AvePoint DocAve 6 User Guide

DocAve® 6 Control Panel

Reference Guide

Service Pack 3 Cumulative Update 2

Revision J

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The Enterprise-Class **Management Platform** for **SharePoint** Governance

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About Control Panel

The DocAve Control Panel is the central interface for managing DocAve and how it interacts with your SharePoint environments.

Control Panel is also integrated into other DocAve products, which enables you to configure relevant settings without having to leave the interface of the module you are using.

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Before You Begin

Refer to the sections below for system requirements for Control Panel.

Configuration

In order to use Control Panel, the DocAve 6 platform must be installed and configured properly on your farm. Control Panel will not function without DocAve 6 present on the farm.

Agents

DocAve Agents are responsible for running DocAve jobs and interacting with the SharePoint object model. DocAve Agents enable DocAve Manager to communicate with the respective servers, allowing for Control Panel commands to function properly.

***Note**: The use of system resources on a server increases when the installed agent is performing actions. This may affect server performance. However, if the agent installed on a server is not being used, the use of system resources is very low and, therefore, the effect on server performance is negligible.

For instructions on installing the DocAve Platform, DocAve Manager, and DocAve Agents, see the DocAve 6 Installation Guide.

Getting Started

Refer to the sections below for important information on getting started with Control Panel.

Launching Control Panel

To launch Control Panel and access its functionality, follow the instructions below:

1. Log in to DocAve. If you are already in the software, click the DocAve tab.
2. From the **DocAve** tab, click **Control Panel** to launch Control Panel.

   Alternatively, you can click the Control Panel icon ( ) from anywhere within the DocAve software to launch Control Panel.

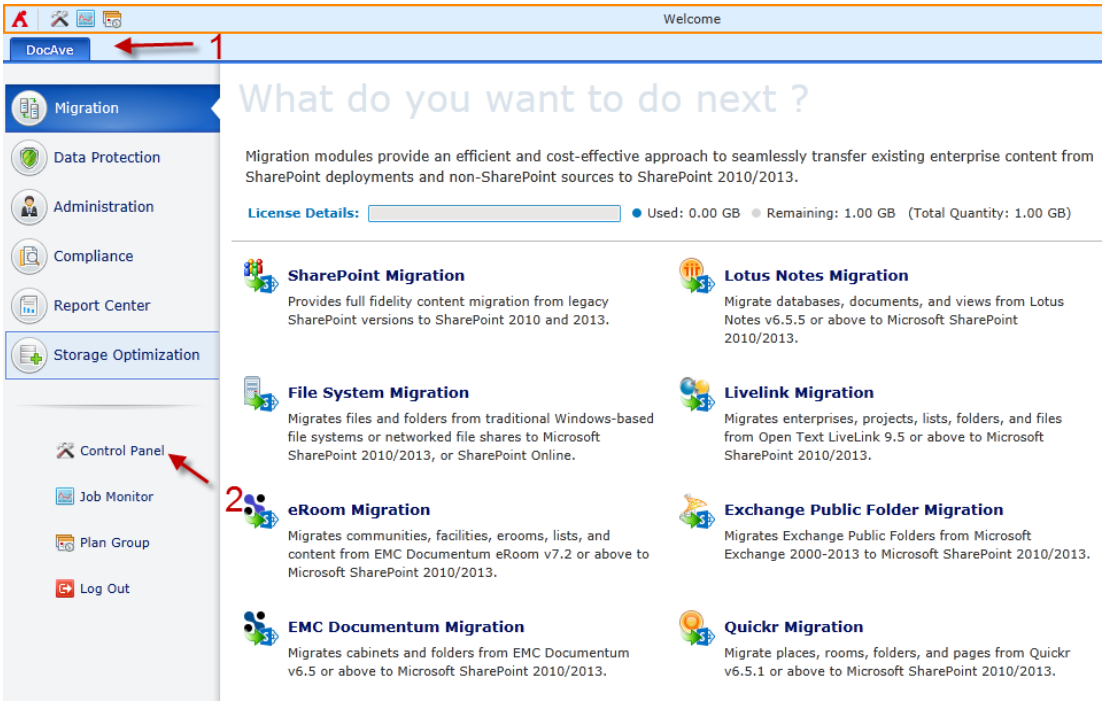

Figure 1: Control Panel icon on DocAve home page.

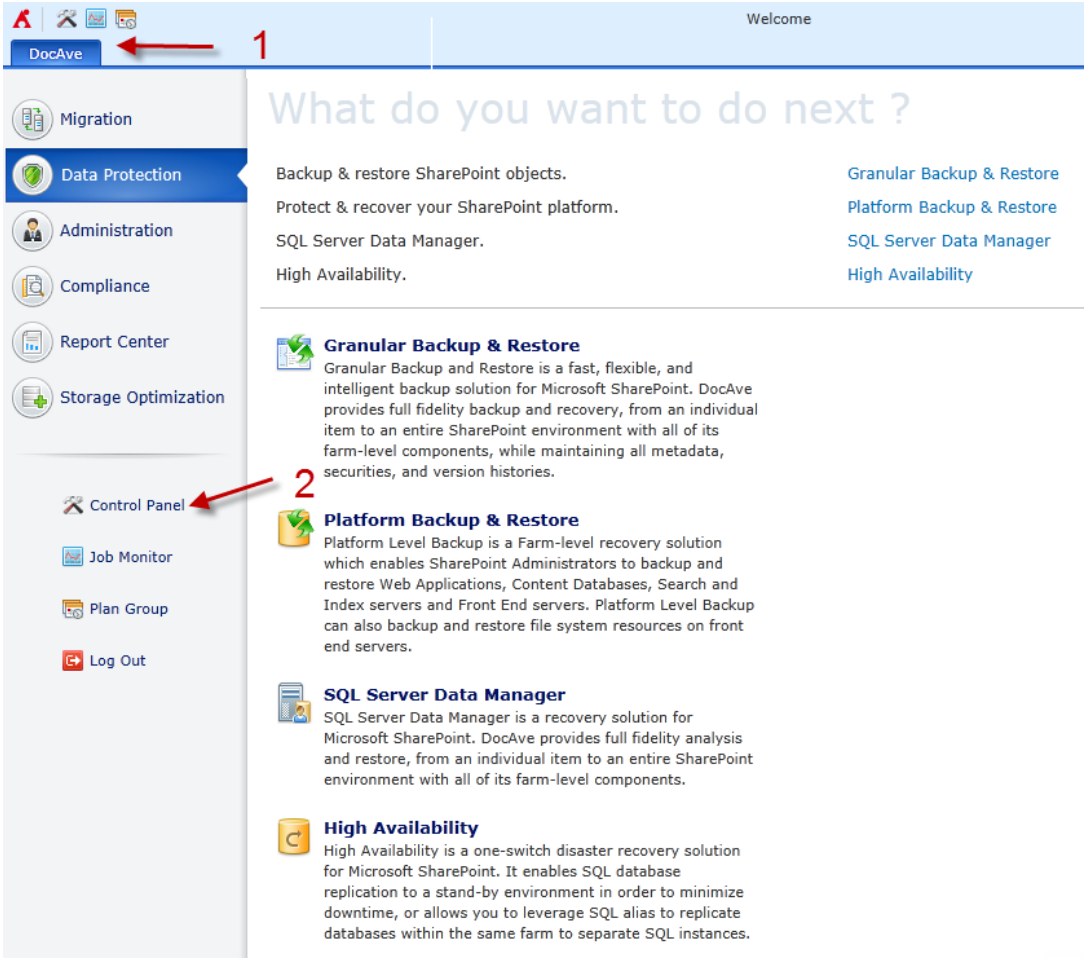

Figure 2: DocAve module launch window.

Understanding Control Panel

Control Panel has three key groups of components:

- **System Settings** – This is where you can view and manage your DocAve settings, managers, agents, authentication, licenses and product version. All of these functions are performed in Control Panel so that you can easily access them without leaving the interface for your current task in DocAve.
- **Application Settings** – This is where you can configure settings affect common tasks performed by all DocAve products. All of these settings are configured in Control Panel so that you can easily access them without leaving the interface for your current task in DocAve.
- **Specific Products Settings** – Certain products in DocAve utilize preset configurations for certain functionalities. While these settings may not affect all DocAve products, all of these settings are configured in Control Panel because they can be leveraged by more than one product.

Accessing Control Panel

Since features in Control Panel overlaps with so many products, it is important that it is easily accessible, but not disruptive of your current task. For this reason, while there are many ways to access Control Panel, the interface opens as a popup window so that you can remain on whichever page you are on, and when you are finished configuring settings in Control Panel, closing it will return you to the page you were on.

To access Control Panel:

1. Click the **DocAve** tab, and then click **Control Panel** in the left panel to launch Control Panel.
2. At any point while in DocAve, click the **Control Panel** icon ( ) in the upper left hand corner to launch Control Panel.
3. While in the interface of a certain product, if the product utilizes a feature in Control Panel, clicking on that feature on the ribbon of the product page will bring up the Control Panel popup window with the appropriate tab open.
4. Whenever you are finished configuring settings in Control Panel, close the window to return to the previous screen you were on.

System Settings

General System Settings in Control Panel allows you to customize the way DocAve interacts with your SharePoint environment. Here you can manage DocAve managers and agents, configure DocAve settings, and perform DocAve administrative tasks.

- **Monitor** – DocAve Control Panel includes a Manager Monitor and an Agent Monitor. These provide you with control over the DocAve managers and agents installed on your SharePoint environment.
- **System Options** – In System Options, you can configure General Settings, and Security Settings.
- **Managers** – In Control Panel, there are Authentication managers and DocAve managers; Authentication managers include the Authentication Manager and the Account Manager, which gives you control over who has access to and what they can do in DocAve. DocAve managers include the License Manager and the Update Manager. These let you view and manage which DocAve products you have access to, and what version of DocAve you are using.

Monitor

The monitor features in the Control Panel of DocAve allow you to view and manage DocAve manager services and DocAve agents:

- **Manager Monitor** – Here you can view and configure your DocAve manager services currently installed on your SharePoint environment. With Manager Monitor, you can also perform basic maintenance operations on your manager services should a manager service ever becomes unresponsive or is having issues, or you may temporarily disable the DocAve Manager services to perform a server maintenance.
- **Agent Monitor** – Here you can view and configure your DocAve agents currently installed on your SharePoint environment. This can be useful if there is a change in personnel, and the SharePoint account that the Agent uses to communicate with SharePoint needs to be changed. With Agent Monitor, you can also perform basic maintenance operations on your agents if an agent ever becomes unresponsive or is having issues, or temporarily disable the DocAve Agent service to perform server maintenance.

Using Manager Monitor

To access **Manager Monitor**, in the **Control Panel** interface, click **Manager Monitor** under the **Monitor** heading. In **Manager Monitor**, you will see a list of manager services which have been registered to the current DocAve Control service. You can customize how your manager services are displayed in the following ways:

- **Search** – Filters the manager services displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the Manager Monitor viewing pane, enter the keyword for the manager service(s) you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** ( ) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button ( ), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** ( ) – Hover over the column name you want to hide, and then click the hide the column button ( ).
- **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name you want to filter, then click the filter the column button ( ), and then select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

Once your manager services are appropriately displayed, you can select a manager service by selecting the checkbox next to the Service Name, then click:

- **Configure** – If you select a media service, this button will become available. Click **Configure** on the ribbon to access the **Configure** interface. Here you can configure the cache location settings and adjust the free space threshold. If more than one cache location is configured for the media service, DocAve will store cache data according to the order of the cache locations listed here. You can change the order in which the cache locations are listed in by selecting its desired place in the list from the corresponding drop-down menu under the **Order** column. Once all of the cache locations are full, the oldest data will be deleted to make room for new data. The following settings may be configured for a Media Service:
    - **Cache Location** – The cache location saves the index database which stores the index of the backup data. By default, the cache location is set to: *…\AvePoint\DocAve6\Manager\Media\Cache*.

      Click **Add Cache Location** to create a new cache location. A new window will pop up where you can select a **Device Type** in the corresponding drop-down menu, which can be a **Local Path** or a **UNC Path**. If you select **Local Path**, in the **Destination** field, enter the Local Path in the **Local path** text box. If you select **UNC Path**, enter the **UNC Path**, **Username** and **Password** in the corresponding text boxes in the **Destination** field.

***Note:** If your environment is the Media service High Availability environment, you can only select the **UNC Path** as the **Device Type**; otherwise, the test will fail.

Click **Validation Test** to verify that the information entered provides access to the corresponding path. Then click **OK** to add the new cache location, or click **Cancel** to exit this page without saving the configurations.

- **Threshold** – The threshold you set will be the lowest amount of free space a cache location can have before either another cache location (if configured) is used, or the data is deleted. To set the **Threshold**, enter the number in Megabytes into the corresponding text box.

  ***Note**: By default, the threshold is 1024 MB. If the cache location is in the system disk, keep at least 1024 MB of free space to ensure that the performance of the operating system is not affected.

- **Refresh** – Select a cache location then click **Refresh** on the ribbon to update the amount of free space the selected cache location has.
- **Delete** – Select a cache location, then click **Delete** on the ribbon to delete the selected cache location.

  ***Note:** The media service must have at least one cache location. If you attempt to delete the only cache location configured for a media service, an error message will pop up, and the selected cache location will not be deleted.

  Once you are finished configuring the media service, click **OK** to save the configurations and return to the **Manager Monitor** interface, or click **Cancel** to return to the **Manager Monitor** interface without saving any changes.

- **View Details** – Click **View Details** on the ribbon to bring up the **View Details** page with information about the selected manager service.
- **Notification Selection** – Click **Notification Selection** on the ribbon to configure e-mail notification settings. The specified recipients in the selected notification profile will be sent an e-mail when the Manager service is inactive. In the **Notification Selection** page, select a previously configured notification profile from the drop-down menu or select **New Notification Profile** to set up a new e-mail notification profile. For more information about how to configure notification, refer to the User Notification Settings section in this user guide.
- **Restart** – Click **Restart** on the ribbon to restart the selected managing service. This is useful in situations where the manager is sluggish, or if a job it is running hangs. You can restart the manager service and try again.

  ***Note**: Any jobs that are running when you restart the manager service will fail.

- **Remove** – Click **Remove** on the ribbon to remove the selected manager service from the Manager Monitor. The removed manager service will no longer be used by the control

service. You can only remove manager services that have a down arrow ( ) in the **Status** column.

***Note:** This does not uninstall the manager service.

- **Deactivate** – Click **Deactivate** on the ribbon to deactivate the selected manager service. Once the manager service is deactivated, it is marked as *Inactive,* and will not be used by the current control service. However, the deactivated service will still run normally. This is useful when you want to perform maintenance on a specified DocAve Manager server.

  ***Note**: Any jobs that are running when you deactivate the manager service will fail.

- **Activate** – Click **Activate** on the ribbon to activate the selected manager service. Once the manager service is activated, it is marked as *Active,* and will be used by the current control service.

When you are finished viewing and managing your manager services, click **Close** on the ribbon to close the Manager Monitor tab and return to the Control Panel main page.

Using Agent Monitor

To access Agent Monitor, in the Control Panel interface, click **Agent Monitor** under the Monitor heading. In Agent Monitor, you will see a list of DocAve agents which have been registered to the current DocAve Control service. You can customize how your agents are displayed in the following ways:

- **Search** – Filters the agents displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the Agent Monitor viewing pane, enter the keyword for the agent(s) you want to display. You can select to **Search all** pages or **Search current page**.
- **Manage columns** ( ) – Manages which columns are displayed in the list so that only the information you want to see will be shown. Click the manage columns button ( ), then select the checkbox next to the column name to have that column shown in the list. The columns available for selecting are:
  - **Agent Name** – The name of each registered Agent.
  - **Status** – The status of each registered Agent.
  - **Notification** – The notification profile name.
  - **Mode** – The current work mode of the Agent.
  - **Version** – The DocAve version of each registered Agent.
  - **Farm Name** – The name of the farm where the Agent resides.
  - **Agent Type** – The number of the selected Agent types for each registered Agent.
  - **Last Registration Time** – The last registration time of the Agent.

- **Environment Details** – The detailed information of the environment where the Agent is installed.
- **Message** – The prompted error information for the Agent. If an error occurred to the Agent, click **Message…** in this column and the detailed error information will be displayed in the pop-up window.

- **Hide the column** (⊖) – Click the hide the column button (⊖) in the column name to hide the column.
- **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Click the filter the column button ( ) in the column you want to filter, and then select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

Once your DocAve agents are appropriately displayed, you can select an agent by selecting the checkbox next to the Agent Name, and then click:

- **Configure** – Once you select an agent, this button will become available. Click **Configure** on the ribbon to access the Agent Configuration interface. Here you can configure the SharePoint Account for the agent as well as the agent type.
  - **SharePoint Account** – The SharePoint Account is used by the DocAve agent to provide DocAve with access and control to your SharePoint environment.
    - By default, the **Select a previously created managed account profile** radio button is selected. Select a previously-configured profile from the drop-down list, or click **New Managed Account Profile** to create a new profile. For more information on how to create a new managed account profile, refer to the Managing the Managed Account Profile section in this user guide.
    - Select the **Create a new managed account profile** radio button and enter the **Username** and **Password** for the desired account into the corresponding text box. The account configured here must have the required permissions for the DocAve products that are enabled. For more information on the minimum permissions required, refer to the **Appendix D: Permission Requirement for DocAve Modules** in the DocAve 6 Installation Guide.

      ***Note:** After the changes take effect, the entered username and password will be automatically saved as a new managed account profile. You can verify the newly saved managed account profile by going to the **Managed Account Profile** interface.
  - **Agent Type Configuration** – In order to use a certain product, the corresponding agent type must first be configured. Before selecting the product, the necessary Agent(s) for that product must already be installed. For more information, refer to DocAve 6_Installation_Guide.

To configure the agent type for the agent, select the checkbox next to the corresponding product. You can navigate through the different product suites that are enabled for you by clicking on the name of the suite. Click **On Premise** to configure the agent type on your local environment. Switch to the **Registered SharePoint Sites** tab to configure the agent type for your SharePoint Online environment. The products that support SharePoint Online are Granular Backup, Administrator, Content Manager, Replicator, File System Migration, and SharePoint Migration.

***Note:** If your DocAve 6 Service Pack 3 is upgraded from DocAve 6 Service Pack 2, under the **On Premise** tab, the **SQL Server Data Manager** checkbox and the **High Availability** checkbox are deselected by default; under the **Registered SharePoint Sites** tab, the **File System Migration** checkbox and the **SharePoint Migration** checkbox are deselected by default. If desired, you can manually select these checkboxes after purchasing the corresponding licenses.

- **Job Restriction** – Limit the maximum number of jobs that are allowed to run simultaneously by this agent by enabling the **Restrict the simultaneously running job count** option and enter a positive integer into the text box.

  ***Note**: **Platform Backup and Restore** does not support the **Job Restriction** function.

- **Temporary Buffer** – Select **Local Path** or **UNC Path** to store the temporary files that are generated when running the jobs of the following products: Report Center, Replicator, Platform Backup & Restore, Granular Backup & Restore, and High Availability.

  ***Note**: The temporary files that are generated when running the jobs are saved in the Agent installation directory by default: *…\AvePoint\DocAve6\Agent\temp.*

Once you finish configuring the agent, click **OK** to save the configurations and return to the Agent Monitor interface, or click **Cancel** to return to the **Agent Monitor** interface without saving any changes.

- **Configuration File** – Upload agent configuration files to the Manager server and change them for the specified agents. Select the desired DocAve Agents in Agent Monitor and click **Configuration File** on the ribbon to change the configuration file for them. In the pop-up window, click **OK** to confirm the modification action and you will be redirected to the configuration page. Refer to the instructions below to change the configuration file.

  ***Note**: Since modifying the agent configuration files can be risky, it is not recommended for end-users to do it.

  - **Agent Information** – In this field, you can view the agents you have selected previously.

- **Browse Configuration File** – Upload the configuration file to the Manager server. Click **Browse** to find the specified **.config** file and click **Open** to upload it. You are able to upload multiple configuration files. Note that the name of the configuration file you upload must have the same name as the existing one, and then you are able to apply the configuration file to destination.
- **Destination Path** – Enter the place where you want to upload the configuration file. DocAve supports configuration file change in **Agent\Bin** and **Agent\data** paths.
- **Conflict Resolution** – Select a resolution when two configuration files have the same name.
  - **Merge** – The content of the newly uploaded configuration file will be merged into the old one.
  - **Replace** – The newly uploaded configuration file will replace the old one.

Click **OK** to change the configuration files as you have configured or click **Cancel** to exit the interface without saving the configuration. If you click **OK**, you will be asked to restart the Agent service. Click **Auto** to automatically restart the agent service immediately or click **Manual** to manually restart the agent service later.

- **View Details** – Click **View Details** on the ribbon to bring up the View Details page with information about the selected DocAve Agent. Click the **Summary** tab to view the Agent information. Click the **Agent Types** tab to view all the agent types of this selected DocAve Agent.
- **Notification Selection** – Click **Notification Selection** on the ribbon to configure e-mail notification settings. The specified recipients in the selected notification profile will be sent an e-mail when the Agent service is inactive. In the **Notification Selection** page, select a previously configured notification profile from the drop-down menu or select **New Notification Profile** to set up a new e-mail notification profile. For more information about how to configure notification, refer to the User Notification Settings section in this user guide.
- **Restart** – Click **Restart** on the ribbon to restart the selected DocAve agent. This is useful in situations where the agent is sluggish, or if a job it is running hangs. You can restart the agent and try again.

  ***Note**: Any jobs that are running when you restart the agent will fail.

- **Remove** – Click **Remove** on the ribbon to remove the selected DocAve agent from the Agent Monitor. The removed agent will no longer be used by the control service. You can only remove agents that have a down arrow ( ) in the **Status** column. Note that this does not uninstall the agent.

  ***Note**: If the Agent is currently used by one or more plans, the Agent cannot be removed.

- **Deactivate** – Click **Deactivate** on the ribbon to deactivate the selected DocAve agent. Once the agent is deactivated, it is marked as *Inactive,* and will not be used by the current control service. However, the deactivated service will still run normally. This is useful when you want to perform maintenance on a specified DocAve agent.

  ***Note**: Any jobs that are running when you deactivate the agent will fail.

- **Activate** – Click **Activate** on the ribbon to activate the selected DocAve agent. Once the agent is activated, it is marked as *Active,* and will be used by the current control service.

When you are finished viewing and managing your DocAve agents, click **Close** on the ribbon to close the Agent Monitor tab and return to the Control Panel main page.

System Options

System Options allow you to customize DocAve General Settings and Security Settings:

- **General Settings** – These settings affect DocAve's interface, which includes settings for Appearance and SharePoint Farm Settings. This way, you can have DocAve be displayed in the language of your preference, use date and time format that you are comfortable with, insert a custom logo for your reports and e-mail templates, and rename your SharePoint farms so that it is easier for you to recognize them.
- **Security Settings** – These settings affect access to DocAve, which includes settings for System Security Policy and System Password Policy. This way, you have control over the users that are able to access DocAve.

Configuring General Settings

To access General Settings for DocAve, in the Control Panel interface, click **General Settings** under the **System Options** heading.

The following settings can be configured in this page:

- **Language Preference** – Specify a language for DocAve to be displayed in, or allow users to utilize a translation engine to have DocAve displayed in the language of the user's browser.
  - **Display … for all users** – Select this option to have DocAve be displayed in the language specified here. To change the display language, click on the drop-down menu, and select your desired language.
  - **Change to the end user browser used language** – Select this option to allow DocAve to be displayed in the language used by the user's browser. Then select a language for DocAve to default to in the **If the language does not change successfully, please select to use a default language** drop-down menu. This way, if DocAve does not properly display in the user's browser language, DocAve will be displayed in the language specified here.

- **Date and Time Format** – Set the system location by selecting a location from the **Locale(Location)** drop-down menu. Set the format for all date and time displayed in DocAve by selecting a date format from the **Date format** drop-down menu, and selecting a time format from the **Time format** drop-down menu.
- **Customize Logo** – Customize the logo for DocAve system reports and e-mail templates. Click **Browse** to find the desired logo file in the pop-up, then select the logo, and click **Open** to open it. Click **Show Preview** to view the logo in the Show Preview area. To hide the Show Preview area, click **Hide Preview.**

  Click and drag the logo in the display field to change its placement. Click to zoom in, to zoom out, or to reset the settings of the new logo. Click **Restore to Default** button to roll back to the default logo.

- **Farm Name Mapping** – Customize the display names for your farms in DocAve. To find a specific farm, enter the farm name in the search text box, and click the magnifying glass ( ) to search.

  ***Note:** The search function is not case sensitive. For each farm, enter the desired display name in the corresponding **Display Name** text field.

When you are finished configuring DocAve General Settings, click **Save** to save all changes, then **Close** to close the System Options interface. If you click **Close** without saving first, any changes you have made will be lost.

Configuring Security Settings

To access Security Settings for DocAve, in the Control Panel interface, click **Security Settings** under the System Options heading. There are two tabs under Security Settings, System Security Policy and System Password Policy.

System Security Policy

In the **System Security Policy** tab, the following options can be configured:

- **Maximum User Session** – Configure the number of simultaneous logons allowed for DocAve. For any new sessions that surpass the designated number, the earliest session will be terminated.
- **Session Timeout** – Configure how long a user can be inactive before being automatically logged off. Enter an integer into the **Logon will expire in:** text box, then select either **Minute(s)** or **Hour(s)** in the drop-down menu.
- **Failed Logon Limitation** – Specify the maximum number of failed logon attempts allowed in one day. If a specific account fails to provide the correct login information in a single day, it will be locked. To unlock the specified account, refer to the Account Manager section of this guide.

***Note**: This setting only affects local users besides the default Admin account. Active Directory users and Windows users added in DocAve are not affected by the limitations.

- **Inactive Period** – Configure how long a user can be inactive before the account is automatically disabled. Enter an integer into the **Deactivate the account when the inactive period reaches:** text box, then select either **Day(s)** or **Month(s)** in the drop-down menu. Once deactivated, a DocAve administrator must activate the account before the user can log onto DocAve.
- **Network Security** – Configure the IP addresses to have the desired level of access to DocAve. To access these settings, select the **Enable network security** checkbox, then select either:
    - **Trusted network** – If selected, only the IP addresses added to this field can access DocAve. To add an IP address as a trusted network, enter the IP address in the **Equals** text box, then click Add. Repeat these steps to add additional IP addresses.
    - **Restricted network** – If selected, the IP addresses added to this field cannot access DocAve. To add an IP address as a restricted network, enter the IP address in the **Equals** text box, then click Add. Repeat these steps to add additional IP addresses.

System Password Policy

In the **System Password Policy** tab, the following options can be configured:

- **Default Password Settings** – Specify the rules to be applied on the password after it has been saved. Select **Account is inactive** if you would like to manually activate the account before it can be used.

  If no option is selected in this field, the password does not need to be modified at first login and it will never expire.

