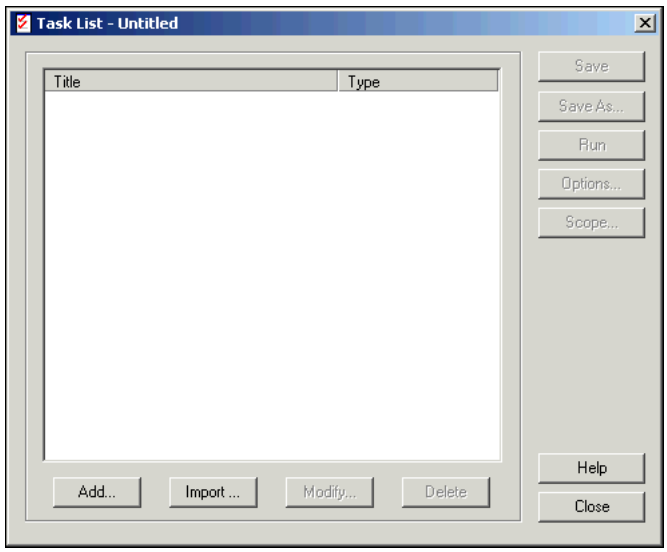


Fig. 72 Task List Dialog

2 Click **Add**.

The **Select a Task Type** dialog appears.

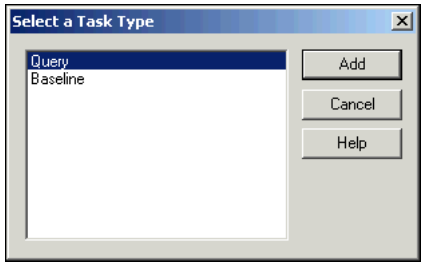


Fig. 73 Select a Task Type Dialog

3 Select **Query** and click **Add**.

The **Select Query Binder** dialog appears.

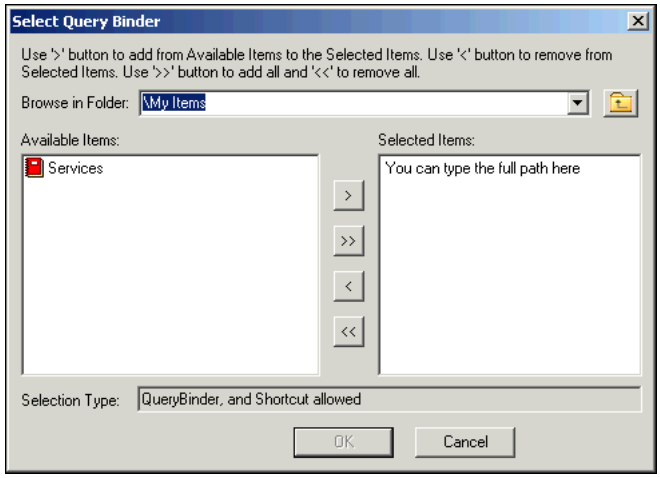


Fig. 74 Select Query Binder Dialog

4 Use the **Select Query Binder** dialog to locate the Query Binders to add to the task list. The **Browse in Folder** drop-down list contains the name of the current folder, the other folders in the current tree, and the **Pre-defined**, **Shared**, **My Items**, and **All User Items** folders. Use the **Up One Level** button to go up in the folder tree.

To add an item, select it in the **Available Items** list and click **>** or click in the **Selected Items** list and type the full path of the item. To add all items in the **Available Items** list, click **>>**.

To remove an item, select it in the **Selected Items** list and click **<**. To remove all items in the **Selected Items** list, click **<<**.

When all the items you wish to add to the task list are in the **Selected Items** list, click **OK** to close the **Select Query Binder** dialog.

5 The **Query Task Item** dialog appears configured with the selected query binder and default post process commands (Fig. 75).

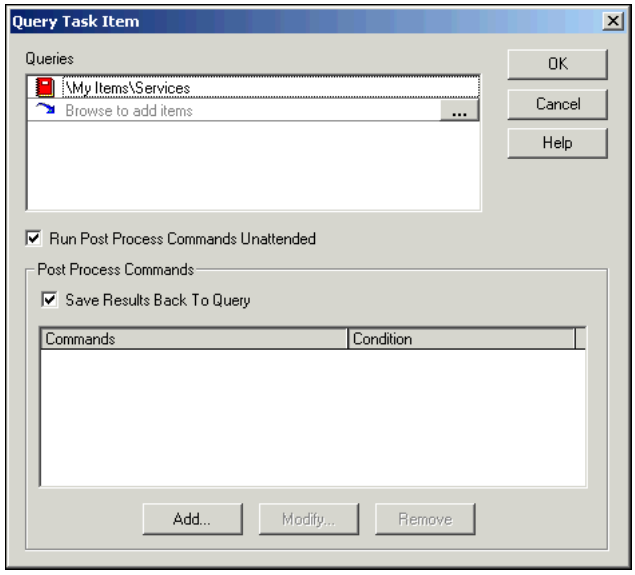


Fig. 75 Query Task Item Dialog

6 If desired, add additional query binders to the task item.

7 Select **Run Post Process Commands Unattended**, if desired.

Selecting this option causes the Information Server machine to execute the added post process commands when the task list is run. Clearing this option causes the Console machine to execute the commands.

8 Add the desired post process commands and click **OK**.

The **Task List** dialog reappears. The query task you added appears in the list of added tasks.

Adding Post Process Commands for a Query Task

An added query task must have at least one post process command defined. A query task post process command tells the Console or Information Server machine what to do with the dataset gathered for the query task. You can define multiple post process commands for a query task.

Depending on the selections you make in the **Query Task Item** dialog, post process commands are executed by either the Console or the Information Server machine. All query task post process commands can be executed by the Console machine. Some post process commands can be executed by the Information Server machine. The Information Server machine executes post process commands “unattended.” The Console does not have to be open when unattended post process commands are executed. You must have access rights to execute post process commands from the Information Server machine (see the Help for the **Task List** tab in the User Properties dialog).

If you use BindView RMS Schedules or run the TaskLaunch.exe program on an Information Server machine and run a task list that contains only unattended post process commands, the Console is not required for any task processing or post process command executions.

▶ *To add post process commands executed by the Console machine*

1. Create a task list and add one or more query binder items to the task.

   The **Query Task Item** dialog appears (Fig. 75 on page 111).

2. Clear **Run Post Process Commands Unattended**.

3. Click **Add**.

   You can only add one post process command at a time.

   The **Query Post Process Commands** dialog appears.

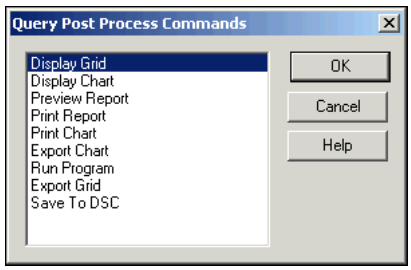


Fig. 76 Query Post Process Commands Dialog

4. Select the post process command and click **OK**.

   If the post process command requires additional user selections, a secondary dialog appears (see "Completing Post Process Command Requirements" on page 113).

   If additional user selections are not required, the **Query Task Item** dialog reappears. The post process command you added appears in the Post Process Commands list.

▶ *To add post process commands executed by the Information Server machine*

1. Create a task list and add one or more query binder items to the task.

   The **Query Task Item** dialog appears (Fig. 75 on page 111).

2. Select **Run Post Process Commands Unattended**.

3. Clear **Save Results Back To Query**, if desired.

   When this option is selected and when you run the task list, the dataset will be linked to the query binders listed in the **Queries** box.

4. Click **Add**.

   You can only add one post process command at a time.

The **Query Post Process Commands** dialog appears.

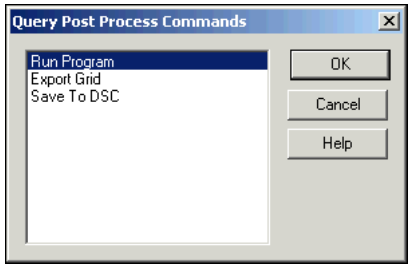


Fig. 77 Query Post Process Commands Dialog

5 Select the desired post process command and click **OK**.

The secondary dialog for the post process command appears.

6 Enter or select the information required on the secondary post process command dialog and click **OK** (see "Completing Post Process Command Requirements", next).

The **Query Task Item** dialog reappears. The post process command you added appears in the Post Process Commands list.

In the **Query Task Item** dialog, you can control whether a post process command is always started or whether it should only start when conditions you set are met. To set a post process command for conditional operation, select it and click the browse (**...**) button. The **Modify Condition to Run Post Process Commands** dialog appears.

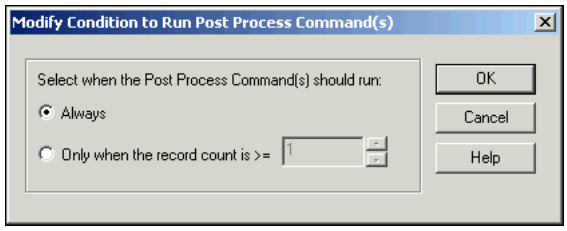


Fig. 78 Modify Condition to Run Post Process Commands Dialog

Set the conditions for running the Post Process Command and click **OK**.

If you selected **Save Results Back To Query**, the dataset gathered for the query task is automatically saved to the selected query binder each time you run the task list. The query task only appears in the **Task Status** dialog while the Information Server gathers the dataset.

Completing Post Process Command Requirements

The following post process commands require additional user selections on secondary dialogs:

- Display Chart
- Print Report

- Print Chart
- Export Grid
- Export Chart
- Save to DSC
- Run Program

▶ *To add a Display Chart post process command*

The **Display Chart** post process command can only be executed on the Console machine.

1 Select **Display Chart** and click **OK** on the **Query Post Process Commands** dialog. The **Post Process Commands - Display As Chart** dialog appears.

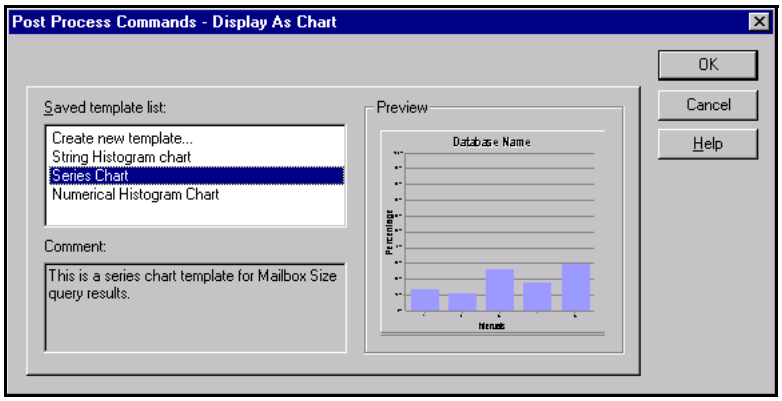


Fig. 79 Post Process Commands - Display As Chart Dialog

2 Select the desired chart template, and click **OK**.

If there are no chart templates in the query binder, you must create a chart template, save it to the query binder, then select it on the **Post Process Commands - Display As Chart** dialog.

The **Display Chart** command appears in the post process commands list in the **Query Task Item** dialog.

▶ *To add a Print Report post process command*

The **Print Report** post process command can only be executed on the Console machine.

1 Select **Print Report** and click **OK** on the **Query Post Process Commands** dialog.

The **Post Process Commands - Print As Report** dialog appears.

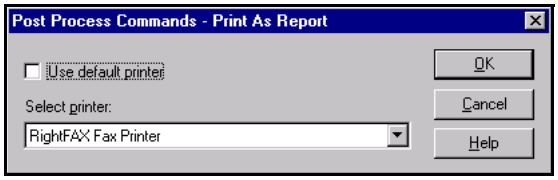


Fig. 80 Post Process Commands - Print as Report Dialog

2 Select the desired printer, and click **OK**.

Click **Use default printer** to print the report on the default Windows printer.

The **Select printer** list is only active if **Use default printer** is cleared.

The **Print Report** command appears in the post process commands list on the **Query Task Item** dialog.

▶ *To add a Print Chart post process command*

The **Print Chart** post process command can only be executed on the Console machine.

1 Select **Print Chart** and click **OK** on the **Query Post Process Commands** dialog.

The **Post Process Commands - Print As Chart** dialog appears.

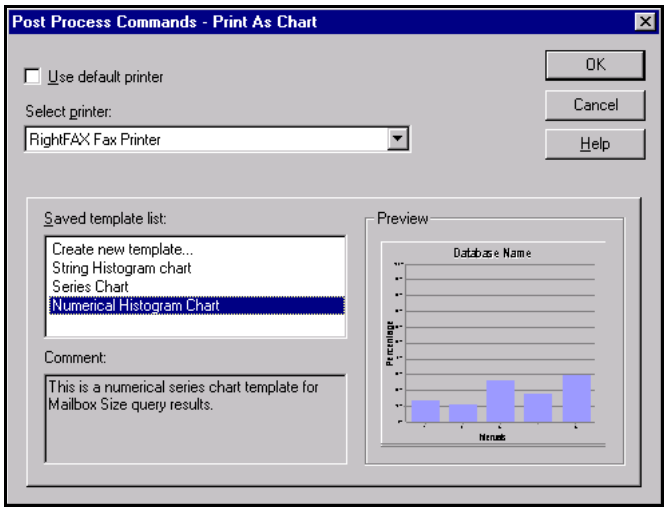


Fig. 81 Post Process Commands - Print As Chart Dialog

2 Select the desired printer.

Click **Use default printer** to print the report on the default Windows printer.

The **Select printer** list is only active if **Use default printer** is cleared.

3 Select the desired chart template.

If there are no chart templates in the query binder, you must create a chart template, save it to the query binder, then select it on the **Post Process Commands - Print As Chart** dialog.

4 Click **OK**. The **Print Chart** command appears in the post process commands list on the **Query Task Item** dialog.

▶ *To add an Export Grid post process command*

Depending on the selections made in the **Query Task Item** dialog (Fig. 75 on page 111), the **Export Grid** post process command can be executed by either the Console or the Information Server.

If you are adding an **Export Grid** post process command that exports a dataset as an Excel (using OLE) file from the Information Server machine (unattended exporting), you must have Microsoft Excel installed on the Information Server machine.

1. Select **Export Grid** and click **OK** on the **Query Post Process Commands** dialog.

   The **Export Settings** dialog appears.

2. Make the desired selections for the export file.

   For detailed information on the **Export Settings** dialog, refer to Chapter 11 on page 181.

3. Click **OK**. The **Export Grid** command appears in the post process commands list on the **Query Task Item** dialog.

When you export multiple items from a task list, or when a task list may export multiple times to the same location, you should use export name variables to ensure that each exported file has a unique name. If you export multiple items using a single filename, the items may overwrite one another.

▶ *To add an Export Chart post process command*

The **Export Chart** post process command can only be executed on the Console machine.

1. Select **Export Chart** and click **OK** on the **Query Post Process Commands** dialog.

   The **Post Process Commands - Export As Chart** dialog appears.

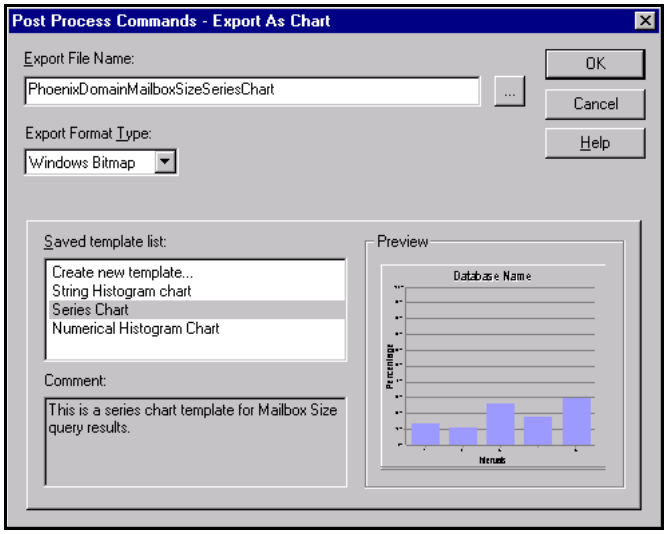


Fig. 82 Post Process Commands - Export As Chart Dialog

2. Enter or select a file name for the chart export file in the **Export File Name** box.

   If you select a file name that has an associated export chart template, it is replaced with the template you select on this dialog when you run the task list.

3. Select the desired chart export file type from the **Export Format Type** list.

4. Select the desired chart template.

   If there are no chart templates in the query binder, you must create a chart template, save it to the query binder, then select it on the **Post Process Commands - Export As Chart** dialog.

5. Click **OK**. The **Export Chart** command appears in the post process commands list on the **Query Task Item** dialog.

▶ *To add a Save to DSC post process command*

Depending on the selections in the **Query Task Item** dialog (Fig. 75 on page 111), the Save to DSC post process command can be executed by either the Console or the Information Server.

For detailed information on the DSC, refer to Appendix A on page 197 and to the *BindView RMS Decision Support Center User Guide.*

1. Select **Save to DSC** and click **OK** on the **Query Post Process Commands** dialog.

   The **DSC Settings** dialog appears.

2. Make the desired selections for the DSC data and click **OK**.

   The **Save to DSC** command appears in the post process commands list on the **Query Task Item** dialog.

▶ *To add a Run Program post process command*

Depending on the selections you made in the **Query Task Item** dialog (Fig. 75 on page 111), the Run Program post process command can be executed by either the Console or the Information Server machine.

1. Select **Run Program** and click **OK** in the **Query Post Process Commands** dialog.

The **Post Process Commands - Run a Program** dialog appears (Fig. 83).

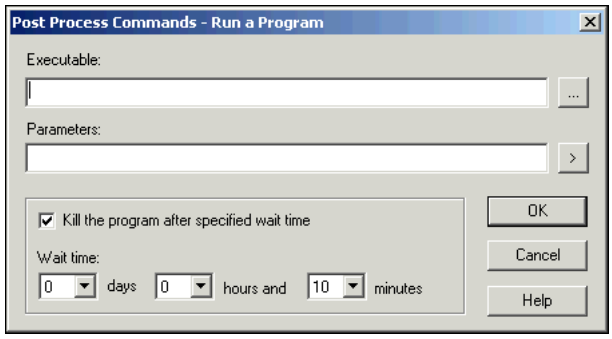


Fig. 83 Post Process Commands - Run a Program Dialog

2 Enter or select the path and name of the desired program in the **Executable** box. If the Information Server machine will execute the post process command, the only executables available are in the folder set on the **Task List** tab of the **Properties** dialog.

3 Enter the parameters for the executable in the **Parameters** box, if desired.

4 Select **Kill the program after specified wait time** and select the **Wait time** options, if desired. This option stops the selected program on the Information Server machine after the wait time expires. These options do not appear if the post process command will run attended (on the Console machine).

5 Click **OK**. The **Run Program** command appears in the post process commands list on the **Query Task Item** dialog.

Applying a Scope for Added Query Tasks

You can apply a single named scope to query tasks added to a task list. The selected named scope will override the scope currently saved in the query definition of the affected query tasks.

▶ ***To apply a scope***

1 Click **Scope** in the **Task List** dialog.

The **Task List Scope Settings** dialog appears.

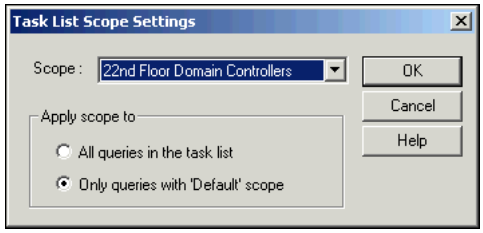


Fig. 84 Task List Scope Settings Dialog

2 Select the desired named scope from the **Scope** list. Select **Default** from the **Scope** list if you do not want to overwrite the scopes of your added query tasks.

3 If **Default** is not selected, select the desired **Apply scope to** option.

The **Only queries with 'Default' scope** option will apply the selected named scope to the query tasks that use the bv-Control product-specific default scope. Product-specific default scopes cannot be defined by the user.

4 Click **OK**.

If you selected **Default** from the **Scope** list, no changes are made to the scopes of your query tasks.

If you selected a named scope from the **Scope** list, the Information Server will overwrite the scope currently saved in the query definition of the affected query tasks when you run the task list.

Adding Baseline Tasks from Query Binders

When you add a baseline task to a task list, you select the query binders to baseline and designate the two historical datasets linked to each query binder to baseline. You can add baseline tasks from any pre-defined or user-created query binder that you can access.

▶ ***To add a baseline task to a task list***

1 Click the **New Task List** button on the bv-Control query-based product toolbar, or click **Create Task List** on a taskpad.

The **Task List** dialog appears (Fig. 72 on page 109). Click **Add**.

The **Select a Task Type** dialog appears (Fig. 73 on page 109).

2 Select **Baseline** and click **Add**.

The **Select Query Binder** dialog appears.

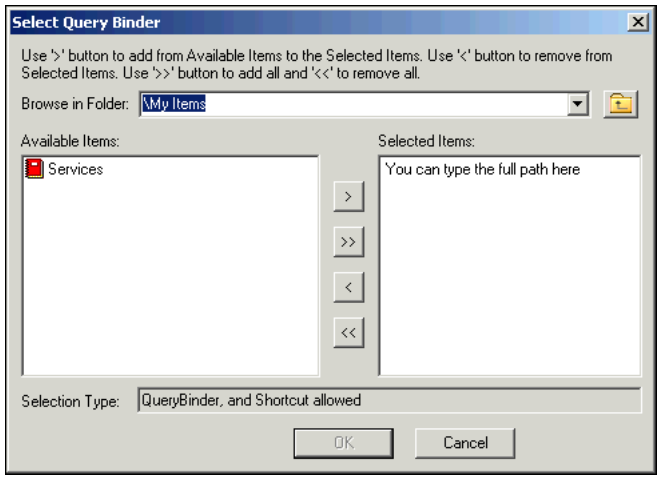


Fig. 85 Select Query Binder Dialog

3 Use the **Select Query Binder** dialog to locate the Query Binders to add to the task list. The **Browse in Folder** drop-down list contains the name of the current folder, the other folders in the current tree, and the **Pre-defined**, **Shared**, **My**

Items, and **All User Items** folders. Use the **Up One Level** button to move up in the folder tree.

To add an item, select it in the **Available Items** list and click **>** or click in the **Selected Items** list and type the full path of the item. To add all items in the **Available Items** list, click **>>**.

To remove an item, select it in the **Selected Items** list and click **<**. To remove all items in the **Selected Items** list, click **<<**.

When all the items you wish to add to the schedule are in the **Selected Items** list, click **OK** to close the **Select Query Binder** dialog.

You can only select query binders that reside in the **Pre-Defined**, **Shared**, or **My Items** folders that you can access.

4 The **Baseline Task Item** dialog appears, configured with the selected query binder and default post process commands (Fig. 86).

