

Configuring Usage Tracking and Reporting for SharePoint Online

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Configuration Prerequisites

CardioLog Analytics allows you to easily integrate with Microsoft's SharePoint Online for both intranet and public internet SharePoint sites.

By default, the CardioLog Analytics tracking code is hosted on the CardioLog application on-premise server. You can also host it on a dedicated tracking server (web server) in the DMZ, or as Azure App Service.

Configuring the CardioLog Analytics Tracking Agent on the CardioLog Application Server

Following the [product installation](#) and before running the [Configuration Wizard](#), please do the following:

1. Configure a public DNS name for the CardioLog application server.
2. If you have a secured SharePoint Online site, create a certificate (Requires purchase of an SSL certificate from a certificate authority) for the CardioLog application server and [configure SSL](#) for the CardioLog web application in IIS.
3. Click the CardioLogAgent web application in **IIS**, choose **Authentication**, enable Anonymous Authentication and disable Windows Authentication.
4. In `[CardioLog Installation Folder]\CardioLogAgent\Web.config`, update the following key values (edit the CardioLog application server public DNS name):

```
<add key="overwriteConnectedUser" value="true" />
<add key="UseSPAAuth" value="true" />
<add key="CardioLogAgentRoot" value="https://cardiologserverdnsname" />
```

5. Verify that the CardioLog Tracking Agent web application is accessible over the internet by browsing to `https://cardiologserverdnsname/CardioLogAgent/ca.aspx` (edit the CardioLog application server public DNS name).
6. Verify that you have a Microsoft Live ID user account with the SharePoint Administrator role in Office 365 Admin Center.

Note: The CardioLog application server public DNS name must be accessible over the internet.

Configuring the CardioLog Analytics Tracking Agent on a Dedicated Tracking Server in the DMZ

Following the [product installation](#) and before running the [Configuration Wizard](#), please do the following:

1. Create a new CardioLogAgent web application in IIS on the CardioLog tracking server (web server). For the new web application, create a dedicated application pool and set ASP.NET version to 4.0. Set the authentication method of the web application to Anonymous access (disable Windows Authentication).
2. Copy the files from the CardioLog application server `[CardioLog Installation Directory]\CardioLogAgent` to the new directory.
3. Configure a public DNS name for the CardioLog tracking server.
4. If you have a secured SharePoint Online site, create a certificate (Requires purchase of an SSL certificate from a certificate authority) for the CardioLog tracking server and [configure SSL](#) for the CardioLogAgent web application in IIS.
5. In `[CardioLog Tracking Agent Installation Folder]\CardioLogAgent\Web.config`, update the following key values (edit the CardioLog tracking server public DNS name):

```
<add key="overwriteConnectedUser" value="true" />
<add key="UseSPAAuth" value="true" />
<add key="CardioLogAgentRoot" value="https://cardiologtrackingserverdnsname" />
```

6. Verify that the CardioLog Tracking Agent web application is accessible over the internet by browsing to <https://cardiologtrackingserverdnsname/CardioLogAgent/ca.aspx> (edit the CardioLog tracking server public DNS name).
7. Verify that you have a Microsoft Live ID user account with the SharePoint Administrator role in Office 365 Admin Center.

Note: The CardioLog tracking server public DNS name must be accessible over the internet.

Configuring the CardioLog Analytics Tracking Agent on Azure App Service

Following the [product installation](#) and before running the Configuration Wizard, please follow the steps mentioned in [Configuring the CardioLog Analytics Tracking Agent on Azure App Service](#)

Running the Configuration Wizard

Upon activating CardioLog Analytics, the Configuration Wizard will be displayed. This wizard will help you configure the **SharePoint Tracking Agent**, which is a tool designed to monitor visitor behavior in SharePoint, and the **SharePoint Adaptor**, which provides the structure of your SharePoint Online tenant. Login to the CardioLog server with the CardioLog service account and verify that it has the [required permissions](#) before running the wizard.

1. Launch CardioLog. If the Configuration Wizard doesn't launch automatically, you can run it manually by clicking on **Administration** in the Navigation pane and then selecting **System Configuration**. Click **Configuration Wizard** to restart CardioLog and begin the configuration process.
2. In the **Welcome** dialog, select the desired UI language and date format. Under **SharePoint Version**, select **SharePoint Online** and then click **Next**.

Configuration Wizard

3. You can add the tracking code by either [deploying the CardioLog tracking code](#) through a SharePoint solution, **OR** manually adding the [JavaScript tracking code](#) to your master pages.