- **Maximum and Minimum Password Length** – Enter an integer for the maximum and minimum number of characters allowed in a password.
- **Password Rule** – Configure requirements for password.
    - **Minimum number of alpha** – Enter a positive integer, there must be at least the specified number of letters in the password.
    - **Minimum number of numeric** – Enter a positive integer, there must be at least the specified number of numbers in the password.
    - **Minimum number of special characters** – Enter a positive integer, there must be at least the specified number of special characters in the password. The special characters include !, @, #, $, %, ^, & and *.
    - **Password cannot contain user ID** – Select this option and the password cannot contain the user's name.

    - **Password cannot contain space** – Select this option and the password cannot contain space(s).

- **Password Expiration Warning** – Send out warnings if the password of a user will expire in the specified time period. Set the period by entering a positive integer using the options of **Day(s)** or **Month(s)**. You can choose the forms of the warning by select **Popup message** or **E-mail Notification**.

Viewing Security Information

DocAve 6 uses passphrase to protect the DocAve databases and secure the communication. Before connecting to the DocAve Manager when installing the DocAve Agents, the passphrase must be entered to verify the access.

The passphrase is configured during the Manager's Installation. To manage the passphrase, while in the System Options tab, click **Security Information** on the ribbon. You can perform the following actions:

- **Back Up** – Click this button to back up the passphrase to the following path: *…\AvePoint\DocAve6\Manager\KeysBak*.

  It is strongly recommended backing up security keys and save the backup in a safe place.

- **Manage Passphrase** – Click this button to view and modify the passphrase. The following option will be displayed.

  - **Modify** – By default, the password cannot be modified. You can click this button to enable the modification of the default password.

    Enter a new passphrase in the corresponding text box and click **OK** to save it.

  ***Note**: Only the users of Administrators group have the permission to modify the passphrase. For details of adding users into Administrators group, refer to the Managing Users section in Account Manager.

Authentication and Account Manager

Authentication Manager and Account Manager allow you to customize which users and user groups have access to DocAve. You can set up DocAve to utilize existing methods for authentication such as Windows Authentication, Active Directory integration (AD) and Active Directory Federation Services (ADFS) Integration, or manually add specific users and set permission levels.

***Note:** In order to add specific users in Account Manager that authenticates using Windows Authentication, AD authentication or ADFS authentication, you must first set up the authentication integration in Authentication Manager.

Authentication Manager

Authentication Manager allows you to view and manage integrated authentication methods usable by DocAve. This means that DocAve can leverage your pre-existing authentication methods, and customize it for access to DocAve. These authentication methods include:

- **Windows Authentication** – Allows the users to log onto DocAve using their Windows Authentication credentials.
- **AD Integration** – Allows the users to log onto DocAve using their Active Directory authentication credentials.
- **ADFS Integration** – Allows the users to access DocAve as long as they have logged into the local machine using their ADFS credentials.

To access Authentication Manager for DocAve, in the Control Panel interface, click **Authentication Manager** under the Authentication Manager heading. Click **Close** on the ribbon to close the Authentication Manager interface.

On the Authentication Manager interface, you can select one authentication method, and click **Set as default** in the **Set as default** column to set the specified authentication method as the default authentication method. After setting the authentication method, you can go to Account Manager to add users.

Configuring Windows Authentication

To leverage Windows Authentication credentials to access DocAve, complete the following steps:

1. In the Authentication Manager interface, click **Windows Authentication** on the ribbon.
2. Select the **Authentication Type** from the drop-down menu:
    a. NTLM
    b. Negotiate (Kerberos)

    ***Note**: Kerberos authentication method must be previously configured in the operating system before you select the **Negotiate (Kerberos)** option when enabling the integration with Windows Authentication. Otherwise, the **NTLM** authentication method will be enabled.
3. Click **OK** to save any changes made and close the Windows Authentication interface, or click **Back** to close the Windows Authentication interface without saving any changes made.

Configuring AD Integration

To leverage Active Directory authentication credentials to access DocAve, configure your Active Directories in the AD Integration interface.

To access your Active Directory integration configurations, in the Authentication Manager interface, click **AD Integration** on the ribbon. In the AD Integration configuration interface, you will see a list of previously configured Active Directories. You can customize how these Active Directories are displayed in the following ways:

- **Search** – Filters the Active Directories displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the Active Directory you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).
- **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name you want to filter, then click the filter the column button ( ), and then select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

To manage your integrated Active Directories, you can perform the following actions:

- **Add** - To add a new Active Directory, click **Add** on the ribbon, then enter the **Domain**, **Username** and **Password** in the corresponding text box. Click **Validation Test** to see if the values you entered are valid, then click **OK** to save the configurations for the new Active Directory and return to the AD Integration interface, or click **Back** to return to the AD Integration interface without saving the configurations.
- **Edit** – To make changes to a previously configured integrated Active Directory, select the Active Directory by selecting the corresponding checkbox, then click **Edit** on the ribbon. Make the necessary changes, then click **OK** to save the changes and return to the AD Integration interface, or click **Back** to return to the AD Integration interface without saving any changes.
- **Delete** – To delete a previously configured Active Directory, select the Active Directory by selecting the corresponding checkbox, then click **Delete** on the ribbon. You will be presented with a popup window notifying you that "**The user(s) associated with the selected domain(s) will be disabled. The user(s) can be enabled only by adding the selected domain(s) again. Are you sure you want to proceed?"**. There is also an option to remove all of the users that are associated with the selected Active Directory(s) from DocAve; to do so, select the **Remove all users associated with the selected domain(s)** checkbox. Click **OK** to confirm the deletion, or click **Cancel** to return to the AD Integration interface without deleting the selected Active Directory(ies).
- **Enable** – Click **Enable** to allow the use of credentials from the corresponding Active Directory to access DocAve.

- **Disable** – Click **Disable** to not allow the use of credentials from the corresponding Active Directory to access DocAve. This option is useful during the maintenance of the Domain Controller machine. You can disable the integration with the domain to be maintained and enable the integration again after the maintenance.

After one Active Directory has been integrated with DocAve, it will be shown in the **Domain** text box after you select **AD Integration** in the **Log on to** drop-down list of the DocAve login page. If a domain has father domain, sub domain or trust domain, when a user from these domains has been added to DocAve, the corresponding domain will also be added into DocAve and you will be able to view this domain in DocAve login page.

Configure ADFS Integration

To leverage Active Directory Federation Services (ADFS) authentication credentials to access DocAve, configure your ADFS integration in the ADFS Integration interface.

To access your ADFS integration configurations, in the Authentication Manager interface, click **ADFS Integration** on the ribbon, then select **ADFS Integration** in the drop-down menu. You will be brought to the **ADFS Integration Wizard**. Follow the steps laid out by the wizard to set up ADFS integration:

1. **ADFS Information** – Specify the following general information of the ADFS you wish to integrate:
    a. **ADFS Integration Method** – Select **Manually** to configure the settings yourself, or select **Automatically** to get the required information by using a federation metadata trust XML file.
        - **Manual configuration** – Enter the URL of the security token service (STS) in the **ADFS Issuer** text box in the following format: *https://full qualified domain name/adfs/ls*
        - **Automatic configuration** – Enter the URL of the federation metadata trust XML file in the **Federation Metadata Trust** text box in the following format: *https://full qualified domain name/FederationMetadata/2007-06/FederationMetadata.xml*

    b. **Relying Party Identifier** – Enter DocAve's Relying Party Identifier, which must first be configured in ADFS in the **Relying Party Identifier** text box.

    When you are finished configuring the ADFS Information, click **Next** to configure the Security Token Settings.

2. **Security Token Settings** – Configure the certificates used in the ADFS integration.
    a. **Token-signing** – Click **Select.** A new Select Certificate popup window will appear for you to specify a token-signing certificate to communicate with ADFS. This certificate must be the same as the one configured in ADFS. Alternatively, you may also click **Find Certificate** to search for the desired certificate. Select a **Find in:** parameter from the drop-down menu, enter the keywords in the **Contains:** text box, select a **Look in field:** parameter from the drop-down menu, then click **Find Now** to start the search. Click

Stop to stop the search. Once you have selected your desired certificate, click **OK** to save and exit the Select Certificate interface, or click **Back** to exit the Select Certificate interface without saving specifying a certificate.

***Note**: The certificate specified here must be the same as the one configured in ADFS.

b. **Token-decrypting (optional)** – Click **Select.** A new Select Certificate popup window will appear for you to specify a token-decrypting certificate to protect the communication between DocAve and ADFS. This certificate must be the same as the one configured in ADFS. Alternatively, you may also click **Find Certificate** to search for the desired certificate. Select a **Find in:** parameter from the drop-down menu, enter the keywords in the **Contains:** text box, select a **Look in field:** parameter from the drop-down menu, then click **Find Now** to start the search. Click **Stop** to stop the search. Once you have selected your desired certificate, click **OK** to save and exit the Select Certificate interface, or click **Back** to exit the Select Certificate interface without saving specifying a certificate.

When you are finished configuring the Security Token Settings, click **Next** to configure the Claim Configuration.

3. **Claim Configuration** – Configure the mappings between the Claim Name displayed in DocAve and the Claim Type displayed in ADFS. You can perform the following actions to your claims:

   a. You can change the order of the claims in the Order column of the table. If a user can be identified using several claims, DocAve will use the Claim Name of the first claim listed here as the display name for each respective user.

   b. Click to delete the selected claim.

   c. Click **Automatically** to have the claim type be specified automatically after you select the claim name from the **Claim Name** drop-down menu. Click **Manu** to add the claims manually. Click **Auto** to switch back to the default option.

4. **Overview** – Review the settings you have configured in the previous steps. To make changes, click **Edit** in the corresponding section, and you will be brought back to that step so you can make changes.

5. **Finish** – Provides you with three options to import the relying party data for DocAve in ADFS (using the **Add Relying Party Trust Wizard**).

   a. **Option 1** – Click the link to import relying party data that is published online from the local network Federation metadata address.

   b. **Option 2** – Click on the link to download the Federation metadata XML file, then upload the downloaded file to the ADFS server. Follow the wizard to configure other settings.

   c. **Option 3** – Enter the relying party data and the relying party identifier manually in the ADFS configuration wizard.

In this step, you can also choose to export the current ADFS configuration information to a specified location by clicking **Export** on the ribbon, then explore to the location you wish to save the XML file to.

Click **Finish** to save your configurations, and return to the Authentication Manager interface, or click **Cancel** to return to the Authentication Manager interface without saving any of the configurations made.

Once you have configured an ADFS integration for DocAve, the **Add Federation Trust** option will become available**. Add Federation Trust** allows you to integrate another trusted ADFS with the ADFS you have already configured for DocAve.

To add integration with another trusted ADFS, in the Authentication Manager interface, click **ADFS Integration** on the ribbon, then select **Add Federation Trust** from the drop-down menu. In the Add Federation Trust interface, enter the following information:

- **Name** – The name entered here will be displayed in the **Server** drop-down menu on the login page. You can select the corresponding name to log on DocAve using the trusted ADFS.
- **URL** – The identifier of the trusted ADFS.

Click **Add** to add the new record or click ✕ to delete a selected ADFS trust.

Account Manager

Account Manager allows you to view and manage users for DocAve, as well as configure user groups with custom permission levels. This allows you to give specific people, or groups of people your desired level of access to DocAve.

In Account Manager you can security trim DocAve users to limit which DocAve module a user is able to access and which farm(s) and remote site collection(s) specific DocAve users can access. Each user can only be added to either a System Group or a Tenant Group. A user in a system group can belong to multiple system groups; however, a user in a tenant group can only belong to one tenant group. The same user cannot be added to both a System Group and a Tenant Group. In order to add a user in a system group to a tenant group, you must remove this user from the system group, and add this user to a tenant group as a new user.

- **Administrators Group** – Administrators group is the built-in group which cannot be deleted. Users in this group can manage both system groups and tenant groups, but they cannot see the objects created by the users in the tenant groups. Users in the Administrators group manage tenant objects by creating another user in the tenant groups to the tenant group.
- **System Group** – System Group is the user-defined group. Users in this group can view and modify DocAve objects created by any users in the system groups. Due to different specified permission levels, users in this group can view and modify the SharePoint objects of the specified modules in the specified farm.

- **Tenant Group** – Tenant group includes Web application tenant group and site collection tenant group. There are power users and standard users in the tenant group. A power user must be added when creating the tenant group. Refer to Security Trimming Users section of this guide for more detailed information.

***Note:** If you would like to leverage authentication credentials from Windows Authentication, AD or ADFS, you must first configure the relevant integration settings in Authentication Manager.

To access **Account Manager** for DocAve, in the **Control Panel** interface, click **Account Manager** under the **Account Manager** heading. Click **Close** on the ribbon to close the **Account Manager** interface.

Security Trimming Users

If you are using DocAve Governance Automation alongside DocAve 6, it is recommended that you do not have users in the tenant groups and only use the default System Group.

DocAve 6 Service Pack 3 supports security trimming rule to all of the DocAve modules. For details on permission control over the users in the Tenant Group and the users in the System Group, refer to the information below.

- For users of Tenant Group:
  - The users in a Tenant Group include power users and standard users.
    - **Power User** – The power users can create and delete any standard users and other power users. The power users can manage all the objects in their own group. The power users can share the site collections and the plans that are belonged to a standard user to the other standard users.

      ***Note**: The related objects of the deleted standard users or power users will not be deleted. The last power user in the tenant group cannot be deleted.

    - **Standard User** – The standard user can only have permission to the site collection when the power user shares the site collection to him.

      ***Note**: When the power user shares the specified site collections to the standard user, the standard user can only view and use the specified site collections in the tree, but cannot edit or delete the content of these site collections.

      ***Note:** When logging in to DocAve using a standard user in the tenant group, the standard user cannot perform the **Object-based Restore** jobs in the **Granular Backup & Restore** module.

  - The users in the Tenant Group cannot view objects created by the users in System Group.
  - When a user in the Tenant Group is removed from the group, the DocAve plans, profiles or jobs it creates will not be deleted.

- If there are no plans or data, only users and profiles in the tenant group you are about to delete, this kind of tenant group can be deleted. If there are plans and data in the tenant group you are about to delete, a pop-up window appears to inform you that cannot delete this tenant group. In this pop-up window, DocAve also provides two workarounds for the security reason: one is to manually delete all of the objects in this group, then delete this group; the other is to remove or disable all of the users in this tenant group to make sure there are no users can access this tenant group.
- The users in the tenant group can be granted the permission to the following modules: **Granular Backup & Restore**, **Administrator**, **Content Manager**, and **Replicator**.
- The users in the tenant group can be granted the permission to the following functions in Control Panel: **User Notification Settings**, **Security Profile**, **Storage Configuration**, **Mapping Manager**, and **Filter Policy**. For Web application tenant group, power users have permission to **Account Manager** by default while standard users do not. For site collection tenant group, power users have permission to **Account Manager** and **SharePoint Sites** by default while standard users do not.

- For users of System Group:
  - The users in the System Group can view and modify DocAve plans, profiles, or jobs created by other users in the same group or in the different system groups. Users in the System Group can share data and information. Users in the System Group cannot view any plan, profile or job created by a user in the Tenant Group.
  - Users in a System Group can only see plans, profiles, or jobs of modules they have permission for.
  - Users in a System Group can be granted the permission to all of the DocAve modules.
  - Users in a System Group can be granted the permission to the following functions in Control Panel: **User Notification Settings**, **Security Profile**, **SharePoint Sites**, **Storage Configuration**, **Export Location**, **Data Manager**, **Index Manager**, **Mapping Manager**, and **Filter Policy**.
- Different users cannot create plans with the same name.
- For security trimming rule of SharePoint Online environment, refer to SharePoint Sites.

Managing Permission Levels

Use Permission Levels to create pre-configured permissions that can be applied to user groups. This way you can quickly and easily apply the same permission configuration for multiple users.

To configure permission levels for DocAve, in the **Account Manager** interface, click **Permission Level** on the ribbon. In the **Permission Level** interface, previously configured Permission Levels will be displayed.

You can customize how these permission levels are displayed in the following ways:

- **Search** – Filters the permission levels displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the permission level you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).
- **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name you want to filter, then click the filter the column button ( ), and then select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

To manage your permission levels, you can perform the following actions:

- **Add** – To create a new permission level, click **Add** on the ribbon, and select **Add System Permission** or **Add Tenant Permission**. After selecting to add the corresponding permission level, you will be redirected to the configuration page accordingly, and then you can perform the following actions.
    - **Add System Permission** – Creates system permissions for system groups and users.
        - **Name and Description** – Enter a name for the new system permission level and an optional **Description** for future references.
        - **Module** – Select the modules you want to grant permission to for all groups and users using this permission level.

          For the modules, such as Granular Backup & Restore, Platform Backup & Restore, SQL Server Data Manager, Report Center, and Administrator, select the corresponding checkbox to grant the permission to each function in the corresponding module for all of the groups and users.
    - **Add Tenant Permission** – Tenant permission levels are permission settings that can be applied to tenant groups and users.
        - **Name and Description** – Enter a name for the new tenant permission level and an optional **Description** for future references.
        - **Module** – Select the modules you want to grant permission to for all groups and users of this permission level.

          For the Granular Backup & Restore module and the Administrator module, you can select the corresponding checkbox to grant the

permission to each function in the corresponding module for all of the groups and users.

Click **OK** to save the configuration. Click **Cancel** to return to the Permission Level Interface without saving changes.

- **Edit** – To edit a previously configured permission level, select the permission level you wish to edit by selecting the corresponding checkbox, then click **Edit** on the ribbon to navigate to the **Edit Permission Level** interface.
  - In the **Name and Description** section, you can modify the **Name** and a **Description** of this Permission Level.
  - In the **Module** section, you can select the modules or functions you wish to allow this permission level to access by selecting the corresponding checkboxes. You can click on a product suite name to modify the access to its modules, and click the up and down arrows to scroll to product suite tabs that are not currently in view. Note that unlicensed products have grayed out tabs, and cannot be configured.

  Click **OK** to save the modifications for the permission level and return to the **Permission Level** interface, or click **Cancel** to return to the **Permission Level** interface without saving the modifications.

  ***Note:** If the edited permission level is being used, a pop-up window appears to inform you that the permission of the group using this permission level is changed, and the permission of the users in this group is also changed. These permission changes may affect the users' access to the plans or jobs. The changes will take effect from the next login.

- **Delete** – To delete a previously configured permission level, select the permission level you wish to delete by selecting the corresponding checkbox, then click **Delete** on the ribbon. A pop-up window appears to confirm this action. Click **OK** to delete the selected permission level and return to the **Permission Level** interface, or click **Cancel** to return to the **Permission Level** interface without deleting the selected permission level.

  ***Note:** Cannot delete a permission level that is currently being used by one or more groups.

When you are finished managing your permission levels, click **Cancel** on the ribbon to return to the **Account Manager** interface.

Managing User Groups

User groups allow you to apply the same permission levels to all users within the same user group. This way, you can change the permission levels of multiple users by editing your user group rather than individually configuring permission levels for each user. You can also change the permission levels of a user by changing the group they belong to which has pre-configured permission levels.

To access your user group configurations, in the Account Manager interface, click **Groups** on the ribbon. In the Groups configuration interface, you will see a list of previously configured user groups. The Administrators group comes pre-configured and users of this group have full control over all modules.

You can customize how these user groups are displayed in the following ways:

- **Search** – Filters the user groups displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the user group you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).
- **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name you want to filter, then click the filter the column button ( ), and then select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

Adding User Groups

To add a new group, click **Add Group** on the ribbon. On the Add Group interface, you can perform the following configurations:

- **Add System Group** – To add new system groups, refer to the following steps.
    - **Group Name** – Enter a **Group Name** for the new system group, then enter an optional **Description** for future references, and select **System Group** as the group type.
    - **Permission** – Configure the Scope and permission for this new system group.
        - In the **Scope** section, select **Global permission** to grant the users of this system group access to all farms with the permission levels configured here or select **Permission for different farms** to grant users of this system group access to specific farms with the configured system permission levels. If **Global permission** is selected, choose which or all of the System Permission Levels you wish to associate with this System

Group. If **Permission for different farms** is selected, for each farm, choose which or all of the System Permission Levels you wish to associate with this System Group. Note that at least one permission level must be assigned to the new group.

        - In the **Permission** section, select the previously defined system permission levels you want to apply to this group by selecting the corresponding checkboxes.

    - **Add User** – Select users from the drop-down list to add to this system group.
    - **Overview** – On the overview page, you can view the group configuration information. Click **Finish** to save the configuration, Click **Back** to return to the previous interface, or click **Cancel** to return to the Account Manager interface without saving the configurations.

- **Add Tenant Group** – To add new tenant groups, refer to the following steps.
    - **Group Name** – Enter a **Group Name** for the new tenant group, then enter an optional **Description** for future references. Select either of the following two group types.
        - **Web Application Tenant Group**– Tenant group for the Web application level.
        - **Site Collection Tenant Group**– Tenant group for the site collection level.
    - **Permission** – Select the previously defined tenant permission levels you want to apply to this group by selecting the corresponding checkboxes. Note that you must at least assign one permission level to the new group.
    - **Scope** – Select the Web applications for the Web application tenant group. The scope configuration is only for the Web application tenant groups.
    - **Add User** – Select users from the drop-down list to add to this tenant group.
        - **Power User** – Select users as power users to manage this tenant group and the standard users in this tenant group. At least one power user should be added to the tenant group you are about to create.
        - **Standard User** – Optionally select users as the standard users to manage the specified Web applications or site collections.
    - **Overview** – On the overview page, you can view the group configuration information. Click **Finish** to save the configuration, Click **Back** to return to the previous interface, or click **Cancel** to return to the Account Manager interface without saving the configurations.

Editing User Groups

To edit a group, select the group by selecting the corresponding checkbox, then click **Edit Group** on the ribbon, or click on the name of the desired group. You will be brought to the **Edit Group** interface. Here you can change the description for this group, as well as the permission scope and permission levels. However, you cannot change the type (System Group or Tenant Group) of the saved group.

***Note**: If you have a group with **Full Control** permission configured in DocAve 6.0, after upgrading to DocAve 6 Service Pack 1 or later version, this group will maintain the **Full Control** permission but this will not show up on the interface by default. When you edit this group and change the permission, it will pop up a warning message that the **Full Control** permission of this group will be replaced by the newly granted permissions. You can click **OK** to continue the action and save the change or click **Cancel** to cancel the operation. In DocAve 6 Service Pack 1 or later version, only users of **Administrators** group have **Full Control** permission.

When you have finished making changes to the configurations for this group, click **OK** to save and return to the **Account Manager** interface, or click **Cancel** to return to the **Account Manager** interface without saving any changes.

Viewing and Managing Users in User Groups

To view and manage the users in a group, select the group by selecting the corresponding checkbox, and then click **Show Users** on the ribbon. You will be brought to the **Show User(s)** interface. For different types of the groups, the **Show User(s)** interfaces are different. Refer to the following descriptions for the detailed information:

- On the **Show User(s)** interfaces of Administrators group or system groups, you will see a list of all of the users that belong to this group. You can customize how these users are displayed in the following ways:
    - **Search** – Filters the users displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the user you want to display. You can select to **Search all pages** or **Search current page**.
    - **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the **information** you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
    - **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).
    - **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name you want to filter, then click the filter the column button ( ), and then select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

  You can perform the following actions on the users of this group:

    - **Add User to Group** – To add users to this group, click **Add User to Group** on the ribbon. You will be brought to the **Add User to Group** interface. Enter the username of the user you wish to add, then click to verify that the username you entered is valid. Alternatively, you can click to search for the desired

user; In the popup window, enter the value to search for in the Find text box, then click . Select the desired user then click **Add**. Click **OK** to add the users, or click **Back** to close the window without adding the users.

***Note**: The same user cannot be added to groups of the different types (System Group and Tenant Group).

- **Remove User from Group** – To remove users from this group, select the desired users by selecting the corresponding checkbox, then click **Remove User from Group** on the ribbon. A confirmation popup window will appear to confirm the remove operation. Click **OK** to delete the selected user(s), or click **Cancel** to return to the Show Users interface without deleting the users.

When you are finished, click **Back** to add the defined users to this group and return to the Show Users interface.

- On the **Show User(s)** interface of Web application tenant groups and site collection tenant groups, you can select different view types of the groups, and perform the following operations:
  - **User Based View** – The **Managed Web Applications/Site Collections** and **Plans** will be displayed according to different users. While selecting this view type, the power users and standard users will be displayed on the left pane of this interface. Specify a user by selecting the checkbox beside the user, the **Managed Web Applications/Site Collections** and **Plans** for this specified user will be displayed on the right pane.
    - **Add User** – To add users to this group, click **Add User** on the ribbon. You will be brought to the **Add User** interface. Specify users from the **Select users to add to the group** drop-down list. Select the user type. Click **Next** to assign the Web applications to the specified users. Click **Next** to assign the plans to the specified users. Click **Next** to go to the **Overview** interface where the **Managed Web Applications/Site Collections** and **Plans** assigned to the specified users will be displayed. Click **Finish** to save the configuration.
    - **Change Permission** – To change the permissions of the specified user. When changing the permissions of the specified power user, you have to change it to a standard user first, and then you can change the permission to the site collections, Web applications, and plans. When changing the permissions of the specified standard user, you can change it to a power user. You can also change the permission to the site collections, Web applications, and plans.
    - **Remove from Group** – To remove users from this group. Cannot remove the last power user from the tenant group.
    - **Activate** – To activate a selected user.
    - **Deactivate** – To deactivate a selected user.

*Note: The built-in user **admin** cannot be deactivated.

- **Object Based View** – All the Managed Web Applications/Site Collections and Plans in the group will be displayed. The users who have the permission to the Web applications, site collections, and plans are also displayed here.
  - **Change Permission** – To change the permissions of the Managed Web Applications/Site Collections and Plans.
  - **Managed Web Applications/Managed Site Collections** – Click the **Managed Web Applications/Managed Site Collections** tab to view all the managed Web applications or site collections for this tenant group.
  - **Plans** – Click the **Plans** tab view all the plans for this tenant group.

- **Delete Group** – To delete a group, select the desired groups by selecting the corresponding checkbox, then click **Delete Group** on the ribbon. A confirmation popup window will appear to notify you that deleting the group will delete user permissions in the group. Click **OK** to delete the selected group, or click **Cancel** to return to the Account Manager interface without deleting the groups. All users of the group must be removed before the group can be deleted.

Managing Users

***Note**: If a domain is integrated with DocAve and a user from its parent domain, subdomain or trust domain is added in DocAve Account Manager, the corresponding parent domain, subdomain or trust domain will be integrated into DocAve and added to the **Log on to** drop-down list in DocAve login page.