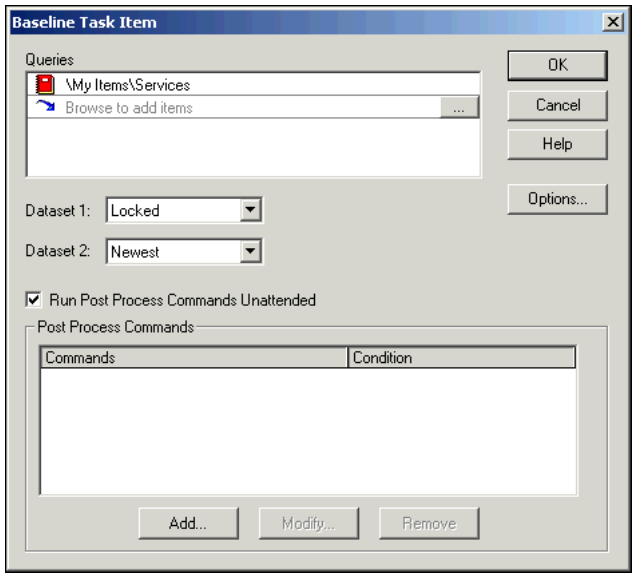


Fig. 86 Baseline Task Item Dialog

5 If desired, click the browse (**...**) button to add additional query binders to the task item.

6 For each query binder, select the datasets to compare.

If you add a baseline task and a query task from the same query binder, you may want to use the **Save Results Back To Query Binder** option on the **Query Task Item** dialog. Then, when you run the task list, the Information Server can use the dataset gathered for the query task for the baseline.

7 Click **Options** in the Baseline Task Item dialog. The **Baseline Options** dialog appears, configured with the default settings.

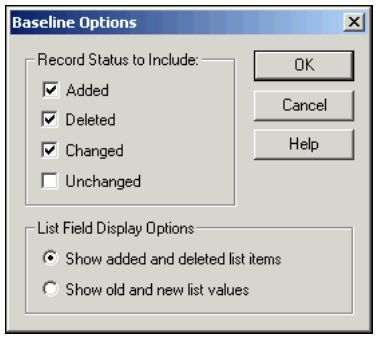


Fig. 87 Baseline Options Dialog

8 Select the desired record status options and click **OK**.

9 On the **Baseline Task Item** dialog, select **Run Post Process Commands Unattended**, if desired (Fig. 86 on page 120).

When post process commands are run unattended, the Information Server machine executes the commands when the task list is run. Otherwise, the Console machine executes the commands.

10 Add the desired post process commands and click **OK**. The **Task List** dialog reappears. The baseline task you added appears in the list of added tasks.

Adding Post Process Commands for a Baseline Task

An added baseline task must have at least one post process command defined for it. A baseline task post process command tells the Console or Information Server machine what to do with the delta dataset gathered for the baseline task. You can define multiple post process commands for a baseline task.

Depending on the selections you make on the **Baseline Task Item** dialog (Fig. 86 on page 120), post process commands are executed by either the Console or the Information Server machine. All baseline task post process commands can be executed by the Console machine. Specific post process commands can be executed by the Information Server machine. The Information Server machine executes post process commands “unattended.” This means that the Console does not have to be open when the post process commands are executed. You must have access rights to execute post process commands from the Information Server machine (see the Help for the **Task List** tab in the User Properties dialog).

If you use BindView RMS Schedules or run the TaskLaunch.exe program on an Information Server machine and run a task list that contains only unattended post process commands, the Console is not required for any task processing or post process command executions.

Some post process commands require additional user selections on secondary dialogs. The same post process command secondary

dialogs are used for query and baseline tasks. For detailed information on using post process command secondary dialogs, refer to "Completing Post Process Command Requirements" on page 113.

▶ *To add post process commands executed by the Console machine*

1. Add a baseline task from a query binder.

   The **Baseline Task Item** dialog appears (Fig. 86 on page 120).

2. Clear **Run Post Process Commands Unattended**.

3. Click **Add**.

   You can only add one post process command at a time.

   The **Baseline Post Process Commands** dialog appears.

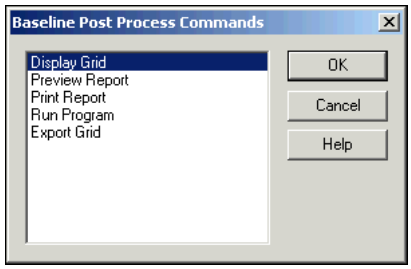


Fig. 88 Baseline Post Process Commands Dialog

4. Select the desired post process command and click **OK**.

   If the post process command requires additional user selections, a secondary dialog appears (see "Completing Post Process Command Requirements" on page 113).

   If additional user selections are not required, the **Baseline Task Item** dialog reappears. The post process command you added appears in the **Post Process Commands** list.

▶ *To add post process commands executed by the Information Server machine*

1. Add a baseline task from a query binder.

   The **Baseline Task Item** dialog appears (Fig. 86 on page 120).

2. Select **Run Post Process Commands Unattended**.

3. Click **Add**.

   You can only add one post process command at a time.

The **Baseline Post Process Commands** dialog appears.

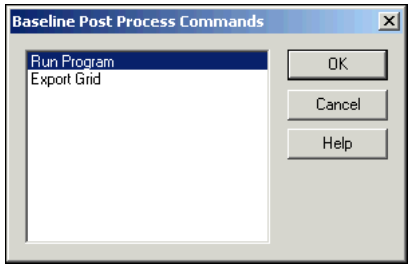


Fig. 89 Baseline Post Process Commands Dialog

4 Select the desired post process command and click **OK**.

The secondary dialog for the post process command appears.

5 Enter or select the information required on the secondary post process command dialog and click **OK** (see "Completing Post Process Command Requirements" on page 113).

The **Query Task Item** dialog reappears. The post process command you added appears in the Post Process Commands list.

In the **Query Task Item** dialog, you can control whether a post process command is always started or whether it should only start when conditions you set are met. To set conditional operation, select a post process command and click the browse (**...**) button. The **Modify Condition to Run Post Process Commands** dialog appears.

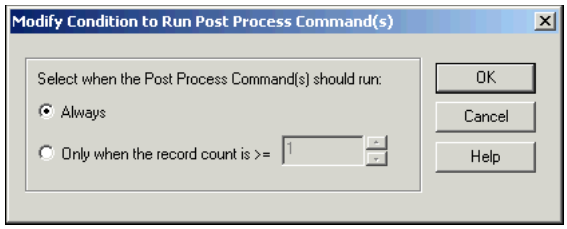


Fig. 90 Modify Condition to Run Post Process Commands dialog

Set the conditions for running the Post Process Command and click **OK**.

Adding Query and Baseline Tasks from Saved Task Lists

You can add query and baseline tasks to a task list by importing them from a saved task list. You can import tasks from any pre-defined or user-created task list that you can access. When you use the import feature, the selected task and the post process commands defined for it are added to the task list.

▶ *To add tasks from a saved task list*

1 Open the **Task List** dialog and click **Import**.

The **Select Task List** dialog appears.

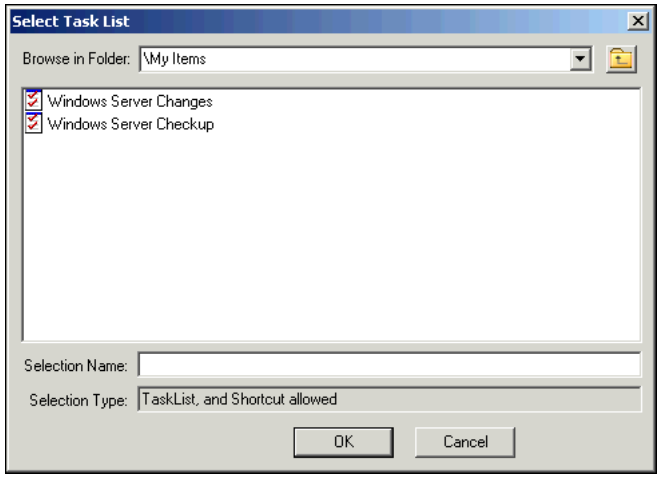


Fig. 91 Select Task List Dialog

2 Use the **Select Task List** dialog to locate the task list containing the tasks that you want to import. The **Browse in Folder** drop-down list contains the name of the current folder, the other folders in the current tree, and the **Pre-defined**, **Shared**, **My Items**, and **All User Items** folders. Use the **Up One Level** button to move up in the folder tree.

To add an item, select it and click **OK** to close the **Select Task List** dialog.

You can only select task lists that reside in the **Pre-Defined**, **Shared**, or **My Items** folders that you can access.

The **Import Task Items From** dialog appears.

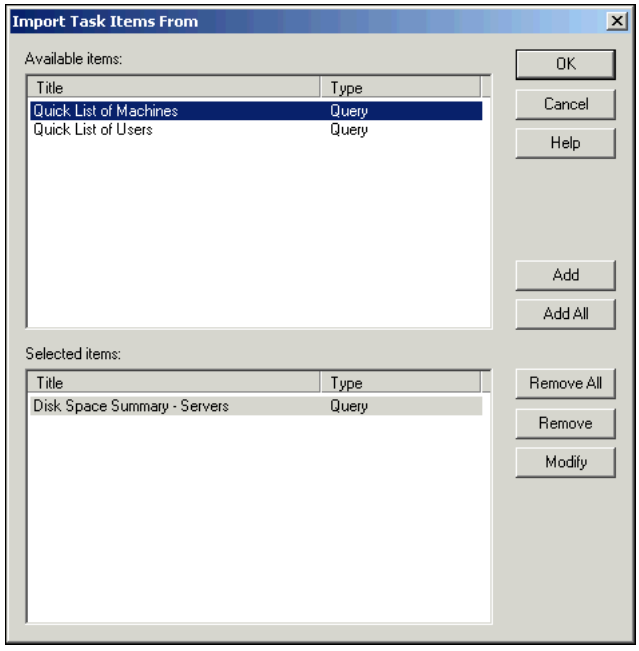


Fig. 92 Import Task Items From Dialog

3 Add the desired tasks from the **Available items** list.

The tasks appear in the **Selected items** list.

4 Click **Modify** to view or change the post process commands defined for a task selected in the Tasks added area, if desired.

5 Click **OK**. The imported tasks appear on the **Task List** dialog.

Defining Summary File Properties

Each time you run a task list, a summary file is created. The *summary file* lists information about the tasks processed by the Information Server.

You use the **Summary File Settings** dialog to define the following properties for summary files:

- Storage location of saved files
- File name of saved files
- Criteria for saving files

Open the **Summary File Settings** dialog with the **Options** button on the **Task List** dialog.

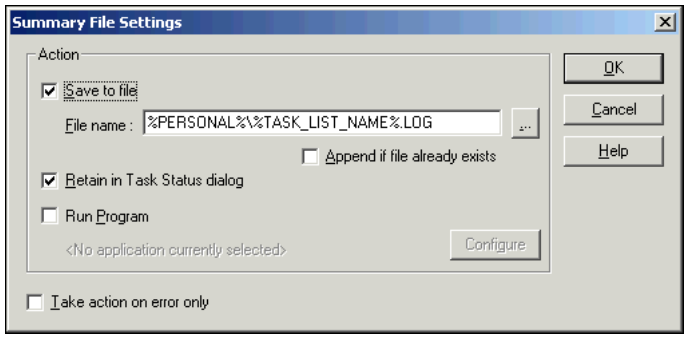


Fig. 93 Summary File Settings Dialog

Use the check boxes in the **Action** area to configure summary file storage. You can store summary files in the **Task Status** dialog or in any **Risk Assessment and Control** subfolder that you can access.

Use the **File name** box and browse (**...**) button to set a name and path for saved summary files. Select **Append if file already exists** to maintain one summary file for the task list. When it is selected, the Information Server appends the summary information gathered to the end of the file listed in the File name box.

Use the **Run Program** check box and **Configure** button to specify a program to run when the summary file is processed.

When the **Take action on error only** check box is selected, the Information Server saves the summary file only if an error occurs during task list processing.

Running Task Lists

When you run a task list, the Information Server processes all tasks and post process commands added to the task list in a sequence. If a baseline task depends on a query task, the Information Server processes the query task before the baseline task.

Run task lists from:

- Task List dialog
- Shortcut menu of a saved task list
- Schedules
- Command line

Use the **Run** button on the **Task List** dialog to run the task list. After you run the task list, the **Run** button changes to **Run Again**.

Saved task lists have **shortcut menus** that you can use to run the task list (right-click the task list and choose **Help** for more information).

To start a task list at a specified time, you use a schedule (see Chapter 8 on page 131) or the command-line task list launcher with a third-party scheduling application.

Using the Command-Line Task List Launcher

You can run saved task lists from the command line by using the TaskLaunch.exe program. You do not have to open the BindView RMS Console to run a task list from the command line.

You use the following path definition to run a task list from the command line:

```
[exe path] [task list path]
```

The `exe path` variable represents the path where the TaskLaunch.exe program is running.

The `task list path` variable represents the location of the task list in the Risk Assessment and Control folder. The path should start with a backslash (\), and contain the path to the task list. When you select a task list in the BindView RMS Console tree, its path is displayed in the **Location** field in the details pane on the right side of the Console window. The following is an example of a command line path for running a task list:

```
"c:\program files\bindview\tasklaunch"
"\My Items\Windows Server Changes"
```

You can log the processing of a task list by using the `-L` flag. Add `-L` and the path and file name to the end of the command line, and the task progress will be logged to the hard disk.

Instead of specifying a task list, you can specify a shortcut to a task list, a folder, or a shortcut to a folder. If you specify a folder or shortcut to a folder, all task lists in that folder will be launched, including task lists in subfolders.

When you open the BindView RMS Console after running a task list from the command line, the **Task Status** dialog and the gathered datasets in the selected view type appear.

Scheduling a Task List for Automatic Processing

You can use the built-in BindView RMS Console **Create Schedule Wizard** to run a task list automatically. As long as the BindView RMS Information Server is running, the task will be processed at the time you specify. For complete information on using the built-in **Create Schedule Wizard** to schedule tasks, please see Chapter 8 on page 131.

If you prefer, you can also use Windows Scheduled Tasks and TaskLaunch.exe to process a task list at a specified time. For specific instructions on setting up Scheduled Tasks in the version of Scheduled Tasks included in the version of Windows you are using, please consult the Windows help (from **Help** in the **Start** menu).

In general, you should create a Windows Scheduled Task. When prompted for the program to launch, select TaskLaunch.exe in the Program Files\BindView\RMS folder on the machine hosting the BindView RMS Console or the BindView Information Server. When the task is created, open the **Advanced Properties** dialog for the task and specify the command line that should be used in the Run: field, using the command line options discussed in the section "Running Task Lists" on page 126. The user name and password you specify when creating the Scheduled Task will be used as the

user credentials by the Information Server when processing the Task List.

If you create the Windows Scheduled Task on a machine hosting the BindView RMS Console, rather than a machine hosting the Information Server, and the machine is off, the Task List may not be processed on schedule. To ensure that it is processed at the desired time, you should consider creating the Scheduled Task on the machine hosting the Information Server.

Monitoring the Status of Processed Task Lists

You use the **Task Status** dialog to quickly monitor and manage the tasks included in and the summary file associated with the processed task list. You open the **Task Status** dialog from the task status button  on the bv-Control product toolbar, or from the **View Task Status** option on a taskpad.

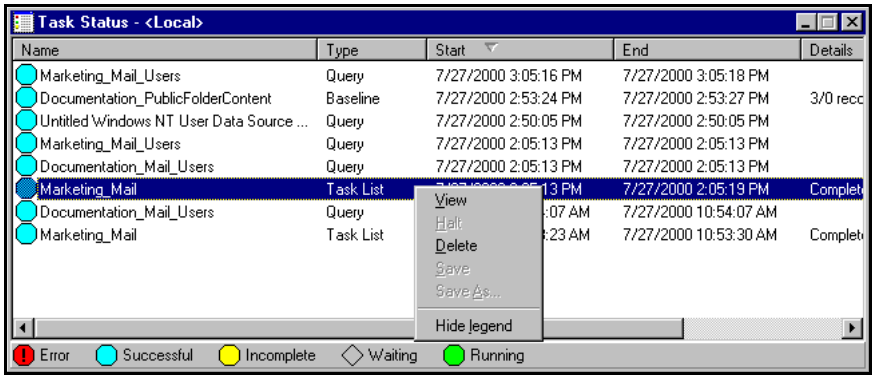


Fig. 94 Task Status Dialog

When you run a task list, each query and baseline task included in the task list appears on the **Task Status** dialog. For detailed information on monitoring query tasks, refer to "Monitoring the Status of Processed Queries" on page 78. For detailed information on monitoring baseline tasks, refer to "Monitoring the Status of Processed Baseline Tasks" on page 104.

Summary files only appear in the **Task Status** dialog if the display conditions defined on the **Summary File Settings** dialog are met.

You use the commands on the summary file shortcut menu to do the following:

- View the contents of the summary file
- Delete the summary file

Saving Task Lists

You use the **Save** or **Save As** buttons in the **Task List** dialog to save a task list. Saved task lists must contain at least one query or baseline task.

The **Save** button appears dimmed on the **Task List** dialog until you do one of the following:

- Add a task to an unsaved task list
- Modify a task in a saved task list

The **Save As** button is only active if the **Task List** dialog is displaying a saved task list.

The save buttons open a **Save As** dialog for selecting a name and storage location for the task list. All saved task lists appearing in the details pane on the Console have a task list icon.

The default storage location for saved task lists is your **My Items** folder.

Using Task List Shortcut Menus

You manage task lists and task list-related information from the **Task List** shortcut menu.

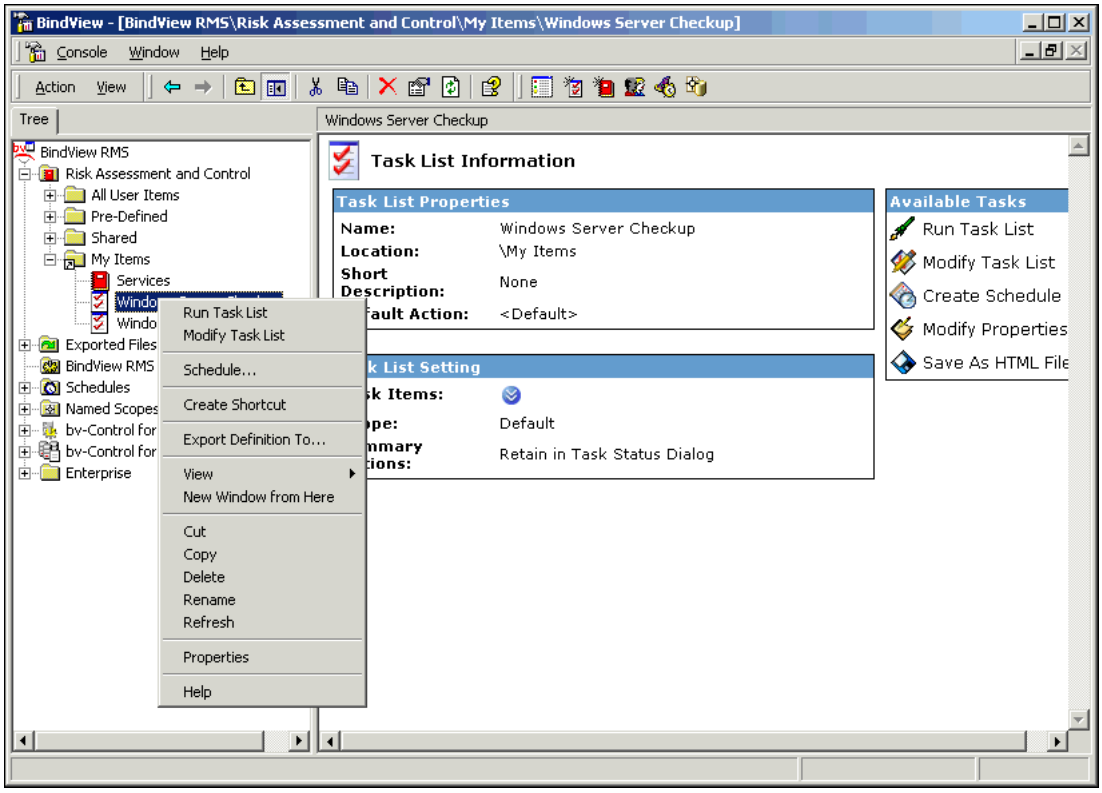


Fig. 95 Task List Shortcut Menu

For information on the options on the shortcut menu, choose **Help** from the shortcut menu.

8 Scheduling Queries and Task Lists

In This Chapter

Understanding Schedules

Using the BindView RMS Console, you can schedule existing Task Lists and Queries for automatic processing by the BindView Information Server. As long as the machine which hosts the BindView Information Server is on and the BindView Information Server Service is running, the scheduled item will be processed at the specified time.

You can schedule items for processing a single time, or on a daily, weekly, or monthly basis. You can schedule task lists or you can schedule one or more individual queries. If you schedule queries, the schedule can perform some exporting options automatically. For more complex export options, create a task list and schedule it. To view existing schedules, select the **Schedules** container in the BindView RMS Console tree. Existing schedules appear in the details pane on the right of the **Console** window.

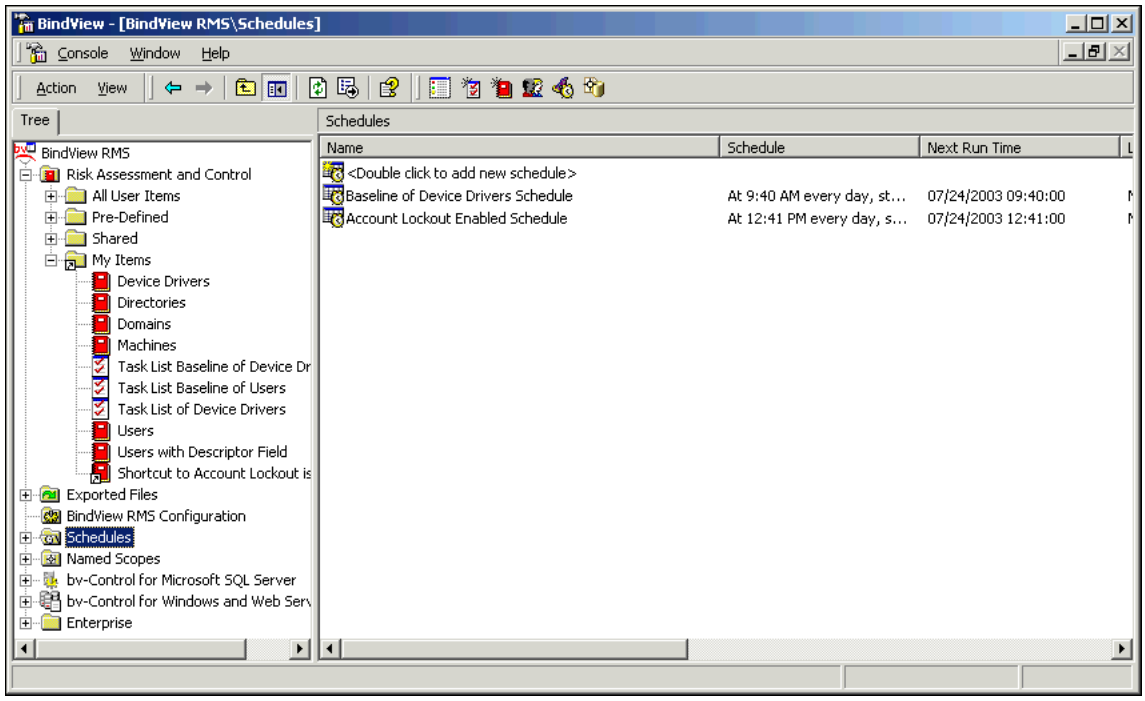


Fig. 96 Schedules Details Pane

If the current user is a BindView user, only the schedules they create will appear. If the current user is a BindView Administrator, all existing schedules will appear.