Note: You may select only one option to add the tracking code.

Configuration Wizard

Step 1
Welcome

Step 2
Usage Tracking

Step 3
SharePoint Adaptor

Step 4
Usage Data Processing

Step 5
Finish

SharePoint Online Usage Tracking

Tracking Code

The following code block should be copied into every webpage you wish to track, immediately after the opening <HEAD> tag.

```
<script type="text/javascript">
//Intlock tracking code start

function ignoreca() {
  var s = document.getElementById("_cat_async_load");
  if (s) {
```

You can deploy the tracking code through a SharePoint solution as detailed [here](#). After activating the solution, you can automatically add the JavaScript tracking code onto all of the pages of your site.

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Configuration Wizard Step 2a: SharePoint Online Usage Tracking

Deploy the CardioLog tracking code through a SharePoint solution

You can deploy the tracking code on all selected site collections automatically or add the tracking code to a specific site collection manually.

Deploying the Tracking Code to all Selected Site Collections Automatically

- Once you complete the Configuration Wizard, go to the **Administration** section of the navigation pane, click **System Configuration**, select **SharePoint Tree Adaptor** and then select your **SharePoint Online** tenant.
- Click on **Download** button to download the automatic deployment package.

SharePoint Online Adaptor

SharePoint Online

Settings

Title:

SharePoint Admin Center URL:

Authentication:

Advanced Settings: Import document versioning information for your SharePoint lists and libraries

Additional Actions: Tracking installation package download button.

Web Sites

Select Zone...

All Web Sites

Selected Web Sites (Select at least one web site)

- https://intlock.sharepoint.com/
- https://intlock.sharepoint.com/sites/B&G
- https://intlock.sharepoint.com/sites/dev
- https://intlock.sharepoint.com/sites/ModernCommunicationSite
- https://intlock.sharepoint.com/sites/ModernCommunicationsSite
- https://intlock.sharepoint.com/sites/ModernPublicTS

SharePoint Tree Adaptor Settings

Note: The deployment package includes a PowerShell script that deploys the tracking agent wsp solution and Java Script tracking code on all selected site collections, as well as the modern sites integration app on the App catalog and on all selected site collections and their sub-sites.

- c. Right click the *WSP-Tracking-Install-Script.zip* file, select Properties > General and click on "Unblock" before unzipping it.
- d. Open the *sites.json* file and verify that all of the site collections you would like to track are included.
- e. Open the *tracking.txt* file. If you have chosen to configure the CardioLogAgent as Azure App Service, update it as follows:

```
sourceDomain: '<app service URL without https prefix>/js/modern',
eventListenerDomain: '<app service URL without https prefix>',
modules: ['survey-and-message-bar'],
statisticsPath: '<app service URL>/CardioLogAgent/ReportDispatcher.aspx'
```

Otherwise, verify that the <cardiologserverdnsname> placeholders of the sourceDomain and eventListenerDomain fields that redirect to the CardioLog application server or dedicated tracking server have a public DNS name (that should be accessible over the internet).

```
sourceDomain: '<cardiologserverdnsname>/CardioLogAgent/js/modern', (CardioLog application server / tracking server
public DNS name, without the https:// protocol prefix)
eventListenerDomain: '<cardiologserverdnsname>/CardioLogAgent',
modules: ['survey-and-message-bar'],
statisticsPath: '<cardiologserverdnsname>/CardioLogAgent/ReportDispatcher.aspx'
```

- f. Execute the *Run_Script.ps1* script in PowerShell. Make sure the you have the following prerequisites before executing the PowerShell script:
 - You must have [PowerShell version 5.1](#) or higher with the [MS Online module](#) installed.
 - The credentials of the SharePoint Online global administrator.
 - If you are using multi-factor authentication (MFA), make sure you have an [app password for Office 365](#).
 - Make sure custom scripts are turned on (changes in this setting take up to 24 hours to apply):
Office 365 Admin > Admin Centers > SharePoint Admin Center > Settings > Custom Script > Select Allow in both options