To view and manage users, in the Account Manager interface, click **Users** on the ribbon. In the Users interface, you will see a list of previously added users. You can customize how these users are displayed in the following ways:

- **Search** – Filters the users displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the user you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).
- **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name you want to filter, then click the filter the column button ( ), and then select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

Adding Users

To add a user for DocAve, click **Add User** on the ribbon. You will be brought to the **Add User** interface. Select a **User Type** to configure the method for authentication:

- **Local User** – Select **Local User** in the **User Type** section to manually enter the authentication credentials for this user. Configure the following settings to add a local user:
  - **User Information** – Enter the **Username** and **E-mail** of the user you are adding, as well as an optional **Description** for future references.
  - **Security** – Enter the desired password into the **Password** and **Confirm password** text boxes, then configure the Password Settings. The password entered here must meet the **System Password Policy**, for more information, refer to the System Password Policy section.

    You can select to use the **Default** password settings, or select **Customized** to configure the password settings manually; select the corresponding checkbox to enable **User must change password at next logon**, **User cannot change password**, **Password never expires**, **Account is inactive**.
  - **Group** – Set the permissions for this user by adding the user to a previously configured DocAve user group. The user will have all the permissions of the specified group:
    - **Do not add to any group** – Select this option if you do not want to add this user to any DocAve groups.
    - **Add the user to Administrators group** – Select the Administrators group from the drop-down list to add the user.
    - **Add user to system groups** – Select one or more system groups from the drop-down list to add the user.
    - **Add user to tenant group** – Select an existing tenant group from the drop-down list to add the user. A user can only be added to one tenant group.
- **Active Directory User/Group** – Select **Active Directory User/Group** in the **User Type** section to utilize the user's active directory authentication credentials for this new user. Configure the following settings to add an active directory user:
  - **User Information** – Enter the name of the user/group you wish to add into the **AD User/Group Name** field, then click the Check Names ( ) button to verify that the username you entered is valid. Alternatively, you can click the Browse Name ( ) button to search for the desired user/group; In the popup window, enter the value to search for in the **Find** text box, then click the Find Name ( ). Select the desired user, then click **Add**. Click **OK** to add the users, or click **Cancel** to close the window without adding the users. Enter an optional **Description** for future references.

- **Group** – Set the permissions for this user by adding the user to a previously configured DocAve user group, the user will have all of the permissions of the specified group:
    - **Do not add to any group** – Select this option if you do not want to add this user to any DocAve groups.
    - **Add user to administrators group** – Select the Administrators group from the drop-down list to add the user
    - **Add user to system groups** – Select one or more system groups from the drop-down list to add the user.
    - **Add user to tenant group** – Select an existing tenant group from the drop-down list to add the user. A user can only be added to one tenant group.

- **Windows User/Group** – Select **Windows User/Group** in the **User Type** section to utilize the user's Windows authentication credentials for this new user. Configure the following settings to add a Windows user:
    - **User Information** – Enter the username of the user/group you wish to add into the **Windows User/Group Name** field, then click the Check Names ( ) to verify that the username you entered is valid. The users/groups who are in the same domain as the DocAve Control server can be added to DocAve. Alternatively, you can click the Browse Name ( ) to search for the desired user/group; In the popup window, enter the value to search for in the **Find** text box, then click the Find Name ( )**.** Select the desired user, then click **Add**. Click **OK** to add the users, or click **Cancel** to close the window without adding the users. Enter an optional **Description** for future references.

      ***Note**: In order to log on DocAve using the added user, the corresponding user must have the permission to access the machine where the DocAve Control service is installed.

    - **Group** – Set the permissions for this user by adding the user to a previously configured DocAve user group, the user will have all of the permissions of the specified group:
        - **Do not add to any group** – Select this option if you do not want to add this user to any DocAve groups.
        - **Add user to administrators group** – Select the Administrators group from the drop-down list to add the user
        - **Add user to system groups** – Select one or more system groups from the drop-down list to add the user.
        - **Add user to tenant group** – Select an existing tenant group from the drop-down list to add the user. A user can only be added to one tenant group.

- **ADFS Claim -** Select **ADFS Claim** in the **User Type** section to utilize the user's ADFS authentication credentials for this new user. Configure the following settings to add an ADFS user:
    - **User Information** – Select a **Claim name** from the drop-down menu. Claims are configured in Authentication Manager. Enter the username in the **Claim value** text box. The value entered in the **Claim value** text box will be displayed as the logon name for the user in DocAve.
    - **Group** – Set the permissions for this user by adding the user to a previously configured DocAve user group, the user will have all of the permissions of the specified group:
        - **Do not add to any group** – Select this option if you do not want to add this user to any DocAve groups.
        - **Add user to administrators group** – Select the Administrators group from the drop-down list to add the user
        - **Add user to system groups** – Select one or more system groups from the drop-down list to add the user.
        - **Add user to tenant group** – Select an existing tenant group from the drop-down list to add the user. A user can only be added to one tenant group.

  ***Note:** When using an ADFS Claim user who belongs to different types of DocAve groups to login to DocAve Manger, this ADFS Claim user cannot check which group it belongs to; therefore, it cannot select which role (the group permission) it want to use to login DocAve Manager.

When you are finished, click **OK** to add the user and return to the Users interface, or click **Cancel** to return to the Users interface without saving the configurations for this new user.

Editing Users

To edit a user for DocAve, select the user by selecting the corresponding checkbox, then click **Edit User** on the ribbon, or click on the username. You will be brought to the Edit User interface. Here you can configure the following settings for a user:

1. **Edit Information** – Edit the user information for the current user.
    - **E-mail** – Enter the e-mail address of the current logged-on user.
    - **Description** – Enter the optional description for future reference.
2. **Password** – Change the user password and configure the security settings for the logged-on user. Select the **Change my password** checkbox. Supply the **New password** and re-enter the new password in the **Confirm new password** field. Select the desired security settings by selecting the corresponding checkboxes. This setting is only for the local users.

- **User must change password at next logon** – When selecting this option, the specified user must change the password when logging in DocAve next time.
- **User cannot changed password** – When selecting this option, the specified user cannot change the password.
- **Account is inactive** – When selecting this option, this user account will be inactive.

Select a deactivation method for the password:

- **Never** – The password never expires.
- **After __ days** – Enter the number of days you wish the password to be valid for before it expires.
- **On __** - Click to choose the date when you wish the password to expire.

3. **Group** – Change the group the logged-on user belongs to. Select the **Add user to administrators group** radio button to add the user to the Administrators group, or select the desired system or tenant group from the **Add user to System groups** or **Add user to tenant group** drop-down menu. The user will have all of the permissions of the specified group. Note that you are only able to add/move a user to another group of the same type.

   *__Note__: The **Group** field is only used for editing the users in a system group, or the users who are not added to any DocAve groups. When editing the users in the tenant groups, this field will be hidden.

   When you are finished, click **OK** to save the changes made and return to the Users interface, or click **Cancel** to return to the Users interface without saving any changes made.

Deleting Users

To delete a previously configured user, select the users by selecting the corresponding checkbox, then click **Delete User** on the ribbon. A confirmation window will pop up for this deletion. Click **OK** to delete the selected users, or click **Cancel** to return to the Account Manager interface without deleting the selected users.

***Note:** If the users were deleted before upgrading DocAve 6 to DocAve 6 Service Pack 3, the permission to all of the objects (such as jobs, plans, and profiles) created by these users will be automatically assigned to the Admin in DocAve 6 Service Pack 3.

Activating and Deactivating Users

Refer to the section below to activate or deactivate a user.

- **Activate** – To activate the *Inactive* user, select the user by selecting the corresponding checkbox, then click **Activate** on the ribbon.

  ***Note:** If a user fails to provide the correct credentials when attempting to log into DocAve, they will receive the following alert: *Sorry, the login ID or password is incorrect.*

If the user receives this alert more times than the number of Failed Login Attempts specified in the System Security Policy, the user's account will become *Inactive*.

- **Deactivate –** To deactivate the *Active* user, select the user by selecting the corresponding checkbox, then click **Deactivate** on the ribbon.

Monitoring Current Logon Account(s)

You can view and manage the users currently logged onto DocAve by clicking on **Current Logon Account(s)** on the ribbon of the **Account Manager** interface. This allows you to monitor and control DocAve access in case maximum user sessions limit is met, or if you need to log a user off for security reasons. To log a user(s) off of DocAve, select the user(s) by selecting the correlating checkbox, then click **Log Off** on the ribbon. You will be prompted to enter an optional message to be sent to the user you are logging off. Click **Back** to return to the Account Manager interface.

My Settings

In DocAve, some users do not have the permission to navigate to Account Manager. **My Settings** allows the user to edit its own Account's information.

- When you log into DocAve GUI, the currently logged-on user will be displayed at the top right corner of the DocAve interface. Click the current username, a drop-down list appears. Click **My Settings** and enter **My Settings** interface. In **My Settings** interface, the users in the system groups can view the detailed information of the current logged-on user and the DocAve groups it belongs to; the users in the tenant groups can view the managed Web applications/site collections and the plans. Click **Edit** on the ribbon and you can configure the settings. For details on how to configure the settings, refer to the Managing Users section in this chapter. Also refer to the detailed information below:
- In the **Password** field, if one user does not have the permission to change the password, the password field will be greyed out. You must supply the **Old password** here.
- The security settings field is greyed out for both the users in the tenant groups and the user in the system groups.

After you have saved the modifications, click **Close** to exit the **My Settings** interface and return to the previous DocAve interface you are in.

License Manager

DocAve licensing is based on the scaling complexity of your SharePoint infrastructure. This means that for any given product, you will be licensed based on different conditions:

- Data Protection, Administration, Storage Optimization, Report Center, Compliance and Governance Automation – Licensed based on the number of SharePoint servers (For SharePoint 2007 environment, the number of Web front-end severs and Application servers will be counted; for SharePoint 2010 and SharePoint 2013 environments, only servers with one of the following values in the **SharePoint Products Installed** column (in

the **Servers in Farm** section of SharePoint Central Admin) will be counted in the DocAve license: Microsoft SharePoint Server 2010, Microsoft SharePoint Foundation 2010, Microsoft SharePoint Server 2013, or Microsoft SharePoint Foundation 2013).

- Migration – Licensed based on migrated data quota.
- Remote Farms – Licensed based on user seats and time.

***Note**: Governance Automation licenses can be managed in License Manager of DocAve 6.0.2 and after.

License Manager provides you with information regarding your DocAve licenses. Here you are also able to import and export license files, generate license reports, set up expiration notifications, as well as monitor the number of SharePoint servers you have used up in your license.

To access License Manager for DocAve, in the Control Panel interface, click **License Manager** under the License Manager heading. Click **Close** on the ribbon to close the License Manager interface.

***Note**: By default, there is a 30-day trial license for all DocAve modules in the downloaded package. This trial license ensures that you can have DocAve up and running right after the Manager and Agent installation completes. To obtain an Enterprise license, contact your local AvePoint representative for details. For more information on managing your DocAve license, refer to the **License Manager** section in this user guide.

Viewing License Information

In the License Manager interface, the License Details section shows you the following information:

- **License Type** – Shows whether you have a Trial license or an Enterprise license.
- **Server Host/IP** – Shows the host/IP of the server used to install DocAve Control Service. If the value of this field is N/A, it means that all of the servers where the DocAve Managers reside can use this license.
- **Maintenance Expiration Details** – The expiration date of the DocAve maintenance service you have purchased.
- **License Details** – Display the detailed license information for every module. Note that you are able to view the modules you are licensed for and the modules you have used in the past that occupied some of the total quota.

  Click the tabs **Data Protection**, **Administration**, **Storage Optimization**, **Report Center**, **Compliance**, **Migration**, **Remote Farm**, and **Governance Automation** to see license information specific to that module:

  - **Module** – The name of the DocAve product.
  - **License Type** – The type of license purchased for the product.
  - **The Number of Servers** – The number of servers you have bought.
  - **Registered Servers** – The number of servers you have used.

- **Expiration Time** – The expiration time of the license for this product.
- **Status** – The current status of the product which reflects proper licensing.
- Clicking the **Migration** tab will allow you to also view Remained Quantity and Total Quantity information, as well as the amount of data that has been migrated for each migration product.
- Remote Farm is for SharePoint sites online and only supports modules: Administrator, Content Manager, Granular Backup and Restore, Replicator, and Governance Automation. If you have a Governance Automation Online license, then Governance Automation can be viewed under this tab. The number of User Seats can be viewed under the table.

Generating License Reports

Your license information can be exported to a PDF file so that you can save or e-mail it. To export a license report, click **Export** on the ribbon, and then click **License Report**. Your browser will ask if you would like to open or save the PDF file. Click **Open** to view the file, or **Save** to save it to a designated location.

***Note**: Make sure the Downloads settings are configured before downloading the license file or the license report:

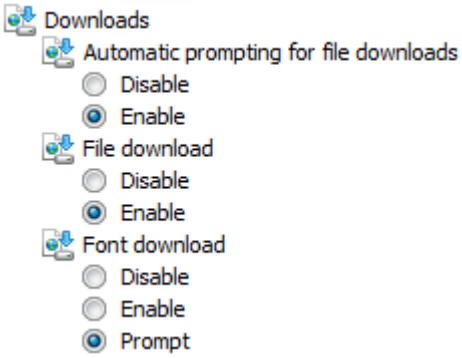

Figure 3: Configuring Downloads settings before generating license reports.

Importing and Exporting License Files

In License Manager, you can import a license file to apply that new license. Since all of DocAve products are installed as a single platform, activating any product is as simple as applying the new license file.

To import a license file, click **Import** on the ribbon. In the Import License interface, click **Browse**. Find and choose the desired LIC file, then click **Open**. You will see a summary view of this license. Click **OK** to apply this license, or click **Cancel** to return to the previous page without applying this license.

***Note**: DocAve will automatically log you off in order to use the new license upon logging in again.

Configuring License Renewal Notifications

DocAve can be configured to notify you before licenses or maintenance expires. You can set how many days prior to expiration and at what interval you wish to be notified, as well as configure the method of notification to use.

To configure License Renewal Notifications, click **Settings** on the ribbon. You will be brought to the License Renewal Notification Settings interface. Here you can configure the following settings for Notification Schedule:

- **By expiration date** – Configure these settings for notifications for license expiration:
  - Enter a positive integer into the text box and select **Day**, **Week** or **Month** from the drop-down menu of **Remind me starting from __ before license expires for any modules**.
  - Select the **Interval** checkbox to have the reminder repeat at a set interval. Enter a positive integer into the text box and select **Day**, **Week** or **Month** from the drop-down menu.
- **By maintenance expiration date** – Configure these settings for notifications for maintenance expiration:
  - Enter a positive integer into the text box and select **Day**, **Week** or **Month** from the drop-down menu of **Remind me starting from __ before license maintenance expires**.
  - Select the **Interval** checkbox to have the reminder repeat at a set interval. Enter a positive integer into the text box and select **Day**, **Week** or **Month** from the drop-down menu.
- **By number of servers** – Configure these settings for notifications for the number of available servers left for any module.
  - Enter a positive integer into the text box and DocAve will send you a notification when the number of servers left of any module is less than the specified value.
  - Select the **Interval** checkbox to have the reminder repeat at a set interval. Enter a positive integer into the text box and select **Day**, **Week** or **Month** from the drop-down menu.

Configure the following settings for **Notification Method** (Note that you must select at least one of the options in order for License Renewal Notifications to work.):

- **Popup message box when you login** – Select this option to have a message box pop up with a reminder for expiring licenses or maintenance.
- **E-mail notification** – Select this option to be notified of expiring licenses or maintenance by e-mail based on the Notification Schedule you configured above. A drop-down menu will appear where you can either select a previously configured Notification Profile or you can choose **New Notification Profile** to set up a new e-mail notification profile. For

more information on how to configure the notification profile, refer to the User Notification Settings section in this user guide.

When you are finished configuring License Renewal Notification Settings, click **OK** to save and return to the License Manager interface, or click **Cancel** to return to the License Manager interface without saving the new configurations.

Configuring SharePoint Servers Usage

In SharePoint Servers Usage, you can view detailed information of all product license registration, register a new Farm or remove a previously registered Farm.

Click **SharePoint Server Usage** on the ribbon or the server number in the **Registered Servers** column of the **License Details** area to enter the **SharePoint Server Usage** interface. Clicking the number link in the **Registered Servers** will bring you to the **SharePoint Server Usage** interface with only the server usage information for the corresponding.

Refer to the instructions below to configure the settings:

***Note**: Only Data Protection, Administration, Compliance, Report Center, Storage Optimization and Governance Automation can be managed in **SharePoint Server Usage**. Remote Farm and Migration are not registered by server number.

Click on a product suite tab to expand in the left and view all DocAve products you have purchased within that suite. Then select the product to modify its registered farms. You can perform the following actions:

- Register a farm – Select the farm you want to register in the **Unregistered Farm(s)** list and click **Add>>**. The farm will be moved to the **Registered Farm(s)** list.
- Unregister a farm – Select the farm you want to unregister in the **Registered Farm(s)** list and click **<<Remove** button. The farm will be moved to the **Unregistered Farm(s)** list.
- View detailed registering information of a farm – Select the farm from either of the lists above and click **View Farm Detail** on the ribbon. This brings you to the **Report Center** interface where you are able to view the SharePoint topology. For more information, refer to the DocAve 6 Report Center User Guide.

***Note:** If the number of servers in the **Registered Farm(s)** list exceeds the number of servers for which the license you have purchased allows, DocAve will not allow you to register more farms and the warning ( ) icon will appear left of the module name.

Click **Apply** to save the changes or click **Cancel** to cancel the operation, you will then be redirected to the License Manager interface.

Deleting the Selected Modules

Select the module you want to delete in the **License Details**, and click **Delete** on the ribbon to delete the module from the license. The deleted modules can no longer be used. If any modules with the working status are mistakenly deleted, you can restore them by re-applying the license.

Update Manager

DocAve Update Manager provides you with information regarding DocAve versions. You can check whether you are running the most up to date version of DocAve or Governance Automation, download updates, view download and installation history, and configure download and update settings. Update Manager allows you to update the current version of DocAve or Governance Automation within the DocAve GUI, which will reduce the time and risk of manual update.

Note the following before performing an update:

- If multiple DocAve Control services are installed in the Windows Network Load Balance environment, the **Download Location** must be configured before you can perform the update operation successfully.
- Before updating your DocAve, you must make sure the files of SDK and Management Shell under DocAve installation path *…\AvePoint\DocAve6\Shell* are not occupied.

To Access Update Manager for DocAve or Governance Automation, in the Control Panel interface, click **Update Manager** under the Update Manager heading. Click **Close** on the ribbon to close the Update Manager interface.

Configuring Update Settings

In Update Manager, you can configure settings for custom locations to download updates to, set Update Manager to download or check for updates automatically, and configure a proxy server for downloading DocAve updates. To do so, click **Update Settings** on the ribbon. You will be brought to the Update Settings interface where you can configure the following settings:

- **Download Location** – Downloads DocAve updates to a net share path and store them for future use. To utilize this capability, select the **Use the Net Share path as the update storage location** checkbox, and then enter the **UNC path**, **Username** and **Password** into the corresponding text boxes. Note that the UNC path should be entered in the following format:

  \\admin-PC\c$\data or \\admin-PC\ shared folder

  Click **Validation Test** to verify the access to the specified path.

  If you are changing the download location to a new one, you can perform the following two actions on the previously downloaded updates in the old path.

- **Move the uninstalled update(s) to the new location** – All the uninstalled updates whose versions are higher than the current DocAve version will be moved to the new location. The original update files in the old location will be deleted.
- **Delete the installed update(s)** – All the downloaded files of the installed update(s) will be deleted from the old path.

- **Update Port** – Enter the port to use when updating DocAve Control service in the **Update port** text box. The default port is 14007.
- **Automatic Update Settings** – Configuring Automatic Update Settings can save time and effort for DocAve administrators. Choose from the following options:

  ***Note**: Automatic Update settings can only be configured if you have purchased maintenance for DocAve.

  - **Download the update for me, but let me choose when to install it** – DocAve will download the available updates for you, and save them to the default installation path or the customized net share path. This way you will have all of the updates ready for installation at your own discretion.
    - Select an e-mail notification profile you previously configured from the drop-down list or click **New Notification** to set up a new e-mail notification. For more information about how to configure notification, refer to User Notification Settings**.**
  - **Please notify me of the new updates, but do nothing to the updates** – DocAve will notify the users configured below of available updates but will not download the updates automatically. Note that the maintenance license must already have been applied in order to select this option.
    - Select an e-mail notification profile you previously configured from the drop-down list or click **New Notification** to set up a new e-mail notification. For more information about how to configure notification, refer to the User Notification Settings section in this user guide**.**
  - **Turn off automatic updates** – The automatic updates function will be turned off and you will not be notified about the DocAve updates.

- **Proxy Selection** – Select the proxy protocol you wish to use from the **Proxy type** drop-down menu:
  - **No Proxy** (default) – No proxy server will be used.
  - **HTTP Proxy** – Select this to use the HTTP proxy, then configure the following settings:
    - **Proxy host** – The host name or IP address of the proxy server.
    - **Proxy port** – The port used to access the proxy server.
    - **Username** – The username to log on the proxy server.
    - **Password** – The password to access the proxy server.

- **SOCKS5 Proxy** – Select this to use the SOCKS5 proxy, then configure the following settings:
    - **Proxy host** – The host name or IP address of the proxy server.
    - **Proxy port** – The port used to access the proxy server.
    - **Username** – The username to log on the proxy server.
    - **Password** – The password to access the proxy server.

Checking for Updates

To check for the latest updates, click **Check for Updates** on the ribbon. Note that you can only check for updates after having purchased maintenance for DocAve.

If there are any new updates available, the following information will be displayed in the area on the right:

- **Update Name** – The name of the update.
- **Product Name** –DocAve or Governance Automation.
- **Type** – The type of the update.
- **Size** – The size of the update. The unit of the size is megabyte.
- **Status** – The installation status of the update.
- **Version** – The version of the update.

Managing Updates

To manage available updates, click **Manage Updates** on the ribbon. All available updates found by using the **Check for Updates** function will be listed in this page. You can perform the following actions on these updates:

- **View History** – Click **View History** on the ribbon to view a list of previously installed DocAve or Governance Automation updates. Refer to the Reviewing Installation History of Updates for more information.
- **Browse** – Click **Browse** on the ribbon to look for the updates on your local server. Select the desired update, and then click **Open** to load the update file into DocAve. The hotfix will be stored in the UNC path you specified in **Update Settings**. If there is no UNC path configured, the hotfix will be stored under the default path: *…\AvePoint\DocAve6\Manager\Work\patchFolder*.

  ***Note:** For Governance Automation hotfix, you can only use this function to apply new updates.

- **Download** – Click **Download** to download the selected update(s) from DocAve update server.

***Note:** When downloading the new update, the dependent version update will also be downloaded. For example, if your current DocAve version is DocAve 6 Service Pack 1, when you download the update for DocAve 6 Service Pack 2 Cumulative Update 1, then DocAve 6 Service Pack 2 will also be downloaded.

- **Stop** – Click **Stop** to interrupt the selected downloading update. Note that the download progress will be reset to 0%.
- **Install** – Click **Install** to install the selected updates. The following options can be configured in the pop-up window.
    - In the **Manager** tab, all the installed Manager services will be displayed. Select **Install the update for all the managers below** when installing updates for the DocAve Manager services since all the available manager services must be updated at the same time.
    - In the **Agent** tab, select a farm to update all DocAve Agents in that farm.
    - When selecting a Governance Automation update, the **Governance Automation** tab will be displayed. If selecting the Governance Automation service on this tab, the Governance Automation server will be upgraded.

  ***Note:** When installing the new update, the dependent version update will also be installed. For example, if your current DocAve version is DocAve 6 Service Pack 1, when you install the update for DocAve 6 Service Pack 2 Cumulative Update 1, then DocAve 6 Service Pack 2 will also be installed.

  ***Note**: Before installing the selected updates, click the link in the prompted message displayed on the right pane to learn more about the selected updates. The message says: **This update contains several changes to the platform that you must be aware of before upgrading. Please see the latest release notes on http: // www.avepoint.con/support/product-updates.**

  ***Note:** If the hotfix failed to be installed in **Update Manager**, use the **PatchInstallCLI.exe** tool in the hotfix's package to manually install the hotfix. This tool is only included in the hotfix package for DocAve 6 Service Pack 2 or above and the user guide is not included in it. If desired, contact AvePoint Support for the user guide.

- **Delete** – Click **Delete** to delete the selected updates from DocAve. The downloaded/browsed update files will be deleted at the same time.

Reviewing Installation History of Updates

To review the installation history of your DocAve or Governance Automation updates, click **View History** on the ribbon. You will see a list of all of the previously installed DocAve or Governance Automation updates. You can customize how the list is displayed in the following ways:

- **Search** – Filters the updates displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the update you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).
- **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name you want to filter, then click the filter the column button ( ), and then select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

To see more information about an update, select the update by selecting the corresponding checkbox, then click **View Details** on the ribbon. In the popup window, you can perform the following actions:

- **Uninstall** – Click **Uninstall** to uninstall the selected update. The following options can be configured in the pop-up window.

  ***Note**: Only hotfixes and feature packs can be uninstalled. Service packs (SP) and cumulated updates (CU) contain major important changes between different versions and cannot be uninstalled.

  - In the **Manager** tab, all the installed Manager services will be displayed, select **Uninstall the update from all the managers below** when uninstalling updates from the DocAve Manager services since all the available manager services must be updated at the same time.
  - In the **Agent** tab, select a farm to remove the update from all DocAve Agents in that farm.

When you are finished, click **Close** to close the popup window then click **Back** to return to the Update Manager interface.

Application Settings

Application Settings in Control Panel allows you to customize configurations that affect all products within the DocAve platform.

Agent Groups

Use Agent Groups to assign specific agents for performing certain jobs. This way, you can maintain balanced work load for different agents, and not have certain agents perform slower due to poor load distribution.

To access Agent Groups for DocAve, in the **Control Panel** interface, click **Agent Groups** under the **Agent Groups** heading. Click **Close** on the ribbon to close the **Agent Group** interface.

If you have several Agents enabled for an agent type, they will be displayed in different colors in the **Available Agents** table.

Managing Agent Groups

In the **Agent Groups** interface, you will see a list of previously configured Agent Groups. You can customize how these Agent Groups are displayed in the following ways:

- **Search** – Filters the Agent Groups displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the Agent Group you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).
- **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name you want to filter, then click the filter the column button ( ), and then select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

There is a default agent group for each **On Premise/SharePoint Sites** farm. The default agent group contains all the available agents for each of the modules. All of the SharePoint Sites Agents (both for SharePoint 2010 and SharePoint 2013) can be added to the same SharePoint Sites Agent Group.