Creating Schedules

When you create a schedule, you use the **Create Schedules Wizard**. In order to create the schedule, the wizard needs the following information:

- The type of item to schedule (query or task list)
- The items to schedule
- The name to use for the schedule

- When the schedule should run
- The scope to use for scheduled query items
- The export options to use for scheduled query items
- The account to use to process the schedule

Scheduling Task Lists

The **Create Schedule Wizard** guides you through the process of creating a schedule. You can schedule any existing task list for automatic processing. When a task list is scheduled, the task list is processed using the user name and password combination you supply exactly as if that user executed the task list. Any post processing the task list performs will also be executed.

If the tasks in the task list are not set up to run post process commands unattended, all non-interactive post process commands (such as exporting) will be performed. Post process commands which require user interaction (such as displaying a grid or chart) will be performed when the user who created the schedule starts the BindView RMS Console.

▶ ***To schedule task lists***

1 Start the **Create Schedule Wizard**. To start the wizard, you can:

- Click the **New Schedule** button  on the bv-Control query-based product toolbar, or
- Click **Create Schedule**  on a taskpad, or
- Right-click the **Schedules** container and select **New Schedule**, or
- Select the **Schedules** container and double click **<Double click to add new schedule>**

The **Welcome to the Create Schedules Wizard** panel appears.

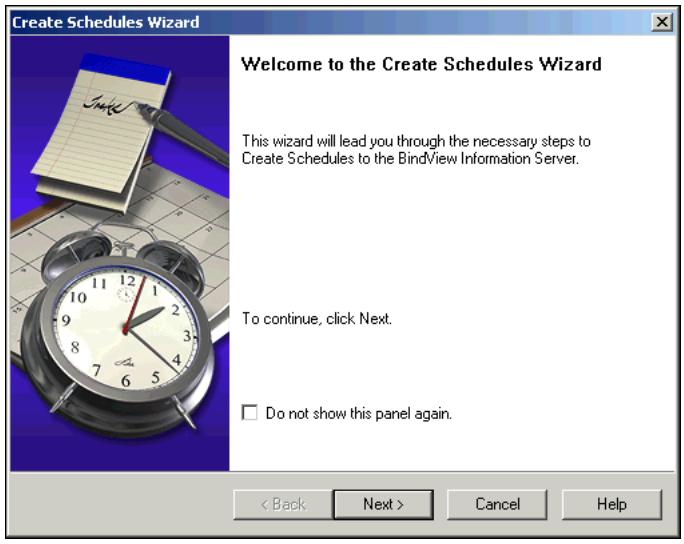


Fig. 97 Welcome to the Create Schedules Wizard Panel

2 Click **Next.** The **Choose a schedule type** panel appears.

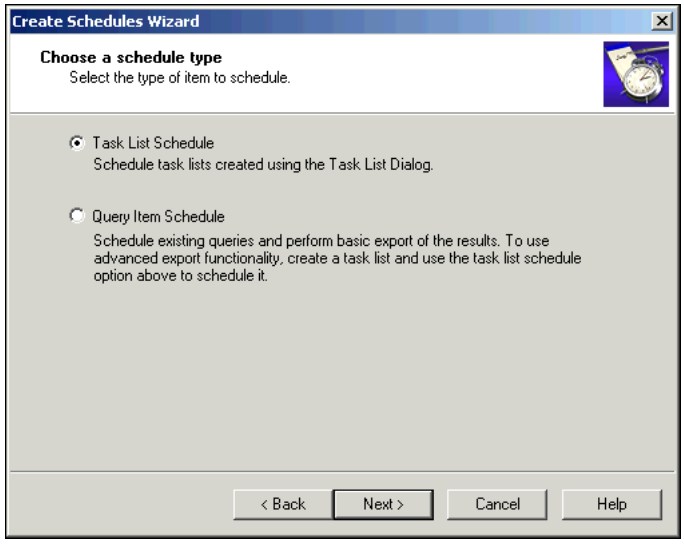


Fig. 98 Choose a Schedule Type Panel

3 Select **Task List Schedule** and click **Next**. The **Add Items** panel appears.

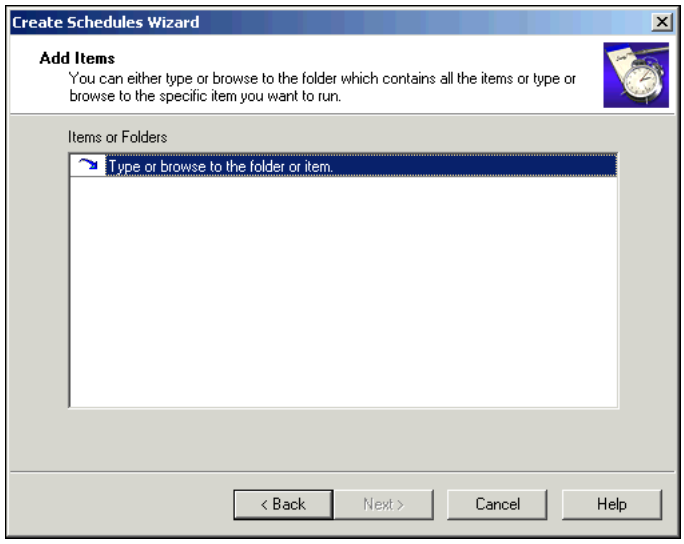


Fig. 99 Add Items Panel

4 Enter the full path and name of the Task List item to add to the schedule or click the browse (**...**) button that appears when you click the field to select the item. You can add any items you have access to. You can add one or more task lists, shortcuts to task lists, or folders.

If you add a folder, all the items in that folder will be added to the schedule. If there is a subfolder inside the folder, all items in the subfolder will be added. If there is a shortcut to another folder, all items in the linked folder will be added as well.

If you click the browse (**...**) button that appears when you click the field button, the **Select file** dialog appears.

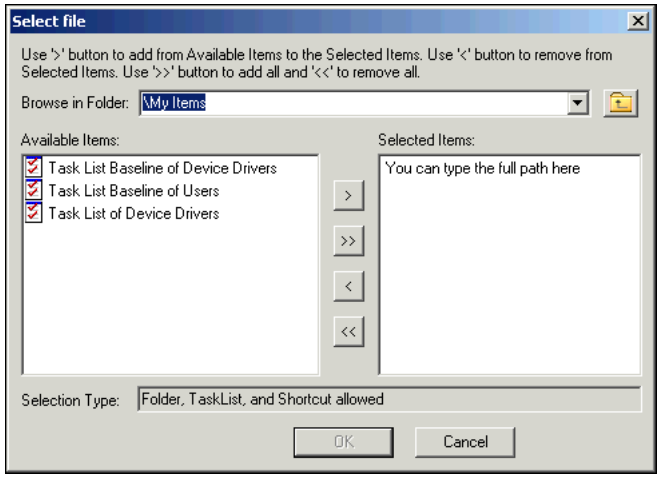


Fig. 100 Select File Dialog

5 Use the **Select File** dialog to locate the Task Lists to add to the schedule. The **Browse in Folder** drop-down list contains the

name of the current folder, the other folders in the current tree, and the **Pre-defined**, **Shared**, **My Items**, and **All User Items** folders. Use the **Up One Level** button to move up in the folder tree.

To add an item, select it in the **Available Items** list and click **>** or click in the **Selected Items** list and enter the full path of the item. To add all items in the **Available Items** list, click **>>**.

To remove an item, select it in the **Selected Items** list and click **<**. To remove all items in the **Selected Items** list, click **<<**.

When all the items you wish to add to the schedule are in the **Selected Items** list, click **OK** to close the **Select File** dialog.

6 Click **Next** in the **Add Items** panel. The **Name the Schedule** panel appears.

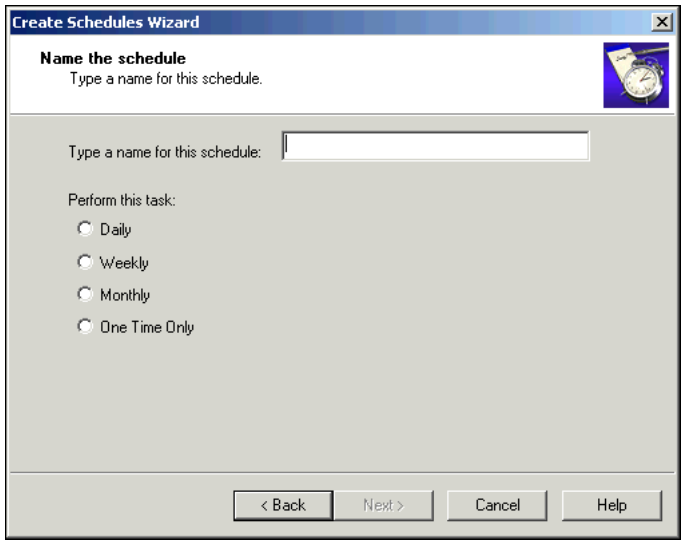


Fig. 101 Name the Schedule Panel

7 Enter a name for the schedule in the **Type a name for this schedule** field and select how often the schedule should be performed. Click **Next**. The **Specify Schedule** panel appears. The contents of the **Specify Schedule** panel vary depending on whether you chose to run the schedule **Daily**, **Weekly**,

Monthly, or **One Time Only** on the **Name the Schedule** panel.

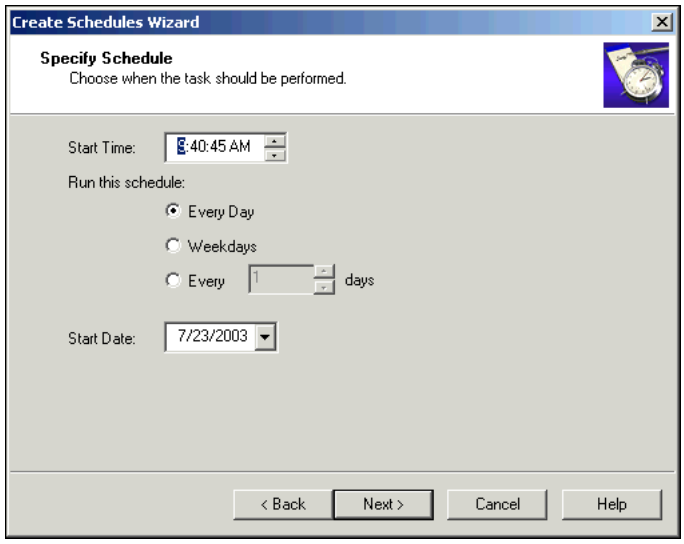


Fig. 102 Specify Schedule Panel - Daily Options

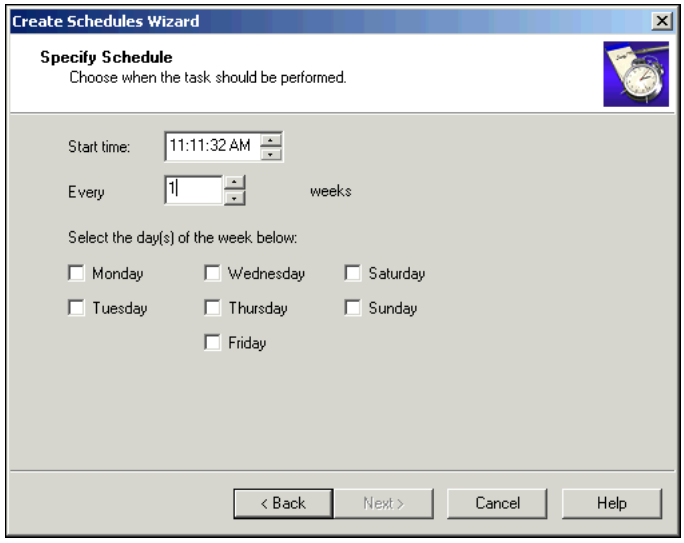


Fig. 103 Specify Schedule Panel - Weekly Options

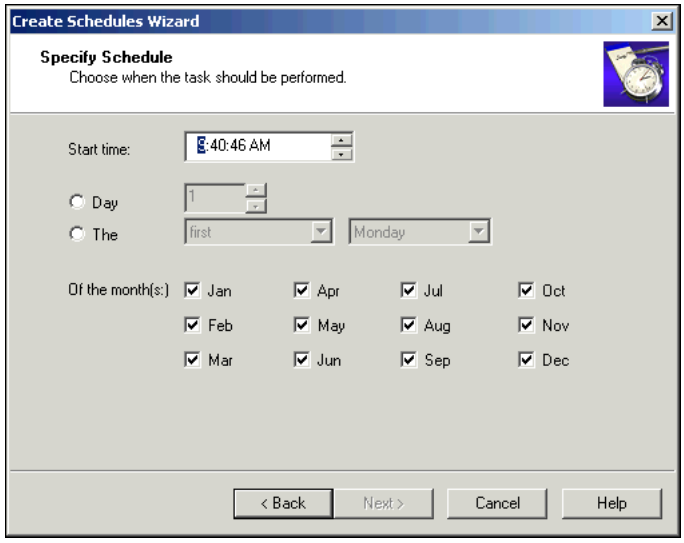


Fig. 104 Specify Schedule Panel - Monthly Options

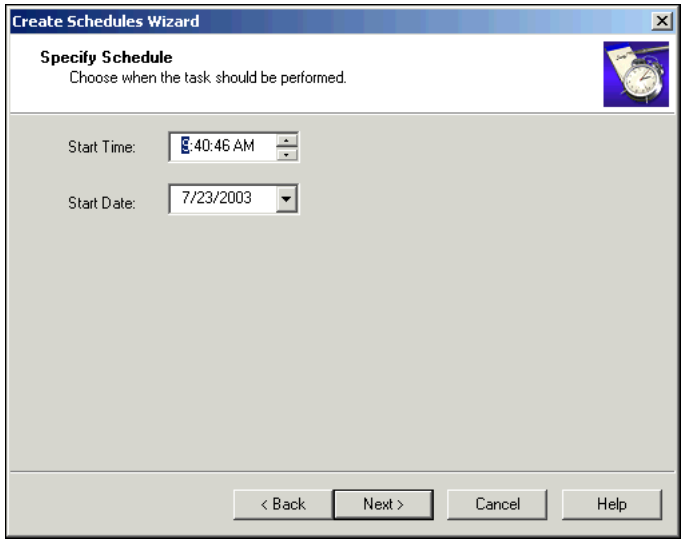


Fig. 105 Specify Schedule Panel - One Time Only Options

8 Set the time the schedule should start in the **Start Time** field, then set the other options for the schedule you chose.

The options allow you to control when the schedule runs and the interval between runs. For **Daily**, **Weekly**, or **Monthly** schedules, select the days or months when the schedule should run. For **Monthly** schedules, you can choose to run the schedule on a specific day, or on a day based on its relative position in the month.

9 Click **Next** to continue. The **Specify Account Information** panel appears.

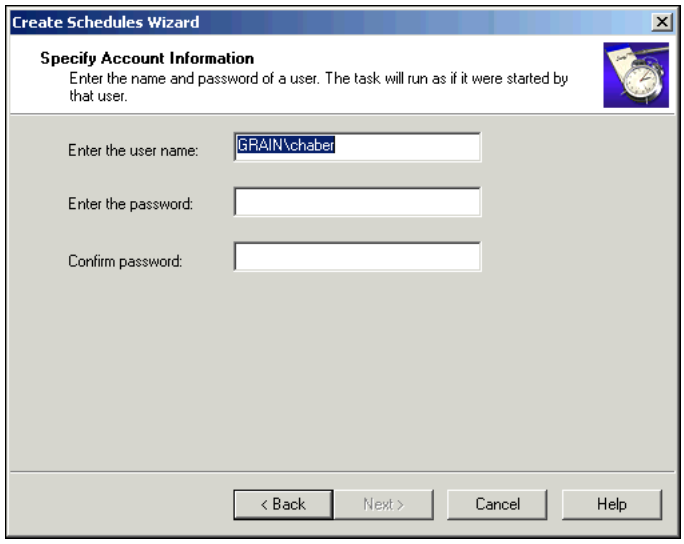


Fig. 106 Specify Account Information Panel

10 Enter the **User Name** and **Password** the BindView Information Server should use when processing the task lists in the schedule, and confirm the password.

The **Create Schedule Wizard** does not verify the password, other than to ensure that the entries in the password fields match.

Caution: If an individual uses another user's credentials in a schedule and that user makes changes to the password and you do not update the credentials in the schedule, the schedule will not be processed at the specified time.

---

11 Click **Next** to continue. The **Summary** panel appears.

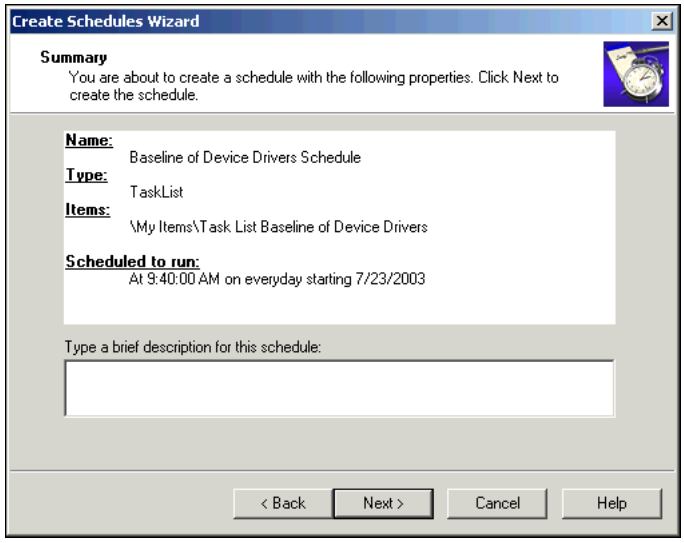


Fig. 107 Summary Panel

12 The **Summary** panel lists the settings made for the schedule. If you are satisfied with the settings, enter a description of the schedule in the **Type a brief description for this schedule** field and click **Next** to create the schedule. If you wish to change any of the settings, click **Back** to make changes. When you click **Next**, the schedule is created and the **You have successfully completed the Create Schedules Wizard** panel appears.

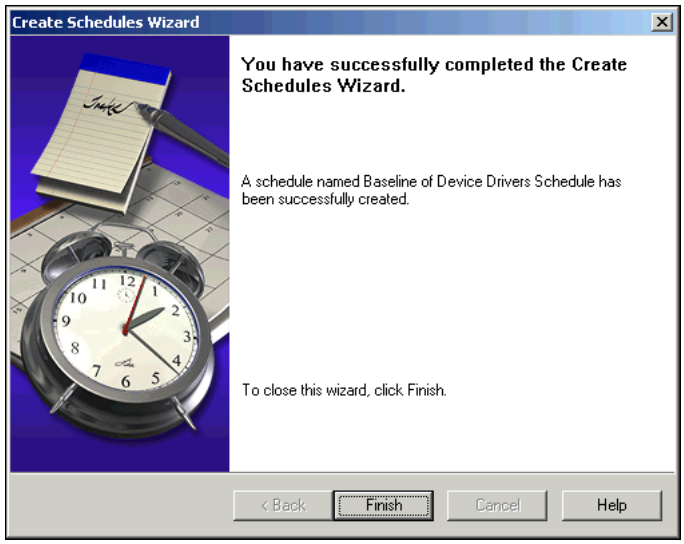


Fig. 108 Create Schedules Wizard Complete Panel

13 Click **Finish** to close the wizard. The new schedule item appears in the details pane of the **Schedules** container in the BindView RMS Console.

When a schedule runs, a log of the schedule's progress is saved on the BindView Information Server in the folder

`BindView\RMS\data\<User Name>\ScheduleLogs`
where
`<user Name>` is the name of the user whose credentials are used to run the schedule.

Scheduling Queries

The **Create Schedule Wizard** guides you through the process of creating a schedule. You can schedule any existing query for automatic processing. When a query is scheduled, the query is processed using the user name and password combination you supply, exactly as if that user ran the query. In addition, the results of scheduled queries can be exported automatically.

▶ ***To schedule queries***

1 Start the **Create Schedule Wizard**. To start the wizard, you can:

- Click the **New Schedule** button on the bv-Control query-based product toolbar

or

- Click **Create Schedule** on a taskpad

or

- Right-click the **Schedules** container and select **New Schedule**

or

- Select the **Schedules** container and double click **<Double click to add new schedule>**

The **Welcome to the Create Schedules Wizard** panel appears.

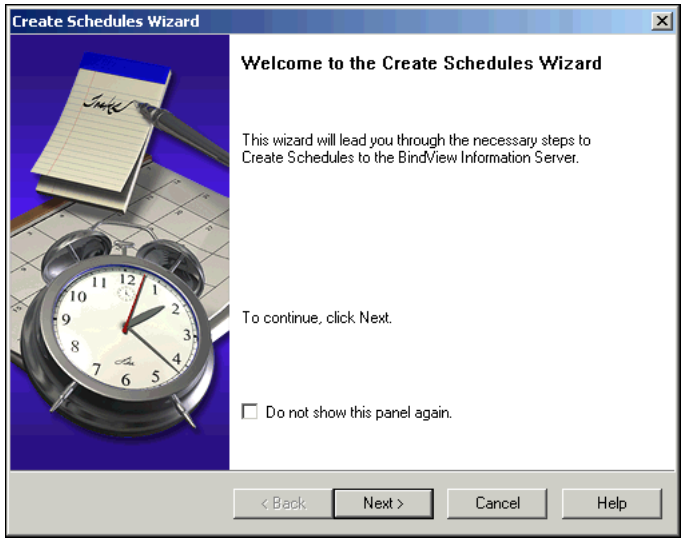


Fig. 109 Welcome to the Create Schedules Wizard Panel

2 Click **Next**. The **Choose a schedule type** panel appears.

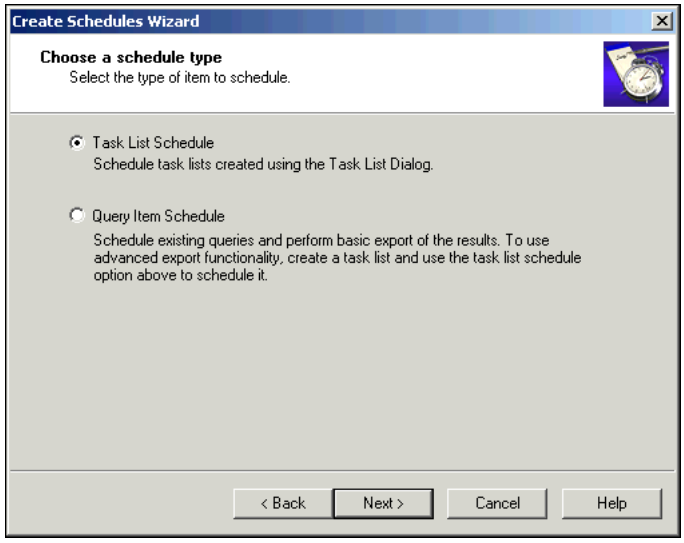


Fig. 110 Choose a Schedule Type Panel

3 Select **Query Item Schedule** and click **Next**. The **Add Items** panel appears.

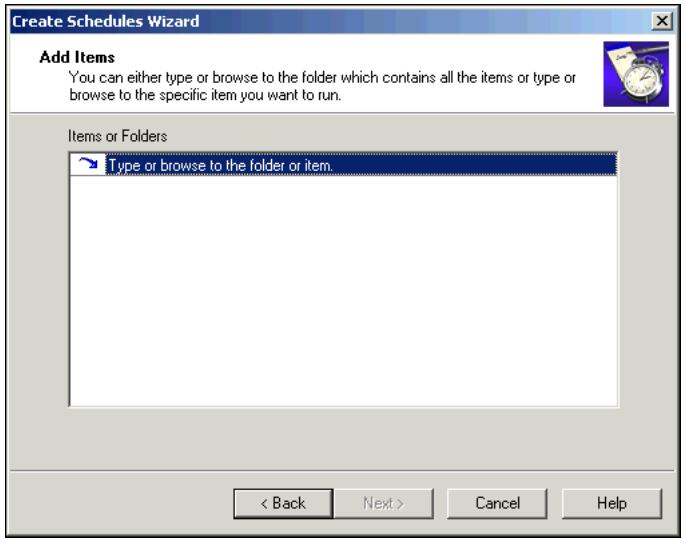


Fig. 111 Add Items Panel

4 Enter the full path and name of the Query Item to add to the schedule or click the browse (**...**) button that appears when you click the field to select the item. You can add any items you have access to. You can add one or more query items, shortcuts to query items, or folders.