In case a specific site collection does not inherit these settings from SharePoint Central Administration, you can execute the following commands in SharePoint Online Management Shell (replace the placeholders for [company] and [site collection url]):

```
$url = "https://[company]-admin.sharepoint.com"
$User = Read-Host -Prompt "Enter username for $url"
$Password = Read-Host -Prompt 'Enter password' -AsSecureString
$credentials = New-Object
Microsoft.SharePoint.Client.SharePointOnlineCredentials($User, $Password)
$adminContext = New-Object Microsoft.SharePoint.Client.ClientContext($url)
$adminContext.Credentials = $credentials
$tenant = New-Object
Microsoft.Online.SharePoint.TenantAdministration.Tenant($adminContext)
$adminContext.Load($tenant)
$adminContext.ExecuteQuery()
$props = $tenant.GetSitePropertiesByUrl("[site collection url]", $false)
$adminContext.Load($props)
$adminContext.ExecuteQuery()
$DenyAddAndCustomizePagesStatusEnum =
[Microsoft.Online.SharePoint.TenantAdministration.DenyAddAndCustomizePagesStatus]
$props.DenyAddAndCustomizePages = $DenyAddAndCustomizePagesStatusEnum::Disabled
$props.Update()
$adminContext.ExecuteQuery()
```

Add the Tracking Code to a Site Collection Manually

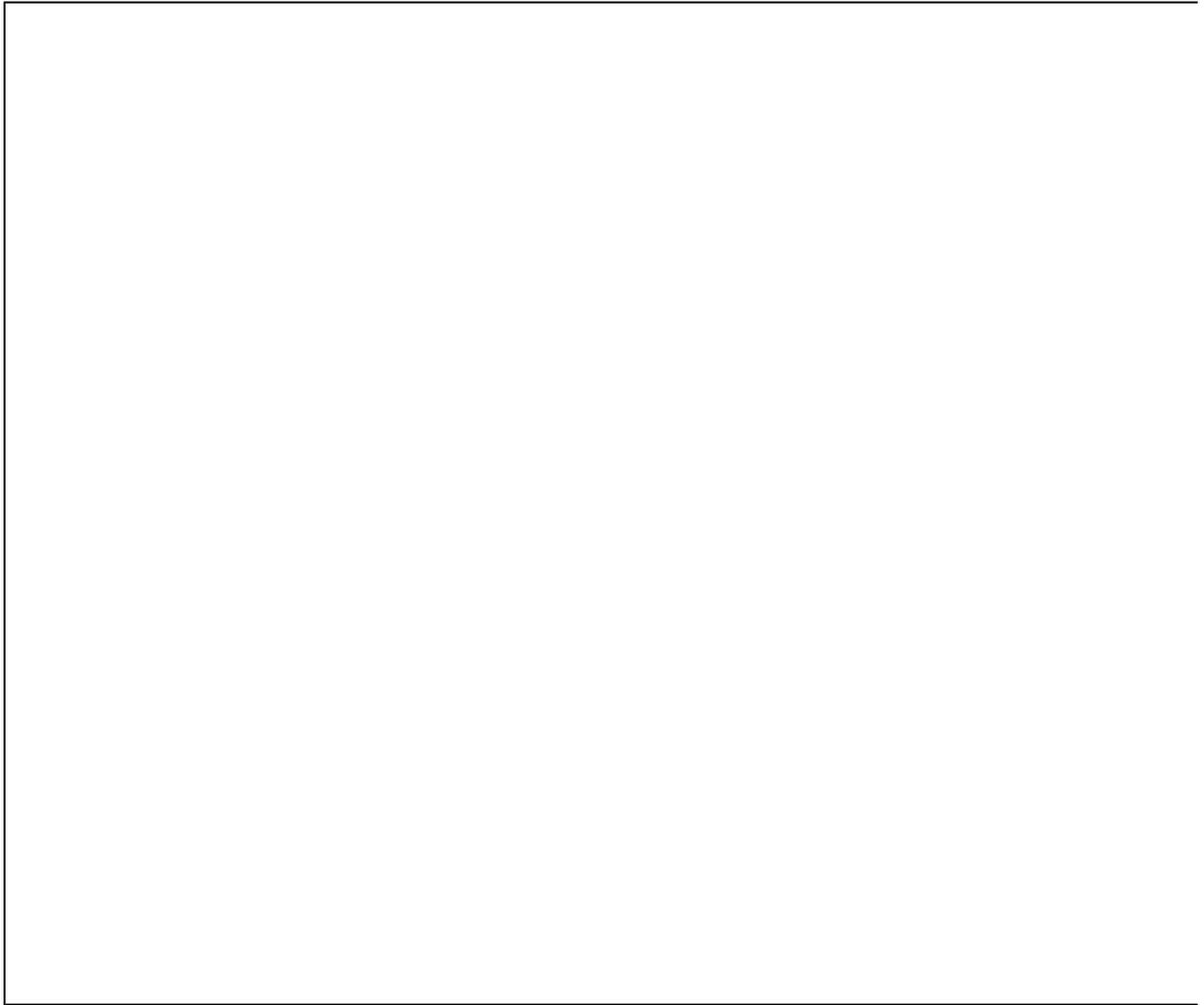
- a. Browse to your SharePoint Online site Solution Gallery (Replace the website root URL with yours): [\[https://intlock.sharepoint.com/_catalogs/solutions/forms/allitems.aspx\]](https://intlock.sharepoint.com/_catalogs/solutions/forms/allitems.aspx)