The following settings can be configured in the **Agent Groups** interface:

- **Create** – Click **Create** on the ribbon to create a new Agent Group. In the Create interface, you can configure the following settings:
    - **Agent Group Name** – Enter a name for the new Agent Group, and then enter an optional description for future references.
    - **Farm Type** – Choose from two farm types, **On Premise** for local SharePoint farms and **Registered SharePoint Sites** for hosted SharePoint sites. Before setting up the agent group, go to Agent Monitor and configure the agent type. Only the configured agent type can be selected in **Available Agents** area.
    - **Farm (Only for On Premise farm)** – Select the farm where you want to create this new Agent Group.
    - **Available Agents** – Available agents will be displayed in the lower panel. In the Available Agents panel, the number of the available agents will be displayed on the top left corner above each product suite name, and the available products for each agent will be colored in blue. Select the desired agent by selecting the corresponding checkbox, then click **Add** to add the agent to the Agent Group. To remove an agent from the Agent Group, select the desired agent in the **Agent(s) in Group** column by selecting the corresponding checkbox, then click **Remove**.

  When you are finished, click **OK** to save these configurations and return to the Agent Groups interface, or click **Back** to return to the Agent Groups interface without saving this new Agent Group.

- **View Details**– Select an Agent Group by selecting the corresponding checkbox, then click **View Details** on the ribbon to view detailed information about the agent group. In the Overview interface, click **Edit** on the ribbon to make changes to the configurations of this Agent Group. Follow the instructions in the next bullet point for editing Agent Groups.

- **Edit** – Select an Agent Group by selecting the corresponding checkbox, then click **Edit** on the ribbon to make changes to the configurations of this Agent Groups. In the Edit Agent Group interface, enter a new name for the Agent Group, and then enter a description for future references. Select the farm where you want to create this Agent Group from the **Farm** drop-down menu. Available agents will be displayed in the lower panel. In the Available Agents column, the number of the available agents will be displayed on the top left corner above each product name, and the available products for each agent will be colored blue. Select the desired agent by selecting the corresponding checkbox, then click **Add** to add the agent to the Agent Group. To remove an agent from the Agent Group, select the desired agent in the **Agent(s) in Group** column by selecting the corresponding checkbox, then click **Remove**.

  When you are finished, click **Save** to save all changes made to the configurations of this Agent Group, click **Save As** to save the new configurations as a new Agent Group, or click **Back** to return to the Agent Groups interface without saving any changes.

- **Delete** – Select an Agent Group by selecting the corresponding checkbox, then click **Delete** to delete the selected Agent Group. A confirmation window will pop up to ask if you are sure you wish to delete the selected Agent Groups. Click **OK** to delete the selected Agent Groups, or click **Cancel** to return to the **Agent Groups** interface without deleting the selected Agent Groups.

  ***Note**: Agent group cannot be deleted when:

  - There are other Agents in the Agent group you are about to delete. This only applies for **Default Agent Group**.
  - There are plans or profiles associated with the Agents in the Agent group you are about to delete.

User Notification Settings

Certain DocAve products provide e-mail reports or notifications to provide you with information when a certain triggering event occurs. Currently, DocAve notifications are provided as a pop-up window within DocAve, or as e-mails to designated recipients. We are working on providing you with additional notification options which will be configurable in the Integration Settings interface. Once the notification integration feature is activated, the **Integration Settings** button on the ribbon will become available.

To access User Notification Settings for DocAve, in the Control Panel interface, click **User Notification Settings** under the User Notification Settings heading. Click **Close** on the ribbon to close the User Notification Settings interface.

Configuring Outgoing E-mail Settings

The outgoing e-mail server must be configured before DocAve can send out e-mail notifications. To configure the Outgoing e-mail server, complete the following steps:

1. Select the **Enable Outgoing E-mail Servers Settings** checkbox in order to activate e-mail server settings.
2. **Outgoing e-mail server (SMTP)** – Enter the address of the outgoing e-mail server.
3. **Secure password authentication** – Check this checkbox if you have this option enabled in your E-mail account configuration.
4. **Port** – Enter the SMTP port. The default SMTP port is 25. For SSL authentication, the default port is 587.
5. **Sender** – Enter the e-mail address for all DocAve e-mails to be from.
6. **Username on SMTP** – Enter the sender's username on the SMTP server.
7. **Password on SMTP** – Enter the sender's password to log onto the SMTP server.
8. **SSL authentication** – Configure this option according to your E-mail settings.
9. Click the **Validation Test** button to verify the information entered. If the information you entered is verified successfully, a test e-mail will be sent to the sender you configured.

   ***Note:** If you configured SMTP server as Anonymous, DocAve will not verify the validation of the entered credential.
10. Click **Save** to save your configurations and click **Close** to exit the interface.

Configuring Notification E-mail Settings

In the **Notification E-Mail Settings** interface, you will see a list of previously configured e-mail notification profiles. You can customize how these notification profiles are displayed in the following ways:

- **Search** – Filters the notification displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the notification you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).
- **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name you want to filter, then click the filter the column button ( ), and then select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

Creating Notification E-mails

The notification e-mail notification profile allows you to specify e-mail address to receive reports from DocAve plans and services. To create an e-mail notification profile, complete the following steps:

1. **Notification Name** – Enter a name for this E-mail Notification profile and an optional **Description** for future references.
2. **Type** – Select a type of report to be generated in the e-mail notification profile.
    a. **Global report** – Global report e-mail notification profiles can be used by modules with notification options available. These profiles will be available for selection when configuring notifications within each module.
    b. **Service report** – Service report e-mail notification profiles are only used for Manager Monitor and Agent Monitor. The e-mail address you enter in the specified Service report profile will receive e-mail notifications when the DocAve Manager services or Agent services goes down.
3. **Notification Address** – Configure the recipients for this notification. Click **Add a Notification Address** and then follow the steps below to add a recipient:
    a. (**Only for Global report**) Choose the detail level for the notification from the drop-down menu in the **Report** column. Select either **Summary Report Recipient** or **Detailed Report Recipient**.

b. Enter the notification recipient's e-mail address in the **Recipient** column.

c. Repeat the steps above to add more recipients.

4. **Report Settings** – Select the type of information to include for the report level(s), the recipients of the corresponding report type(s) must exist before you can configure the report level(s):

   a. If **Global Report** was select as the report type, configure the available settings below:

      - **Summary report level(s)** – Set when to send the summary report. By default, Success, Failure and Warning are all selected. After the job completed/failed/completed with exception, a summary report will be sent to the recipient. And the job status will be included in the subject of the received e-mail.
      - **Detailed report level(s)** – Set when to send the detailed report. By default, Success, Failure and Warning are all selected. After the job completed/failed/completed with exception, a detailed report will be sent to the recipient. The job status will be included in the subject of the received e-mail.
      - **Send All Logs to Recipient According to Status** – Select what kind of logs will be sent to recipient. You can select **Success**, **Failure** or **Warning**. By default, Failure is selected. The job status will be included in the subject of the received e-mail.
      - **Message format** – Select the format which the message will be delivered in: **HTML** or **Plain text**.

   b. If you select **Service Report** in **Type,** configure the settings below in **Report Setting**.

      - **Send all logs to recipient** – Select **Yes** to send all logs to the recipient when the DocAve Manager service(s) or Agent service(s) goes down or select **No** to not send them.
      - **Message format** – Select the format which the message will be delivered in: **HTML** or **Plain text**.

Click **OK** on the ribbon to save the settings or click **Cancel** to return to the Receive E-mail Settings interface without saving the profile.

Managing E-Mail Notifications

To see the configurations of a notification profile, select a notification profile, then click **View Details** on the ribbon. You will see the configuration details of this notification profile.

To change the configurations for a notification profile, select the notification profile from the list of previously configured notification profiles, and click **Edit** on the ribbon. For details on editing configurations for a notification, see the Configuring Notification E-mail Settings section of this guide.

To set a notification profile as the default one, select the notification profile from the list of previously configured notification profiles, and click **Set as Default Profile** on the ribbon. The default notification

profile will be selected by default when you build up plans or configure notification settings for the DocAve Manager services or Agent services.

To delete a notification profile which is no longer needed, select the notification profile from the list of previously configured notification profiles, and click **Delete** on the ribbon. Click **OK** to confirm the deletion or click **Cancel** to cancel the operation.

Job Pruning

Job Pruning allows you to set up pruning rules for all job records across your farms. When a job record is pruned, it will be deleted from the Job Monitor and the DocAve Control database.

***Note:** It is highly recommended to configure a Job Pruning policy if you are running backups frequently. This will ensure your databases not be overloaded with job data.

In Job Pruning, you can configure Job Pruning Rules for each DocAve module to retain the desired number of jobs, or jobs within a desired time frame. Once you have configured the Job Pruning Rule for a module, you may configure a schedule in the **Settings** tab to have DocAve prune jobs according to the Job Pruning Rules at a specified time with a specified notification, or manually run pruning jobs by selecting a module by selecting the corresponding checkbox, and click **Prune Now** on the ribbon to prune jobs for the selected module based on the Job Pruning Rules you have configured for each module.

Job Pruning has Job Monitor integrated within the interface. To see the progress of your pruning jobs, click **Job Monitor** on the ribbon. For more information about Job Monitor, refer to the DocAve 6 Job Monitor User Guide.

To access Job Pruning for DocAve in the Control Panel interface, click Job Pruning under the Job Pruning heading. Click **Save** on the ribbon to save any changes made in Job Pruning. Click **Close** on the ribbon to close the Job Pruning interface.

Configuring Pruning Rules

In the **Rules** tab, select a DocAve module by selecting the corresponding checkbox, then click **Configure** on the ribbon, or click on the corresponding Job Pruning Rule for a module. The Configure interface will open in a popup window. The following options can be configured:

- **No Pruning** – Select this option to not prune the job records of this module.

  Depending on the module(s) you are configuring pruning rules for, you will be presented with different options:

  - **Keep the last__ job(s)** – Select this option to keep only the desired number of most recent jobs for this module. Set the number of jobs to keep by entering a positive integer into the text box. For example: If you enter 5 in the text box,

only the 5 most recent jobs for this module will be kept. All other job records for this module will be deleted.

- **Keep the last __ Day(s)/Week(s)/Month(s) of job(s)** – Select this option to keep only the jobs within the desired time frame for this module. Set the time frame for the jobs you want to keep by entering a positive integer into the text box, then select **Day(s)**, **Week(s)** or **Month(s)** from the drop-down menu. For example: If you enter 7 in the text box, and select Day(s), only jobs performed within the last 7 days by this module will be kept. All the previous job records of this module will be deleted.
- **Keep the last __ job group(s)** – Select this option to keep only the desired number of most recent job groups for this module. Set the number of job groups to keep by entering a positive integer into the text box. For example: If you enter 5 in the text box, only the 5 most recent job groups for this module will be kept. All other job records for this module will be deleted.
- **Keep the last __ Day(s)/Week(s)/Month(s) of job group(s)** – Select this option to keep only the job groups within the desired time frame for this module. Set the time frame for the job groups you want to keep by entering a positive integer into the text box, then select **Day(s)**, **Week(s)** or **Month(s)** from the drop-down menu. For example: If you enter 7 in the text box, and select Day(s), only job groups performed within the last 7 days by this module will be kept. All the previous job records of this module will be deleted.
- **Keep the last __ job(s) or job group(s)** – Select this option to keep only the desired number of most recent jobs/job groups for this module. Set the number of jobs/job groups to keep by entering a positive integer into the text box. For example: If you enter 5 in the text box, only the 5 most recent jobs/job groups for this module will be kept. All other job records for this module will be deleted.
- **Keep the last __ Day(s)/Week(s)/Month(s) of job(s) or job group(s)** – Select this option to keep only the jobs/job groups within the desired time frame for this module. Set the time frame for the jobs/job groups you want to keep by entering a positive integer into the text box, then select **Day(s)**, **Week(s)** or **Month(s)** from the drop-down menu. For example: If you enter 7 in the text box, and select Day(s), only jobs/job groups performed within the last 7 days by this module will be kept. All the previous job records of this module will be deleted.

When you are finished, click **OK** to save your configurations and return to the Job Pruning interface, or click **Cancel** to return to the Job Pruning interface without saving any changes.

Configuring Settings

Once you have configured Job Pruning Rules for DocAve modules, you can set up a schedule for DocAve to run pruning jobs, and notify the designated users with reports about the pruning jobs. In the **Settings** tab of the Job Pruning interface, configure the following settings:

1. **Schedule Selection** – Set up a schedule for DocAve to run pruning jobs, or select to manually run pruning jobs.
    - **No Schedule** – Select this option if you wish to manually run pruning jobs.
    - **Configure the schedule myself** – Select this option to have DocAve run pruning jobs at a designated time. If this is selected, the **Schedule Settings** configuration will appear. Here you will see a list of all of your previously configured schedules. To add a new schedule, click **Add Schedule**. To edit a previously configured schedule, click on the text in the *Summary* column. To delete a schedule, click the delete button ( ). To preview the added schedules in a calendar, click **Calendar View**. For more details on adding or editing a schedule, refer to the Configuring a Schedule section of this guide.
2. N**otification** – Select an e-mail notification profile you have previously configured, or click **New Notification** to set up a new e-mail notification profile. For more information about how to configure the notification profile, refer to the User Notification Settings section in this user guide.

Configuring a Schedule

To add or edit a schedule, follow the instructions below:

1. **Type** – Select the time unit of the time interval for this schedule.
    - **By hour** – Configure the schedule by hour
    - **By day** – Configure the schedule by day.
    - **By week** – Configure the schedule by week.
    - **By month** – Configure the schedule by month.
2. **Schedule Settings** – Configure the frequency for this schedule by entering a positive integer in the text box. If you wish to set up a more specific schedule, select the **Advanced** checkbox, more options will appear depending on the **Type** you have selected in step 1:
    - If you selected **By hour**, select one of the following options and configure its settings:
        - **Specify production time**: **From __ to __** – Specify the production time, it will run the job pruning in the specified production time frame. Note that all pruning jobs that started within this time frame will finish even if the end time is reached.
        - **Select time below** – Specify the time you want to run the job pruning. To add several time points, click **Add**.

- If you select **By week**, configure the following settings:
    - **Run every __ week(s)** - Enter the frequency in terms of weeks in the text box.
    - **On __** – Specify the days of the week to run the job pruning on.
- If you select **By month**, select one of the following options and configure its settings:
    - **On day __ of __** – Select the day of the specific month(s) to run the pruning jobs. For example, if you select **On day 3 of January** and **July**, the pruning jobs will run on the third of January and July.
    - **Day __ of every __ month(s)** – Select the day of the month and frequency to run the pruning jobs on. For example, if you select **Day 3 of every 3 month(s)**, the pruning jobs will run every three months, on the third of the month.
    - **The __ __of every __ month(s)** – Specify on which occurrence of which day(s) of the month, and the frequency to run the pruning jobs. For example, if you select **The First Monday of every 3 month(s)**, the pruning jobs will run every three months, on the first Monday of the month.
    - **The __ __ of __** – Specify on which occurrence of which day(s) of which month to run the pruning jobs. For example, if you select **The First Monday of January** and **July**, the pruning jobs will run on the first Monday of January and July.

3. **Range of Recurrence** – Specify the **Start time** for pruning jobs. Select one of the following options for the end time and configure its settings:
    - **No end date** – The pruning jobs will run on the configured schedule until you manually end it.
    - **End after __ occurrence(s)** – The pruning jobs will stop running after the number of times you specify here.
    - **End by __** – The pruning jobs will end on the date and time you specify here.
4. When you are finished configuring the new schedule you wish to add, click **OK** to save, or click **Cancel** to close the Add Schedule interface without saving.

Log Manager

Log Manager allows you to manage the logs of all of the DocAve services. Logs provide the DocAve support staff with important information for quicker troubleshooting.

Log Manager has Job Monitor integrated within the interface. To see the progress of your log collection jobs, click **Job Monitor** on the ribbon. The detailed log collection information will be displayed on the Job Details interface. For more information about Job Monitor, refer to the DocAve 6 Job Monitor User Guide.

***Note**: A **Report Location** must be configured in Job Monitor before you can use the Log Manager when DocAve Control Service High Availability is used. For more information, refer to the DocAve 6 Job Monitor User Guide.

To access Log Manager for DocAve, in the Control Panel interface, click **Log Manager** under the Log Manager heading. Click **Close** on the ribbon to close the Log Manager interface.

Configuring Log Settings

To configure the log settings, in the **Log Manager** interface, click **Log Settings** on the ribbon. You can configure the log settings for the following services by clicking on the corresponding tab:

- Control Service
- Media Service
- Report Service
- SharePoint Agent

In each of the tabs, you will see the name of the service. For each service, the following options can be configured.

- **Service Host** – The server where the service resides.
- **Log Level** – Logs could be configured to generate on each of the following levels.
  - **Information** (default) – Logs of this level record the basic information of DocAve, such as the jobs that you have ran, the operations you have performed and important processes of jobs. Information level logs also contain all of the logs from **Warning** and **Error** levels.
  - **Debug** – Logs of this level record the detailed information related to the internal operations such as the communication between DocAve Manager and DocAve Agent, the operations in the database, the output message of the data.

    Logs of this level are used for finding out all the details of the jobs, and it is recommend that the level is set to **Debug** before troubleshooting. Debug level logs also contain all of the logs from **Information**, **Warning** and **Error** levels.
  - **Error** – Logs of this level record the error messages for jobs. Not all the errors could lead to the failure of the jobs, some of the errors have already been dealt with and the logs will record the detailed information.
  - **Warning** – Logs of this level record exceptions for jobs. **Warning** level logs also contain all of the logs from **Error** level.

  ***Note:** After changing the log levels, the changes will not affect the previous logs but will affect the newly generated logs.

- **Size of Each Log File** –The default size for a log is 5 MB. You can adjust the size according to your requirements by entering a different number into the text box.
- **Total Log File Limit** – The maximum number of all the log files in the Logs folder under the installation folder of each Manager service. For each Agent server, the Total Log File Count is the maximum number of all the log files which can be generated by each **.exe**

file. The Agent logs are stored in the Logs folder under the installation folder of each Agent.

When the number of log files exceeds the threshold, the oldest log files will be deleted.

When you are finished configuring **Log Settings**, click **OK** to save all changes and return to the **Log Manager** interface, or click **Back** to return to the Log Manager interface without saving any changes.

You can also configure the log settings in batch by selecting the checkboxes in front of the **Service Name** and clicking **Batch Log Settings** in the ribbon. On the batch settings interface, you can configure the log level, size of each log file, and total log count file.

Collecting Logs

In order to collect logs, you must first specify the Manager services or Agents that you wish to collect the logs from in the **Log Collection** section of the **Log Manager** interface. Click **Collect** on the ribbon to begin collecting logs for the selected services or agents.

To receive e-mail notification containing the report, select a previously configured e-mail notification profile in the drop-down list or click **New Notification** to set up a new e-mail notification profile. For more information about how to configure the e-mail notification profile, refer to the User Notification Settings section in this user guide.

SharePoint Sites

Use SharePoint Sites to map out your SharePoint Online sites so that you can manage the site collections within those objects with DocAve.

***Note:** DocAve Agent requires internet access in order for you to configure **SharePoint Sites** settings.

To access **SharePoint Sites** for DocAve, in the **Control Panel** interface, click **SharePoint Sites** under the **SharePoint Sites** heading. Click **Close** on the ribbon to close the **SharePoint Sites** interface.

Managing SharePoint Online Site Collection URLs

In DocAve's **SharePoint Sites** interface, any SharePoint Site Groups that you have previously configured will be displayed in the main display pane along with its associated Agent group, description and last modified time. Follow the instructions below to create a new SharePoint Sites Group.

***Note**: The users in the System Group can also register SharePoint sites to site groups, and users within the same System Group can view and manage sites created under the same SharePoint Site Group. Users of one System Group can also view and modify SharePoint Site Groups and registered site collections created by users of another System Group. The users in the Tenant group can view and manage only **their own** registered site collections and the corresponding SharePoint Site Groups where

the registered site collections reside, but they cannot view local Farms when managing their site collections using **Administrator**, **Granular Backup and Restore**, **Replicator**, and **Content Manager**.

To add a SharePoint Sites Group, click **Create** on the ribbon, then configure the following settings:

1. **SharePoint Sites Group** – Enter a name for this SharePoint Sites Group in the **SharePoint Sites group name** textbox, then enter an optional description for future reference. Keep in mind that while you are able to input any name for this site group, we recommend that you use names that provide some information as to what type of SharePoint sites should be associated with this group.
2. **Agent Group** – Specify an agent group to perform DocAve jobs on this SharePoint site. For detailed information on configuring agent groups, refer to the Agent Groups section of this user guide.

Click **OK** to save these configurations and return to the **SharePoint Sites** interface, or click **Cancel** to return to the **SharePoint Sites** interface without saving these configurations.

To view information about a previously configured SharePoint Sites Group, select the SharePoint Sites Group, and then click **View** on the ribbon. To modify the description for a previously configured SharePoint Sites Group, select the SharePoint Sites Group, and then click **Edit** on the ribbon. To delete a previously configured SharePoint Sites Group, select the SharePoint Sites Group, and then click **Delete** on the ribbon.

Managing Site Collections

For each SharePoint Sites Group you add to DocAve, you must configure each site collection in order to manage it with DocAve. In order to configure site collections for a SharePoint Sites Group, select the SharePoint Sites Group, and then click **Manage Site Collection** on the ribbon. In the **Manage Site Collection** interface for a SharePoint Sites Group, you will see a list of previously configured site collections.

To view information about a previously configured site collection, select the site collection, and then click **View** on the ribbon. To modify to a previously configured site collection, select the site collection, and then click **Edit** on the ribbon. To delete a previously configured site collection, select the site collection, and then click **Delete** on the ribbon.

Configuring Site Collections

To add a site collection, click **Add** on the ribbon. In the **Add Site Collection** interface or **Edit Site Collection** interface, configure the following settings:

- **Site Collection URL** – Enter the URL of an existing site collection within this SharePoint Sites Group.

  ***Note:** If you want to use an on premise site collection in the SharePoint Sites group, make sure the farm where the site collection resides has the corresponding license.

- **Site Collection User** – Specify the user who has access to this site collection.
    - **Username** – Enter the username to use in order to manage this site collection.
    - **Password** – Enter the password for the specified account.

  ***Note:** To register a site collection, the specified user must have the **Design** permission at a minimum. However, the **Design** permission is not sufficient to use the registered site collection to run jobs. DocAve recommends you use the site administrator who can access to the site collection you specified here so that you can normally use the registered SharePoint site to run jobs.

  ***Note:** DocAve does not support to add subsites to the SharePoint sites group. If you try to add a subsite to the SharePoint sites group, the following two scenarios may occur:

    - If the user specified in the **Site Collection User** section does not have permission to the site collection where the subsite you are about to add resides, a pop-up window informs you the site failed to be added to the SharePoint sites group, and the current user does not have sufficient permission to the specified site collection.
    - If the user specified in the **Site Collection User** section has permission to the site collection where the sub site you are about to add resides, DocAve adds the site collection to the SharePoint sites group.

Click **OK** to save these configurations and return to the **Manage Site Collection** interface, or click **Cancel** to return to the **Manage Site Collection** interface without saving these configurations.

After clicking **OK**, DocAve will verify the connection between all of the Agents and the entered site collection. If any agent cannot connect to the entered site collection, a pop-up window appears to inform the end users that the Agent cannot connect to the entered site collection. The window also displays an error message and a suggestion on how to solve the error.

When configuring the Site Collection, the URL of the Site Collection will be tested by all the agents in the SharePoint Sites Group of the SharePoint Sites with this Site Collection. A green check ( ) means all the agents connect to the Site Collection URL. A yellow check ( ) means some of the agents connect to the Site Collection URL. A red X ( ) means none of the agents connect to the Site Collection URL. By default, the status of the connection between the agents and the Site Collection URL will be checked every 10 minutes. The checking frequency can be configured through the configuration file.

Adding Site Collections

You can import the site collections in bulk using the provided template. Click **Add Site Collection** on the ribbon in the **Manage Site Collection** interface to access the **Add Site Collection** interface. To import the site collections, complete the following steps:

- **Download Template –** Click **Download Template** on the ribbon or click the **download** link to download the configuration file template. Modify the downloaded template to

add the site collections' URLs you are about to add to the selected group into the template. Save the modifications and close the modified template.

- **SharePoint Sites Group** – Displays the name of the selected SharePoint sites group.
- **Upload Configuration File** – Uploads the modified configuration file template. Click **Browse** next to the **File path** text box to upload the modified template.
- **Site Collection User** – Uses the user specified here to register all of the site collections you are about to add. Enter the **Username** and the corresponding **Password** to access to all of the site collections you are about to import.

  ***Note**: To register SharePoint sites in bulk, the specified user must have the **Design** permission at a minimum to all of the SharePoint sites you are about to add. But the **Design** permission is not sufficient to use the registered site collections to run jobs. DocAve recommends you use the site administrator who can access all of the site collections you are about to add so that you can normally use the registered SharePoint sites to run jobs.

  ***Note:** If any site collections fail to connect, a pop-up window appears to let you choose to add only the successfully connected site collections, or add all site collections.

Click **OK** to save the configurations and return to the **Managed Site Collection** interface, or click **Cancel** to return to the **Managed Site Collection** interface without saving any changes.

Profile Manager

Profile Manager allows you to manage profiles for application.

Security Profile

Security profile can protect your backup data using the security keys generated by the specified encryption method. Security Profile provides an interface for you to manage DocAve job data security of the following modules: Granular Backup, Platform Backup, Content Manager, Replicator, Archiver, and Storage Manager. In the Security Profile pane, there is a default security profile named **DocAve Default Profile**. It cannot be deleted because it is required for performing data upgrade from DocAve 5 (DocAve 5.7 or later required) or DocAve 6 to DocAve 6 Service Pack 1 or later versions. The default profile is not able to be edited or deleted and only the users in the system groups are able to view it.

Profile Setting

To create a new security profile, click **Create** on the ribbon, then configure the following settings:

- **Name** – Enter a profile name and an optional **Description**. When configuring encryption options while creating plans for different DocAve modules, security profile names are listed for you to select from.
- **Encryption Method** – Select encryption method and encryption length to be used in the encryption.
    - **Specify an encryption method** – Select an encryption method in the drop-down list from AES, DES and Blowfish. Note that if you are using an FIPS policy in your environment, you can only use AES as the encryption method.
    - **Encryption Length (bit)** – Specify the length of the encryption.
- **Encryption Key** – Select the way to generate an encryption key.
    - **Automatically generate an Encryption Key** – DocAve will generate a randomized key for you.
    - **Generate Encryption Key from seed** – Select this option to have DocAve generate a key based on the Seed you enter. If you choose this method, enter a seed into the **Seed** text box and then enter the same seed into the **Confirm seed** text box.

Click **OK** to save these configurations and return to the Security Profile Interface, or click **Cancel** to return to the Security Profile interface without saving these configurations. The encryption method or length of a security profile cannot be modified once the profile has been created.

In the Security Profile interface, to modify the description and configuration for a previously configured security profile, select the profile you want to modify, and then click **Edit** on the ribbon. To delete a previously configured security profile, select the profile you want to delete, and then click **Delete** on the

ribbon. Note that if the security profile you want to delete is already in use, it is not allowed to be deleted.