If you add a folder, all the items in that folder will be added to the schedule. If there is a subfolder inside the folder, all items in the subfolder will be added. If there is a shortcut to another folder, all items in the linked folder will be added as well.

If you click the browse (**...**) button, the **Select file** dialog appears.

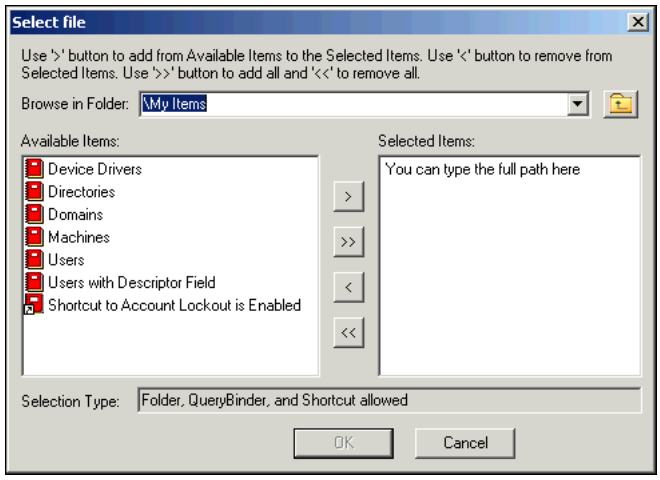


Fig. 112 Select File Dialog

5 Use the **Select File** dialog to locate the Query Items to add to the schedule. The **Browse in Folder** drop-down list contains the name of the current folder, the other folders in the current tree, and the **Pre-defined**, **Shared**, **My Items**, and **All User Items** folders. Use the **Up One Level** button to move up in the folder tree.

To add an item, select it in the **Available Items** list and click **>** or click in the **Selected Items** list and enter the full path of the item. To add all items in the **Available Items** list, click **>>**.

To remove an item, select it in the **Selected Items** list and click **<**. Click **<<** to remove all items.

When all the items you wish to add to the schedule are in the **Selected Items** list, click **OK** to close the **Select File** dialog.

6 Click **Next** in the **Add Items** panel. The **Name the schedule** panel appears.

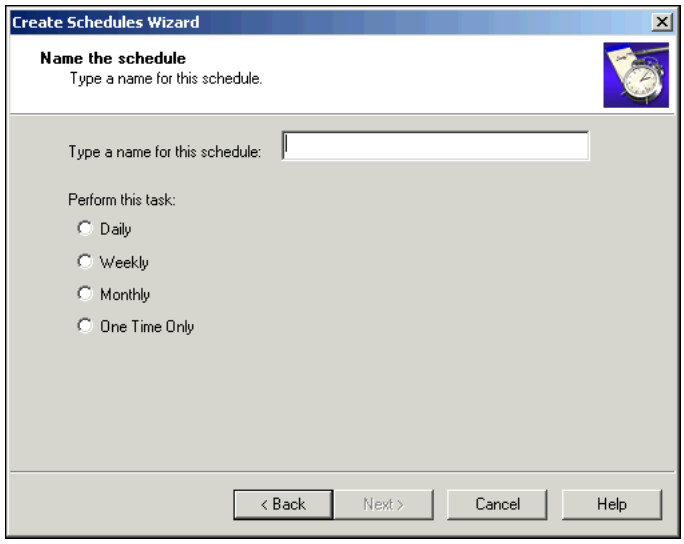


Fig. 113 Name the Schedule Panel

7 Enter a name for the schedule in the **Type a name for this schedule** field and select how often the schedule should be performed.

8 Click **Next**. The **Specify Schedule** panel appears. The contents of the **Specify Schedule** panel vary depending on whether you chose to run the schedule **Daily**, **Weekly**, **Monthly**, or **One Time Only** on the **Name the Schedule** panel.

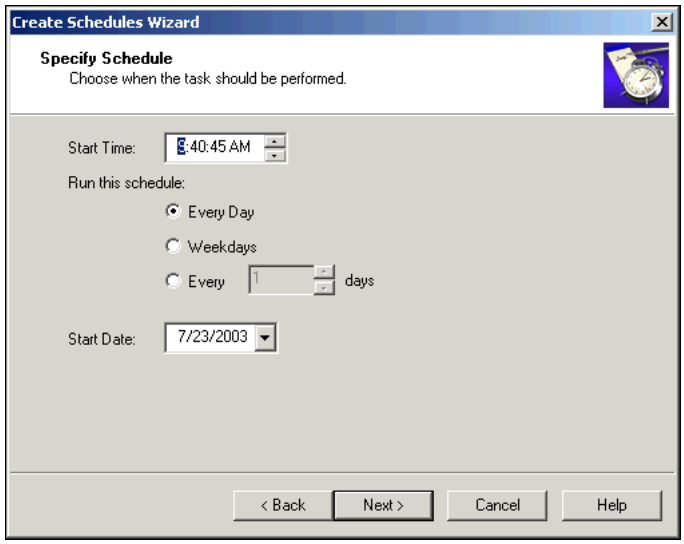


Fig. 114 Specify Schedule Panel - Daily Options

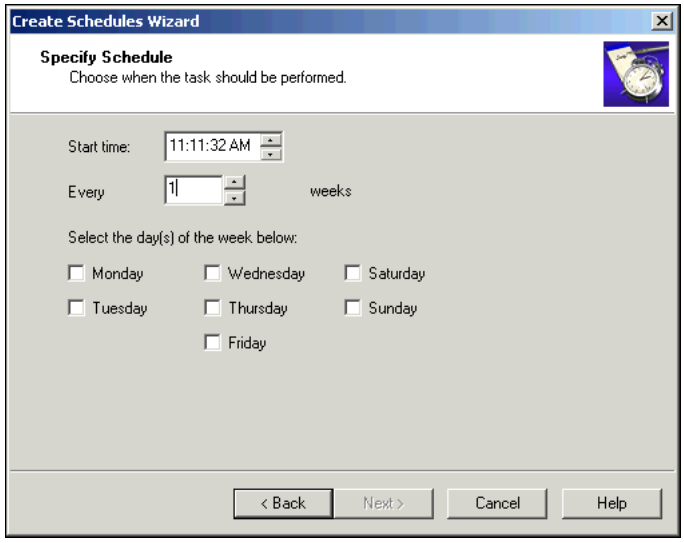


Fig. 115 Specify Schedule Panel - Weekly Options

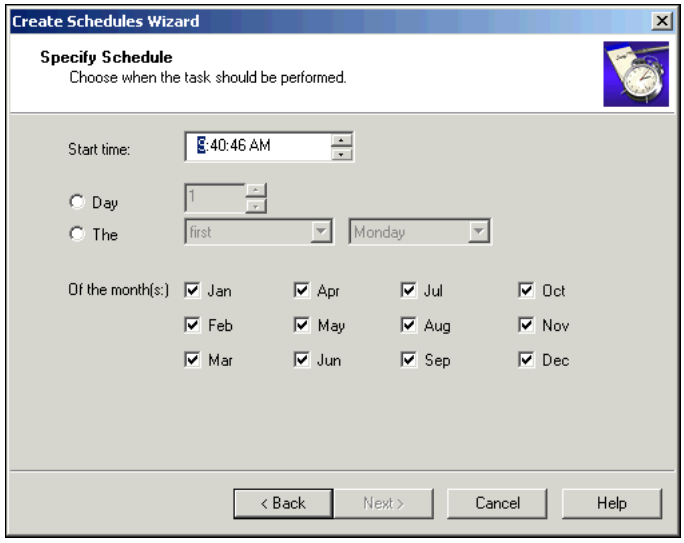


Fig. 116 Specify Schedule Panel - Monthly Options

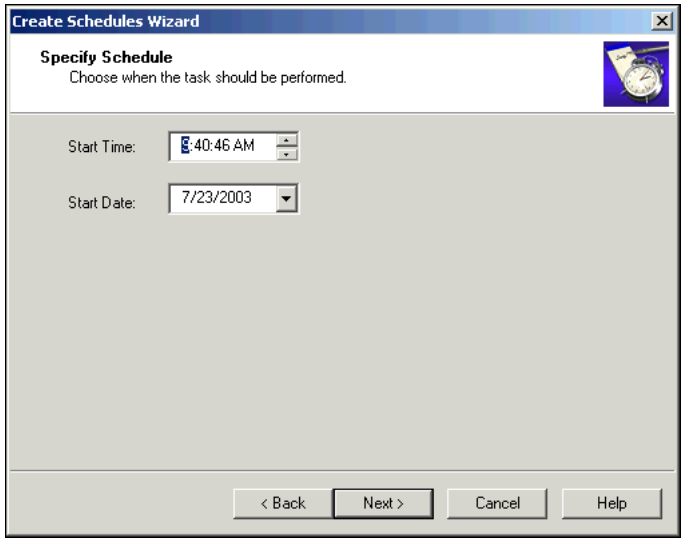


Fig. 117 Specify Schedule Panel - One Time Only Options

9 Set the time the schedule should start in the **Start Time** field, then set the other options for the schedule you chose.

The options allow you to control when the schedule runs and the interval between runs. For **Daily**, **Weekly**, or **Monthly** schedules, select the days or months when the schedule should run. For **Monthly** schedules, you can choose to run the schedule on a specific day, or on a day based on its relative position in the month.

10 Click **Next** to continue. The **Apply Scope** panel appears.

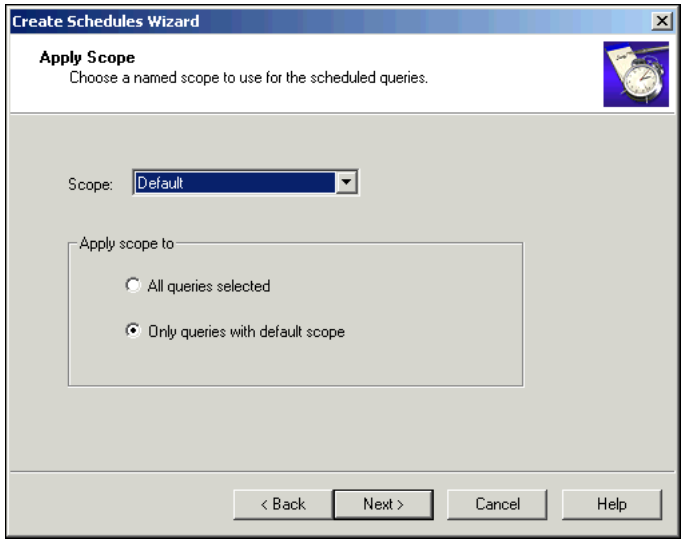


Fig. 118 Apply Scope Panel

11 Select the scope that should apply when the scheduled queries are processed. The default scope and any Named Scopes you

have created appear in the **Scope** drop-down list. Select which queries the scope you select should apply to.

The scope chosen only applies when the schedule is run. Selecting a scope here does not modify the original queries.

12 Click **Next** to continue. The **Export Options** panel appears.

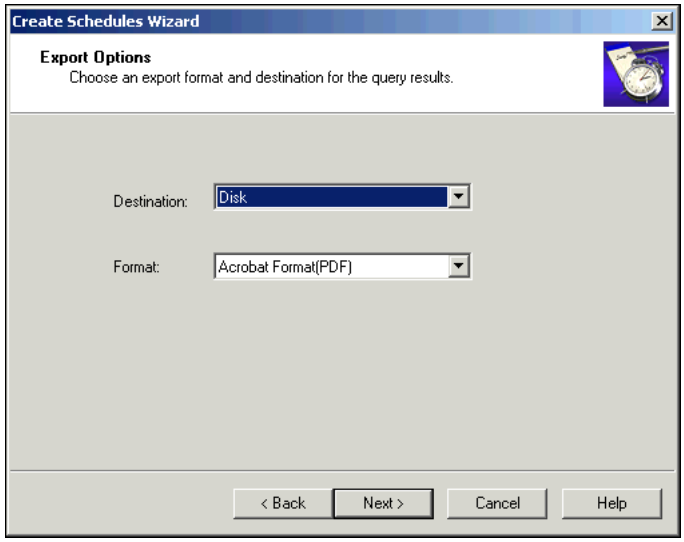


Fig. 119 Export Options Panel

13 Select the **Destination** for the export and the **Format** from the drop-down lists. You can choose to export to a disk file, a Microsoft Access or Microsoft SQL Server database, or to an Exchange, GroupWise, or Lotus Notes mailbox.

When you export to a database, the data is exported as a table. You can select the format of the exported data when you export to a disk file or to a mailbox. Select from the available options in the **Format** drop-down list.

14 Click **Next** to continue. One of the **Export Options** panels appears. The **Export Options** panel that appears depends on the destination you chose in the **Destination** drop-down list.

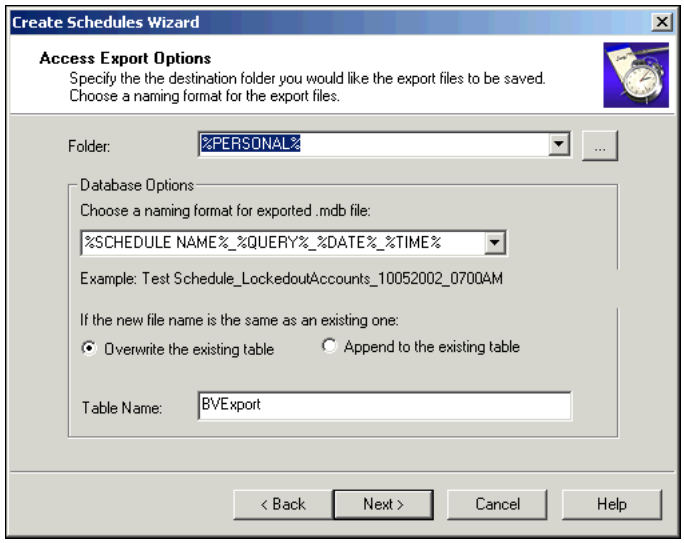


Fig. 120 Access Export Options Panel

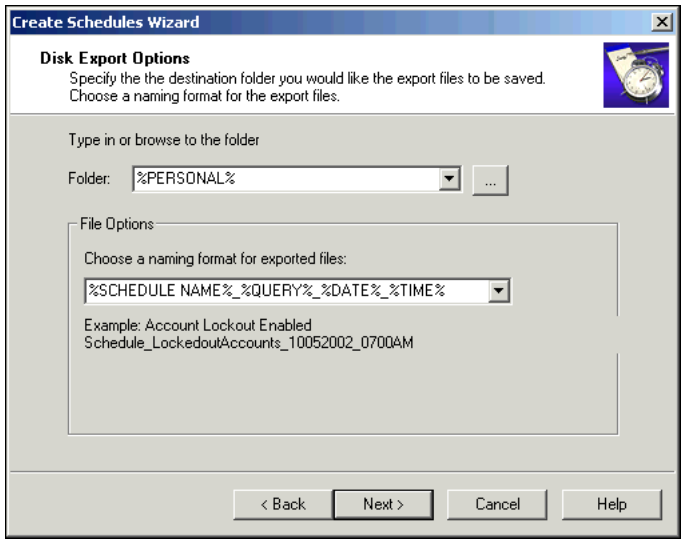


Fig. 121 Disk Export Options Panel

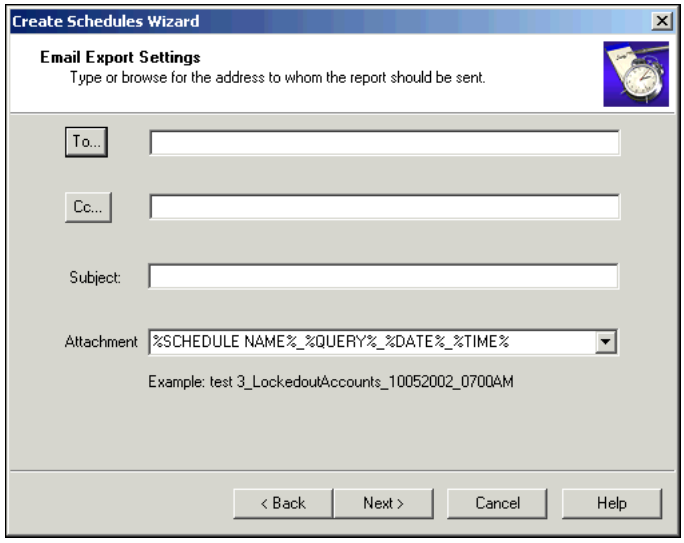


Fig. 122 Email Export Settings Panel

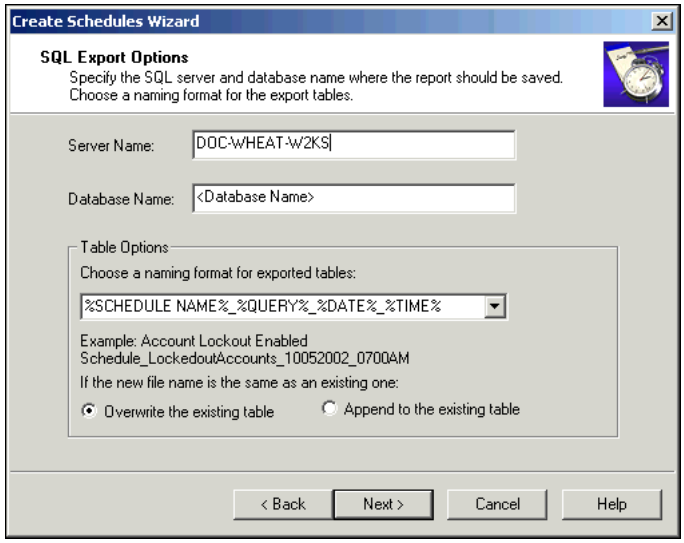


Fig. 123 SQL Export Options Panel

15 The **Email Export Options** Panels allow you to specify how the query information should be exported.

- For **Access** exports, you must specify the folder where the database should be exported. You must also select a naming format for the exported .mdb file and select whether to overwrite existing tables with the same name or to append them. Finally, you must specify a name for the table within the database.
- For **Disk File** exports, you must specify the location where the file should be exported and specify a naming format for the files. You can export to the **Exported Files** folder or (by specifying the complete UNC path to the folder) any folder the

user's credentials can access. For information on User Credentials, please see the Help for the **Export Settings** tab in the User Properties dialog.

- For **Email** exports, you must specify the recipients of the exported file, the subject of the email message, and select a naming format for the exported file.
- For **SQL** exports, you must specify the server name, the database name where the table should be exported. You must also select a naming format for the table and select whether to overwrite existing tables with the same name or to append to them. You can only export to databases the user's credentials can access. For information on User Credentials, please see the Help for the **Export Settings** tab in the User Properties dialog.

16 Click **Next**. The **Specify Account Information** panel appears.

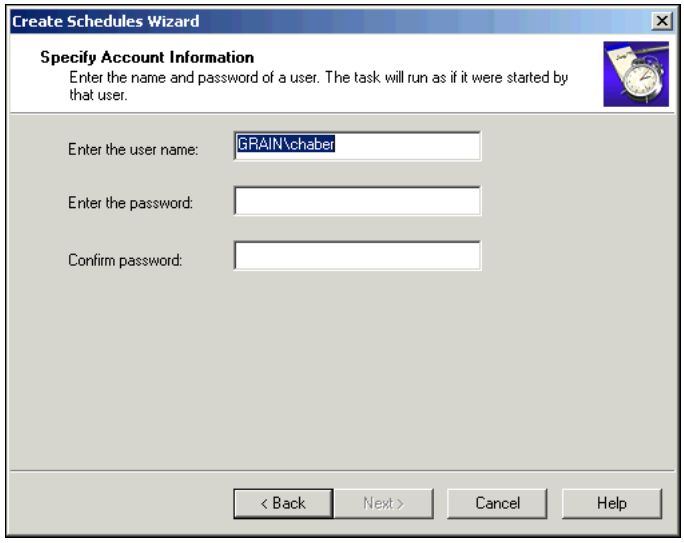


Fig. 124 Specify Account Information Panel

Enter the **User Name** and **Password** the BindView Information Server should use when processing the Query Items in the schedule, and confirm the password. The **Create Schedule Wizard** does not verify the password, other than to make sure that the entries in the password fields match.

Caution: If an individual uses another user's credentials in a schedule and that user makes changes to the password and you do not update the credentials in the schedule, the schedule will not be processed at the specified time.

17 Click **Next** to continue. The **Summary** panel appears.

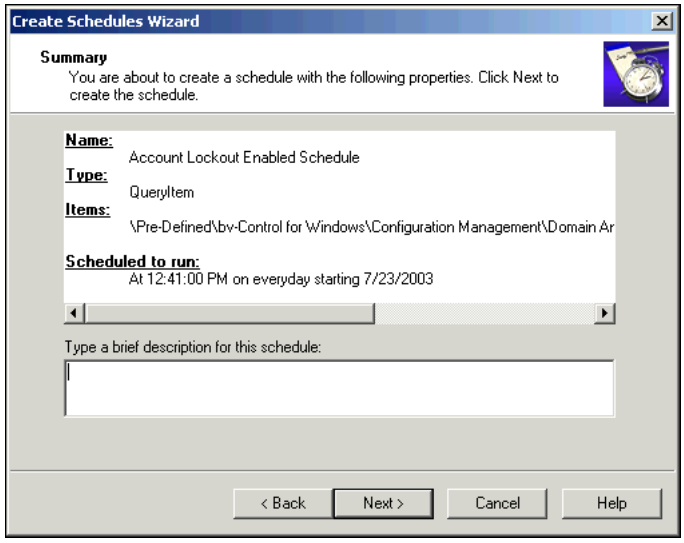


Fig. 125 Summary Panel

18 The **Summary** panel lists the settings made for the schedule. If you are satisfied with the settings, enter a description of the schedule in the **Type a brief description for this schedule** field and click **Next** to create the schedule. If you wish to change any of the settings, click **Back** to make changes. When you click **Next**, the schedule is created and the **You have successfully completed the Create Schedules Wizard** panel appears.

Fig. 126 Create Schedules Wizard Complete Panel

19 Click **Finish** to close the wizard. The new schedule item appears in the details pane of the Schedules container in the BindView RMS Console.

When a schedule runs, a log of the schedule's progress is saved on the BindView Information Server in the folder

BindView\RMS\data\<User Name>\ScheduleLogs
where
<User Name> is the name of the user whose credentials are used to run the schedule.