'SharePoint Online' Site Solution Gallery

- b. Click **Upload Solution > Choose File** > select *[CardioLog Installation*

- Folder]\CardioLog\Configuration\AgentFeature\Online\Resources\CardioLog Analytics Integration.wsp > **Activate**
- c. Browse to CardioLog Analytics Integration solution configuration page (Replace the website root URL with yours): [<https://intlock.sharepoint.com/CardioLogAnalytics/Configuration.2.0.8.0.aspx>]



CardioLog Analytics Integration Solution Configuration Page

- d. Copy the code from the **Tracking Code** box in Step 2 of the Configuration Wizard.
- e. Edit the tracking code and verify that all URLs contained in the tracking code that redirect to the CardioLog application/tracking server have the public DNS name and appropriate protocol. The URLs should be accessible over the internet. Use HTTPS if you are tracking secured SharePoint Online site collections.
- f. Add the JavaScript tracking code and click **OK**.

Uninstalling the CardioLog Analytics Tracking Agent Feature

You can choose between pausing and uninstalling the tracking code from your SharePoint online sites:

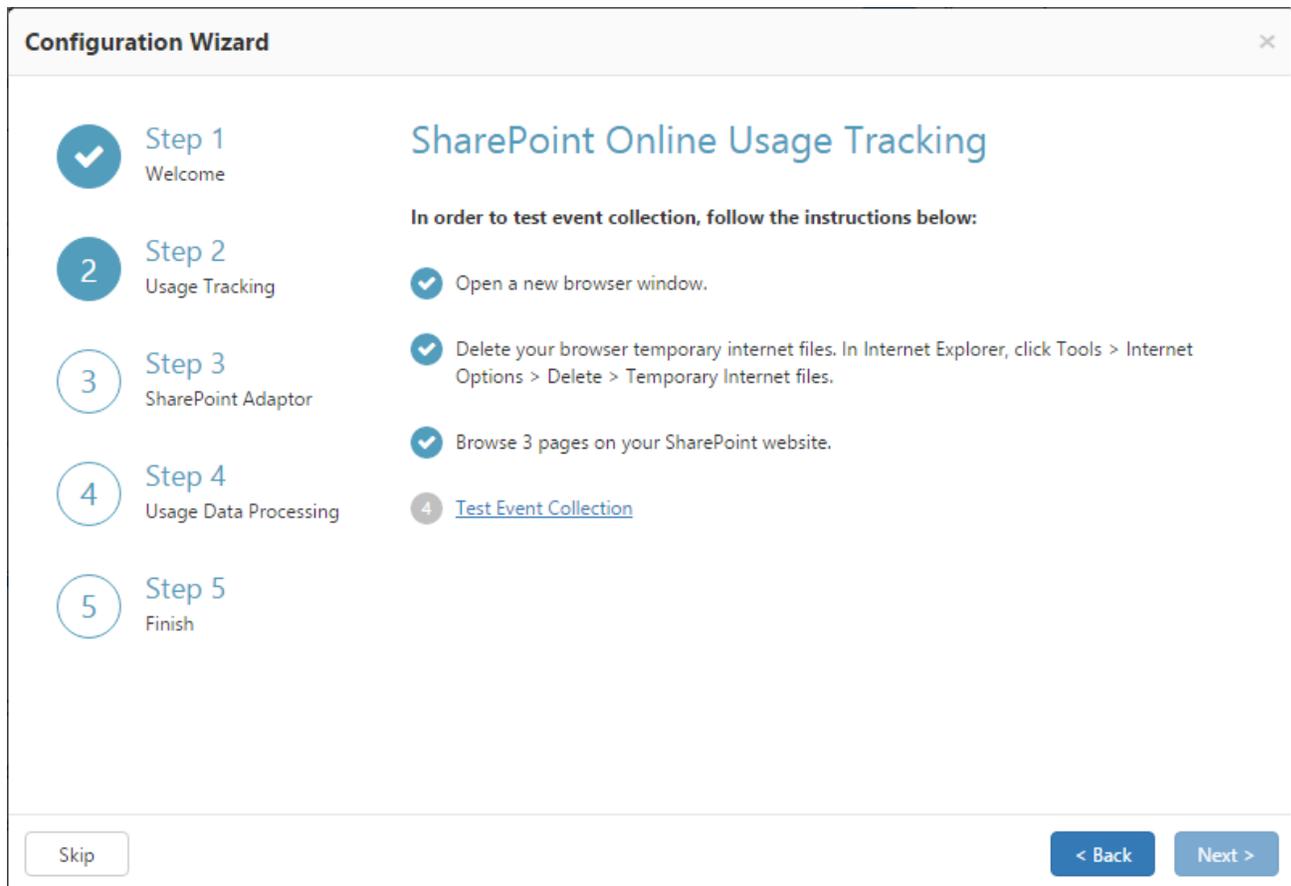
- a. To pause the tracking code, browse to your SharePoint Online site Solution Gallery (edit the website root URL): [https://intlock.sharepoint.com/_catalogs/solutions/forms/allitems.aspx] and deactivate the **CardioLog Analytics Integration** solution.
- b. To uninstall the tracking code, deactivate the **CardioLog Analytics Integration** solution and then delete the solution.