Importing and Exporting Security Profiles

You can create Security Profiles and export them to be used later. To export the Security Profile, select the profile(s) you want to export, and click **Export** on the ribbon. You will be asked to create a password for this security profile. Click **OK** after entering the desired password in both the **Password** and the **Confirm password** text boxes. Then click **OK** on the ribbon to save the password and export the profile(s) to the desired location.

To import the security profile, click **Import** on the ribbon. Enter the password that was created when the profile was exported then click **OK** on the ribbon. The security profile will appear in the list of Security Profiles in the Security Profile interface once it has been imported.

To exit the Profile Manager interface, click **Close** on the ribbon and return to Control Panel interface.

Managed Account Profile

Use Managed Account Profile to manage the all of the SharePoint Accounts for all of the DocAve Agents.

Managing the Managed Account Profile

In the **Managed Account Profile** interface, you will see a list of previously configured managed account profiles.

***Note:** When you first enter the Managed Account Profile interface, there will be one or more managed account profiles in this interface. When configuring the SharePoint account in **Agent Monitor**, the entered SharePoint Account will be automatically created as a managed account profile.

You can customize how these managed account profiles are displayed in the following ways:

- **Search** – Filters the managed account profiles displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the managed account profiles you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).
- **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name you want to filter, then click the filter the column button ( ), and then

select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

The following settings can be configured in the **Managed Account Profile** interface:

- Click **Create** on the ribbon to create a new managed account profile. Configure the following setting:
  - **Account Credentials** – Specify the account credentials for the managed account profile you are about to create.
    - **Username** – Enter the username for the managed account profile.
    - **Password** – Enter the corresponding password for the managed account profile.

  Click **Save** on the ribbon to save your configurations and go back to the **Managed Account Profile** interface, or click **Cancel** on the ribbon to go back to the **Managed Account Profile** interface without saving any configurations.

- Click **View Details** on the ribbon to view the selected managed account profile.
  - **User Name** – The user name in the selected managed account profile.
  - **Modified Time** – The modified time or the selected managed account profile.

  Click **Edit** on the ribbon to edit the selected managed accounts profile, or click **Cancel** to go back to the **Managed Account Profile** interface.

- Click **Edit** on the ribbon to edit the selected managed accounts profile.
  - **Account Credentials** – Specify the account credentials for the managed account profile you are about to edit.
    - **Username** – Enter the username for the managed account profile.

      ***Note:** DocAve does not support entering **.\Administrator** in this field.
    - **Password** – Enter the corresponding password for the managed account profile.

  Click **Save** to save your changes and go back to the **Managed Account Profile** interface, or click **Cancel** to go back to the **Managed Account Profile** interface without saving any configurations.

- Click **Delete** on the ribbon to delete the selected managed account profiles. A prompt message appears to inform you whether or not you want to delete the selected account profiles, click **OK** to delete them or click **Cancel** to go back to the **Managed Account Profile** interface. You cannot delete the managed account profile that DocAve is currently using.

- Click **Close** on the ribbon to exit the **Managed Account Profile** interface and go back to the **Control Panel** interface.

Settings for Specific Products/Modules

Settings for Specific Products allow you to configure settings that may be only relevant to certain products.

Solution Manager

Solution Manager provides an interface for you to manage all of the DocAve solutions. To access Solution Manager for DocAve, in the Control Panel interface, click **Solution Manager** under the Solution Manager heading. Click **Close** on the ribbon to close the Solution Manager interface.

***Note**: Be sure that you have full control of all zones of all web applications via User Policy for Web Applications in your SharePoint permissions.

***Note**: If you are using Auditor and want to upgrade DocAve 6.0 to DocAve 6 Service Pack 1 or later versions, before you upgrade DocAve 6 Auditor data to DocAve 6 Service Pack 1 or later versions, refer to the instruction below to ensure the successful upgrade:

1. Go to SharePoint and delete DocAve 6 solution **SP2010RCAuditorSiteCreationMonitor.wsp**.
2. If you have enabled monitoring Site Deletion action in DocAve 6 Auditor module and want to continue using this function in DocAve 6 Service Pack 1 or later versions , go to the DocAve 6 Agent servers and select the path *…/windows/assembly*, find **SP2010RCAuditorSiteDeletion.dll** and delete it. For detailed information on how to monitor SharePoint actions in DocAve 6 Report Center, refer to the DocAve 6 Report Center User Guide.
3. Go to DocAve 6 Solution Manager and deploy **SP2010AuditorMonitor.wsp** and **SP2010DocumentAuditing.wsp**.

Managing Solutions

When you first access Solution Manager, you will see a list of DocAve solutions. In order to see some of the information for these solutions, or to perform certain actions to these solutions, you must first select a farm.

Farm Selection

Select a farm from the **Farm** drop-down menu, the following information of the farm will be displayed in a table:

- **The Number of Front-end Web Servers** – Number of the servers which have enabled the Microsoft SharePoint Foundation Web Application service.
- **The Number of Available Agents** – Number of the DocAve agents with an up arrow ( ) and **Active** status.

- **Deployment Method** – Currently the solution can only be locally deployed. In other words, solution files are deployed only to the DocAve agent server from which the deployment operation was initiated.

Viewing the Solution's Information

You can view the following information of the solutions in the corresponding table:

- **Solution** – The name of the DocAve solution.
- **Module** – The name of the module this solution is intended for.

The following information is only available if you have a farm selected:

- **Version** – The version of the solution.
- **Status** – The deployment status of the solution file.
  - **N/A** – The solution is not installed.
  - **Not Deployed** – The solution is installed but not deployed.
  - **Deployed** – The solution is deployed to all the Agent servers.
  - **Partially Deployed** – The solution is deployed to some of the Agent servers.
- **Last Refreshed Time** – The last modified time of the corresponding solution.
- **Message** – Display the detailed information of the solution deployment.

***Note:** The first time you go to **Solution Manager**, it will take you awhile to load all of the available solutions for the selected farm.

Operations on the Solutions

Select a solution from the table by selecting the corresponding checkbox. You can perform the following actions.

***Note**: For the SharePoint 2013 Site Collections that are created using the SharePoint 2010 template, you must install and deploy the Connector, Archiver, and Report Center solutions designed for SharePoint 2010.

- **Install** – Click **Install** on the ribbon to add a solution package to the farm's solution store, which is in the farm's configuration database. Use this button when you only want to add the solution to the specified farm and do not want to deploy it.
- **Deploy** – Click **Deploy** on the ribbon to unpack the solution package, and copy its elements to their appropriate places. This button can be used even when the solution has not been installed to the specified farm. In that case, the solution will be installed to the specified farm first and then be deployed.
- **Retract** – Reverse the deployment of the farm solution's components. The solution remains in the solution store and can be redeployed later.

- **Remove** – Deletes the solution package from the solution store. This button can be used even when the solution has not been retracted from the specified farm. In that case, the solution will be retracted from the specified farm first and then be removed.

After a solution is installed, to view information about it, select the solution by selecting the corresponding checkbox, then click **Solution Properties** on the ribbon. You will be brought to the Solution Properties page. By default, you are in the **Summary** tab, which shows an overall view of the specified solution. Click the **Details** tab to view the solution's deployment status on each of the web applications and other detailed information. In the Details tab, you can also select a web application(s) by selecting the corresponding checkboxes, then click **Deploy** or **Retract** to deploy or retract the solution from the selected web applications. When you are finished, click **Back** on the ribbon to return to the Solution Manager interface.

Maintaining Solutions

To keep your DocAve solutions up to date, Solution Manager provides you tools to check for solution version, upgrade existing solutions, and repair deployed solutions. To perform any of these actions, select the solution by selecting the corresponding checkbox, then click:

- **Retrieve Version** on the ribbon to retrieve version information about the selected solution(s). The information displayed in the Version, Status, and Message columns will be refreshed.
- **Upgrade** on the ribbon to upgrade the selected solution to the latest version. A solution can be upgraded if the solution version is lower than the current agent version.
- **Repair** on the ribbon to repair the selected solution. You can repair a solution if it does not have the same version as the current agent version.

Solution Description

Refer to the descriptions below to get an overall view of all the DocAve 6 solutions.

- **SP2010EndUserArchiver.wsp** – This solution is only used for Archiver module for SharePoint 2010 environments. If you deploy this solution, you are able to use End User Archiving in Archiver and the end users are able to archive data by directly operating on the corresponding objects in SharePoint 2010. For details on how to use this feature, refer to the Archiver User Guide.
- **SP2010ErrorPageforArchivedData.wsp** – This solution is only used for Archiver module for SharePoint 2010 environments. After enabling this feature, when an item has been archived and a user want to open the archived item using the original URL, DocAve will check if the item has already been archived, if yes, it will pop up a prompt message. For details on how to use this feature, refer to the Archiver User Guide.
- **SP2010ConnectorContentLibrary.wsp** – This solution is only used for Connector module for SharePoint 2010 environments. After deploying this solution, you will be able to enable the corresponding feature at site collection level, allowing you to create the

content library in SharePoint 2010. For details on how to use this feature, refer to the Connector User Guide.

- **SP2010ConnectorMediaLibrary.wsp** – This solution is only used for Connector module for SharePoint 2010 environments. After deploying this solution, you are able to enable the corresponding feature at site collection level, allowing you to create the media library in SharePoint 2010. For details on how to use this feature, refer to the Connector User Guide.
- **SP2010DocumentAuditing.wsp** – This solution is only used for Report Center module for SharePoint 2010 environments. After deploying this solution, go to **Report Center**> **Settings** > **Manage Features** to activate this feature at site collection level. Or you can go to SharePoint to activate this feature. Then you will be able to audit all documents under the specified site collection. And you will be able to view the auditor history of the documents. For details on how to use this feature, refer to the Report Center User Guide.
- **SP2010AuditorMonitor.wsp** – This solution is only used for Report Center module for SharePoint 2010 environments. After deploying this solution, go to **Report Center** > **Settings** > **Auditor Controller** to activate this feature by selecting the **Site Collection Deletion** or **Site Creation** checkboxes in the **Audit Action** field. For details on how to use this feature, refer to the Report Center User Guide.
- **SP2010SecurityManagement.wsp** – This solution is only used for Administrator module for SharePoint 2010 environments. After deploying the solution, go to SharePoint to active the corresponding features in the specified site collection. You will be able to activate the DocAve Security Management Feature, DocAve Security Management Ribbon, DocAve Security Search History Feature and DocAve Security Search Result Feature. Then you will be able to use the corresponding functions of these features in SharePoint. For more information, refer to the Administrator User Guide.
- **SP2013ConnectorContentLibrary.wsp** – This solution is only used for Connector module for SharePoint 2013 environments. After deploying this solution, you will be able to enable the corresponding feature at the site collection level, allowing you to create the content library in SharePoint 2013. For details on how to use this feature, refer to the Connector User Guide.
- **SP2013ConnectorMediaLibrary.wsp** – This solution is only used for Connector module for SharePoint 2013 environments. After deploying this solution, you are able to enable the corresponding feature at the site collection level, allowing you to create the media library in SharePoint 2013. For details on how to use this feature, refer to the Connector User Guide.
- **SP2013EndUserArchiver.wsp** – This solution is only used for Archiver module for SharePoint 2013 environments. If you deploy this solution, you are able to use End User Archiving in Archiver and end users are able to archive data by directly SharePoint 2013. For details on how to use this feature, refer to the Archiver User Guide.
- **SP2013ErrorPageforArchivedData.wsp** – This solution is only used for Archiver module for SharePoint 2013 environments. After enabling this feature, when an item has been archived and a user want to open the archived item using the original URL, DocAve will

check if the item has already been archived, if yes, the user will see a prompt message. For details on how to use this feature, refer to the Archiver User Guide.

- **SP2013DocumentAuditing.wsp** – This solution is only used for Report Center module for SharePoint 2013 environments. After deploying this solution, go to **Report Center**> **Settings** > **Manage Features** to activate this feature at the site collection level. You can also activate this feature directly in SharePoint. This allows you to audit all documents under the specified site collection as well as view the auditor history of documents in the site collection. For details on how to use this feature, refer to the Report Center User Guide.

- **SP2013AuditorMonitor.wsp** – This solution is only used for Report Center module for SharePoint 2013 environments. After deploying this solution, go to **Report Center** > **Settings** > **Auditor Controller** to activate this feature by selecting the **Site Collection Deletion** or **Site Creation** checkboxes in the **Audit Action** field. For details on how to use this feature, refer to the Report Center User Guide.

- **SP2013SecurityManagement.wsp** – This solution is only used for Administrator module for SharePoint 2013 environments. After deploying the solution, go to SharePoint to active the features for each site collection: **DocAve Security Management Feature**, **DocAve Security Management Ribbon**, **DocAve Security Search History Feature** and **DocAve Security Search Result Feature**. For more information, refer to the Administrator User Guide.

  *__Note__: In order to use the **SP2013SecurityManagement** feature successfully, you must restart the timer service on your server with SharePoint 2013. Navigate to **Start** > **Administrative Tools** > **Services**, Select **SharePoint Timer Service**, and click **Restart the service**.

- **SP2010EndUserGranularRestore.wsp** – This solution is only used for the Granular Backup and Restore module for the SharePoint 2010 environment. After deploying the solution, navigate to **DocAve Manager** > **Data Protection** > **Granular Backup and Restore** > **Restore** > **End-User Restore**, and select the desired farm, Web application, or site collection where you want to activate this solution. Click **Activate** on the ribbon to activate the solution. You can also go to SharePoint to activate the **End-User Restore for SharePoint 2010** feature for each site collection. For more information, refer to the Granular Backup and Restore User Guide.

- **SP2013EndUserGranularRestore.wsp** – This solution is only used for the Granular Backup and Restore module for the SharePoint 2013 environment. After deploying the solution, navigate to **DocAve Manager** > **Data Protection** > **Granular Backup and Restore** > **Restore** > **End-User Restore**, and select the desired farm, Web application, or site collection where you want to activate this solution. Click **Activate** on the ribbon to activate the solution. You can also go to SharePoint to activate the **End-User Restore for SharePoint 2013** feature for each site collection.

  ***Note:** This solution does not support the 2010 mode sites of SharePoint 2013. For more information, refer to the Granular Backup and Restore User Guide.

- **SP2010LotusNotesLinkTracking.wsp** – This solution is used to enhance the DocLinks migration process for SharePoint 2010.
- **SP2013LotusNotesLinkTracking.wsp** – This solution is used to enhance the DocLinks migration process for SharePoint 2013.

Storage Configuration

Storage Configuration allows you to create and configure physical and logical devices or storage policies for certain DocAve modules to store backup data.

In the Storage Configuration interface, you will see pie charts containing Data Usage information by the physical devices. The chart on the left displays the share of data stored on each physical device type. The chart on the right displays the amount of storage used for storing SharePoint BLOBs versus the amount of storage used for storing DocAve native data; You can configure the physical device type you want this chart to display by clicking on the drop-down menu above the chart, then selecting from: **All Physical Devices**, **Net Share**, **FTP**, **TSM**, **Cloud Storage**, **Caringo Storage**, and **HDS Hitachi Content Platform**.

Physical Device

Physical devices allow DocAve to store backup data. In order for DocAve to recognize a physical device for use, it must first be configured. While you can create multiple physical devices for use in DocAve here, but only one is necessary to perform a successful backup job.

*__Note__: Depending on where you want to store the backup data, DocAve has the capability to write to any Net Share, FTP, TSM, EMC Centera, Cloud Storage, DropBox, SkyDrive, Dell DX Storage, Caringo Storage, and HDS Hitachi Content Platform devices.

To access Physical Device settings for DocAve, go to the Control Panel interface and click **Physical Device** under the Storage Configuration heading. You will be brought to the Storage Configuration interface with the Physical Device tab selected. Click **Close** on the ribbon to close the Storage Configuration interface.

In the Physical Device configuration interface, you will see a list of previously configured physical devices. You can customize how these physical devices are displayed in the following ways:

- **Search** – Filters the physical devices displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the physical device you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).

To update the storage space information in the Space Usage column of the list of physical devices, as well as the data usage information presented in the pie charts in the Data Usage section, click **Refresh** on the ribbon.

Managing Physical Devices

In Storage Configuration, you can create a new physical device, view details about a physical device, edit a previously configured physical device, or delete a previously configured physical device. For details on creating or editing a physical device, see the Configuring Physical Devices section of this guide.

To view details about a physical device, select it from the list of previously configured physical devices, and then click **View Details** on the ribbon. You will see all of the detailed information about the specific physical device displayed in the following three tabs:

- **Summary** – The configurations for this physical device.
- **Associated Logical Device** – The logical devices that use this physical device.
- **Data** – The size of the data stored in this physical device.

Click **Edit** on the ribbon to change the configurations for this physical device. For details on editing configurations for a physical device, see the Configuring Physical Devices section of this guide.

To delete a physical device from DocAve, select a physical device from the list of previously configured physical devices, then click **Delete** on the ribbon. A confirmation window will pop up and ask if you are sure you want to proceed with the deletion. Click **OK** to delete the selected physical device(s), or click **Cancel** to return to the Storage Configuration interface without deleting the selected physical device(s).

Configuring Physical Devices

To create a new physical device, click **Create** on the ribbon, and then select **Physical Device** from the drop-down menu. To modify a previously configured physical device, select the physical device, and then click **Edit** on the ribbon. Because DocAve supports a number of types of physical devices, each device type requires different configurations. In the sections that follow, you will find instructions on configuring the following types of physical devices: Net Share, FTP, TSM, EMC Centera, Cloud Storage, Dell DX Storage, Caringo Storage, and HDS Hitachi Content Platform.

***Note**: For physical devices with the **Advanced** option, refer to the information below.

- Only use the extended parameters to fulfill your special requirements.
- Except for the **FileSpace** parameter of TSM, all the extended parameters and their values are not case-sensitive.

Net Share

In the Create Physical Device or Edit Physical Device interface, configure the following settings:

- **Physical Device Name** – Enter a **Name** for this physical device. Then type an optional **Description** for future reference.
- **Storage Type** – Select **Net Share** from the drop-down list.
- **Storage Type Configuration** – Enter the **UNC Path**. Then enter the **Username** and **Password** in the corresponding text boxes. If the path you specified does not exist, it will be created automatically.
- **Advanced** – Specify the following extended parameters in advanced settings if necessary. Note that if you have multiple parameters to enter, press **Enter** on the keyboard to separate the parameters. Refer to the instructions below to add parameters:
    - **LongPathEnabled** – Windows full path is designed to be less than 256 characters. This parameter configuration allows you to use more than 256 characters for full path. The default value is false.
        - If you enter **LongPathEnabled=true**, it will enable DocAve to support full path that has more than 256 characters.
        - If you enter **LongPathEnabled=false**, DocAve will not support full path that has more than 256 characters.
    - **AuthMethod** – Enable different permission validation methods for different users to visit Net Share. The default value is **LogonUser**.
        - If you enter **AuthMethod=LogonUser**, it will enable LogonUser user permission validation method.
        - If you enter **AuthMethod=NetUse**, it will enable NetUse user permission validation method.
        - If you enter **AuthMethod=NetUse_DeleteOld**, it will enable NetUse user permission validation method and delete the previous validation method.
    - **ReadOnly –** Modify the current device to read-only mode. The default value is **False**.
        - If you enter **ReadOnly=true**, it will enable the read-only mode of the current device.
        - If you enter **ReadOnly=false**, it will not enable the read-only mode of the current device.

  Click **Validation Test**. DocAve will test the path and user information to make sure they are valid.

- **Space Threshold** – Set up the space threshold for the physical device. Once the threshold is reached, data will stop being written to the physical device and the device will become read-only. There are two methods you can select:
    - **Less than … MB** – Specify the minimum size of the free space for the physical device, if the free space of the physical device is less than the specified size, data will stop being written to the physical device and the device will become read-only. By default, this option is used and the default size is 1024 MB. The size you enter into the text box must be equal to or larger than 1024MB.
    - **Less than … %** – Specify the minimum percentage of the free space, if the free space of the physical device is less than the specified percentage, data will stop being written to the physical device and the device will become read-only.

  Click **Validation Test** to verify the space or percentage you entered.

Click **OK** to save the configurations and return to the **Storage Configuration** interface, or click **Cancel** to return to the **Storage Configuration** interface without saving any changes. After the physical device is saved, it will be listed in the **Physical Device** tab.

FTP

In the Create Physical Device or Edit Physical Device interface, configure the following settings:

- **Physical Device Name** – Enter a **Name** for this physical device. Then type an optional **Description** for future reference.
- **Storage Type** – Select **FTP** from the **Storage Type** drop-down list.
- **Storage Type Configuration** – Configure the following settings:
    - **Host** – Enter the IP address of the FTP server.
    - **Port** – Enter the port to use to connect to this FTP server. The default port is 21.
    - **Username** – Enter the username to use to connect to this FTP server.
    - **Password** – Enter the password of the specified username.

  Click **Validation Test** to verify that the information you entered is correct.

Click **OK** to save the configurations and return to the Storage Configuration interface, or click **Cancel** to return to the Storage Configuration interface without saving any changes. After the physical device is saved, it will be listed in the Physical Device tab.

TSM

In the Create Physical Device or Edit Physical Device interface, configure the following settings:

- **Physical Device Name** – Enter a **Name** for this physical device. Then type an optional **Description** for future reference.
- **Storage Type** – Select **TSM** from the **Storage Type** drop-down list.

- **Storage Type Configuration** – Configure the following settings:
    - **Communication** – Select the protocol to use to connect to the TSM server from the drop-down menu.
    - **Server address** – Enter the host name or IP address of the TSM server.
    - **Server port** – Enter the port to use to connect to this TSM server. The default port is 1500.
    - **Node name** – Enter the name of the node you wish to connect to.
    - **Management class** – Enter the name of the management class to manage the data stored in the node.
    - **Node Password** – Enter the password to use to connect to the node.
- **Advanced** – Specify the following extended parameters in advanced settings if necessary. Note that if you have multiple parameters to enter, press **Enter** on the keyboard to separate the parameters. Refer to the instructions below to add parameters.
    - **FileSpace** – Uses a different FileSpace under the same node. The default FileSpace is **DocAve**. Note that this parameter's value is case-sensitive. You can enter the value according to the FileSpace on your server. If the FileSpace does not exist, it will be created automatically.
    - **SingleSession** – Uses the single session for DocAve interaction with TSM Server. The default value is **SingleSession=false**.
        - If you enter **SingleSession=true**, it will enable the single session for DocAve interaction with TSM Server. Note that this will slow down the performance.
        - If you enter **SingleSession=false**, it will not enable the single session for DocAve interaction with TSM Server.

  Click **Validation Test** to verify that the information you entered is correct.

Click **OK** to save the configurations and return to the Storage Configuration interface, or click **Cancel** to return to the Storage Configuration interface without saving any changes. After the physical device is saved, it will be listed in the Physical Device tab.

EMC Centera

In the Create Physical Device or Edit Physical Device interface, configure the following settings:

- **Physical Device Name** – Enter a **Name** for this physical device. Then type an optional **Description** for future reference.
- **Storage Type** – Select **EMC Centera** from the **Storage Type** drop-down list.
- **Storage Type Configuration** – Configure the following settings:
    - **Centera cluster address** – Enter the IP address of the EMC Centera cluster.

- **Authentication** – Select one authentication methods to connect to the EMC Centera cluster, refer to the Authentication Configuration section for more information.

- **Space Threshold** – Set up the space threshold for the physical device. Once the threshold is reached, data will stop being written to the physical device and the device will become read-only. There are two methods you can select:
  - **Less than … MB** – Specify the minimum size of the free space for the physical device, if the free space of the physical device is less than the specified size, data will stop being written to the physical device and the device will become read-only. By default, this option is used and the default size is 1024 MB.
  - **Less than … %** – Specify the minimum percentage of the free space, if the free space of the physical device is less than the specified percentage, data will stop being written to the physical device and the device will become read-only.

  Click **Test** to verify the space or percentage you entered.

Click **OK** to save the configurations and return to the Storage Configuration interface, or click **Cancel** to return to the Storage Configuration interface without saving any changes. After the physical device is saved, it will be listed in the Physical Device tab.

Authentication Configuration

To configure the Authentication, complete the following steps. Select one authentication methods to connect to the EMC Centera cluster:

- **Name/Secret Authentication** – If this option is chosen, you must then configure the following settings:
  - **Name** – Enter the name to connect to the EMC Centera cluster with.
  - **Secret** – Enter the secret for this name.
- **PEA files authentication** – If this option is chosen, you must then configure the following settings:
  - **PEA file location** – The location of the PEA file used to connect to the EMC Centera cluster.
  - **Location username** – Enter the username to use to access the PEA file location.
  - **Location password** – Enter the password of the specified Username used to access the PEA file location.

  Click **Validation Test** to verify that the information you entered is correct.

Cloud Storage

In the **Create Physical Device** or **Edit Physical Device** interface, configure the following settings:

- **Physical Device Name** – Enter a **Name** for this physical device. Then type an optional **Description** for future reference.

- **Storage Type** – Select Cloud Storage from the Storage Type drop-down list.
- **Storage Type Configuration** – Select a **Cloud Type** from the drop-down menu, then configure its path:
    - **RackSpace Cloud Files** – Enter the Container Name you wish to access, then enter the Username and API Key to access the container with. Select the CDN Enabled checkbox if the content delivery network (CDN) is enabled.
    - **Windows Azure Storage** – In the **Access point** text box, enter the URL for the Blob Storage Service; The default URL is http://blob.core.windows.net. Enter the **Container name** you wish to access, then enter the **Account name** and **Account key** to access the container with. Select the **CDN Enabled** checkbox if the Windows Azure content delivery network (CDN) is enabled.
    - **Amazon S3** – Enter the **Bucket Name** you wish to access, then enter the **Access Key ID** and **Secret Access Key** to access the bucket with. You can view the **Access Key ID** and **Secret Access Key** from your AWS account. Select the **Storage Region** of this bucket from the drop-down menu. The available regions are US Standard, US West (Northern California), EU (Ireland), Asia Pacific (Singapore), and Asia Pacific (Tokyo).
    - **EMC Atmos** – In the **Access point** text box, enter the URL to connect to Atmos Online with; The default URL is http://accesspoint.emccis.com. Enter the **Root folder** where you wish to access, then enter the **Full token ID** (commonly referred to as the UID) and **Shared secret** to access the Root Folder with.
    - **AT&T Synaptic** – Enter the **Root folder** where you wish to access, then enter the **Full token ID** (commonly referred to as the UID) and **Shared secret** to access the Root Folder with.
- **Advanced** – Specify the following extended parameters in advanced settings if necessary. If you have multiple parameters to enter, press **Enter** on your keyboard to separate the parameters. Refer to the instructions below to add parameters.
    - **RetryInterval** – Customize the retry interval when the network connection is interrupted. The default value is 200 milliseconds. You are allowed to enter any positive integer between 0 and 2147483646 (the unit is millisecond). For example, RetryInterval=30 represents the interval between the network interruption and reconnection is 30 milliseconds.
    - **RetryCount** – Customize the reconnection times after the network connection is interrupted. The default value is 6. You are allowed to enter any positive integer between 0 and 2147483646. For example, RetryCount=10 represents when the network connection is interrupted, it can reconnect at most 10 times.
        - **CustomizedMetadata** – Configure if DocAve customized metadata or user-added metadata is supported. By default, DocAve customized metadata and user-added metadata are all supported in DocAve. Refer to Configuring Customized Metadata.