Running a Schedule Immediately

Normally, a schedule runs at the time or interval you defined when creating it. If you prefer, you can also start a schedule manually. Running a schedule is very helpful in testing the schedule's settings.

▶ ***To run a scheduled item manually***

1 Select the **Schedules** container in the BindView RMS Console tree. The existing schedules you have created appear in the details pane.

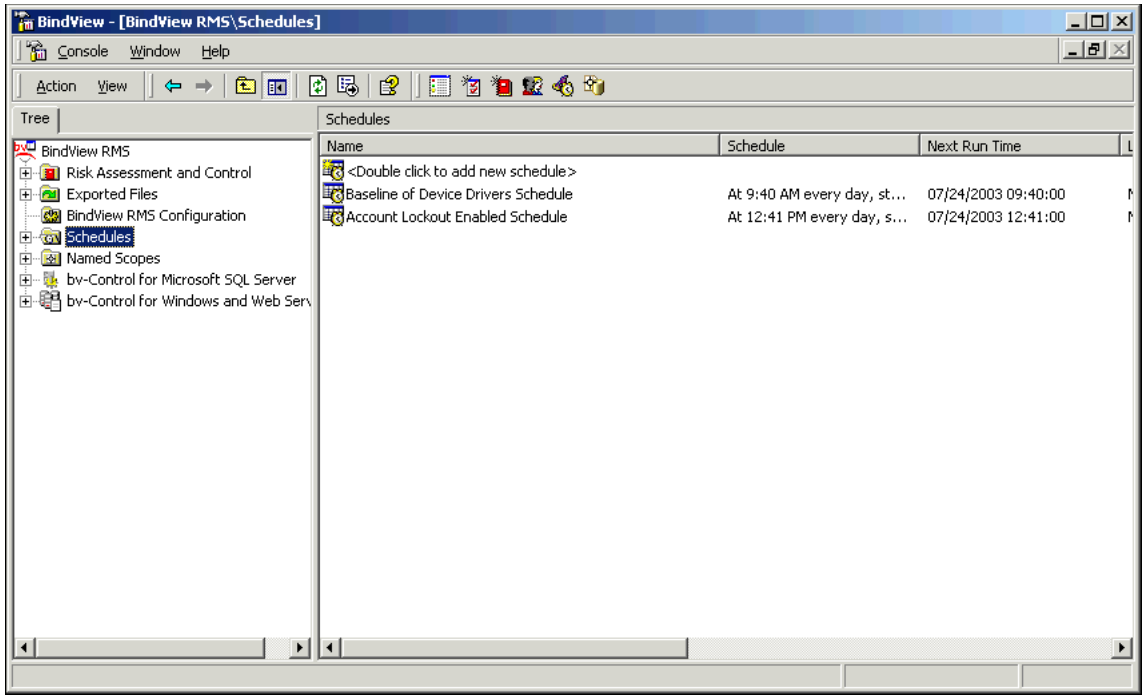


Fig. 127 Schedules Details Pane

2 Right-click any schedule and select **Run Schedule**. The schedule will run immediately.

When a schedule runs, a log of the schedule's progress is saved on the BindView Information Server in the folder
BindView\RMS\data\<User Name>\ScheduleLogs
where
<User Name> is the name of the user whose credentials are used to run the schedule.

Modifying Schedules

Once you have created a schedule, you can make changes to it as needed. You can change any aspect of a schedule except whether it schedules Task Lists or Query Items. You can also delete unneeded schedules.

▶ *To make changes to an existing schedule*

1. Select the **Schedules** container in the BindView RMS Console tree.

   The existing schedules you have created appear in the details pane of the BindView RMS Console window.

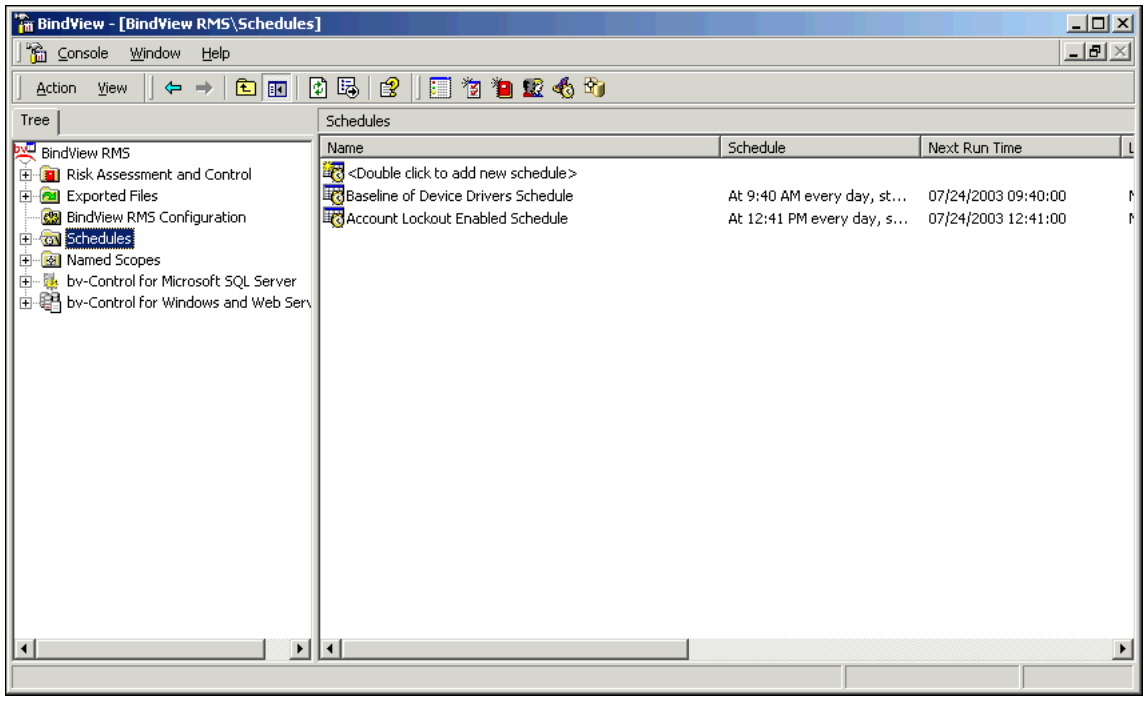


Fig. 128 Schedules Details Pane

2. Right-click any schedule and select **Modify Schedule** or double-click the schedule. The **Add Items** panel of the **Create Schedule Wizard** appears. Use the wizard to make any needed changes to the schedule. Close the wizard when you have made your changes.

▶ *To delete a schedule*

1. Select the **Schedules** container in the BindView RMS Console tree. The existing schedules you have created appear in the details pane (Fig. 128).
2. Right-click the schedule you wish to delete or select multiple schedules and right-click any selected schedule and select **Delete** or select a schedule and press the **Delete** key.
3. You will be asked to confirm that the schedule should be deleted.

Using Schedule Shortcut Menus

Manage schedules using the schedule shortcut menu.

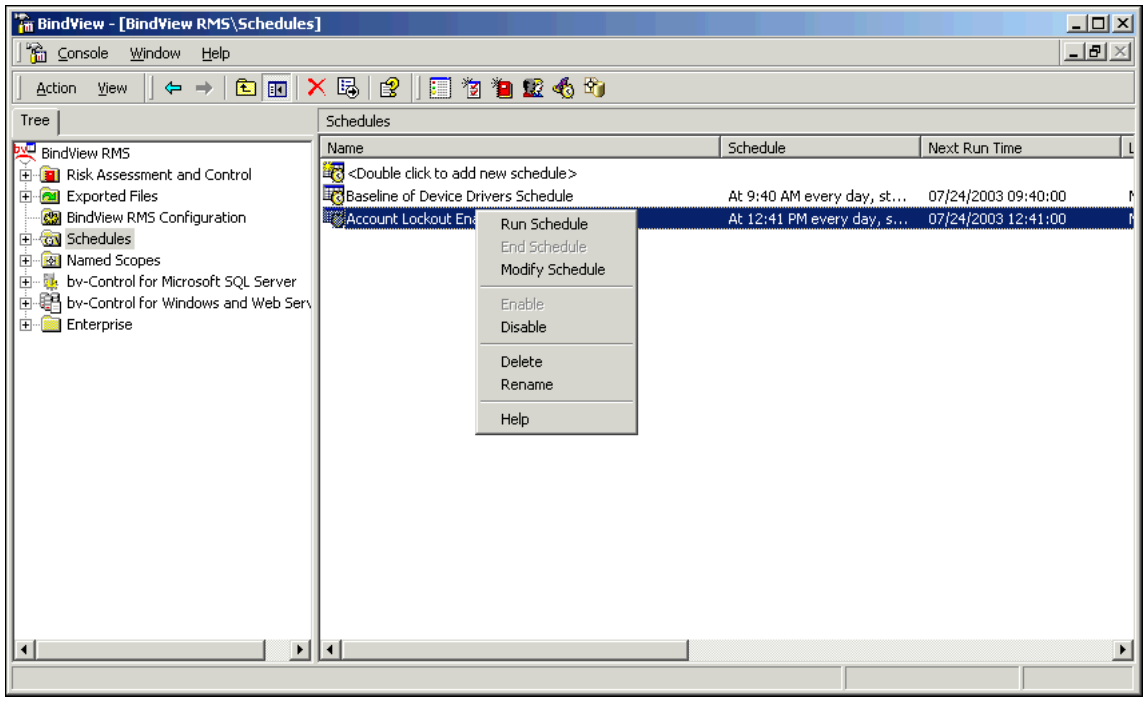


Fig. 129 Schedule Shortcut Menu

For information about the options available in the shortcut menu, choose **Help** from the shortcut menu.

9 Charting

In This Chapter

Understanding Charts

The chart feature allows you to create charts and save chart templates.

A *chart* is a customized graphic image of a dataset. Use the Chart Builder Wizard to create charts.

A *chart template* contains saved chart settings used for multiple datasets. You use the **Save Template Wizard** to save chart templates. Saved chart templates are stored in query binders.

All bv-Control query-based products use the chart feature.

Chart Styles

You can create charts in the following two styles:

- **Series** – displays the relative values of one or more fields for each record in a dataset
- **Histogram** – displays the value frequencies for the records associated with a single field in a dataset

Table 3 shows the six types of BindView fields and the chart styles they support.

Table 3 Chart Styles Supported by Field Type

	Field Type					
	Numerical	**String**	**Date**	**Time**	**Date / Time**	**Boolean**
Series	X					
Histogram	X	X	X	X	X	X

Chart Types

You can create series and histogram charts in the following two chart types: column and pie.

The **Chart Style** shortcut menu of a completed chart provides additional chart type options (see Fig. 133 on page 159).

Invoking the Chart Builder Wizard

You use the **Chart Builder Wizard** to create series and histogram charts. You open the **Chart Builder Wizard** from the following locations:

- Chart options in the Query Options dialog
- Chart-related Post Process Commands dialogs
- Grid toolbar and View menu
- Chart toolbar and View menu
- Query Binder shortcut menu

If you open the **Chart Builder Wizard** from a query binder that contains saved chart templates, the **Chart Template** panel appears first (see “Applying Chart Templates” on page 165). If you want to define new chart settings rather than use a template, click **Next** on the **Chart Template** panel.

Creating a Series Chart

A *series chart* displays the relative values for each record of the selected numerical fields in the dataset. You should only use the series chart type if the dataset you are charting contains a limited number of fields and records.

▶ *To create a series chart*

1 Open the **Chart Type** panel of the **Chart Builder Wizard**, and select the desired chart type and version (Fig. 130). The available chart types vary depending on the data in the chart.

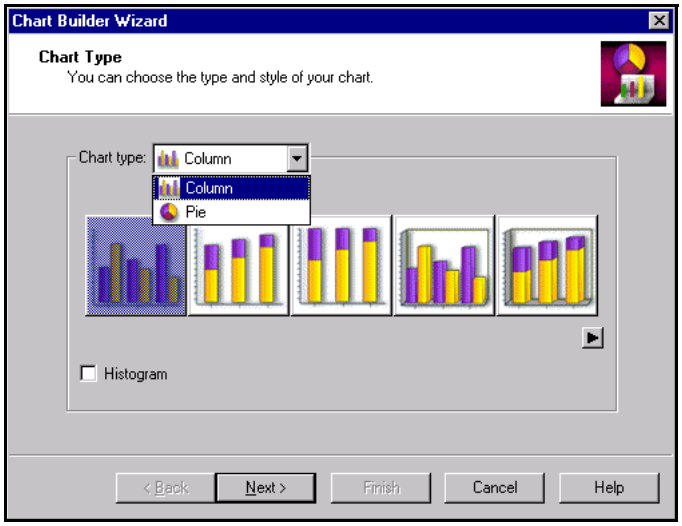


Fig. 130 Selecting Chart Type Settings

2 Make sure that **Histogram** is cleared and click **Next**.

The **Chart Data Source** panel appears.

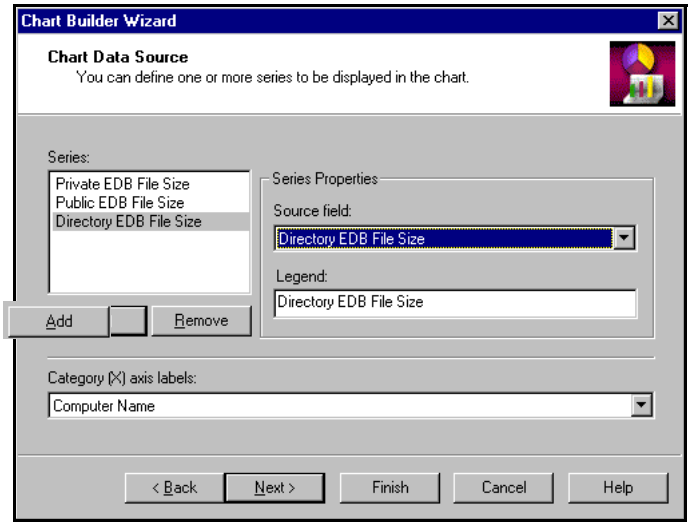


Fig. 131 Chart Data Source Panel

3 Designate a field for each **Series** position by selecting the series position and then selecting the desired field from the **Source field** list.

The **Source field** list contains all numerical fields included in the query definition.

Use the **Add** button to create the desired number of **Series** positions. You must designate a field for each series position in the **Series** list. Click **Remove** to remove a series position.

4 Review or change the **Legend** labels for each series.

5 Select the desired label from the **Category (X) axis labels** list and click **Next**.

The list contains all string fields included in the query definition.

The **Chart Titles** panel appears.

6 Enter the desired titles for the chart and click **Next**. The **Chart Legends** panel appears (Fig. 132).

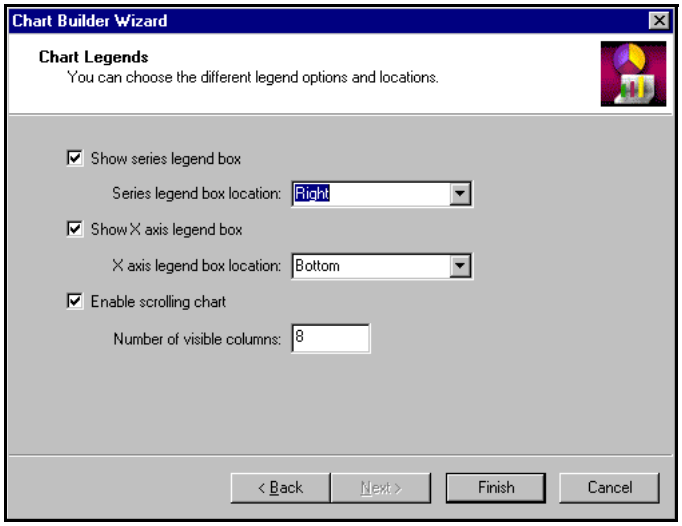


Fig. 132 Chart Legends Panel

7 Select the desired legend check boxes and select the desired position. If you do not select legends now, you can use the chart legend shortcut menu of the completed chart to add them.

8 Add a scroll bar, if desired, and enter the number of series displayed on the chart at one time. A scroll bar is automatically added to charts that have 20 or more series positions.

9 Click **Finish**.

A series chart appears, similar to the one shown in Fig. 133.

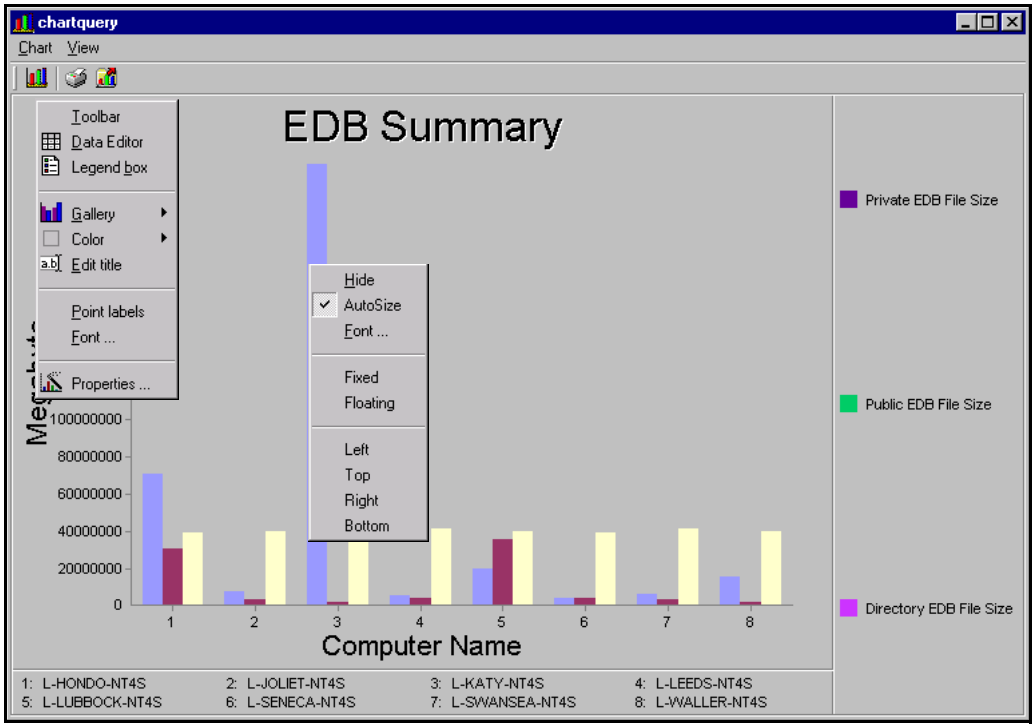


Fig. 133 Sample Column Series Chart

You use the **Chart Style** and **Chart Legend** shortcut menus to modify the appearance of the completed chart.

Creating a Histogram

A *histogram* displays value frequencies for records of the source field you select. Like values are displayed in intervals on a histogram chart. The Information Server can automatically define intervals for a histogram chart, or you can manually define complex intervals.

Histogram charts only display data gathered for one field.

Automatic Interval Definitions

If you do not define intervals for a histogram chart, the Information Server automatically creates intervals for each unique value gathered for a field.

You should only use the automatic interval creation option if the field you are charting has a limited set of unique values.

▶ ***To create a histogram chart with automatic intervals***

1. Open the **Chart Type** panel of the **Chart Builder Wizard** (Fig. 130 on page 157) and select the desired chart type and version.
2. Select **Histogram** and click **Next**.

The **Histogram** check box appears selected and dimmed if there are no numerical fields in the dataset you are charting.

The **Histogram Data Source** panel appears.

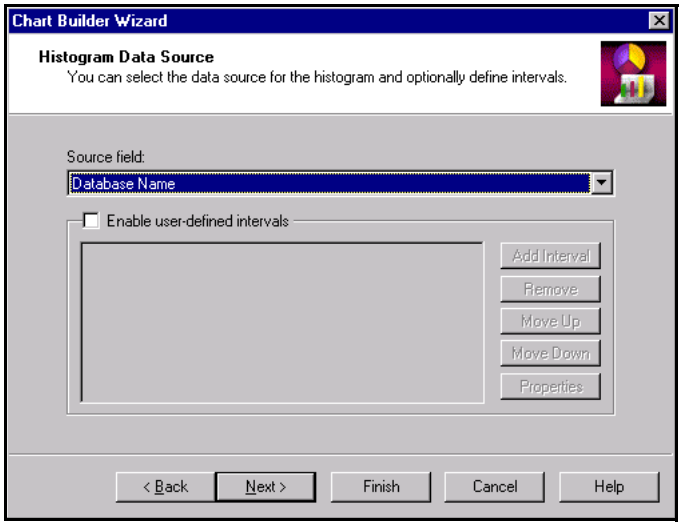


Fig. 134 Histogram Data Source Panel

3 Select the desired field from the **Source field** list.

You can only display the data gathered for one field on a histogram chart.

4 Make sure that **Enable user-defined intervals** is clear and click **Next**.

The **Chart Titles** panel appears.

5 Enter the desired titles for the chart and click **Next**.

The **Chart Legends** panel appears (Fig. 132 on page 158).

6 Select the desired legend check boxes and select the desired position. If you do not select legends now, you can use the chart legend shortcut menu of the completed chart to add them later.

7 Add a scroll bar, if desired, and enter the number of intervals displayed on the chart at one time. A scroll bar is automatically added to charts that have 20 or more intervals.

8 Click **Finish**. The histogram chart appears.

User-Defined Intervals

You can define intervals for a histogram chart to categorize the values collected for the selected source field.

You can display any BindView field type on a histogram chart with user-defined intervals. Each field type has a corresponding histogram interval wizard. You access these wizards from the **Chart Builder Wizard**.

▶ *To define a histogram chart with user-defined intervals*

1. Open the **Chart Type** panel of the **Chart Builder Wizard** (Fig. 130 on page 157) and select the desired chart type and version.

2. Select **Histogram** and click **Next**.

   The **Histogram** check box appears selected and dimmed if there are no numerical fields in the dataset you are charting.

   The **Histogram Data Source** panel appears (Fig. 135).

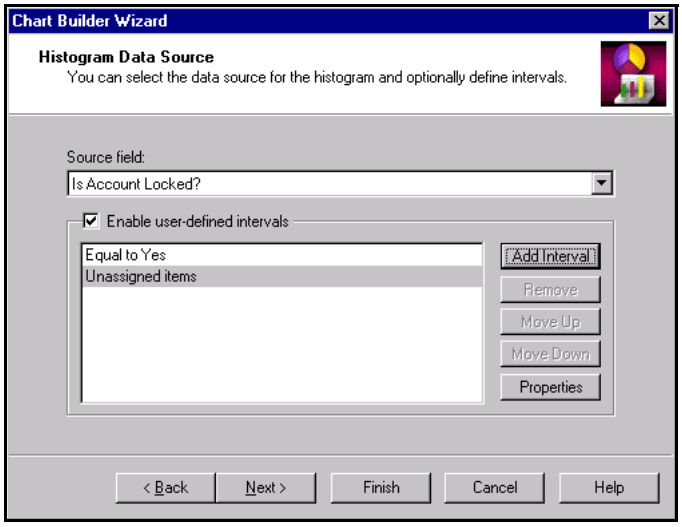


Fig. 135 Histogram Data Source Panel

3. Select the desired field from the **Source field** list (Fig. 135). The **Source Field** lists all fields included in the dataset.

   You can only display the data gathered for one field on a histogram chart.

4. Select **Enable user-defined intervals**.

   The interval buttons become active and the default interval appears.

   All field values that are not assigned to a user-defined interval are assigned to the default interval.