Manually Add the JavaScript Tracking Code to Your Master Pages

- a. Open SharePoint Designer and add the SharePoint Online website: Go to **Site Templates > Open Site >** Enter website root URL (eg., - <https://intlock.sharepoint.com/>).
- b. Open **Site Objects > Master Pages >** *.master (we suggest the seattle.master page) and add the JavaScript tracking code in the `<head>` tag.
- c. Verify that all URLs contained in the tracking code that redirect to the CardioLog application/tracking server have the public DNS name and appropriate protocol. The URLs should be accessible over the internet. Use HTTPS if you are tracking secured

SharePoint Online site collections. You may choose to use HTTP for public websites.

4. In order to verify that your SharePoint Online pages are tracked, follow these steps:
 - a. Open a new browser window and click **Next Step**.
 - b. Delete your browser temporary internet files and click **Next Step**.
 - c. Browse 3 pages on your SharePoint Online website and click **Next Step**.
 - d. Click **Test Event Collection**. The Wizard will now verify usage events tracking.



Step 2 - Usage Tracking

Otherwise,

- a. Navigate to your SharePoint Online site homepage with Internet Explorer, Chrome, or FireFox.
 - b. Press Ctrl+F5 to clear the cache and reload the page.
 - c. While on the SharePoint website page, click Ctrl+F12. The tracking agent console should pop-up, displaying the ID number for the most recent monitored action (event). To close the console, press Ctrl+F12.
5. In the **SharePoint Adaptor** dialog, enter a title and root URL of your SharePoint Online Admin Center. Specify the authentication details used to connect to it, then click **Next**. Loading your SharePoint Online tree structure may take several minutes to a few hours, depending on the number of items in the selected websites.

Note: Confirm that the CardioLog service account has the SharePoint Administrator role enabled in Office 365 Admin Center, under Customized Administrator.

Configuration Wizard ×

Step 1
Welcome

Step 2
Usage Tracking

3 **Step 3**
SharePoint Adaptor

4 **Step 4**
Usage Data Processing

5 **Step 5**
Finish

SharePoint Online Adaptor

Name:

SharePoint Admin Center URL:

Microsoft Live ID (Office 365) Authentication:

Username:

Password:

Note: SharePoint Site Collection administrator is required.

Configuration Wizard Step 3 - SharePoint Adaptor

6. In the **SharePoint Adaptor** dialog, select the SharePoint website(s) you would like to report on, then click **Next**.

Configuration Wizard ×

Step 1 **SharePoint Online Adaptor**
Welcome
SharePoint Online Web Site
Specify the SharePoint Online web sites you wish to report on:

Step 2 Usage Tracking
 All Web Sites **Selected Web Sites**

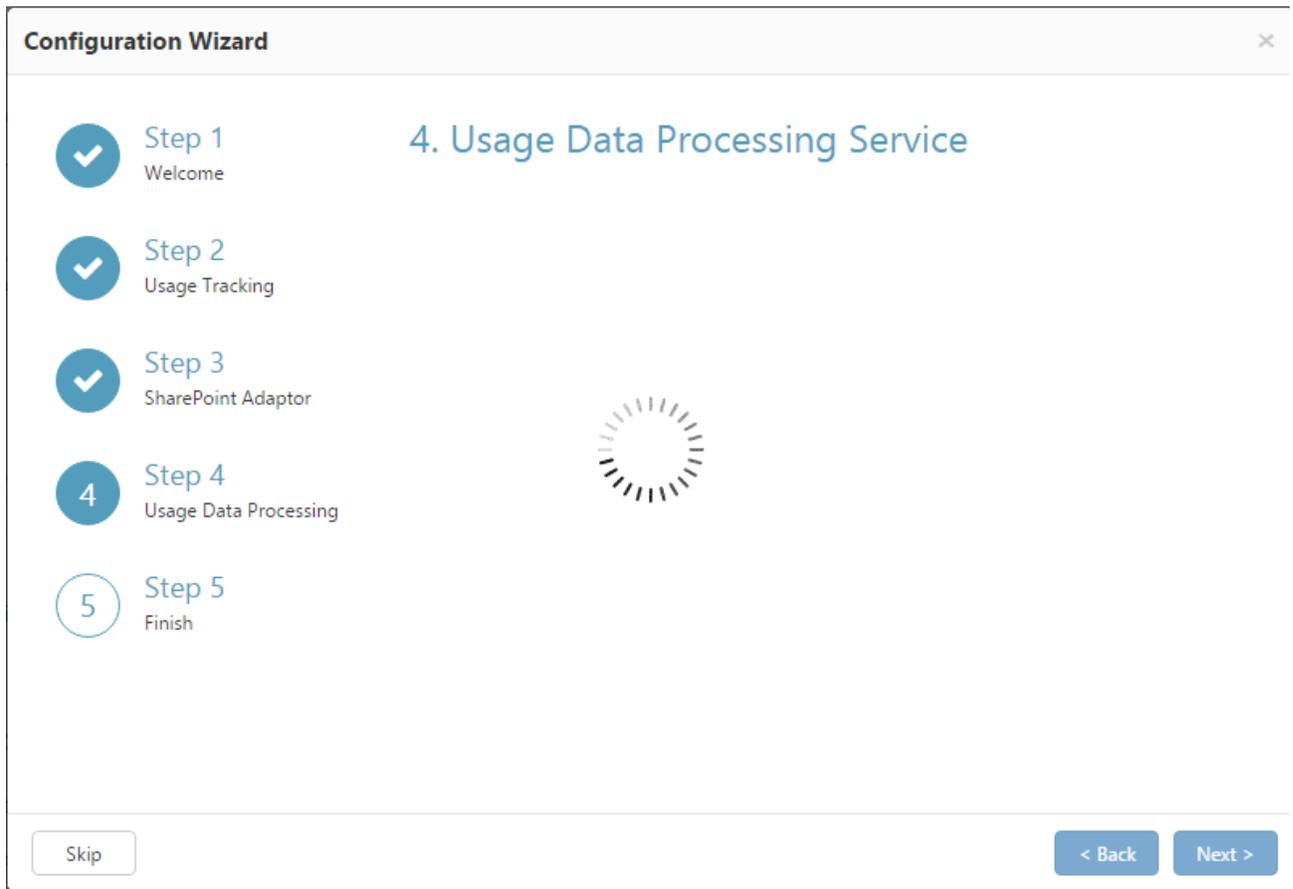
Step 3 SharePoint Adaptor
 https://intlock.sharepoint.com/portals/hul https://intlock.sharepoint.com/
 https://intlock.sharepoint.com/search https://intlock.sharepoint.com/portals/cor
 https://intlock.sharepoint.com/sites/apps
 https://intlock.sharepoint.com/sites/dev
 https://intlock-my.sharepoint.com/
 http://intlock-public.sharepoint.com/

Step 4 Usage Data Processing

Step 5 Finish

Configuration Wizard Step 3 - SharePoint Adaptor Web Site Selection

7. In the **Usage Data Processing** dialog, click **Next**.



Configuration Wizard Step 4 - Usage Data Processing

8. In the **Finish** dialog, click **Finish**. Click **Show Raw Usage Data** to view the usage events collected thus far. The data will be available in reports in the next hour.



Step 1
Welcome



Step 2
Usage Tracking



Step 3
SharePoint Adaptor



Step 4
Usage Data Processing



Step 5
Finish

Finish

✔ Congratulations! You have completed the configuration of CardioLog.
Reports will be available in the next rounded hour - at 12:00 PM.

Show Raw Usage Data (50 rows)

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Finish