Click **Validation Test** to verify that the information you entered is correct.

Click **OK** to save the configurations and return to the Storage Configuration interface, or click **Cancel** to return to the Storage Configuration interface without saving any changes. After the physical device is saved, it will be listed in the **Physical Device** tab.

Configuring Customized Metadata

To configure the customized metadata, complete the following steps:

- If you enter **CustomizedMode=Close**, it represents this physical device will not support DocAve customized metadata or user-added metadata.
- If you enter **CustomizedMode=SupportAll**, it represents this physical device will support all DocAve customized metadata and user-added metadata.
- If you enter **CustomizedMode=DocAveOnly**, it represents this physical device will only support DocAve customized metadata.
- If you enter **CustomizedMode=CustomizedOnly**, it represents this physical device will only support user-added metadata.

Dropbox

In the **Create Physical Device** or **Edit Physical Device** interface, configure the following settings:

- **Physical Device Name** – Enter a **Physical device name** then type an optional **Description** for future reference.
- **Storage Type** – Select **Dropbox** from the **Storage Type** drop-down list.
- **Storage Type Configuration** – Configure the following settings:
    - **Root folder –** Specify a name for the root folder which will be created in the DropBox and used to store the data.
    - **AppKey –** Enter the app key of any existing app.
    - **AppSecret –** Enter the app secret of the corresponding app.
    - **TokenAccess –** Enter the token access of the corresponding app which is obtained by the DropBox Token Tool.
    - **TokenSecret –** Enter the token secret of the corresponding app which is obtained by the DropBox Token Tool.
    - **Advanced –** Specify the following extended parameters in advanced settings if necessary. If you have multiple parameters to enter, press **Enter** on your keyboard to separate the parameters. Refer to the instructions below to add parameters.
        - **RetryInterval** – Customize the retry interval when the network connection is interrupted. The default value is 200 milliseconds. You are allowed to enter any positive integer between 0 and 2147483646 (the unit is millisecond). For example, RetryInterval=30 represents the

interval between the network interruption and reconnection is 30 milliseconds.

- **RetryCount** – Customize the reconnection times after the network connection is interrupted. The default value is 6. You are allowed to enter any positive integer between 0 and 2147483646. For example, RetryCount=10 represents when the network connection is interrupted, it can reconnect at most 10 times.

Click **Validation Test** to verify that the information you entered is correct.

- **Space Threshold** – Set up the **Space Threshold** for the physical device. Once the threshold is reached, data will stop being written to the physical device and the device will become read-only. There are two methods you can select:
  - **Less than … MB** – Specify the minimum size of the free space for the physical device. If the free space of the physical device is less than the specified size, data will stop being written to the physical device and the device will become read-only. By default, this option is used and the default size is 1024MB.
  - **Less than … %** – Specify the minimum percentage of the free space. If the free space of the physical device is less than the specified percentage, data will stop being written to the physical device and the device will become read-only.
  - Click **Test** to verify the space or percentage you entered.

Click **OK** to save the configurations and return to the Storage Configuration interface, or click **Cancel** to return to the Storage Configuration interface without saving any changes. After the physical device is saved, it will be listed in the **Physical Device** tab.

SkyDrive

In the **Create Physical Device** or **Edit Physical Device** interface, configure the following settings:

- **Physical Device Name** – Enter a **Physical device name** and then type an optional **Description** for future reference.
- **Storage Type** – Select **SkyDrive** from the **Storage Type** drop-down list.
- **Storage Type Configuration** – Configure the following settings:
  - **Root Folder Name –** Specify a name for the root folder which will be created in the SkyDrive and used to store the data.
  - **Client ID –** Enter the client ID of any existing app.
  - **Client Secret –** Enter the client secret of the corresponding app.
  - **Redirect Domain –** Specify a redirect domain which is used to redirect to the specified URL while the SkyDrive cannot be connected.
  - **Refresh Token –** Enter the refresh token of the corresponding app which is obtained by the SkyDrive Token Tool.

- **Advanced** – Specify the following extended parameters in advanced settings if necessary. If you have multiple parameters to enter, press **Enter** on your keyboard to separate the parameters. Refer to the instructions below to add parameters.
    - **RetryInterval** – Customize the retry interval when the network connection is interrupted. The default value is 200 milliseconds. You are allowed to enter any positive integer between 0 and 2147483646 (the unit is millisecond). For example, RetryInterval=30 represents the interval between the network interruption and reconnection is 30 milliseconds.
    - **RetryCount** – Customize the reconnection times after the network connection is interrupted. The default value is 6. You are allowed to enter any positive integer between 0 and 2147483646. For example, RetryCount=10 represents when the network connection is interrupted, it can reconnect at most 10 times.

  Click **Validation Test** to verify that the information you entered is correct.

- **Space Threshold** – Set up the **Space Threshold** for the physical device. Once the threshold is reached, data will stop being written to the physical device and the device will become read-only. There are two methods you can select:
  - **Less than … MB** – Specify the minimum size of the free space for the physical device, if the free space of the physical device is less than the specified size, data will stop being written to the physical device and the device will become read-only. By default, this option is used and the default size is 1024MB.
  - **Less than … %** – Specify the minimum percentage of the free space, if the free space of the physical device is less than the specified percentage, data will stop being written to the physical device and the device will become read-only.
  - Click **Test** to verify the space or percentage you entered.

Click **OK** to save the configurations and return to the Storage Configuration interface, or click **Cancel** to return to the Storage Configuration interface without saving any changes. After the physical device is saved, it will be listed in the **Physical Device** tab.

Dell DX Storage

In the **Create Physical Device** or **Edit Physical Device** interface, configure the following settings:

- **Physical Device Name** – Enter a **Name** for this physical device. Then type an optional **Description** for future reference.
- **Storage Type** – Select **Dell DX Storage** from the Storage Type drop-down list.
- **Storage Type Configuration** – Configure the following settings:
  - **CSN private network IP** – Enter the hostname or IP address of the node.

- **SCSP proxy port** – Enter the port to use to connect to the cluster. The default port is 80.
- **Cluster name** – Enter the name of the cluster you wish to access.
- **Primary DX CR publisher** – You can keep it empty for now.
- **Primary DX CR publisher port** – You can keep it empty for now.
- **With remote D/R cluster** – Check this checkbox if you wish to use the remote cluster when the local cluster is not available. Select an **Access mode** from the drop-down menu, then configure the following settings:
    - **Remote CSN** – If this mode is selected, enter the **Remote CSN host** (the hostname or IP address of the Remote cluster storage node) and **Remote CSN port** (the port used to access the Cluster) used to access the cluster. The default port is 80.
    - **Local Proxy** – If this mode is selected, enter the **SCSP proxy host** (the hostname or IP address of the SCSP Proxy host configured by the customer), **SCSP proxy port** (the port used to access the SCSP Proxy host, 80 is the default port) and the **Remote cluster name** used to access the cluster.
- **Number of object replicas** – Enter the number of replicas of the data.
- **DX optimizer compression** – Select a compression method for the data stored in the Dell DX Storage:
    - **None** – The data will not be compressed. This is selected by default.
    - **Fast** – The compression time is shorter, and the compression rate is lower. This means that the size of the data will not be reduced by as much as if **Best** is selected, but the process will not take as long.
    - **Best** – The compression time is longer, and the compression rate is higher. This means that the size of the data will be reduced much more than if **Fast** is selected, but the process will take more time.
- **Compress after(Days)** – Enter a positive integer between 0 and 29 for the number of days you wish to delay data compression after it is stored.
- **Advanced** – Specify the following extended parameters in advanced settings if necessary. If you have multiple parameters to enter, press **Enter** on your keyboard to separate the parameters. Refer to the instructions below to add parameters.
    - **LocatorType** – Add a customized locator type. The default type is Proxy. If you enter **LocatorType=Proxy**, it represents you will use Proxy locator. If you enter **LocatorType=Static**, it represents you will use Static locator.
    - **CustomizedMetadata** – Allows you to write customized metadata into the data. The metadata format must be, for example: CustomizedMetadata={[testkey1,testvalue1],[testkey2,testvalue2],[test key3,testvalue3]……}. You are allowed to customize testkey and

testvalue group number. Use "," to separate the entered testkeys and testvalues.

- **CustomizedMode** – Allows you to configure if DocAve customized metadata or user-added metadata is supported. By default, DocAve customized metadata and user-added metadata are all supported in DocAve. Note that before entering this parameter, you have to configure **With remote D/R cluster** and enter the corresponding configuration data. Refer to the Configuring Customized Mode section for more information.
- **CacheRemoteHost** – Allows you to cache the information of the RemoteHost. The default value is true. Refer to the Configuring Cache Remote Host section for more information.
- **RemoteHostTimeout** – Allows you to customize the time to cache the RemoteHost information before the information is deleted. The default value is 3600 seconds. You are allowed to enter any positive integer between 0 and 2147483646 (the unit is second). For example, if you enter **RemoteHostTimeout=3600**, it represents that the cache time is 3600 seconds.

Click **Validation Test** to verify that the information you entered is correct.

- **Space Threshold** – Set up the **Space Threshold** for the physical device. Once the threshold is reached, data will stop being written to the physical device and the device will become read-only. There are two methods you can select:
  - **Less than … MB** – Specify the minimum size of the free space for the physical device, if the free space of the physical device is less than the specified size, data will stop being written to the physical device and the device will become read-only. By default, this option is used and the default size is 1024MB.
  - **Less than … %** – Specify the minimum percentage of the free space, if the free space of the physical device is less than the specified percentage, data will stop being written to the physical device and the device will become read-only.
  - Click **Test** to verify the space or percentage you entered.
  - Click **OK** to save the configurations and return to the Storage Configuration interface, or click **Cancel** to return to the Storage Configuration interface without saving any changes. After the physical device is saved, it will be listed in the **Physical Device** tab.

Configuring Customized Mode

To configure customized mode, complete the following steps:

- If you enter **CustomizedMode=Close**, this physical device will not support DocAve customized metadata or user-added metadata.

- If you enter **CustomizedMode=SupportAll**, this physical device will support all DocAve customized metadata and user-added metadata.
- If you enter **CustomizedMode=DocAveOnly**, this physical device will only support DocAve customized metadata.
- If you enter **CustomizedMode=CustomizedOnly**, this physical device will only support user-added metadata.

Configuring Cache Remote Host

To configure the Cache Remote Host, complete the following steps:

- If you enter **CacheRemoteHost=true**, this physical device will cache the RemoteHost information.
- If you enter **CacheRemoteHost=false**, this physical device will not cache the RemoteHost information.

Caringo Storage

In the Create Physical Device or Edit Physical Device interface, configure the following settings:

- **Physical Device Name** – Enter a **Name** for this physical device. Then type an optional **Description** for future references.
- **Storage Type** – From the Storage Type drop-down box, select **Caringo Storage**.
- **Storage Type Configuration** – Configure the following settings:
    - **Communication Type** – There are two available ways to communicate with server.
        - **Proxy locator** – In this type, enter **CNS private network IP** and **Cluster name,** DocAve can find information of storage node. The DocAve server and the Caringo server must be in the same subnet. Refer to Configuring Proxy Locator for more information.
        - **Static Locator** – In this type, enter the storage node IP address. DocAve will visit the storage node you specified directly. If you have multiple storage nodes, enter their IP addresses and use semicolons to separate the entered IP addresses. Refer to Configuring Static Locator for more information.
    - **Require Authentication** – Enable user authentication when visiting the server. Enter username and password for authentication. **Authentication Realm** is the realm that the user you specified belongs to.
    - **With remote D/R cluster** – Check this checkbox if you wish to use the remote cluster when the local cluster is not available. Select an **Access mode** from the drop-down menu, then configure the following settings:
        - **Remote CSN** – If this mode is selected, enter the **Remote CSN host** (the hostname or IP address of the Remote cluster storage node)and

Remote CSN port (the port used to access the Cluster) used to access the cluster. The default port is 80.

- **Local Proxy** – If this mode is selected, enter the **SCSP proxy host** (the hostname or IP address of the SCSP Proxy host configured by the customer), **SCSP proxy port** (the port used to access the SCSP Proxy host, 80 is the default port) and the **Remote cluster name** used to access the cluster.
- **Number of object replicas** – Enter the number of replicas of the data.

- **Caringo optimizer compression** – Select a compression method for the data stored in the Caringo Storage:
  - **None** – The data will not be compressed. This is selected by default.
  - **Fast** – The compression time is shorter, and the compression rate is lower. This means that the size of the data will not be reduced by as much as if **Best** is selected, but the process will not take as long.
  - **Best** – The compression time is longer, and the compression rate is higher. This means that the size of the data will be reduced much more than if **Fast** is selected, but the process will take more time.
- **Compress after(Days)** – Enter a positive integer between 0 and 29 for the number of days you wish to delay data compression after it is stored.
- **Advanced** – Specify the following extended parameters in advanced settings if necessary. If you have multiple parameters to enter, press **Enter** on the keyboard to separate the parameters. Refer to the instructions below to add parameters.
  - **LocatorType** – Add a customized Locator type, the default type is Proxy. Refer to Configuring Locator Type for more information.
  - **CustomizedMetadata** – Allow you to write customized metadata into the data.

    The metadata format must be, for example:
    CustomizedMetadata={[testkey1,testvalue1],[testkey2,testvalue2],[testkey3,testvalue3]……}

    You are allowed to customize testkey and testvalue group number. Use "," to separate the testkeys and testvalues.

  - **CustomizedMode** – Allow you to configure if DocAve customized metadata or user-added metadata is supported. By default, DocAve customized metadata and user-added metadata are all supported in DocAve. Note that before entering this parameter, you have to configure **With remote D/R cluster** and enter the corresponding configuration data. Refer to Configuring Customized Mode for more information.

- **CacheRemoteHost** – Allow you to cache the information of the RemoteHost. The default value is true. Refer to the Configuring Cache Remote Host section for more information.
- **RemoteHostTimeout** – Allow you to customize the time to cache the RemoteHost information before the information is deleted. The default value is 3600 seconds. You are allowed to enter any positive integer between 0 and 2147483646 (the unit is second). For example, if you enter **RemoteHostTimeout=3600**, it represents that the cache time is 3600 seconds.

Click **OK** to save the configurations and return to the **Storage Configuration** interface, or click **Cancel** to return to the Storage Configuration interface without saving any changes. After the physical device is saved, it will be listed in the **Physical Device** tab.

Configuring Proxy Locator

To configure the proxy locator, complete the following steps:

- **CSN Private Network IP** – Enter the hostname or IP address of the node.
- **SCSP Proxy Port** – Enter the port to use to connect to the cluster. The default port is 80.
- **Cluster Name** – Enter the name of the cluster you wish to access.

Configuring Static Locator

To configure the static locator, complete the following steps:

- **Primary DX storage node** – Enter the hostname or IP address of the node, if you are entering multiple nodes, separate each node using ;
- **Primary DX storage node port** – Enter the port used to connect to the primary DX storage node. The default port is 80.
- **Primary DX CR Publisher** – You can keep it empty for now.
- **Primary DX CR Publisher Port** – You can keep it empty for now.

Configuring Locator Type

To configure the locator type, complete the following steps:

- If you enter **LocatorType=Proxy**, it represents you will use Proxy locator.
- If you enter **LocatorType=Static**, it represents you will use Static locator.

Configuring Customized Mode

To configure the customized mode, complete the following steps:

- If you enter **CustomizedMode=Close**, it represents this physical device will not support DocAve customized metadata or user-added metadata.

- If you enter **CustomizedMode=SupportAll**, it represents this physical device will support all DocAve customized metadata and user-added metadata.
- If you enter **CustomizedMode=DocAveOnly**, it represents this physical device will only support DocAve customized metadata.
- If you enter **CustomizedMode=CustomizedOnly**, it represents this physical device will only support user-added metadata.

Configuring Cache Remote Host

To configure the cache remote host, complete the following steps:

- If you enter **CacheRemoteHost=true**, it represents this physical device will cache the RemoteHost information.
- If you enter **CacheRemoteHost=false**, it represents this physical device will not cache the RemoteHost information.

HDS Hitachi Content Platform

In the Create Physical Device or Edit Physical Device interface, configure the following settings:

- **Physical Device Name** – Enter a **Name** for this physical device. Then enter an optional **Description** for future references.
- **Storage Type** – From the Storage Type drop-down box, select **HDS Hitachi Content Platform**.
- **Storage Type Configuration** – Configure the following settings:
  - **Primary namespace address** – Specify the primary Namespace Address where you want to store data.

    For example, you can enter *http://ns0.ten1.hcp.storage1.com.* Make sure the URL entered here can be accessed by the DocAve Control service, Media service and the corresponding DocAve Agent(s).

  - **Secondary namespace address** (Optional) – Specify the secondary Namespace Address which will be used to store data when the primary Namespace Address is not accessible. This namespace address is used in conjunction with the **FailOverMode** parameter. For the detailed information, refer to the FailOverMode section.

    ***Note**: The secondary Namespace must be mirrored to the primary Namespace.

    For example, you can enter *http://ns0.ten1.hcp.storage2.com.* Make sure the URL entered here can be accessed by the DocAve Control service, Media service and the corresponding DocAve Agent(s).

  - **Root folder** – Enter the directory where you want to store data. The directory will be created automatically in the specified namespace address if it does not exist. For example, *directoryName*.

- **Username and Password** – The user name and password to access the namespace you entered.
- **Advanced** –Specify the following extended parameters in advanced settings if necessary. If you have multiple parameters to enter, press **Enter** on your keyboard to separate the parameters. Refer to the instructions below to add parameters.
    - **RetryInterval** – Specify the time interval of the **Retry** operation when the connection with the HDS Hitachi Content Platform server is not available. The format is **RetryInterval=200**. The unit for this parameter is **millisecond**.

      If you do not configure this parameter, the value is 200 milliseconds by default.
    - **RetryCount** – Specify the count of the **Retry** operation when the connection with the HDS Hitachi Content Platform server is not available. The format is **RetryCount=6**.

      If you do not configure this parameter, the value is 6 by default.
    - **FlushDNS** – Specify whether to flush the DNS before connecting to the specified secondary Namespace Address. The format is **FlushDNS=true**.

      If you do not configure this parameter, the value is true by default, which means the DNS will be flushed before connecting to the specified secondary Namespace Address.
    - **FailOverMode** – Specify when to use the configured secondary Namespace Address if the primary Namespace Address is not accessible. Refer to Configuring FailOverMode for more information.
    - **CacheSecondaryNamespace** – When you configure HDS physical device, you must configure Primary Namespace Address (PNA) and Secondary Namespace Address (SNA). If PNA fails and you want to use cache SNA to run the job, you can enable this configuration. Refer to Configuring CacheSecondaryNamespace for more information.
    - **SecondaryNamespaceTimeout** – When you enable CacheSecondaryNamespace, you can add this configuration to customize the timeout time of it. The default timeout time is 3600 seconds. You can enter the number as you wish.
- **Space Threshold** – Set up the **Space Threshold** for the physical device. Once the threshold is reached, data will stop being written to the physical device and the device will become read-only. There are two methods you can select:
    - **Less than … MB** – Specify the minimum size of the free space for the physical device, if the free space of the physical device is less than the specified size, data will stop being written to the physical device and the

device will become read-only. By default, this option is used and the default size is 1024 MB.

- **Less than … %** – Specify the minimum percentage of the free space, if the free space of the physical device is less than the specified percentage, data will stop being written to the physical device and the device will become read-only.

Click **Test** to verify the space or percentage you entered.

Click **OK** to save the configurations and return to the Storage Configuration interface, or click **Cancel** to return to the Storage Configuration interface without saving any changes. After the physical device is saved, it will be listed in the **Physical Device** tab.

Configuring FailOverMode

To configure FailOverMode, , complete the following steps:

- If you enter **FailOverMode= ReadWrite**, the secondary Namespace Address will enable the upload and download function.
- If you enter **FailOverMode=Read**, the secondary Namespace Address will only enable the download function.
- If you enter **FailOverMode=Off**, the secondary Namespace Address will not be used.

Configuring CacheSecondaryNamespace

To configure CacheSecondaryNamespace, complete the following steps:

- **CacheSecondaryNamespace=true** – When you run a job, and the time is in the SecondaryNamespaceTimeout, it will not check PNA and will use SNA directly. If the time exceeds the SecondaryNamespaceTimeout, it will check PNA.
- **CacheSecondaryNamespace=false** – When you run a job, it will check PNA firstly and will use PNA to run the job. If PNA check fails, it will check SNA and use SNA to run the job.

Logical Device

DocAve has the ability to treat multiple storage drives as a single logical unit when saving DocAve data. This is especially helpful for very large DocAve plans as many smaller drives can be combined. A logical drive must be defined before creating a DocAve plan.

***Note:** Each logical device can only be configured with one type of physical device.

To access Logical Device settings for DocAve, in the Control Panel interface, click **Logical Device** under the Storage Configuration heading. You will be brought to the Storage Configuration interface with the Logical Device tab selected. Click **Close** on the ribbon to close the Storage Configuration interface.

In the Logical Device configuration interface, you will see a list of previously configured logical devices. You can customize how these logical devices are displayed in the following ways:

- **Search** – Filters the logical devices displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the logical device you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).
- **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name you want to filter, then click the filter the column button ( ), and then select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

Managing Logical Devices

In Storage Configuration, you can create a new logical device, view details about a logical device, edit a previously configured logical device, or delete a previously configured logical device. For details on creating or editing a logical device, see the Configuring Logical Devices section of this guide.

To view details about a logical device, select a logical device from the list of previously configured logical devices, then click **Details** on the ribbon. You will see all of the detailed information about the specific logical device displayed in the following three tabs:

- **Summary** – The configurations for this logical device.
- **Physical Device** – The physical device(s) that are used by this logical device.
- **Associated Storage Policy** – The storage policy that uses this logical device.

Click **Edit** on the ribbon to change the configurations for this logical device. For details on editing configurations for a logical device, see the Configuring Logical Devices section of this guide.

To delete a logical device from DocAve, select a logical device from the list of previously configured logical devices, and then click **Delete** on the ribbon. A confirmation window will pop up and ask if you are sure you want to proceed with the deletion. Click **OK** to delete the selected logical device(s), or click **Cancel** to return to the Storage Configuration interface without deleting the selected logical device(s).

Configuring Logical Devices

To create a new logical device, click **Create** on the ribbon, and then select **Logical Device** from the drop-down menu. To modify a previously configured logical device, select the logical device, and then click **Edit** on the ribbon.

In the Create Logical Device or Edit Logical Device interface, configure the following settings:

1. **Logical Device Name** – Enter a **Logical device name** for this logical device. Then enter an optional **Description** for future reference.
2. **Data Storage Type** – Select the device type according to different types of the data you are about to store:
   - **Logical device** – The logical device can be used to store all kinds of data. It is the common type of device.
   - **BLOB storage device** – This storage device is used to store the BLOB data. It can only be used for the Storage Manager.

     ***Note:** When selecting the **BLOB storage device**, you can select the **Configure Folder Structure** feature to generate the BLOB data folders in the structure you selected.

   - **Redundant backup data storage device** – Stores the data of Platform Backup and Granular Backup.

   ***Note:** Once the **Data Storage Type** is configured, it cannot be modified later.

3. **Storage Type** – From **Storage type** drop-down box, select the storage type for this logical device. This will determine the physical devices available to be added to this logical device. Note that when you have selected the **Blob storage device** and the **Redundant backup data storage device** as **Data Storage Type**, only the **Net Share** can be selected as **Storage Type**.
4. **Add Physical Device** – Select the physical device you wish to add from the **Physical Device** drop-down menu. You can also choose **New Physical Device** to create a new one. Click **Add** to add the physical device to this logical device. For more information on creating a new physical device, see the Configuring Physical Devices section of this guide.

   You can change the order of the physical devices by selecting a different position number in the **Order** drop-down box. The data/index will be stored in the physical device according to this order. For each physical device that you add, you may select Storage Data, Storage Index, or both by selecting the corresponding checkbox that you want to store in this physical device. By default, both options are selected. To remove a Physical Device, click the corresponding X in the Remove column.

   When the **BLOB storage device** or the **Redundant backup data storage device** is selected in the **Storage Type** section, click the **Add a Storage Group** link in the **Add Physical Device** section to add a storage group. Follow the instructions below to add a storage group:

- **Add a Storage Group** – This feature is used for the BLOB storage device and the Redundant backup data storage device. When selecting the Logical device, the **Add a Storage Group** link will be hidden.
- **Please choose the sync method for storage groups** – This feature is only used for the **BLOB storage device**. When more than one storage groups have been added, this feature will be displayed. This feature allows you to enable data synchronization among several storage groups and provide high available performance to your data. This means that if the current used storage group is damaged, the data can be obtained from the other storage groups. This option is only available for **Net Share** Storage Type and it is only supported for **Real-Time Storage Manager** and **Scheduled Storage Manager**. This feature will help you synchronize data to all the storage groups. The storage groups will be used in the order that they have been added. The primary group will be used first by priority.
    - **Asynchronous** – Enables the data to be written into the first available storage group, and then DocAve will copy the successful written data from the specified storage group to all the other storage groups.
    - **Synchronous** – Enables the data to be written into all storage groups at the same time. The synchronization thread will keep all the data in the storage groups same, complete and correct.

5. **Configure Folder Structure** – This is an optional feature. When selecting the **BLOB storage device**, configure the **Configure Folder Structure** section to generate the BLOB data folders in the structure you selected here. After selecting the **Create storage path for contents using the following structure** checkbox, there are 4 options you can select from the drop-down list:
    - **YYYY/MM** – Select this to generate the folders. The directory of your stored data is *.../YYYY/MM*.
    - **YYYY/MM/DD** – Select this to generate the folders. The directory of your stored data is *.../YYYY/MM/DD*.
    - **YYYY/MM/DD/HH**– Select this to generate the folders. The directory of your stored data is *.../YYYY/MM/DD/HH*
    - **YYYY/MM/DD/HH/mm** – Select this to generate the folders. The directory of your stored data is *.../YYYY/MM/DD/HH/mm*.

    When selecting the logical device or the backup storage device, this feature will be hidden.

6. Click **OK** to save the configurations and return to the **Storage Configuration** interface, or click **Cancel** to return to the **Storage Configuration** interface without saving any changes. After the logical device is saved, it will be listed in the **Logical Device** tab.

Storage Policy

Use **Storage Policy** to specify which logical device to use when saving backup data, and setting up the retention policy for the data saving in the logical device.

To access **Storage Policy** settings for DocAve in the **Control Panel** interface, click **Storage Policy** under the **Storage Configuration** heading. You will be brought to the **Storage Configuration** interface with the **Storage Policy** tab selected. Click **Close** on the ribbon to close the **Storage Configuration** interface.