5. Click **Add Interval**.

   The **Histogram Interval Wizard** for the selected source field appears. You use the wizard to define the intervals for the chart.

   Each BindView field type has a **Histogram Interval Wizard** associated with it.

6. Select the desired options on the interval definition panels of the **Histogram Interval Wizard** (see "Defining Intervals" on page 163) and click **Next**.

The **Interval Standard Properties** panel appears.

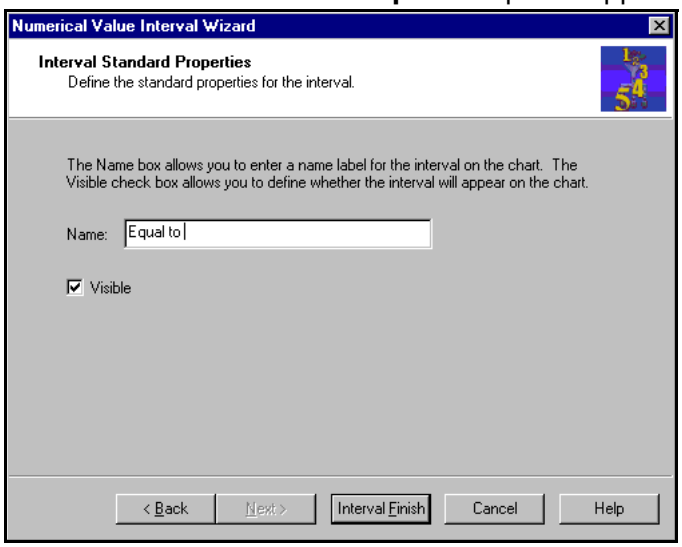


Fig. 136 Interval Standard Properties Panel

7 Enter the desired label for the interval in the **Name** box.

8 Select **Visible**, if desired and click **Interval Finish**.

The **Histogram Wizard** closes and the **Histogram Data Source** panel of the **Chart Builder Wizard** reappears. The interval you defined appears in the interval list, as shown in Fig. 135 on page 161.

9 Add other intervals and use the interval wizard to define them, if desired (see "Defining Intervals" on page 163).

10 Click **Next** on the **Histogram Data Source** panel.

If you did not define relative date, date/time, or time value intervals, the **Chart Titles** panel appears. Proceed to Step 13.

If you defined relative date, date/time, or time value intervals, the **Histogram setup** panel appears (Fig. 137).

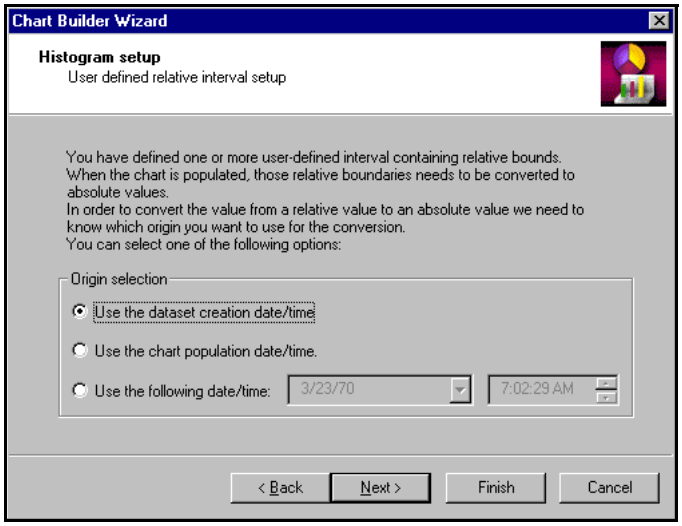


Fig. 137 Histogram Setup Panel

11 Select the desired origin for converting the relative date, date/time, or time value.

If you select **Use the dataset creation date/time**, the time when the Information Server created the dataset will be used.

If you select **Use the chart population date/time**, the time when the Information Server created the chart will be used.

12 Click **Next**. The **Chart Titles** panel appears.

13 Enter the desired titles for the chart and click **Next**. The **Chart Legends** panel appears (Fig. 132 on page 158).

14 Select the desired legend check boxes and select the desired position. If you do not select legends now, you can use the **Chart Legend** shortcut menu of the completed chart to add them later.

15 Add a scroll bar, if desired, and enter the number of intervals displayed on the chart at one time.

A scroll bar is automatically added to charts that have 20 or more intervals.

16 Click **Finish**. The histogram appears.

Defining Intervals

Each BindView field type has an **Interval Wizard** associated with it. When you add an interval for the source field you selected on the **Histogram Data Source** panel (Fig. 135 on page 161), the associated interval wizard automatically appears.

You use the **Interval Wizard** to define the specific values the interval will contain. You can only define one interval at a time using the **Interval Wizard**.

For information on using the Interval Wizards, please see the online help within the wizards.

Using Chart Templates

A *chart template* is a group of chart settings saved in a query binder. If you have a query that you run frequently and create charts of the resulting dataset, you should save the chart settings in a template so that you can quickly apply them. A query binder can have multiple chart templates saved in it. Query binders cannot share chart templates.

Saving Chart Templates

You use the Save Template Wizard to save chart templates. You access the wizard from the following locations:

- Chart Builder Wizard
- Save Style command on the Chart menu of a displayed chart
- Chart Settings button in the Query Options dialog
- Settings>Chart command on the Query Binder shortcut menu

▶ *To save a chart template*

1 Invoke the **Save Template Wizard** (Fig. 138).

Fig. 138 Save Template Wizard

2 Click **Next** on the **Welcome** panel.

The **Chart Template Name** panel appears.

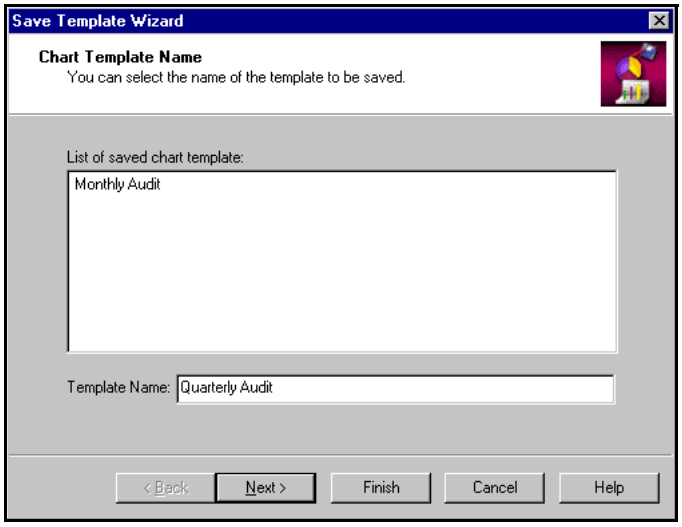


Fig. 139 Chart Template Name Panel

3 Enter a name for the chart template in the **Template Name** box and click **Next**.

The **Chart Template Comment** panel appears.

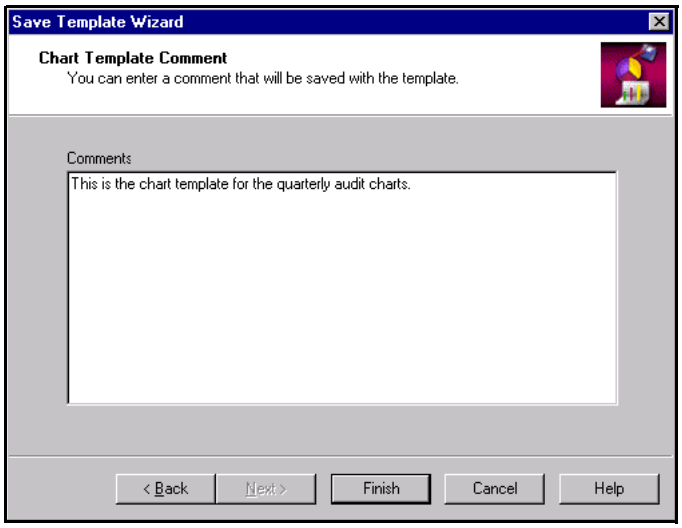


Fig. 140 Chart Template Comment Panel

4 Enter a description of the chart template in the **Comments** box and click **Finish**.

The chart template is saved in the query binder.

Applying Chart Templates

You can apply a saved chart template to any dataset created from the query binder that contains the chart template. You apply a chart template from the **Chart Template** panel of the **Chart Builder Wizard**.

▶ ***To apply a chart template***

1 Open the **Chart Builder Wizard** and click **Next** on the **Welcome** panel.

The **Chart Template** panel appears (Fig. 141).

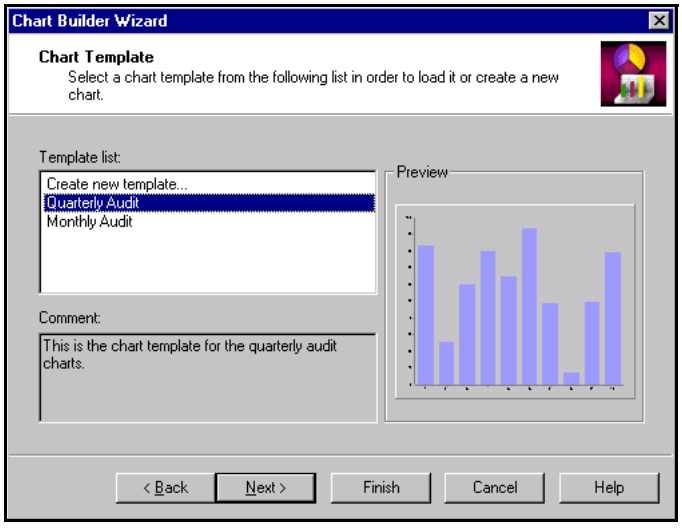


Fig. 141 Chart Template Panel

2 Select the desired chart template from the **Template list** (Fig. 141).

To review the settings of the selected chart template, click **Next**. The **Settings** panel appears, allowing you to review the chart settings.

3 Click **Finish**.

A chart of the dataset appears according to the chart settings saved in the chart template.

Managing Chart Templates

You use the **Manage Chart Template** dialog to manage the chart templates saved in a query binder. You access the **Manage Chart Template** dialog from the **Manage>Chart Templates** command on the **Query Binder** shortcut menu.

For detailed information on using the **Manage Chart Template** dialog, refer to "Managing Chart Templates" on page 88.

Printing and Exporting Existing Charts

Although you cannot save existing charts, you can print or export a chart image.

To print an existing chart on the Windows default printer, use :

- Print button  on the chart toolbar
- Print command on the Chart menu

Use the **Export Chart** button  on the chart toolbar and the **Chart** menu **Export** command to export the graphic image of a chart (see "Exporting a Chart" on page 189).

10 Reporting

In This Chapter

Understanding Reports

You use the report feature to create reports and report style settings. A *report* is a formatted version of a dataset that you can print. A *report style setting* is a group of saved report settings that you can apply to multiple datasets.

All bv-Control query-based products support the report feature.

Creating a Report

You can create reports of the following items:

- Datasets
- Historical datasets
- Delta datasets
- Session logs

Dataset Report

You create a report of a dataset from the following locations:

- Query Options dialog
- Query Binder shortcut menu
- Grid
- Query Post Process Commands dialog

You can use the **Query Options** dialog to run the query defined on the **Query Builder** dialog and view the dataset as a report. For detailed information on these query-related items, refer to Chapter 4, “Querying,” on page 65.

You use the **Query Binder** shortcut menu to create a report of a dataset gathered for the query binder. For detailed information on using the report commands on the **Query Binder** shortcut menu, refer to “Running Queries” on page 75 and “Viewing Historical Datasets” on page 84.

You use the grid toolbar and **Grid** menu commands to create a report of the dataset displayed on the grid. For detailed information on the grid toolbar and **Grid** menu, refer to “Grids” on page 79.

You use the **Query Post Process Commands** dialog to create a report of a dataset gathered for a task list. For detailed information on using the **Query Post Process Commands** dialog, refer to “Adding Post Process Commands for a Query Task” on page 111.

Historical Dataset Report

You create a report of a historical dataset using the **Manage Historical Data** dialog. Reports created from these items are configured according to the default report style settings hierarchy.

For information on using the **Manage Historical Data** dialog, refer to “Managing Data” on page 86.

Delta Dataset Report

You cannot save delta datasets, but you can create and print a report of your delta datasets. Use the baseline grid toolbar and menu commands to create a report of a delta dataset. For

information on using the baseline grid toolbar and menu commands, refer to “Creating a Delta Dataset Report” on page 105.

Session Log Report

You use the session log grid toolbar and menu commands to create a report of the session log. For more information on session logs, refer to “Using Session Logs” on page 98.

Defining Report Settings

Use the tabs of the **Global Report Style Settings**, **User Report Style Settings**, and **Report Settings** dialogs to define report settings. Report settings determine the appearance of a report.

All report settings dialogs contain identical tabs. However, field-related tabs appear dimmed on the **Global Report Style Settings** and **User Report Style Settings** dialogs because there is no underlying dataset associated with the dialogs.

Page Settings

Use the **Page Settings** tab of a **Report Settings** dialog to define *page style settings* and *printer settings*.

Page Style Settings

Page style settings define the basic layout of a report.

▶ ***To define page style settings***

1. Click the **Page Settings** tab (Fig. 142).
2. Select the desired **Style** option.

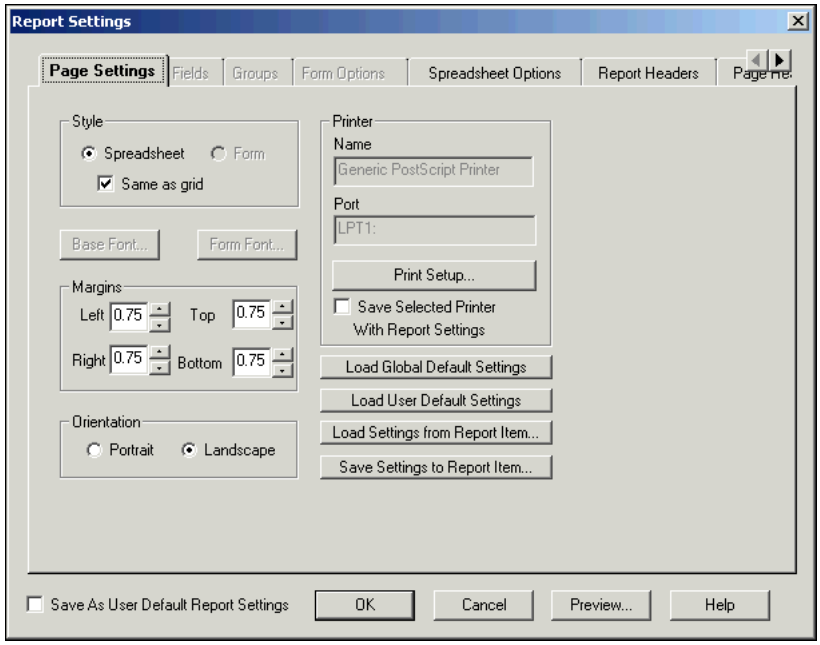


Fig. 142 Page Settings Tab of Report Settings Dialog

The selected style dictates how records are displayed on the report.

If you want your report to look like the grid the report is currently displayed in, select **Same as grid**. Field-related functionality on the **Report Settings** dialog will be dimmed.

Use the **Spreadsheet** option to group records on the report. The **Spreadsheet** option lists data vertically.

Use the **Form** option if the dataset contains form or list fields.The **Form** option lists field data horizontally.

When you select the desired style, the corresponding tab becomes active on the **Report Settings** dialog.

3 Select the desired base and form fonts (Fig. 142).

Use the **Base Font** button to select a default font for the report. Use the **Form Font** button to select a fixed pitch font for form field values. These buttons are dimmed when you select **Same as grid**.

4 Select the desired margins.

5 Select the desired orientation.

Printer Settings

The default printer for reports is the Windows default printer. If you do not want to use the Windows default printer, use the **Printer Setup** button to select another printer (Fig. 142).

If you are creating user, query binder, or settings file report style settings, use the **Save Selected Printer With Report Settings** option to save the selected printer as the default for the settings.

Fields Settings

Use the **Fields** tab in the **Report Settings** dialog to define how fields appear in the report.

The **Fields** tab is dimmed if **Same as grid** is selected on the **Page Settings** tab. The report uses the field settings defined for the grid.

Field settings do not affect the underlying dataset. For detailed information on changing and saving field settings for a dataset, refer to Chapter 4, “Querying,” on page 65.

You can only save field settings in query binder default report style settings.

▶ *To define fields settings*

1. Click the **Fields** tab (Fig. 143).
2. Drag fields to the desired position in the **Print Order** column.

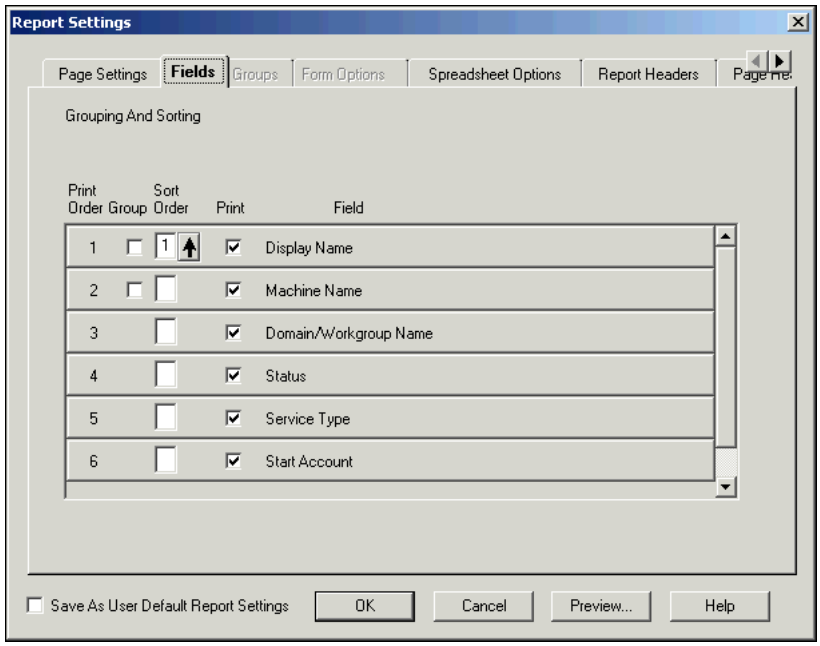


Fig. 143 Fields Tab of Report Settings Dialog

The default print order for fields is that of the query definition.

3. Group the records of the first and second fields in the print order, if desired.

   The **Group** option is only available for the first two fields in the print order. You must group the records of the first print order field in order to group the records of the second print order field.

4. Define the sort order for the records by typing the desired number in the field **Sort Order** boxes.

   The sort order indicates which fields take precedence in the sort. The sort order can be different from the print order. A grouped field automatically takes precedence in the sort order.

5. Use the **Sort Order** buttons to select the desired sort direction for the sort field values. The sort order you define on the **Fields** tab is used instead of the dataset sort order.
6. Select **Print** for each field that should appear in the report.

Groups Settings

Use the **Groups** tab in the **Report Settings** dialog to define the appearance of grouped records on the report. The **Group** feature groups records that contain like field values collected for the group field. The **Groups** tab contains secondary tabs for each group field selected on the **Fields** tab.

The **Groups** tab is only active when a **Group** option is selected on the **Fields** tab.

▶ *To define group settings*

1 Click the **Groups** tab (Fig. 144).

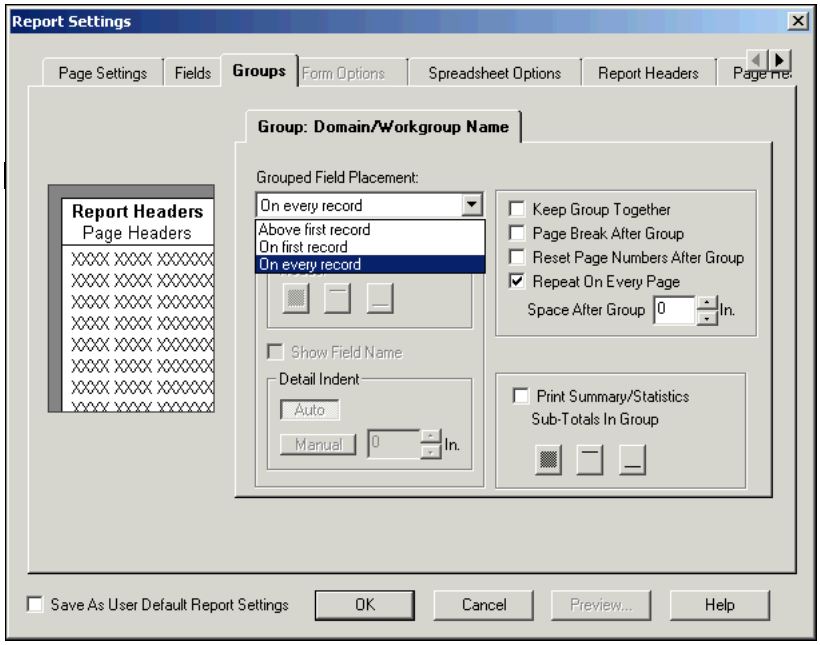


Fig. 144 Groups Tab of Report Settings Dialog

2 Select the desired location for the duplicate values from the location list. The selected location defines where the duplicate value appears for the grouped records included in the report.

Select **Above first record** for the first group field in order to select it for the second group field. Use the **Above first record** location to create a group header.

If you selected **Above first record**, proceed to Step 3. If you selected **On first record** or **On every record**, proceed to Step 6.

3 Select the desired header shading and framing buttons in the **Group Settings** area (Fig. 145).

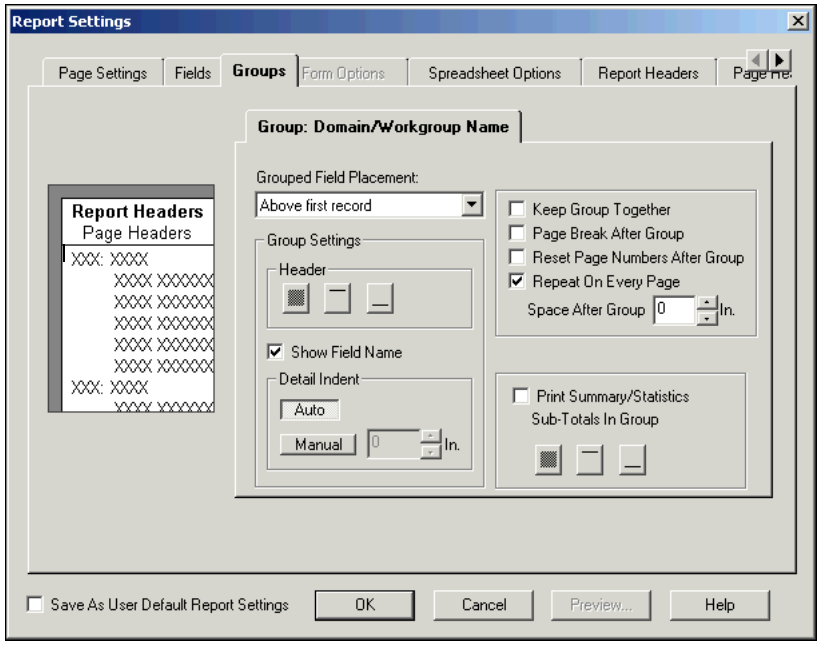


Fig. 145 Selecting Group Settings

4 Select **Show field name**, if desired.

5 Select the indent settings in the **Detail Indent** area.

6 Select the desired print options for the grouped records.

Use the print options to distinguish each set of grouped records on your report. For example, you can include page breaks between groups, or restart page numbering for each group.

Select **Repeat On Every Page** to print the group field title at the beginning of the grouped records on each page. This option only applies if the grouped records span multiple pages.

Select **Print Summary/Statistics Sub-Totals In Group** to include summary or statistical information for all numerical field values in the group.

Use the **Calculations/Statistics** options on the **Spreadsheet Options** tab to select the desired type of summary or statistical information printed for grouped records.

Form Settings

Use the **Form Options** tab on a **Report Settings** dialog to define how values appear horizontally on the report. Since Form reports

list information horizontally, use this report style if your dataset contains **Form** or **List** fields.

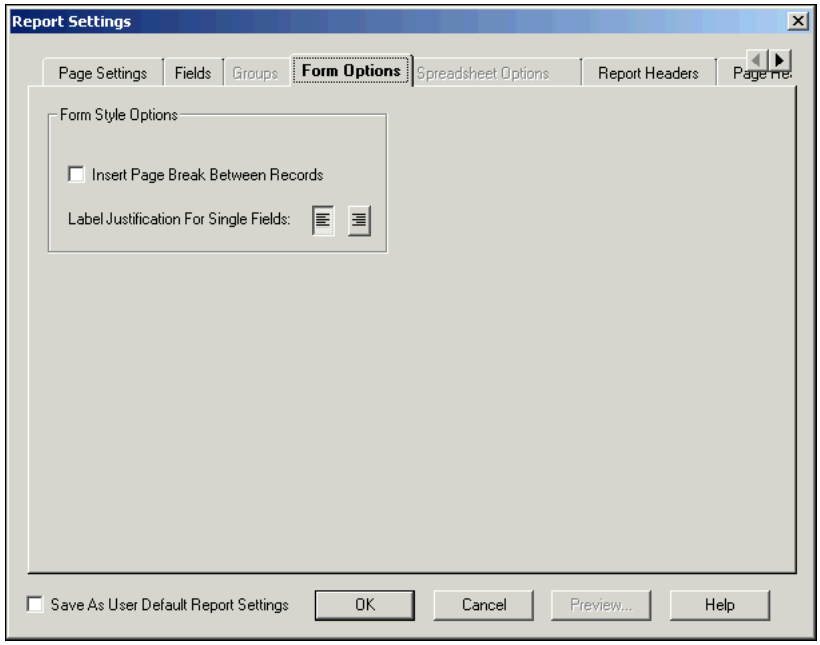


Fig. 146 Form Options Tab of Report Settings Dialog

List fields are multi-value fields. Form field values contain structured text (tables, graphic text) or free-form paragraphs.

The **Form Options** tab is available in all report settings dialogs. It is only active when you select **Form** on the **Page Settings** tab (Fig. 142 on page 169).

Use the **Form Style Options** to distinguish records containing **Form** or **List** field values to read them more easily on the report.

Spreadsheet Settings

Use the **Spreadsheet Options** tab in a **Report Settings** dialog to define how records appear in columns on the report.

The **Spreadsheet Options** tab is available in all report settings dialogs. It is only active when you select **Spreadsheet** on the **Page Settings** tab (Fig. 142 on page 169).

▶ *To define spreadsheet settings*

1. Click the **Spreadsheet Settings** tab (Fig. 147).
2. Click the desired shading and framing buttons for the column titles (Fig. 147).

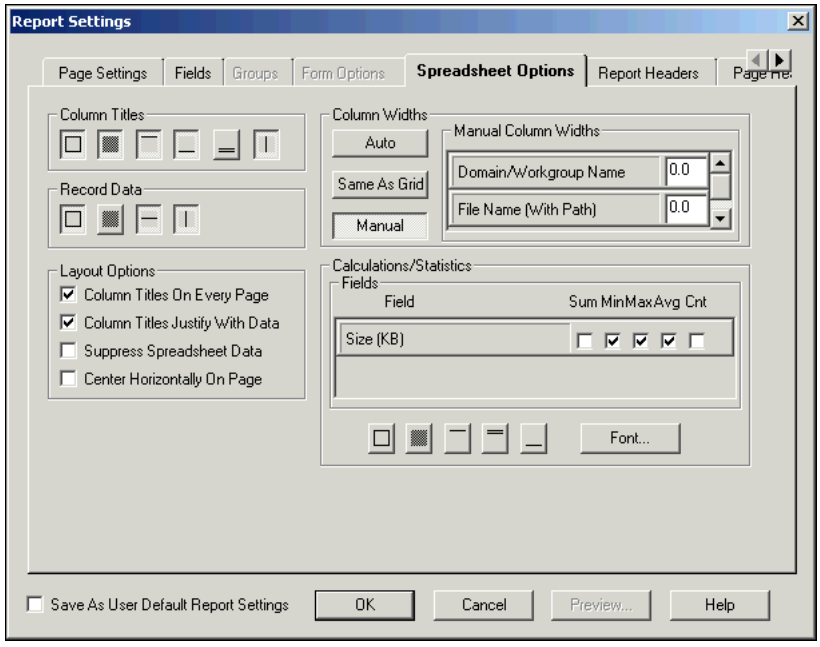


Fig. 147 Spreadsheet Options Tab of Report Settings Dialog

3. Click the desired shading and framing buttons for the record data.
4. Select the desired layout options.
5. Select the desired column widths. Use the **Manual** option to define column widths individually in inches.
6. Select the desired types of calculation and statistical data for each numerical field.

   The **Cnt** (count) option only applies to group fields.

   Calculation and statistical data appear at the bottom of the report, unless you selected **Print summary/statistics sub-totals in group** on the **Groups** tab. Selecting **Print summary/statistics sub-totals in group** causes calculation and statistical data to be sub-totalled and printed at the end of each set of grouped records.
7. Click **Font** to select the desired font for calculation and statistical data.
8. Click the desired shading and framing buttons for calculation and statistical data.

Header and Footer Settings

You use the following tabs on a **Report Settings** dialog to define the desired headers and footers for the report:

- Report headers – appear on first page

- Page headers – appear on every page
- Page footers – appear on every page
- Report footers – appear on last page

All header and footer tabs are similar in appearance and functionality.

Defining Headers and Footers

You can define two lines of information for each type of header and footer. Each line has three separate places to include information: the left corner, center, and right corner of the page.

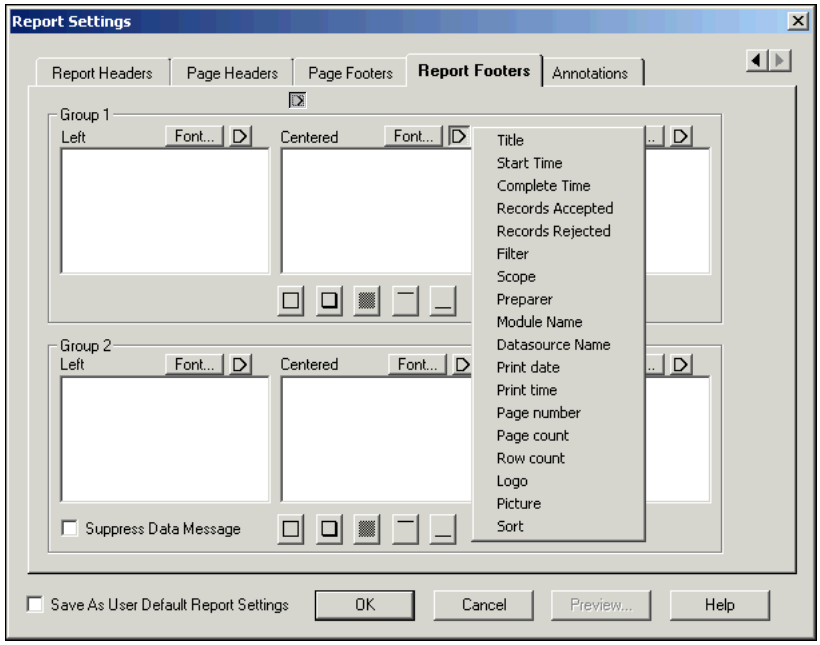


Fig. 148 Defining Header or Footer Information

▶ ***To define header and footer settings***

1. Click the **Report Headers**, **Page Headers**, **Page Footers**, or **Report Footers** tab (Fig. 142).
2. Enter the information in the desired information boxes (Fig. 148).

   You can either manually enter information, or you can select it from the information list (see "Using the Information List", next).
3. Select the desired font.

   Use the **Font** button associated with each information box to open the **Font** dialog.
4. Click the desired shading and framing buttons.

Select **Suppress Data Messages**, if desired. This prevents advisory messages from appearing in the report.

The **Suppress data messages** box only appears on the **Report Footers** tab.

Using the Information List

Each information box has an information list that you use to select the following items for a header, footer, or annotation line:

- Information related to the dataset displayed on the report
- Information related to the printed report
- BindView logo
- User-selected picture

▶ To use the Picture command

1. Select **Picture** from the desired information box shortcut menu (Fig. 148 on page 176). The information box is configured with *%PICTURE:<FileName>%*.
2. Highlight *<FileName>* and type the path and file name of the desired picture file.
   For example, *%PICTURE:C:\\Pictures\Logo.bmp%*.
3. Include a scale size percentage for the picture, if desired.

   You must place a comma after the path and file name before entering the desired percentage.
   For example, *%PICTURE:C:\\Pictures\Logo.bmp, 75%*.

Annotation Settings

Annotations are user-defined notes appearing in headers and footers. Use the **Annotations** tab of a **Report Settings** dialog to define annotation notes. Header annotations appear on the first page of the report. Footer annotations appear on the last page.

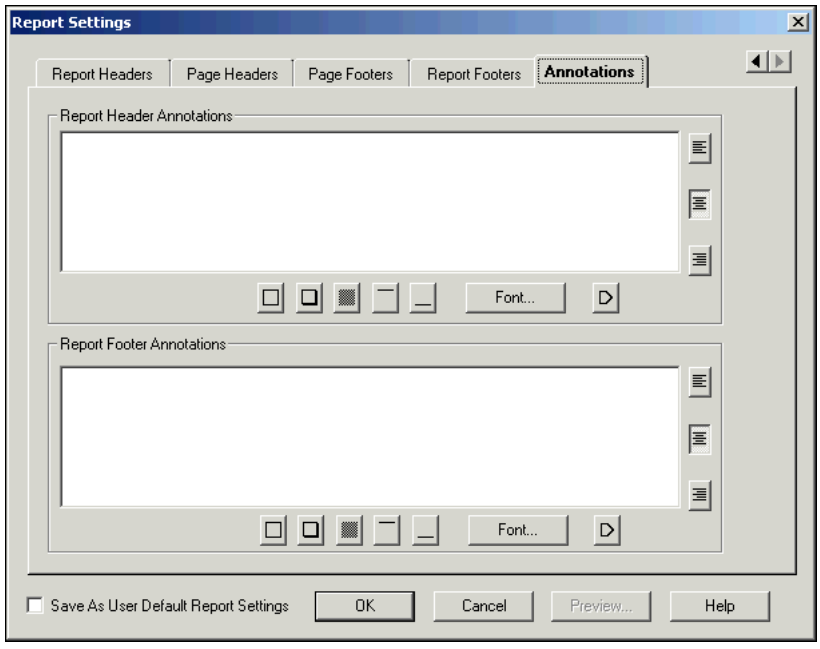


Fig. 149 Annotations Tab of Report Settings Dialog

Saving Report Style Settings

You can save two types of report style settings:

- Default report style settings
- Report style settings items

Since default report style settings are applied automatically, settings should be general enough to support datasets created from different types of queries. You should save report style settings that apply to a specific query in manually applied report style setting.

Default Report Style Settings

You can create three types of default report style settings that are applied to reports and report settings dialogs in this order:

- Query binder
- User
- Global

All default report style settings are stored on the Information Server. Query binder and user default report style settings are specific to the user who created them. All users can access query binder default report style settings in the Shared folder. All users can access the global default report style settings.

Query Binder Default Report Style Settings

Use the **Report Settings** dialog to create query binder default report style settings. Open the **Report Settings** dialog from:

- Report Settings command on the Grid menu of a grid
- Settings>Report command on a Query Binder shortcut menu

▶ ***To save query binder default report style settings***

1 Open the **Report Settings** dialog (Fig. 150).

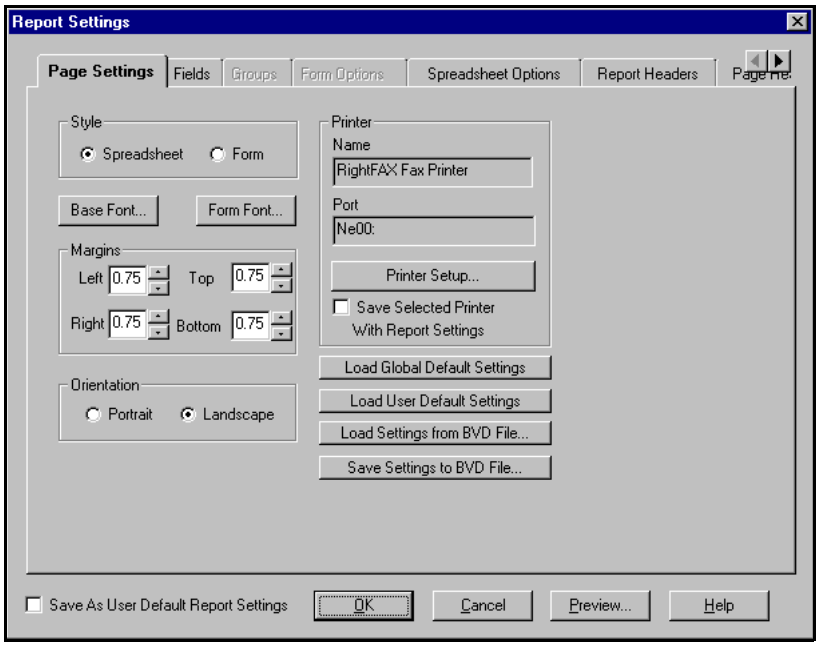


Fig. 150 Report Settings Dialog

2 Select the desired report settings on the available tabs and click **OK**. The report settings are saved as the default for the query binder.

User Default Report Style Settings

You create user default report style settings from the following locations:

- User Report Style Settings dialog
- Report Settings dialog

You can use the **User Report Style Settings** dialog to create user default report style settings for yourself, or a BindView Administrator can use the dialog to create them for all users. For detailed information on opening and using the **User Report Style Settings** dialog, refer to see the Help for the **Query Info** tab in the User Properties dialog.

Use the **Save As User Default Report Settings** option in the **Report Settings** dialog to save the settings defined on the dialog as your user default report style settings.

Global Default Report Style Settings

Only BindView Administrators can create global default report style settings for all bv-Control query-based product users of the Information Server.

For detailed information on creating global default report style settings, refer to "Global Default Report Style Settings" on page 57.

Report Style Settings Items

You may have report style settings that apply to several, but not all, datasets associated with your query binders. You should save these settings in a report style settings item so that you can easily apply them when necessary.

You create and save report style settings items from the following locations:

- Global Report Style Settings dialog
- User Report Style Settings dialog
- Report Settings dialog

You can share report style settings items by placing the item in the Shared folder.

▶ ***To save report style settings items***

1 Open a **Report Settings** dialog.

2 Select the desired report settings on the available tabs.

3 Click **Save Settings to Report Item** on the **Page Settings** tab. The **Save Report Item** dialog appears.

4 Select the desired location for the item, name the item, and click **OK**.

The report style settings item appears in the selected location.

The report icon  is used for report style settings item.

Applying Report Style Settings

Default report style settings are automatically applied when you use the report feature. You can also manually apply them.

You must manually apply report style settings saved in report style settings items.

All report settings dialogs allow you to apply saved and default report style settings.

Default Report Style Settings

Default report style settings are automatically applied in this order:

- Query binder
- User
- Global

You can also use the **Load Global Default Settings** and **Load User Default Settings** buttons on all report settings dialogs (Fig. 150 on page 178) to manually apply global and user default report style settings.

Report Style Settings Items

You can apply the settings saved in any report style settings item that you can access.

▶ ***To apply styles from a report style settings item***

1. Open a **Report Settings** dialog (Fig. 150 on page 178).
2. Click **Load from Report Settings Item** on the **Page Settings** tab.

   The **Select Report Item/Folder/Shortcut** dialog appears.
3. Select the Report Style Settings item containing the desired report style settings and click **OK**.

   The **Report Settings** dialog is configured with the settings saved in the report style settings item.

11 Exporting

In This Chapter

Understanding Exporting

Exporting is the process of formatting and sending data so that it can be used by another application. You can export the following types of BindView data:

- Datasets
- Historical datasets
- Delta datasets
- Session logs
- Charts

Exporting Datasets and Session Logs

Use the **Export Setup** dialog to export datasets and session logs. Exports are performed by either the Console or Information Server, depending on where the **Export Setup** dialog is opened (Table 4).

Table 4 Invoking the Export Setup Dialog

Items that invoke the Export Setup Dialog	Machine to Export From
Export button  on the **Grid** toolbar	Console
Export command on the **Grid** menu of a grid	Console
Export button and command on the **Grid** menu of a baseline grid	Information Server
Run>And Export command on the **Query Binder** shortcut menu	Information Server
Export button on the **Manage Historical Data** dialog	Information Server
Query or **Baseline Post Process Commands** dialog	Console or Information Server

Exporting from the Information Server machine is more secure since BindView Administrators can restrict the directories where users can save export files.

To export from the Information Server machine, you must configure default export settings before you can export files (see the Help for the **Export Settings** tab in the User Properties dialog).

When exporting from a remote Information Server machine, the export process continues even after loging off the Console machine.

You can use the **Export Setup** dialog to save export settings so that you can apply them to multiple datasets or session logs.

Exporting Charts

You use the features of an existing chart to export it as a Windows bitmap or metafile.

Exporting a chart only exports the graphic image of the chart. The dataset used to create the chart is not exported.

Exporting Datasets and Session Logs

The export feature provides a variety of format types and destinations for exporting all dataset types and session logs. Before you export a dataset or session log, you should perform all export prerequisites.

Export Prerequisites

Before you export a dataset or session log, you must configure the following items:

- Report Settings dialog
- Default export destination settings

You must configure the **Fields** tab of the **Report Settings** dialog by selecting **Print** check boxes for each field you want to export. Only values gathered for fields with selected **Print** check boxes will be exported. When creating a text-based export file, select **Auto** in the **Column Width** area on the **Spreadsheet** tab. For detailed information on the **Fields** and **Spreadsheet** tabs of the **Report Settings** dialog, refer to "Fields Settings" on page 170 and "Spreadsheet Settings" on page 174.

To e-mail export files using the Information Server machine, you must provide specific credentials for the mail server the Information Server will use (see the Help for the **Export Settings** tab in the User Properties dialog).

You should review all of your default export settings before exporting (for more information on the settings, see the Help for the **Export Settings** tab in the User Properties dialog).

Export File Format Types

You can export a dataset or session log in the following file formats. Text-based formats are represented by an asterisk (*).

- Acrobat format (PDF)
- Microsoft® Access 2000 (MDB)
- Character-separated values*
- Comma-separated values (CSV)*
- Crystal Reports® (RPT)
- dBase IV®
- Excel 5.0 (XLS)
- Excel 7.0 (XLS)
- Excel 8.0 (XLS)
- Excel (using OLE)
- HTML 4.0*
- HTML (Enhanced)
- Microsoft SQL Server
- Microsoft SQL Server (Enhanced)
- Paginated Text*
- Record style (columns of values)*
- Rich text format (RTF)*
- Tab-separated values*
- Text*
- Word for Windows® (DOC)*
- XML

For detailed information on these formats, refer to the BindView RMS Console and Information Server Help.

Export File Destinations

You can export a dataset or session log to the following destinations:

- Microsoft Windows or Novell NetWare Disk file
- Microsoft Exchange mailbox
- Microsoft Exchange folder
- Novell GroupWise mailbox
- Lotus Notes mailbox

Disk File

Use the disk file destination type to export the dataset or session log to the path entered in the **Folder Name** box on the **Export Setup** dialog (Fig. 151).

The path that appears in the **Folder Name** box is the default directory for your disk file export files. The **Folder Name** list contains the directories on the Information Server machine where you have access rights to send your export files. If you are a BindView Administrator, or if you have access rights to browse additional directories on the Information Server machine, the **Folder Name** browse (**...**) button is available. All Folder Name settings are determined by the default Disk File settings (see the Help for the **Export Settings** tab in the User Properties dialog).

▶ ***To export to a disk file***

1 Open the **Export Setup** dialog and click **Choose** (Fig. 151).

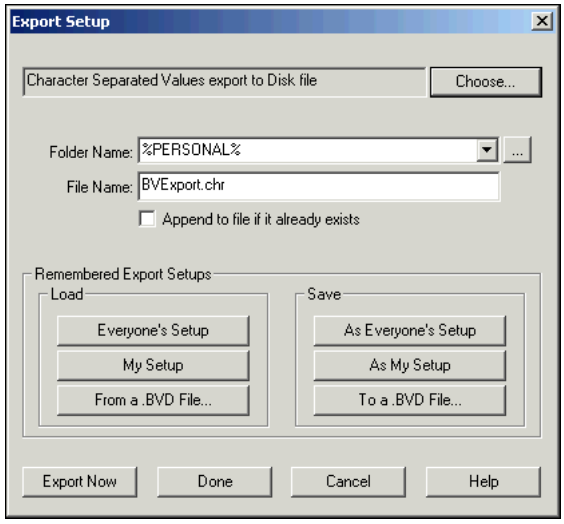


Fig. 151 Export Setup Dialog

The **Choose Export** dialog appears.

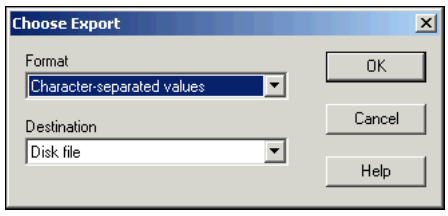


Fig. 152 Choose Export Dialog

2. Select the desired format for the export file (see "Export File Format Types" on page 183).
3. Select **Disk file** from the **Destination** list and click **OK**.

   If you selected **Access 2000, Character-separated values**, **MS SQL Server**, or **Paginated Text** for the format, a secondary dialog appears. See the context-sensitive Help in the dialog for information on the required format settings.

   The **Export Setup** dialog reappears. The field at the top of the dialog displays the format and destination settings you defined.

   The **Folder Name** box displays the path of the default export disk file directory.
4. Enter another path and file name in the **Folder Name** and **File** boxes, if desired. If the browse (**...**) button appears, you can use it to select the folder to export to.

   To export to any machine other than the BindView Information Server and for all Microsoft SQL Server exports, Export Credentials must be set up for the user. For information on setting up Export Credentials, please see the Help for the **Export Settings** tab in the User Properties dialog.
5. Select **Append to file / table if it already exists**, if desired. If the selected export format does not support the append feature, this option will be dimmed.
6. Click **Export now**. The dataset or session log is exported in the defined format to the disk file destination indicated in the **Folder Name** box.

Exchange Mailbox

Use the **Exchange mailbox** destination type to e-mail the export file to any user mailbox. When you create an e-mail export file, the default Exchange server is used. If you export from the Information Server machine, you must provide your password in your default export setup to successfully e-mail the export file. For information on default settings, see the Help for the **Export Settings** tab in the User Properties dialog.