In the Storage Policy configuration interface, you will see a list of previously configured storage policies. You can customize how these storage policies are displayed in the following ways:

- **Search** – Filters the storage policies displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the storage policy you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).
- **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name you want to filter, then click the filter the column button ( ), and then select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

Managing Storage Policies

In **Storage Configuration**, you can create a new storage policy, view details about a storage policy, edit a previously configured storage policy, or delete a previously configured storage policy. For details on creating or editing a storage policy, see the Configuring Storage Policies section of this guide.

To view details about a storage policy, select it from the list of previously configured storage policies, then click **Details** on the ribbon. You will see all of the detailed information about the specific storage policy displayed in the following three tabs:

- **Summary** – The configurations for this storage policy.
- **Logical Device** – The logical device(s) that are used by this storage policy.
- **Data** – The size of the data stored in this storage policy.

Click **Edit** on the ribbon to change the configurations for this storage policy. For details on editing configurations for storage policies, see the Configuring Logical Devices section of this guide.

To delete a storage policy from DocAve, select it from the list of previously configured storage policies, then click **Delete** on the ribbon. A confirmation window will pop up and ask if you are sure you want to proceed with the deletion. Click **OK** to delete the selected storage policies or click **Cancel** to return to the **Storage Configuration** interface without deleting the selected storage policies

Configuring Storage Policies

To create a new storage policy, click **Create** on the ribbon, then select **Storage Policy** from the drop-down menu. To modify a previously configured storage policy, select the storage policy, then click **Edit** on the ribbon.

In the **Create Storage Policy** or **Edit Storage Policy** interface, configure the following settings:

1. **Storage Policy Name** – Enter a **Name** for this storage policy. Then enter an optional **Description** for future references.
2. **Primary Storage** – Select the desired logical device from the **Logical Device** drop-down menu. The backup data will be saved in the device specified here. You can also choose **New Logical Device** to create a new one. For more information about creating logical devices, see the Configure Logical Devices section of this guide.
3. **Media Service** – Select the Media service from the drop-down menu, and then click **Add**. To remove a Media service from this storage policy, click the corresponding **X**. Click **Test** to verify the availability of the Media services.

   If you have added several Media services, you can select the one of the following methods:

   - **Default priority** – The most free Media service will be used by default.
   - **Custom priority** –Configure the positions of the Media services. The Media service with the higher priority will be used when running jobs using this storage policy.
4. **Enable Retention Rule** – To configure a retention rule for this storage policy, select the **Enable retention rule** checkbox and continue to the section below, Configuring Retention Rules.

Click **OK** to save the configurations and return to the **Storage Configuration** interface, or click **Cancel** to return to the **Storage Configuration** interface without saving any changes. After the storage policy is saved, it will be listed in the **Storage Policy** tab.

Configuring Retention Rules

After selecting the **Enable Retention Rule** option, the **Storage Policy Type** will appear. You can select **Backup type** or **Archive type** for the retention rule. After selecting the **Enable Retention Rule** option, the **Primary Retention Rule** configurations will appear. To configure settings for the **Primary Retention Rule**, follow the instructions below:

Storage Policy Type – Choose the usage of the storage policy.

- **Backup Type** – Select this to use the storage policy for the **Data Protection** modules and the **Content Manager** module. The following settings must be configured in the **Primary Retention Rule** section:

  ***Note**: One backup cycle includes a full backup job plus all incremental and differential backup jobs prior to the start of the next full backup job.

- **Retention Rule** – Select one or both of the following to keep data by cycles. If both of the following two rules are selected, DocAve will keep the data specified in both of these rules:

  - **Keep the last __ cycle(s)** – Configure the number of most recent backup cycles to keep. The cycles which are older than the specified cycles will be pruned. For example, if you enter 2 here, all backup data within the last 2 full backup cycles will be kept.

    ***Note**: If you choose to trigger the data retention before the backup job starts in the **Retention Trigger Settings** section, DocAve recommends you to keep at least 2 backup cycles to protect your backup data.

  - **Keep the last __ full backup(s)** – Configure the number of most recent full backups to keep. All of the backups which are older than the specified number of full backups will be pruned. For example, if you enter 2 here, only the latest 2 full backups will be kept. All other backups will be deleted.

  Click **Advanced If you want to keep your data by time** to access the following options for keeping data by time. If both of the following two rules are selected, DocAve will keep the data specified in both of these settings:

  - **Keep the cycle(s) in __ __ –** Keep the backup cycles within the time frame configured here. The cycles which are older than the specified time frame will be pruned. For example, if you select **Day(s)** and enter 2 here, all backup data within the full backup cycles whose start time is within the last two days will be kept.
  - **Keep the full backup(s) in __ __ –** Keep the full backups within the time frame configured here. All backup data older than the specified time frame will be pruned. For example, if you select **Day(s)** and enter 2 here, only the data of full backups whose start time is within the last two days will be kept. All older backup data will be deleted.

- **Others** – Select the **Keep partial backup data for jobs Stopped, Failed or Finished with Exception** checkbox if you do not wish to delete partial backup data.

- **Retention Trigger Settings** – Configure the retention trigger settings. You can only configure the **Retention Trigger Settings** in the primary retention rule.

  - **Trigger data retention** – Select the **Before the backup job starts** radio button to trigger the data retention before the backup job starts. Select the **After the backup job completes** radio button to trigger the data retention after the backup job completes.

    ***Note**: If you choose to trigger the data retention before the backup job starts, DocAve recommends you to keep at least 2 backup cycles when configuring the retention rule.

        - **Select the backup types to trigger data retention** – Select the **Full backup** radio button to trigger the data retention when performing the full backup jobs. Select **Incremental backup** radio button to trigger the data retention when performing the incremental backup jobs. Select **Differential backup** radio button to trigger the data retention when performing the differential backup jobs
        - **Trigger data retention when a backup is** – Select the **Finished** radio button to trigger the data retention when the backup jobs are finished. Select the **Finished with exception** radio button to trigger the data retention when the backup jobs are finished with exception.
    - **Action** – Configure the action you wish DocAve to perform when the retention rules are triggered:
        - **Delete the data** – Select this option to delete any data not included in the retention rule. The excluded data will be deleted when the retention job runs. To also remove related job records from Job Monitor, select the **Remove the job** checkbox.
        - **Move the data to logical device** – Select this option to move any data not included in the retention rule to another logical device. Then select a logical device from the drop-down menu.

      Once you have selected a logical device to move the data to, the **Secondary Retention Rule** configurations will appear. Follow the same instructions for configuring the **Primary Retention Rule**. Note that you can have as many retention rules as the number of logical devices you have configured, and the rules are applied in order. Make sure the logical device you will move data to has enough space.

        - **Custom action** – Use your own retention policy. This function only supports storage policies for Net Share devices. If you create a .bat file with a customized configuration, you can use it for a DocAve retention policy. Enter the local path of the .bat file in the text box. For example, *C:/DocAve/policy.bat*. Click **Test** to verify the connection.

          Enter the description for the custom action in the **Description** section. The description will be shown as the warning message when the user wants to restore the data pruned by the custom action.
    - **Notification** – Configure e-mail notification settings for the retention jobs. You can click the checkbox and select a previously configured e-mail notification profile in the drop-down list or you can click **New Notification Profile** to set up a new e-mail notification profile. For more information about how to configure notification profiles, refer to the User Notification Settings section in this user guide.
- **Archive Type** – Select this to use the storage policy for the **Archiver** module.

***Note**: If you want to modify the previously configured archive type retention rule, the modified archive type retention rule will only have effect on the newly archived data after the rule modification. For the previously archived data, the old retention rule will be used.

- **Retention Rule** – Configure the following settings:
  - **Keep the last __ __** – Keep the archived data within the time frame configured here. For example, if you enter **2** and select **Day(s)** here, the archived data will be kept for 2 days before it is deleted by the retention job.
- **Action** – Configure the action you wish DocAve to perform when the retention rules are triggered:
  - **Delete the data** – Select this option to delete any data not included in the retention rule. The corresponding data will be deleted when the retention job runs. To also remove related job records from Job Monitor, select the **Remove the job** checkbox.
  - **Move the data to logical device** – Select this option to move any data not included in the retention rule to another logical device. Then select a logical device from the drop-down menu.
- **Take effect on all the existing archived data** – This option will only be displayed when changing the original specified time for keeping the archived data or changing the original **Action** settings. If this option is selected, this new retention rule will take effect on all the existing archived data; otherwise, this new retention rule will only affect the newly archived data after this retention rule configuration.

  Once you have selected a logical device to move the data to, the Secondary Retention Rule configurations will appear. Follow the same instructions for configuring the Primary Retention Rule. Note that you can have as many retention rules as the number of logical devices you have configured, and the rules are applied in order. Make sure the logical device you will move data to has enough space.

- **Notification** – Configure e-mail notification settings for the retention jobs. You can click the checkbox and select a previously configured e-mail notification profile in the drop-down list or you can click **New Notification Profile** to set up a new e-mail notification profile.
- **Schedule** – Select the date and time of day for the **Start time** for the archive data retention rule. Then enter a positive integer in the **Interval** text box for the frequency, and select either **Minute(s)**, **Hour(s)** as the time unit for the interval. By default, it is 24 hours.

  ***Note**: For scheduled retention jobs, if there is no data to be pruned when the job is scheduled to run, the job will not run.

***Note**: Your default time zone is selected, and you may change the time zone by clicking on the hyperlink, then selecting the desired time zone from the drop-down menu.

Data Manager

Data Manager allows you to manage data and configure data settings. With this function, you can import data from DocAve, or a third party tool to DocAve 6. To access Data Manager for DocAve in the Control Panel interface, click **Data Manager** under the Data Manager heading in Specific Products Settings.

***Note**: If you are not licensed for a certain module, the corresponding button on the ribbon will be greyed out in the Data Manager interface.

Importing Data from DocAve 5 to DocAve 6

To configure a DocAve 5 to DocAve 6 data import, click the **DocAve 5** button on the ribbon in the Data Manager interface. To access the data importing configuration interface for different modules, follow the instructions in the sections below for each module in the Data Manager interface. You can also click **Data Type** on the ribbon and select the data you want to process from the drop-down list.

***Note**: DocAve 6 now supports data imports from DocAve version 5.5 to DocAve version 5.8. If you want to import data from DocAve 5 to DocAve 6 and are using a DocAve version lower than 5.7, it is recommended that you upgrade to version 5.7 first and then import your data from DocAve 5.7 to DocAve 6.

***Note**: To guarantee the success of the data import from DocAve 5 to DocAve 6, you must go the Scheduled Job Monitor in DocAve 5 to stop all the scheduled jobs.

Importing DocAve 5 Granular Backup Data

Before you begin, you must configure a storage policy and a logical device. To configure a storage policy, open the Control Panel interface and click the **Storage Policy** link under the Storage Configuration category in Specific Products Settings. Then create a storage policy with a logical device pointing to the DocAve 5 Granular Backup Data and Index locations. For details on configuring the storage policy, refer to the Configuring Storage Policies section of this user guide.

To configure a logical device, go to the Control Panel Interface and click the **Logical Device** link under the Storage Configuration category in Specific Products Settings. Then create a logical device with a physical device pointing to the DocAve 5 Granular Backup Data and Index location. For details on configuring the logical device, refer to the Configuring Logical Devices section of this user guide.

When setting up the DocAve 6 physical devices, make sure you are using the same path and settings as the DocAve 5 physical devices.

After you finish your configurations, return to the Control Panel and click the **Data Manager** link under the Data Manager category in Specific Products Settings. From the Data Manager interface, click the **Data Type** button on the ribbon, then select **Granular Backup Data** from the drop-down list.

***Note**: DocAve does not support the upgrade of Granular Backup data stored on the **DELL DX Storage** and **EMC Centera** storage.

To import DocAve 5 Granular Backup Data to DocAve 6, complete the following steps:

1. **Prerequisites** – Have you mapped the device storing DocAve 5 granular backup data to a DocAve 6 storage policy?
    - If you already configured a storage policy according to the directions at the start of this section, then select **Mapped**. Click **Next** to go to the next step.
    - If you have not completed these configurations, select **Not mapped** (the default selection), then click the **Configure Storage Policy** link. Complete your storage policy configurations, then return to the Prerequisites page. Select **Mapped**, and click **Next** to go to the next step.
2. **Data Selection** – Select the data you want to import from DocAve 5. On the **Storage Policy** drop-down list, select a storage policy that you previously configured. In the tree, you can browse from farm level to full backup cycle level. If you want to import data of a farm, select the **Select All** checkbox under the farm name. You can also separately select the backup job you want to include. Click **View Details** to view the logical device that will be used for this backup job and all the jobs in the cycle. If you check a previously imported backup job, you can view the last imported time in the **Last Imported Time** column.

    ***Note:** If you want to import the previously imported backup data and there is no logical device change or new job in the cycle added, the job data importing job will skip. In the comment column of Job Monitor, it displays: **The job's data has existed**.
    After you finish the configuration, click **Next** to go to the next step.

3. **Notification** – Send out an e-mail notification report to specified DocAve users. In the **Select a profile with address only** drop-down list, select the e-mail notification you previously configured. You can also click **New Notification Profile** to create a notification. Click **View** to see the **User Notification Settings** window. You can view the detailed setting of the notification here. Click **Edit** to edit the notification setting or click **Close** to close the window. After you finish the configuration, click **Next** to go to the next step.
4. **Overview** – Review your configurations. In the **Imported Plans and Settings** table, you can view the detailed information of the DocAve 5 Granular Backup Data import. During the setting, you can click **Back** to go to a previous step or click **Cancel** to exit the configuration GUI.
5. Click **Finish** to save the configuration and return to the Data Manger GUI, or click **Cancel** to return without saving any changes. You can click **Job Monitor** on the ribbon to go to the Job Monitor GUI and view the job detail.

Importing DocAve 5 Platform Backup Data

Before you begin, you must configure a storage policy and a logical device. To configure a storage policy, open the Control Panel interface and click the **Storage Policy** link under the Storage Configuration category in Specific Products Settings. Then create a storage policy with a logical device pointing to the DocAve 5 Platform Backup Data and Index location. For details on configuring the storage policy, refer to the Configuring Storage Policies section of this user guide.

To configure a logical device, go to the Control Panel Interface and click the **Logical Device** link under the Storage Configuration category in Specific Products Settings. Then create a logical device with a physical device pointing to the DocAve 5 Platform Backup Data and Index location. For details on configuring the logical device, refer to the Configuring Logical Devices section of this user guide.

When setting up the DocAve 6 physical devices, make sure you are using the same path and settings as the DocAve 5 physical devices.

After you finish your configurations, return to the Control Panel and click the **Data Manager** link under the Data Manager category in Specific Products Settings. From the Data Manager interface, click the **Data Type** button on the ribbon, then select **Platform Backup Data** from the drop-down list.

***Note**: DocAve does not support the upgrade of Platform Backup data stored on the **EMC Centera** storage.

Complete the following steps to import DocAve 5 Platform Backup Data to DocAve 6:

1. **Prerequisites** – Have you mapped the device storing DocAve 5 platform backup data to a DocAve 6 storage policy?
    - If you already configured a storage policy according to the directions at the start of this section, then select **Mapped**. Click **Next** to go to the next step.
    - If you have not completed these configurations, select **Not mapped** (the default selection), then click the **Configure Storage Policy** link. Complete your storage policy configurations, then return to the Prerequisites page. Select **Mapped**, and click **Next** to go to the next step.
2. **Data Selection** – Select the data you want to import from DocAve 5. On the **Storage Policy** drop-down list, select a storage policy that you previously configured. In the tree, you can browse from agent level to full backup cycle level. If you want to import data run by a certain agent, select the **Select All** checkbox under the agent name. You can also separately select the backup job you want to include. Click **View Details** and you can view the logical device that will be used for this backup job and all the jobs in the cycle. If you check a previously imported Platform Backup job, you can view the last imported time in the **Last Imported Time** column.

    After you finish the configuration, click **Next** to go to the next step.
3. **Notification** – Send out an e-mail notification report to specified DocAve users. In the **Select a profile with address only** drop-down list, select the e-mail notification you previously configured. You can also click **New Notification Profile** to create a notification. Click **View** to see

the User Notification Settings window. You can view the detailed setting of the notification here. Click **Edit** to edit the notification setting or click **Close** to close the window. After you finish the configuration, click **Next** to go to the next step.

4. **Overview** – Review your configurations. In the **Imported Plans and Settings** table, you can view the detailed information of the DocAve 5 Platform Backup Data import. During the setting, you can click **Back** to go to a previous step or click **Cancel** to exit the configuration GUI.
5. Click **Finish** to save the configuration and return to the Data Manger GUI, or click **Cancel** to return without saving any changes. You can click **Job Monitor** on the ribbon to go to Job Monitor GUI and view the job detail.

Importing DocAve 5 Archiver Data

Before you begin, you must configure a logical device and a storage policy. To configure a logical device, go to the Control Panel Interface and click the **Logical Device** link under the Storage Configuration category in Specific Products Settings. Then create a logical device with a physical device pointing to the DocAve 5 Archiver Index location. For details on configuring the logical device, refer to the Configuring Logical Devices section of this user guide.

From the Control Panel interface, click the **Storage Policy** link under the Storage Configuration category in Specific Products Settings. Then create a storage policy with a logical device pointing to the DocAve 5 Archiver Data location. For details on configuring the storage policy, refer to the Configuring Storage Policies section of this user guide.

When setting up the DocAve 6 physical devices, make sure you are using the same path and settings as the DocAve 5 physical devices.

After you finish configuring the logical device and the storage policy, return to the Control Panel and click the **Data Manager** link under the Data Manager category in Specific Products Settings. From the Data Manager interface, click the **Data Type** button on the ribbon, then select **Archiver Data** from the drop-down list.

***Note**: This importing option is used for DocAve 5 Archiver data which has no DocAve 5 Archiver stubs created.
***Note**: DocAve does not support the upgrade of Archiver data stored on the **DELL DX Storage** and **EMC Centera** storage.

Complete the following steps to import DocAve 5 Archiver Data to DocAve 6:

1. **Prerequisites** – Have you completed the following mappings and configurations?
    - **Have you mapped the DocAve 5 Archiver index to a DocAve 6 logical device** – You must configure a logical device with a physical device pointing to the DocAve 5 Archiver Index Location. For details about how to configure a logical device, refer to Configuring Logical Devices section in this user guide.

    - If you already configured a logical device according to the directions at the start of this section, then select **Mapped**.
    - If you have not completed these configurations, select **Not mapped** (the default selection), then click the **Configure Logical Device** link. Complete your logical device configuration, then return to the Prerequisites page, and select **Mapped**.
- **Have you mapped the DocAve 5 Archiver data device to a DocAve 6 storage policy?** – You must configure a storage policy with a physical device pointing to the DocAve 5 Archiver Data location. For details about how to configure storage policy, refer to Configuring Storage Policies.
    - If you already configured a physical device according to the directions at the start of this section, then select **Mapped**.
    - If you have not completed these configurations, select **Not mapped** (the default selection), then click the **Configure Storage Policy** link. Complete your logical device configuration, then return to the Prerequisites page, and select **Mapped**.
- **Have you configured a DocAve 6 Archiver index device** – You must configure an Archiver Index Device to store DocAve 6 Archiver index.
    - If you have already configured the Archiver Index Device, select **Configured**.
    - If you have not configured the Archiver Index Device, click the **Configure Archiver Index Device** link to enter the Configure Archiver Index Device interface. Complete the Archiver Index Device configuration, then return to the Prerequisites page, and select **Configured**.

Once you have selected **Mapped** or **Configured** for all three fields, click **Next** to go to the next step.

2. **Data Selection** – Select the Archiver index you want to import from DocAve 5. On the Device drop-down list, select the DocAve 6 logical device you previously configured for mapping the DocAve 5 Archiver index. In the tree, you can browse from farm level to site collection level and select the level you want to import index from. If you check a previously imported level, you can view the last imported time of the index in the **Last Imported Time** column. If you want to import the index you imported before, you can select the same data level, and after the job completes, the last imported time will change to the latest time. After you finish the configuration, click **Next** to go to the next step.
3. **Settings** – Configure the following settings:
    - **Media Service** – Select a media service to get the Index data from DocAve 5. Click the drop-down list, and select the media service you want for the index import.
    - **Notification** – Specify a notification profile to send out an e-mail notification report to specified DocAve users. You can select a previously configured notification profile in the drop-down list or click **New Notification Profile** to create a new notification profile. For details on how to configure a notification setting, refer to the User Notification Settings section in this user guide.

- **Pre-scan** – Scan your device mapping status for the DocAve 5 Archiver data before running an import job. Select **Scan the device mapping status before importing DocAve 5 Archiver index and data**. DocAve will run the following two jobs: **Archiver Scan Data** job and **Archiver Import Data** job. This will make sure that all of your DocAve 5 Archiver Data devices in the scope specified in the **Data Selection** step have been mapped to the corresponding DocAve 6 storage policy.

4. Click **Finish** to save the configuration and return to the Data Manger GUI, or click **Cancel** to return to the Data Manager GUI without saving any changes. You can click **Job Monitor** on the ribbon to go to Job Monitor GUI and view the job details.

Converting DocAve 5 Stubs and BLOB Data

Before you can convert DocAve 5 stubs and BLOB data, you must configure the BLOB Provider and a logical device. From the Data Manager interface in Control Panel, click the **Blob Provider** link in the **Archiver/Extender Stub and BLOB Data** field to configure the BLOB provider settings. For details on how to set up the BLOB Provider, refer to the Configuring the BLOB Provider section in the Storage Manager User Guide.

To specify a logical device to store the BLOB data which is imported from DocAve 5, go to Control Panel and click the **Logical Device** link under the Storage Configuration heading in Specific Products Settings. For details on configuring the logical device, refer to the Configuring Logical Devices section of this user guide.

After you finish these configurations, return to the Control Panel. Then click the **Data Manager** link under the Data Manager category in Specific Products Settings. Click the **Data Type** button on the ribbon, then select **Archiver/Extender Stub and Blob Data** from the drop-down list.

Complete the following steps to configure the stub and BLOB data import:

1. **Prerequisites** – Have you completed the following configurations?
    - **BLOB Provider** – You must configure the BLOB Provider in Storage Optimization before you can continue:
        - If you already configured the BLOB Provider according to the directions at the start of this section, then select **Configured**.
        - If you have not completed this configuration, select **Not Configured** (the default selection), then click the **Configure Blob Provider** link. Complete your BLOB Provider configuration, then return to the Prerequisites page, and select **Configured**.
    - **Configure Logical Device** – You must configure a logical device for storing the imported DocAve 5 BLOB data.
        - If you already configured a logical device according to the directions at the start of this section, then select **Configured**.

    - If you have not completed this configuration, select **Not Configured** (the default selection), then click the **Configure Logical Device** link. Complete your logical device configuration, then return to the Prerequisites page, and select **Configured**.

Once you have selected **Configured** for both fields, click **Next** to go to the next step.

2. **Data Selection** – Select the data you want to import from DocAve 5 in this step.
    - **SharePoint Environment** – Browse from farm level to site collection level and select the level you want to import data from. Refer to the information below for selecting nodes on the farm tree.
        - You can only select nodes in the same farm.
        - When selecting the farm, web application, or content database, there will be a **Configure** button on the right. Note that this button is only for configuring the Storage Manager logical device for the current level you select. While the **Configure** button on the ribbon will configure the Storage Manager device for all the selected nodes. After clicking the **Configure** button next to the node or the **Configure** button on the ribbon, select a logical device from the drop-down list or create a logical device by clicking **New Logical Device**. Click **OK** to finish the logical device configuration and go back to the Data Selection interface or click **Cancel** to exit the interface.

    ***Note:** In **Recycle Bin**, the DocAve 5 stubs in the deleted lists/libraries level or the above level will not be upgraded to the DocAve 6 stubs.

    - **Logical Device** – After you have configured the logical device, this column will show the Storage Manager logical device that you have configured.
    - **Last Imported Time** – If you checked the previously converted data in farm, web application or content database, you can view the last imported time of the data in this column. If you want to import the data you imported before, you can select the same data level, and after the job finished, the last imported time will change to the latest time.

After you finish the configuration, click **Next** to go to the next step.

3. **Data Settings** – Set up the following configurations:
    - **Storage Manager Settings** – In this field, you can set up Compression and Encryption for Storage Manager.
        - **Data Compression** – This option allows you to compress BLOB data and save space. Select the **Compression** option and select a compression level. A low compression level results in a faster compression rate but a larger data set, while a high compression level results in a slower compression rate but a smaller, better quality data set. Note that small data sets occupy more system resources and cause slower job times. The compression is performed on the SharePoint Server (SharePoint Agent).

- **Data Encryption** – If you want to enable data encryption, check **Encryption** and select a security profile in the **Security Profile** drop-down list. You can also click **New Security Profile** to create a new security profile. Encryption protects sensitive materials; however, note that encrypting data causes slower extend times. The encryption is performed on the SharePoint Server (SharePoint Agent).

- **Agent Group** – If you have several agent groups under one farm, you can select an agent group to run the data importing job.
- **Notification** – Specify a notification profile to send out an e-mail notification report to specified DocAve users. You can select previously configured notification profile in the drop-down list or click **New Notification Profile** to create a new notification profile. For details on how to configure a notification setting, refer to the User Notification Settings section in this user guide.
- **Schedule Selection** – Set up a schedule to run the converting data job. If you want to run the job right now, select **Import once finish the wizard**. If you want to set up a schedule, select **Configure the schedule myself** to have DocAve run the converting job at a designated time. You can specify the start time for the job by selecting a time from the drop-down list for date and entering hour and minute in the other two text boxes.

4. Click **Finish** to save the configuration and return to Data Manger GUI, or click **Cancel** to return to Data Manager GUI without saving any changes. You can click **Job Monitor** on the ribbon to go to Job Monitor GUI and view the job detail.

Converting DocAve 5 Connector Stub

Before you can import the Connector stubs, you must first retract and remove the DocAve 5 Connector solutions (**DocAve.SP2010.Connector. ContentLibrary.wsp** and **DocAve.SP2010.Connector.MediaLibrary.wsp**) from SharePoint, and then deploy the DocAve 6 Connector solutions (**SP2010ConnectorContentLibrary.wsp** and **SP2010ConnectorMediaLibrary.wsp**) to SharePoint. For details on how to deploy solutions for DocAve 6 Connector, refer to the Solution Manager section in this user guide. The solutions can be deployed at farm level or web application level in DocAve Solution Manager.

Before you can import DocAve 5 Connector stubs, you must configure the BLOB Provider. From the Data Manager interface in Control Panel, click the **Blob Provider** link in the **Connector Stub** field to configure the BLOB provider settings. For details on how to set up the BLOB provider, refer to Configuring the BLOB Provider section in the Connector User Guide.

After you finish these configurations, return to the Control Panel, click the **Data Manager** link under the Data Manager category in Specific Products Settings. Click the **Data Type** button on the ribbon, then select **Connector Stub** from the drop-down list.