▶ ***To e-mail an export file to any user mailbox***

1. Open **Export Setup** and click **Choose** (Fig. 151 on page 184). The **Choose Export** dialog appears (Fig. 152 on page 184).
2. Select the desired format for the export file.
3. Select **Exchange mailbox** from the **Destination** list and click **OK**.

   If you selected **Access 2000, Character-separated values**, **MS SQL Server**, or **Paginated Text** for the format, a secondary dialog appears. See the context-sensitive Help in the dialog for information on the required format settings.

The **EMail Settings** dialog appears.

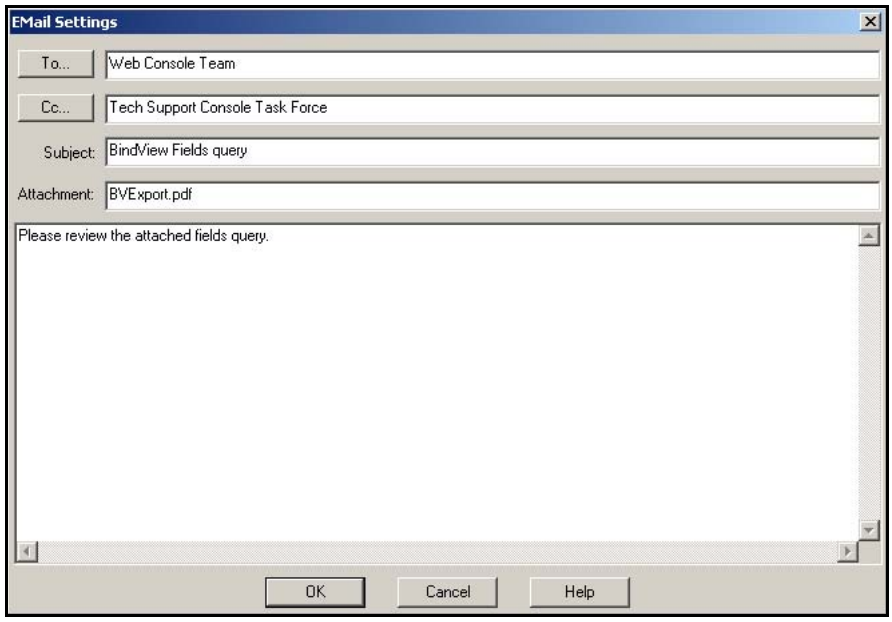


Fig. 153 EMail Settings Dialog

4 Enter the desired recipients, subject, and message for the e-mail export file and click **OK**.

If a recipient belongs to a different mail server than your default Exchange server, you must enter their entire e-mail address.

The **Export Setup** dialog reappears.

The field at the top of the dialog displays the format and destination settings you defined.

5 Click **Export now**.

The dataset or session log export file is e-mailed to the specified recipients.

Exchange Folder

You use the **Exchange folder** destination type to e-mail the dataset or session log export file to a user mailbox folder or public folder. The folder where you send the export file must exist on an Exchange server where your profile has access. If you export from the Information Server machine, you must provide your password in your default export setup to successfully e-mail the export file. For information on your default settings, see the Help for the **Export Settings** tab in the User Properties dialog.

▶ ***To e-mail an export file to your Exchange server***

1 Open **Export Setup** and click **Choose** (Fig. 151 on page 184). The **Choose Export** dialog appears (Fig. 152 on page 184). Select the desired format for the export file.

2 Select **Exchange folder** from the **Destination** list and click **OK**.

If you selected **Access 2000, Character-separated values**, **MS SQL Server**, or **Paginated Text** for the format, a secondary dialog appears. See the context-sensitive Help in the dialog for information on the required format settings.

The **Export to Exchange Folder** dialog appears.

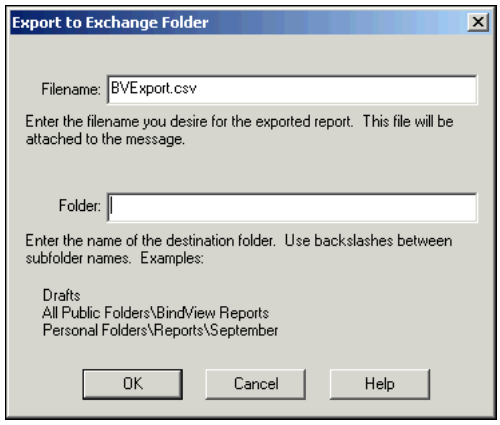


Fig. 154 Export to Exchange Folder Dialog

3 Enter the filename for the exported report and the desired folder path and click **OK**.

The syntax for exporting to a public folder is `<folder>@<subfolder>@<subfolder>`.

You can add the message-store name to the path if you choose. If you do, exporting will be slightly faster.

The **Export Setup** dialog reappears. The field at the top of the dialog displays the format and destination settings you defined.

4 Click **Export now**. The dataset or session log export file is e-mailed to the specified Exchange user mailbox or public folder.

Novell GroupWise Mailbox

Use the **Novell GroupWise mailbox** destination type to e-mail an export file to any user mailbox. When you create an e-mail export file, the default GroupWise server is used. If you export from the Information Server machine, you must provide your password in your default export setup to successfully e-mail the export file. For information on your default settings, see the Help for the **Export Settings** tab in the User Properties dialog.

▶ ***To e-mail an export file to any user mailbox***

1 Open **Export Setup** and click **Choose** (Fig. 151 on page 184). The **Choose Export** dialog appears (Fig. 152 on page 184). Select the desired format for the export file.

2 Select the desired format for the export file.

3 Select **GroupWise mailbox** from the **Destination** list and click **OK**.

The **EMail Settings** dialog appears.

4 Enter the desired recipients, subject, and message for the e-mail export file. If a recipient belongs to a different mail server than your default Exchange server, you must enter their entire e-mail address. Click **OK**.

The **Export Setup** dialog reappears.

The field at the top of the dialog displays the format and destination settings you defined.

5 Click **Export now**. The dataset or session log export file is e-mailed to the specified recipients.

Lotus Notes Mailbox

Use se the **Lotus Notes mailbox** destination type to e-mail an export file to any user mailbox. When you create an e-mail export file, the server specified in the Lotus Notes ID file is used. You must provide a valid Username, ID File, and password in your default export setup to successfully e-mail the export file. For information on your default settings, see the Help for the **Export Settings** tab in the User Properties dialog.

▶ ***To e-mail an export file to any user mailbox***

1 Open **Export Setup** and click **Choose** (Fig. 151 on page 184). The **Choose Export** dialog appears (Fig. 152 on page 184). Select the desired format for the export file.

2 Select the desired format for the export file.

3 Select **Lotus Notes mailbox** from the **Destination** list and click **OK**.

The **EMail Settings** dialog appears.

Enter the desired recipients, subject, and message for the e-mail export file. If a recipient belongs to a different mail server than your default server, you must enter their entire e-mail address. Click **OK**.

The **Export Setup** dialog reappears.

The field at the top of the dialog displays the format and destination settings you defined.

4 Click **Export now**. The dataset or session log export file is e-mailed to the specified recipients.

Exporting a Chart

You can export the graphic image of an existing chart as a Windows bitmap or metafile.

▶ ***To export an existing chart***

1. Click the **Export Chart** button on the chart toolbar  , or select **Export** from the **Chart** menu. The **Save As** dialog appears.
2. Select the desired storage location.
3. Select the desired file type and enter the desired file name.
4. Click **Save**. The chart is exported to the selected location.

Saving Export Settings

You can save the following types of export settings:

- Global default export settings
- Individual default export settings
- Export Settings items

Default Export Settings

You can save three types of default export settings that are automatically applied to the **Export Settings** dialog according to the following hierarchy:

- Export Settings Item
- User (My Setup)
- Global (Everyone's Setup)

All default export settings are stored on the Information Server. Export settings item and user default export settings are specific to the user who created them. However, all users can access export settings items that reside in the Shared folder. All users can access the global default export settings.

Export Settings Items

Use the **Export Setup** dialog to save export settings items.

▶ ***To save export settings items***

1. Open the **Export Setup** dialog (Fig. 151 on page 184).
2. Click **To Export Settings Item**, name the export settings item, and click **OK**. The **Export Setup** dialog reappears.
3. Click **Done**. The settings are saved as the default for the query binder.

As My Setup Export Settings

Use the **As My Setup** button in the **Save** frame of the **Export Setup** dialog to save the settings defined in the dialog as your user default export settings.

Global Default Export Settings

Only BindView Administrators can save global default export settings for all users of the Information Server.

An Information Server stores only one group of global default export settings at a time. When a BindView Administrator saves new global default settings, old settings are automatically deleted. Information Servers cannot share global default export style settings.

BindView Administrators use the **As Everyone's Setup** button in the Save frame of the **Export Setup** dialog to save the settings defined in the dialog as the global default export settings. This option appears dimmed if you are not a BindView Administrator.

Export Settings Items

You may have export settings that apply to several, but not all, datasets or session logs. You can save these export settings in an export settings item so that you can easily re-use them.

You use the **To Export Settings Item** option in the **Save** frame of the **Export Setup** dialog (Fig. 151 on page 184) to save the settings defined on the dialog as an export settings icon.

The **Export** icon  is automatically used for export settings items.

You can save export settings in the Shared folder to share them.

Applying Export Settings

Default export settings are automatically applied when you invoke the **Export Setup** dialog. You can also manually apply them.

You must manually apply export settings in export settings items.

Default Export Settings

Default export settings are automatically applied in this order:

- Export Settings Item
- User (My Setup)
- Global (Everyone's Setup)

You can use the **Everyone's Setup** and **My Setup** buttons in the **Load** area on the **Export Setup** dialog (Fig. 151 on page 184) to manually apply global and user default export settings.

File Export Settings Items

You can apply export settings saved in any export settings item you can access.

▶ ***To apply export settings from an export settings items***

1. Open the **Export Setup** dialog (Fig. 151 on page 184).
2. Click **From Export Settings Item** in the **Load** area.

   The **Select Report Item / Folder / Shortcut** dialog appears.
3. Select the export settings item containing the desired export settings and click **OK**. The **Export Setup** dialog is configured with the settings saved in the export settings items.

12 Uninstalling

In This Chapter

Uninstalling the Console and Information Server

Use the Windows **Add/Remove Programs** dialog to uninstall the BindView RMS Console and Information Server v8.00. Access the **Add/Remove Programs** dialog using **Settings>Control Panel** on your Windows `Start` menu.

If your machine has both the Console and Information Server installed, the uninstall program removes both items simultaneously. If your machine only has a connecting Console installed on it, the uninstall process only removes the Console. The remote Information Server for the Console is not removed.

When you remove the BindView RMS Console or Console and Information Server, any installed bv-Control snap-ins are uninstalled at the same time. If your bv-Control product installation required you to install additional components to collect information, consult your bv-Control product documentation for information on removing those components before removing the BindView RMS Console and Information Server.

Information Server

Uninstalling the BindView RMS Console and Information Server removes the Console and Information Server from your machine, unless other Console users are remotely connected to the Information Server. Uninstalling removes all **Pre-Defined** queries, task lists, schedules, and settings items. Uninstalling does *not* remove user-created files, such as exported files. For information on removing them from your machine, refer to “Removing User-created Files” on page 195.

Caution: When you remove an Information Server from a machine, you cannot operate any BindView RMS products that were connected to the Information Server.

If the Information Server you uninstall is the default Information Server for other Console users, those Console users must use the Information Server Selector to choose a new Information Server before they can open and use their Console.

You must be a Windows Administrator and a BindView Administrator to uninstall the Information Server and Console.

▶ *To remove the Console and Information Server*

You use the BindView RMS Console and Information Server option in the Windows **Add/Remove Programs** dialog to uninstall the v8.00 Console and Information Server.

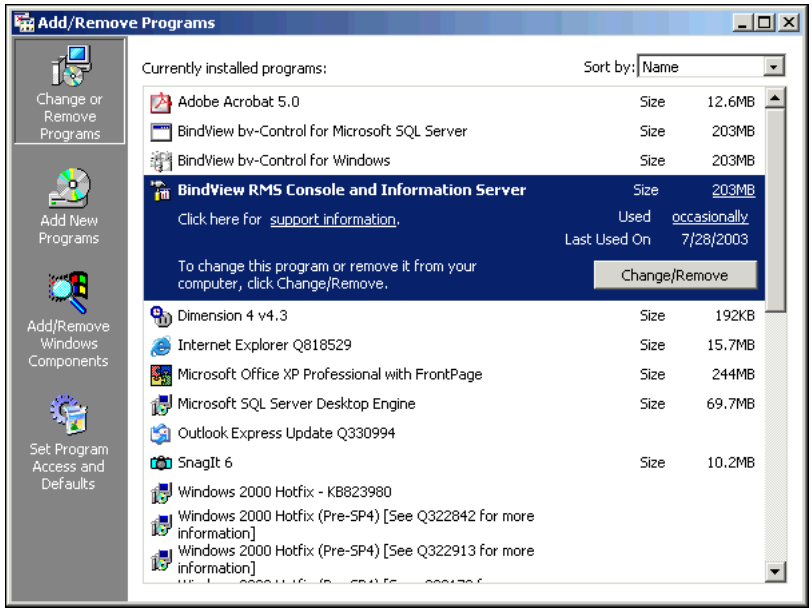


Fig. 155 Add/Remove Programs Dialog

1. Select the **BindView RMS Console and Information Server**.
2. Click **Change/Remove**. The **Welcome** panel appears.

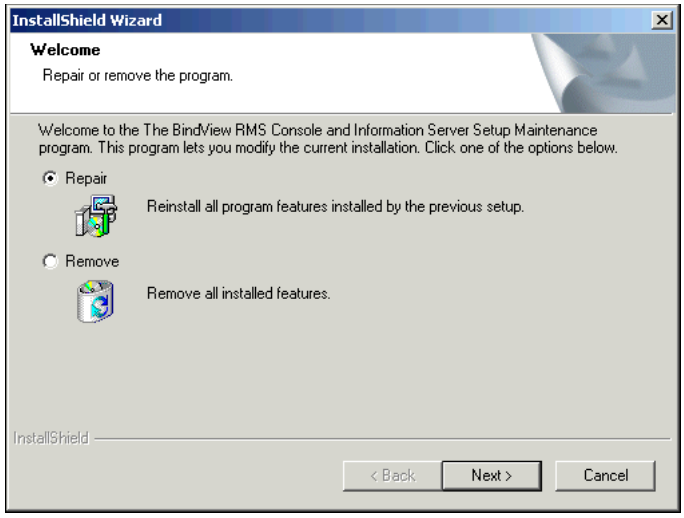


Fig. 156 Welcome Panel

3. To remove the BindView RMS Console and Information Server, select **Remove** and click **Next**. You will be prompted to confirm that you wish to remove the product. Click **OK** to remove the product.

4 During the removal, you will be asked if the BindView User Data on the machine should be saved on the disk. If you save the data, you will not need to create BindView users or administrators if the BindView Information server is reinstalled on the machine later. To save the users, click **Yes**; to delete them, click **No**.

5 When the removal is complete, the **Maintenance Complete** dialog appears. Click **Finish** to close the wizard.

Restart your computer after uninstalling the BindView RMS Console and Information Server.

Connecting Console

Uninstalling the BindView RMS Console removes the Console from your machine. Uninstalling the Console does not uninstall the default Information Server connected to the Console. For detailed information on uninstalling a v8.00 Information Server, see "Information Server".

You must be a Windows Administrator to uninstall the BindView RMS Console.

▶ *To remove a connecting Console*

You use the BindView RMS Console option in the Windows **Add/Remove Programs** dialog to uninstall the v8.00 Console and Information Server.

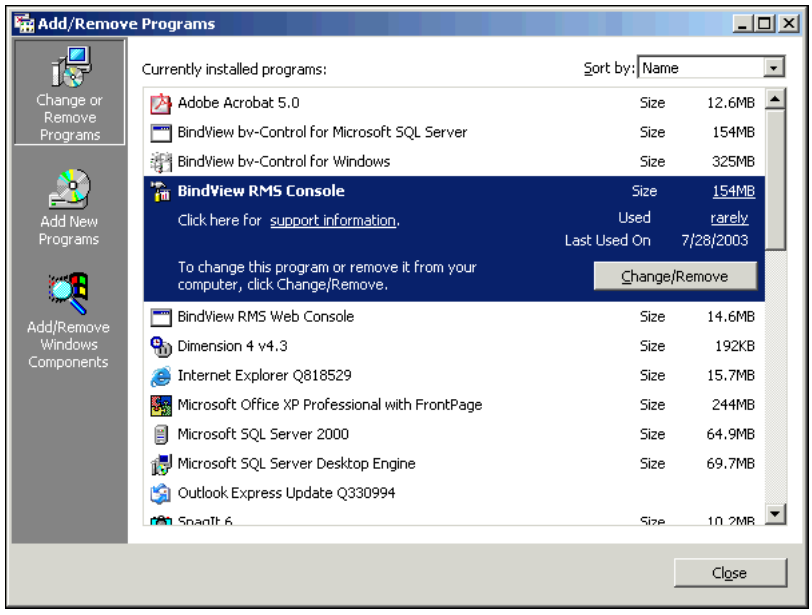


Fig. 157 Add/Remove Programs Dialog

The sizes for the BindView RMS items listed are the total sizes for the installed BindView RMS Console and any installed bv-Control products. Each product lists the total size of all products.

1 Select the **BindView RMS Console**.

2 Click **Change/Remove**. The **Welcome** panel appears.

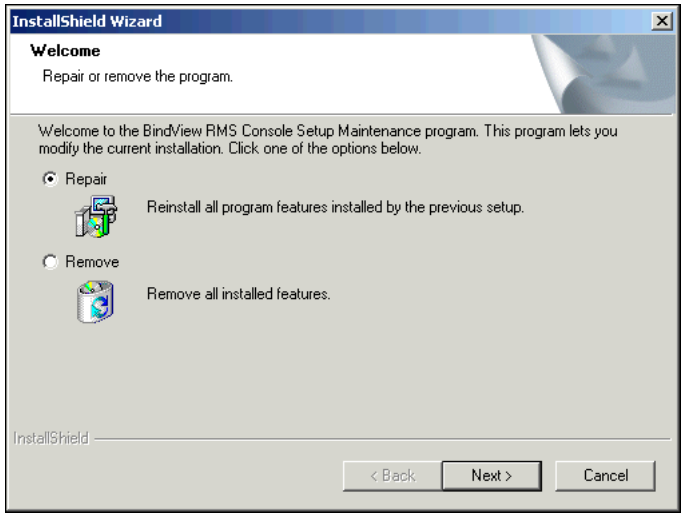


Fig. 158 Welcome Panel

3 To remove the BindView RMS Console, select **Remove** and click **Next**. You will be prompted to confirm that you wish to remove the product. Click **OK** to remove the product.

4 When the removal is complete, the **Maintenance Complete** dialog appears. Click **Finish** to close the wizard.

Restart your computer after uninstalling the BindView RMS Console.

Removing User-created Files

You use Windows File Explorer to remove user-created exported files and the directory containing BindView data files.

If you do not remove user-created exported files, any files stored in the **Exported Files** folder will remain on the BindView Information Server machine.

Warning: Once you remove exported files, they cannot be retrieved.

▶ ***To remove exported BindView data files***

1 Open **Windows Explorer**.

2 Select the `BindView\RMS` folder and delete it.

This is the folder selected as the Destination Folder when the Information Server was installed. By default, this folder is located in `C:\Program Files\BindView\RMS`.

3 Click **Yes** on the Confirm File Deletion message.

The user-created exported files and subfolders in the Exported Files folder are deleted from the machine.

A DSC Data

Introduction

From the v8.00 Console you can save or export dataset data in a format that can be read by the BindView RMS Decision Support Center (DSC). You use the DSC to quickly view and interpret the status of your Enterprise. For detailed information on the functionality and use of the DSC, refer to the *BindView RMS Decision Support Center User Guide*.

You can use the following Console features to create DSC data:

- Grid toolbar
- Saved Query Item shortcut menu
- Task list query task item post process command

Each feature allows you to export dataset data as an .xml file (used by the DSC v7).

Creating DSC v7 Data

You use the **DSC Export** dialog to save dataset data in an .xml file that can be read by the DSC v7.

For detailed information on using the **DSC Export** dialog, refer to the *BindView RMS Decision Support Center User Guide v7*.

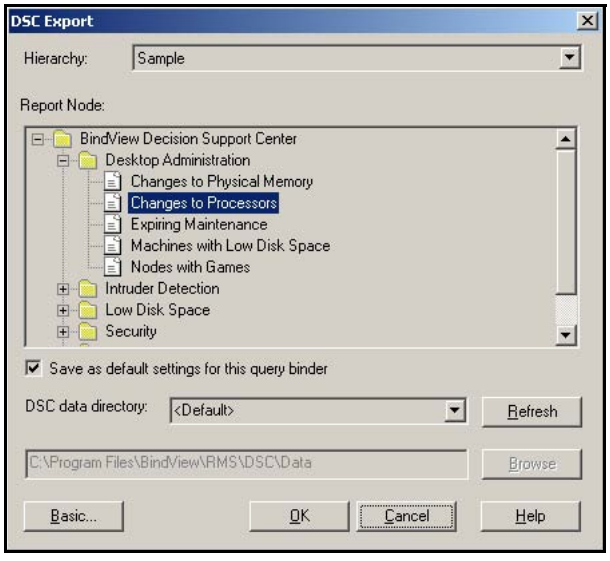


Fig. 159 DSC Export Dialog

B User Provisioning

The user provisioning feature allows Windows Administrators to use Windows® 2000, Windows XP®, or Windows Server™ 2003 user management tools to add users of the BindView RMS Console and Information Server.

Adding Users

BindView RMS creates two Windows user groups:

- BV Console Admins
- BV Console Users

Windows Administrators use the <*group name*> **Properties** dialog, accessed from the Console machine, to add individual users to the BindView RMS user groups.

When you use the BindView RMS Console to add a user, the console automatically adds that user to the BV Console Users group. When you create a user who is also a BindView Console Administrator, the user is added to both the BV Console Admins and BV Console Users groups.

If you manually add a user to the BV Console Admins group, the user will be a BindView RMS Console Administrator. In addition, the BindView RMS Console will automatically add the user to the BV Console User Group when the user launches the BindView RMS Console. Users in the BV Console Admins group have BindView Administrator privileges.

If you manually add a user to the BV Console Users group, the user will be a BindView RMS Console user.

If a user is a Local Administrator on the machine which hosts the BindView Information Server a particular copy of the BindView RMS Console is associated with, and the user runs the BindView RMS Console, the user will be asked if they wish to become a BindView RMS Console user. If the user clicks OK, they will be added to both the BV Console Admins and BV Console Users groups.

Individual users added to the BV Console Users group have access rights to the Console and the default Information Server. The default Information Server is the one that was installed with the Console, connected to the Console during installation, or selected using the Information Server Selector.

Removing Users

Windows Administrators use the <*group name*> **Properties** dialog, accessed from the Console machine, to remove individual users from the BindView RMS user groups.

When you use Windows functionality to remove a user from the BV Console Users group, the Personal directories associated with the removed users are not deleted from the Information Server machine. For information on deleting Personal directories from an Information Server, refer to “Removing User-created Files” on page 195.

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