Complete the following steps to configure the DocAve Connector stubs:

1. **Prerequisites** – Have you completed the following configuration?

- **BLOB Provider** – You must configure the BLOB Provider in Storage Optimization before you can continue:
    - If you already configured the BLOB Provider according to the directions at the start of this section, then select **Configured**. Click **Next** to go to the next step.
    - If you have not completed this configuration, select **Not Configured** (the default selection), then click the **Configure Blob Provider** link. Complete your BLOB Provider configuration, then return to the Prerequisites page. Select **Configured**, then click **Next** to go to the next step.

2. **Data Selection** – Select the Connector stub you want to import from DocAve 5.
    - **SharePoint Environment** – Browse from the farm level to the content database level and select the level you want to import Connector stub from.
    - **Last Imported Time** – If you checked the previously converted data in the farm, web application or content database, you can view the last imported time of the data in this column. If you want to import the data imported before, you can select the same data level, and after the job finished, the last imported time will change to the latest time.
3. **Data Settings** – Set up the following configurations:
    - **Agent Group** – If you have several agent groups under one farm, you can select an agent group to run the Connector stub import job.
    - **Notification** – Specify a notification profile to send out an e-mail notification report to specified DocAve users. You can select a previously configured notification profile in the drop-down list, or click **New Notification Profile** to create a new notification profile. For details on how to configure a notification setting, refer to the User Notification Settings section in this user guide.
    - **Schedule Selection** – Set up a schedule to run the converting data job. If you want to run the job right now, select **Import once finish the wizard**. If you want to set up a schedule, select **Configure the schedule myself** to have DocAve run a converting job at a designated time. You can specify the start time for the job by selecting time from the drop-down list for date and entering hour and minute in the other two text boxes.
4. Click **Finish** to save the configuration and return to Data Manger GUI, or click **Cancel** to return to Data Manager GUI without saving any changes. You can click **Job Monitor** on the ribbon to go to Job Monitor GUI and view the job detail.

Importing DocAve 5 Solution Data

Before you begin, you must configure a storage policy and a logical device. To configure a storage policy, open the Control Panel interface and click the **Storage Policy** link under the Storage Configuration category in Specific Products Settings. Then create a storage policy with a logical device pointing to the DocAve 5 Solution Data platform. For details on configuring the storage policy, refer to the Configuring Storage Policies section of this user guide.

To configure a logical device, go to the Control Panel Interface and click the **Logical Device** link under the Storage Configuration category in Specific Products Settings. Then create a logical device with a physical

device pointing to the DocAve 5 Solution Data platform. For details on configuring the logical device, refer to the Configuring Logical Devices section of this user guide.

After you finish configuring the storage policy and logical device, return to the Control Panel and click the **Data Manager** link under the Data Manager category in Specific Products Settings. From the Data Manager interface, click the **Data Type** button on the ribbon, then select **Solution Data** from the drop-down list.

***Note:** If you have exported DocAve 5 Solution Data and you want to upgrade the data to DocAve 6, you can use DocAve 5 Solution Data Importing to upgrade the solution data. For details on how to export DocAve 5 Solution Data, refer to the Solution Center section in DocAve 5 User Guide.

To configure the DocAve 5 Solution Data import, complete the following steps:

1. **Prerequisites** – Have you mapped the DocAve 5 Solution Center device to a DocAve 6 storage policy?
    - If you already configured a storage policy and logical device according to the directions at the start of this section, then select **Mapped**. Click **Next** to go to the next step.
    - If you have not completed these configurations, select **Not mapped** (the default selection), then click the **Configure Storage Policy** link. Complete your storage policy and logical device configurations, then return to the Prerequisites page. Select **Mapped**, then click **Next** to go to the next step.
2. **Data Selection** – Select the solution data you want to import from DocAve 5. In the **Storage Policy** drop-down list, select a storage policy you previously configured. In the tree, the root node is the logical device's name. Click the logical device and you can browse the solutions data stored in the device.

    After you finish the configuration, click **Next** to go to the next step.
3. **Notification** – Specify a notification profile to send out an e-mail notification report to specified DocAve users. You can select a previously configured notification profile in the drop-down list, or click **New Notification Profile** to create a new notification profile. For details on how to configure a notification setting, refer to the User Notification Settings section in this user guide. Click **View** to view the details of the notification you selected.

    After you finish the configuration, click **Next** to go to the next step.
4. Click **Finish** to save all the changes and go back to Data Manger GUI. Or you can click **Cancel** to exit the configuration interface without saving any changes. There will be a prompt message and you can click **Job Monitor** on the message to go to Job Monitor GUI and view the job detail.

Importing Data from DocAve 6 to DocAve 6 Service Pack 1 or Later Versions

To configure DocAve 6 to DocAve 6 Service Pack 1 or later versions data import, click the **DocAve 6** button on the ribbon in the Data Manager GUI. To access the data importing configuration interface for different modules, follow the instructions in the sections below for each module in the Data Manager interface. You can also click **Data Type** on the ribbon and select the data you want to process from the drop-down list.

***Note**: DocAve 6 Service Pack 1 only supports the upgrade for DocAve 6.0 data stored on **Net Share**, **FTP**, **TSM** and **Cloud Storage**.

Importing DocAve 6 Granular Backup Data

Before you begin, you must configure a storage policy and a logical device. To configure a storage policy, open the Control Panel interface and click the **Storage Policy** link under the Storage Configuration category in Specific Products Settings. Then create a storage policy with a logical device pointing to the DocAve 6 Granular Backup Data and Index locations. For details on configuring the storage policy, refer to the Configuring Storage Policies section of this user guide.

To configure a logical device, go to the Control Panel Interface and click the **Logical Device** link under the Storage Configuration category in Specific Products Settings. Then create a logical device with a physical device pointing to the DocAve 6 Granular Backup Data and Index location. For details on configuring the logical device, refer to the Configuring Logical Devices section of this user guide.

When setting up the physical devices for DocAve 6 Service Pack 1 or later versions, make sure you are using the same path and settings as the DocAve 6.0 physical devices.

After you finish your configurations, return to the Control Panel and click the **Data Manager** link under the Data Manager category in Specific Products Settings. From the Data Manager interface, click the **DocAve 6** button on the ribbon, click the **Data Type**, then select **Granular Backup Data** from the drop-down list.

1. **Prerequisites** – Have you mapped the device storing DocAve 6 granular backup data to a DocAve 6 storage policy?
    - If you already configured a storage policy and logical device according to the directions at the start of this section, then select **Mapped**. Click **Next** to go to the next step.
    - If you have not completed these configurations, select **Not mapped** (the default selection), then click the **Configure Storage Policy** link. Complete your storage policy configurations, then return to the Prerequisites page. Select **Mapped**, and click **Next** to go to the next step.
2. **Data Selection** – Select the data you want to import from DocAve 6. On the **Storage Policy** drop-down list, select a storage policy that you previously configured. In the tree, you can browse from farm level to full backup cycle level. If you want to import data of a farm, check **Select All**

box under the farm name. You can also separately select the backup job you want. Click **View Details** to view the logical device that will be used for this backup job and all the jobs in the cycle. If you check a previously imported backup job, you can view the last imported time in the **Last Imported Time** column.

***Note**: If you want to import the previously imported backup data and there is no logical device change or new job in the cycle added, the job data importing job will skip. In the comment column of Job Monitor, it displays: **The job's data has existed**.

After you finish the configuration, click **Next** to go to the next step.

3. **Notification** – Send out an e-mail notification report to specified DocAve users. In the **Select a profile with address only** checkbox, click the drop-down list and select the e-mail notification you previously configured. You can also click **New Notification Profile** to create a notification. Click **View** and a User Notification Settings window will appear. You can view the detailed setting of the notification here. Click **Edit** to edit the notification setting or click **Close** to close the window. After you finish the configuration, click **Next** to go to the next step.
4. **Overview** – Review your configurations. In the **Imported Plans and Settings** table, you can view the detailed information of the DocAve 6 Granular Backup Data import. During the setting, you can click **Back** to go to the previous step or click **Cancel** to exit the configuration GUI.
5. Click **Finish** button to save the configuration and return to Data Manger GUI or click **Cancel** to return to Data Manager GUI without saving any changes. You can click **Job Monitor** on the ribbon to go to the Job Monitor GUI and view the job detail.

Importing DocAve 6 Platform Backup Data

Before you begin, you must configure a storage policy and a logical device. To configure a storage policy, open the Control Panel interface and click the **Storage Policy** link under the Storage Configuration category in Specific Products Settings. Then create a storage policy with a logical device pointing to the DocAve 6 Platform Backup Data and Index location. For details on configuring the storage policy, refer to the Configuring Storage Policies section of this user guide.

To configure a logical device, go to the Control Panel Interface and click the **Logical Device** link under the Storage Configuration category in Specific Products Settings. Then create a logical device with a physical device pointing to the DocAve 6 Platform Backup Data and Index location. For details on configuring the logical device, refer to the Configuring Logical Devices section of this user guide.

When setting up the physical devices for DocAve 6 Service Pack 1 or later versions, make sure you are using the same path and settings as the former DocAve 6 physical devices.

After you finish your configurations, return to the Control Panel and click the **Data Manager** link under the Data Manager category in Specific Products Settings. From the Data Manager interface, click the **DocAve 6** button on the ribbon, then click the link for **Platform Backup Data** in the Data Manager GUI.

Complete the following steps to import DocAve 6 Platform Backup Data to DocAve 6 Service Pack 1 or later versions:

1. **Prerequisites** – Have you mapped the device storing DocAve 6 platform backup data to a DocAve 6 storage policy?

   - If you already configured a storage policy according to the directions at the start of this section, then select **Mapped**. Click **Next** to go to the next step.
   - If you have not completed these configurations, select **Not Mapped** (the default selection), then click the **Configure Storage Policy** link. Complete your storage policy configurations, then return to the Prerequisites page. Select **Mapped**, and click **Next** to go to the next step.

   After you finish the configuration, click **Next** to go to the next step.

2. **Data Selection** – Select the data you want to import from DocAve 6 in this step. On the **Storage Policy** drop-down list, select a storage policy you previously configured for DocAve 6 Platform Backup data. On the tree, you can browse from farm level to full backup cycle level. If you want to import data of a farm, check **Select All** box under the farm name. You can also select the backup job you want to import separately. Click **View Details** and you can view the logical device that will be used for this backup job and all the jobs in the cycle. If you check a previously imported Platform Backup job, you can view the last imported time in the **Last Imported Time** column.

   After you finish the configuration, click **Next** to go to the next step.

3. **Notification** – Send out an e-mail notification report to specified DocAve users. In the **Select a profile with address only** checkbox, click the drop-down list and select the e-mail notification you previously configured. You can also click **New Notification Profile** to create a notification. Click **View** to view and a **User Notification Settings** window will appear. You can view the detailed setting of the notification here. Click **Edit** to edit the notification setting or click **Close** to close the window.

   After you finish the configuration, click **Next** to go to the next step.

4. **Overview** – Review your configurations. In the Imported Plans and Settings table, you can view the detail information of the DocAve 6 Platform Backup Data importing. During the setting, you can click **Back** to go to the previous step or click **Cancel** to exit the configuration GUI.
5. Click **Finish** to save the configuration and return to the Data Manger GUI or click **Cancel** to return to Data Manager GUI without saving any changes. You can click **Job Monitor** on the ribbon to go to Job Monitor GUI and view the job detail.

Converting EBS Stubs to RBS Stubs in DocAve 6

If you have EBS stubs in the DocAve 6 environment and you want to convert EBS stubs to RBS stubs, this function allows you to achieve the stub converting.

To access the DocAve 6 upgrading EBS to RBS Stub configuration interface, go to the Control Panel and click the **Data Manager** link under the Data Manager category in Specific Products Settings. Then click

the **RBS Blob Provider** link in the middle of the Data Manager interface. You must enable RBS for the farm, web application, or content database you want to convert to RBS stubs. For details on how to enable RBS, refer to the Configuring the BLOB Provider section in the Storage Manager User Guide.

After you finish these configurations, return to the Data Manager interface. Click the **DocAve 6** button on the ribbon, click the **Data Type** button, then select **EBS to RBS Stub** from the drop-down list.

To configure the stub converting, complete the following steps:

1. **Data Selection** – Specify a farm for the DocAve 6 EBS stubs converting. On the Farm Selection drop-down list, select a farm you want to convert EBS stubs. Click **Next** to go to the next step.

   ***Note**: All EBS rules and the EBS provider of the selected farm will be disabled after the converting job finishes.

2. **Data Settings** – Set up the following configurations:

   - **Agent Group** – If you have several agent groups under one farm, you can select an agent group to run the EBS stub converting job.
   - **Notification** – Specify a notification profile to send out an e-mail notification report to specified DocAve users. You can select a previously configured notification profile in the drop-down list or click **New Notification Profile** to create a new notification profile. For details on how to configure a notification setting, refer to the User Notification Settings section in this user guide.

3. **Schedule Selection** – Set up a schedule to run the converting data job. If you want to run the job right now, select **Start converting once finish the wizard**. If you want to set up a schedule, select **Configure the schedule myself** to have DocAve run the converting job at a designated time. You can specify the start time for the job by selecting time from the drop-down list for the date and entering hour and minute in the other two text boxes.

4. Click **Finish** to save the configuration and return to Data Manger GUI or click **Cancel** to return to Data Manager GUI without saving any changes. You can click **Job Monitor** on the ribbon to go to Job Monitor GUI and view the job detail.

Importing DocAve 6 SharePoint Migration Data

Before you begin, you must configure a storage policy and a logical device. To configure a storage policy, open the **Control Panel** interface and click the **Storage Policy** link under the **Storage Configuration** category in Specific Products Settings. Then create a storage policy with a logical device pointing to the DocAve 6 SharePoint migration exported data location. For details on configuring the storage policy, refer to the Configuring Storage Policies section of this user guide.

To configure a logical device, go to the **Control Panel** Interface and click the **Logical Device** link under the **Storage Configuration** category in Specific Products Settings. Then create a logical device with a physical device pointing to the DocAve 6 SharePoint migration exported data location. For details on configuring the logical device, refer to the Configuring Logical Devices section of this user guide.

When setting up the physical devices for DocAve 6 Service Pack 3 or later versions, make sure you are using the same path and settings as the former DocAve 6 physical devices.

After you finish your configurations, return to the **Control Panel** interface and click the **Data Manager** link under the **Data Manager** category in Specific Products Settings. From the **Data Manager** interface, click the **DocAve 6** button on the ribbon, then click **SharePoint Migration** data link in the Data Manager GUI.

Complete the following steps to import DocAve 6 SharePoint Migration exported data to DocAve 6 Service Pack 3 or later versions:

1. **Prerequisites** – Have you mapped the device storing DocAve 6 SharePoint Migration data to a DocAve 6 storage policy?

    - If you already configured a storage policy according to the directions at the start of this section, then select **Mapped**. Click **Next** to go to the next step.
    - If you have not completed these configurations, select **Not mapped** (the default selection), then click the **Configure Storage Policy** link. Complete your storage policy configurations, then return to the **Prerequisites** page. Select **Mapped**, and click **Next** to go to the next step.

    After you finish the configuration, click **Next** to go to the next step.

2. **Data Selection** – Select the data you want to import from DocAve 6 in this step. On the **Storage Policy** drop-down list, select a storage policy you previously configured for DocAve 6 SharePoint Migration exported data. On the tree, you can browse from farm level to full backup cycle level. If you want to import data of a farm, check **Select All** box under the farm name. You can also select the Export job you want to import separately. Click **View Details** and you can view the logical device that will be used for this import job and all the jobs in the cycle. If you check a previously imported SharePoint Migration job, you can view the last imported time in the **Last Imported Time** column.

    After you finish the configuration, click **Next** to go to the next step.

3. **Notification** – Send out an e-mail notification report to specified DocAve users. In the **Select a profile with address only** drop-down list, select the e-mail notification you previously configured. You can also click **New Notification Profile** to create a notification. Click **View** to view and a **User Notification Settings** window will appear. You can view the detailed setting of the notification here. Click **Edit** to edit the notification setting or click **Close** to close the window.

    After you finish the configuration, click **Next** to go to the next step.

4. **Overview** – Review your configurations. In the **Imported Plans and Settings** table, you can view the detailed information of the DocAve 6 SharePoint Migration Data import. During the setting, you can click **Back** to go to the previous step or click **Cancel** to exit the configuration GUI.
5. Click **Finish** to save the configuration and return to the Data Manger GUI or click **Cancel** to return to Data Manager GUI without saving any changes. You can open **Job Monitor** to view the job details.

Converting 3rd Party Tool Stub to DocAve Stub

If you are using a third party tool and have generated some third-party stubs, you can use this function to convert those stubs to DocAve stubs. To convert 3rd Party Tool stub to DocAve stub, go to the Control Panel, and click the **Data Manager** link under the Data Manager category in Specific Products Settings. Click the **3rd Party Tool** button on the ribbon.

Before you begin, you must configure the BLOB Provider in Storage Optimization. Click the **Blob Provider** link in the **3rd Party Tool** interface in Data Manager. For more details on how to configure Blob Provider, refer to the Configure Blob Provider section in the Storage Manager User Guide.

After you finish the configuration, return to the 3rd Party Tool GUI. Click the **Data Type** button on the ribbon and select **Import Stub**.

Complete the following steps:

1. **Prerequisites** – Have you completed the following configurations?
    - **BLOB Provider** – Ensure that you have configured the BLOB Provider in the Storage Manager prior to importing the stubs:
        - If you already configured the BLOB Provider according to the directions at the start of this section, then select **Configured**.
        - If you have not completed this configuration, select **Not Configured** (the default selection), then click the **Configure Blob Provider** link. Complete your BLOB Provider configuration, then return to the Prerequisites page, and select **Configured**.
    - **Configure Logical Device** – Ensure that you have configured a logical device to store the BLOB data of the converted third party stubs:
        - If you already configured a logical device according to the directions at the start of this section, then select **Configured**.
        - If you have not completed this configuration, select **Not Configured** (the default selection), then click the **Configure Logical Device** link. Complete your logical device configuration, then return to the Prerequisites page, and select **Configured**.

    Once you have selected **Configured** for both fields, click **Next** to go to the next step.

2. **Data Selection** – You are able to select where you want to convert the third-party stubs to DocAve stubs in this step.
    - **SharePoint Environment** – Browse from farm level to content database level and select the level where you want to convert the third-party stubs. Refer to the information below to select on the farm tree.
        - You can only select nodes in the same farm.

- When selecting the farm, web application, or content database, there will be a **Configure** button on the right. Note that this button is only for configuring the logical device for the current level you select. While the **Configure** button on the ribbon will configure the logical device for all the selected nodes. After clicking the **Configure** button next to the node or the **Configure** button on the ribbon, select a logical device from the drop-down list or create a logical device by clicking **New Logical Device**. Click **OK** to finish the logical device configuration and go back to the Data Selection interface or click **Cancel** to exit the interface.

After you finish the configuration, click **Next** to go to the next step.

3. **Data Settings** – Set up the configurations below:

   - **Data Compression** – This option allows you to compress BLOB data and save space. Select the **Compression** option and select a compression level. A low compression level results in a faster compression rate but a larger data set, while a high compression level results in a slower compression rate but a smaller, better quality data set. Note that small data sets occupy more system resources and cause slower job times. The compression is performed on the SharePoint Server (SharePoint Agent).
   - **Data Encryption** – If you want to enable data encryption, check **Encryption** and select security profile in the **Security Profile** drop-down list. You can also click **New Security Profile** to create a new security profile. Encryption protects sensitive materials; however, note that encrypting data causes slower extend times. The encryption is performed on the SharePoint Server (SharePoint Agent).
   - **Agent Group** – If you have several agent groups under one farm, you can select an agent group to run the stub converting job.
   - **Notification** – Specify a notification profile to send out e-mail notification report to specified DocAve users. You can select previously configured notification profile in the drop-down list or click **New Notification Profile** to create a new notification profile. For details on how to configure a notification setting, refer to the User Notification Settings section in this user guide.
   - **Schedule Selection** – Set up a schedule to run the stub converting job. If you want to run the job right now, select **Start converting once finish the wizard**. If you want to set up a schedule, select **Configure the schedule myself** to have DocAve run stub converting job at a designated time. You can specify the start time for the job by selecting the date from the drop-down list and entering hour and minute in the other two text boxes.

4. Click **Finish** to save the configuration and return to Data Manger GUI or click **Cancel** to return to Data Manager GUI without saving any changes. You can click **Job Monitor** on the ribbon to go to Job Monitor GUI and view the job detail.

Index Manager

Index Manager allows you to configure a full text index setting. With this function, you can search the entire content of your documents. To access Index Manager for DocAve in the Control Panel interface, click the **Index Manager** link under the Index Manager heading in Specific Products Settings.

Creating an Index Profile

To create a new index profile in Index Manager, complete the following steps:

1. Click **New Index Profile** on the ribbon.
2. Enter a Profile name in the text box. Then enter an optional **Description** for this profile for future reference.
3. Select a **Logical device** from the drop-down list to specify the location to store the index data.
4. Select a **Media service** from the drop-down list, then click **Add**. You can add multiple media services for this profile. Click **Test** to verify the connection between the media service(s) and the logical device.
5. Select one of the following options for generating a full text index:
   - **Automatically generate full text index when the job is finished** (default option) – When an Archiver job completes or completes with exception, it will trigger a full text index job. You can go to job monitor to view the job details.
   - **Generate full text index on schedule** – You can set up a schedule for the full text index job. Enter the date and time of day in the **Start time** text boxes. Enter a positive integer in the **Interval** text box for the frequency, and select either **Day(s)**, **Week(s)**, **or Month(s)** as the time unit for the interval.

   ***Note:** Your browser's time zone is selected by default. You can change the time zone by clicking on the hyperlink, then select a new time zone from the drop-down menu and click **OK**.

6. Click **Advanced** if you want to perform a detailed configuration for any of the following fields (optional):
   - **File Type** – All the file types listed are supported for full text index search. By default, all file types are selected.

   ***Note:** If you are using the built-in PDF analyzer, only English documents can generate index. In order to better generate index for PDF documents in different languages, it is recommended to install Adobe PDF iFilter on the server where the media service for full text index is installed.

   - **File Size** – Enter an integer in the text box for size limitation of full text index. By default, the number is 100 MB. The file whose size is larger than the specified size will not be indexed. Also, generating the index for a larger file may take longer time.
   - **Preview Function** – Enable the preview of the searched content in the search result.
7. Click **OK** to save the profile. DocAve will return you to the Index Manager interface.

After you finish the profile configuration, go to **Storage Optimization > Archiver > Archiver Index Device** and configure the level where you want to apply full text index. For detail on how to configure Archiver Index Device, refer to the **Configuring the Archiver Index Device** section of the Archiver User Guide. The full text index will be generated according to the index profile settings and workday setting.

***Note:** If you want to change the logical device for the configured profile, a pop up window will appear asking you to copy the data from the current index device to the new one before you run the index job. Click **OK** to continue. Another pop up window will appear, asking you to save the Excel file. The file contains site information, source device information, and destination device information. Follow the instructions in the Excel file to copy the index folder from the source device to the destination device while keeping the same structure.

Configuring Workday for the Index Profile

Click the **Configuration Workday** button to globally configure the full text index setting. Running a full text index occupies space and resources on your network. The **Configure Workday** option allows you to control the full text index job based on the working hours you specify.

- **Process Cap for Working Hour(s)** – Limit the maximum number of generating index jobs that can simultaneously run for each media service during work hours. By default, the maximum process number is 3. As an example, if you configured 3 media services in the index profile, you can at a maximum have 9 generating index jobs running during working hours. If you have more than 9 jobs, the job status will change to waiting for any job after the 9th.
- **Process Cap for Non-Working Hour(s)** – Limit the maximum number of generating index jobs that can simultaneously run for each media service during non-working hours. By default, the maximum process number is 3. As an example, if you configured 3 media services in the index profile, you can at a maximum have 9 generating index jobs running during non-working hours. If you have more than 9 jobs, the job status will change to waiting for any job after the 9th.
- **Define Work Hours** – Specify the **Working hour(s)** by selecting times from the drop-down lists and specify **Working day(s)** by selecting the checkboxes. Your browser's time zone is selected by default. If you want to change the time zone, click on the hyperlink, select a new time zone from the drop-down menu, and click **OK**. Then click **OK** on the ribbon to complete the configuration.

To edit an index profile from DocAve, select the checkbox of an index profile, and then click **Edit** on the ribbon to change the configurations for this index profile. For details on editing configurations for an index profile, see the Create an Index Profile section of this guide.

To delete an index profile from DocAve, select an index profile from the list of previously configured index profiles, and then click **Delete** on the ribbon. A confirmation window will pop up and ask if you are sure you want to proceed with the deletion. Click **OK** to delete the selected index profile(s), or click **Cancel** to return to the Index Manager interface without deleting the selected index profile(s).

Export Location

Export Location allows you to export/import data in offline Replicator jobs, import solutions in offline deployment, in offline eRoom Migration/Lotus Notes Migration/ Livelink Migration jobs, export/import data in Vault, and export/import data in Content Manager.

To access Export Location settings for DocAve in the Control Panel interface, click **Export Location** under the Export Location heading. Click **Close** on the ribbon to close the Export Location interface.

Managing Export Locations

In Export Location, you can create a new export location, view details about an export location, edit a previously configured export location, or delete a previously configured export location. For details on creating or editing an export location, see the Configuring Export Locations section of this guide.

To view details about an export location, select it from the list of previously configured export locations, then click **View Details** on the ribbon. You will see the previously configured settings for this export location.

Click **Edit** on the ribbon to change the configurations for this export location. For details on editing configurations for an export location, see the Configuring Export Locations section of this guide.

To delete an export location from DocAve, select it from the list of previously configured export locations, then click **Delete** on the ribbon. A confirmation window will pop up and ask if you are sure you want to proceed with the deletion. Click **OK** to delete the selected export location(s), or click **Cancel** to return without deleting it.

Configuring Export Locations

To create a new export location, click **Create** on the ribbon. To modify a previously configured export location, select the export location, then click **Edit** on the ribbon. In the Create Export Location or Edit Export Location interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this export location. Then enter an optional **Description** for this export location for future reference.
2. **Farm Selection** – Select the farm where you are creating this export location. The created export location can only be used by the farm specified here.
3. **Path** – The export location can be a file share, storage area network (SAN), or network-attached storage (NAS).
    a. Enter the **UNC Path** in the following format: *admin-PC**c$**data* or *admin-PC**shared* folder.

    *__Note:__ If the path you specified does not exist, it will be created automatically.

b. Enter the **Username** and **Password** in the corresponding text boxes. Then click **Validation Test**. DocAve will test the path and user information to make sure they are valid.

4. Click **OK** to save the configurations and return to the Export Location interface, or click **Cancel** to return to the Export Location interface without saving any changes.

Filter Policy

Filter Policy allows you to set up filter rules so you can control what objects and data within any SharePoint level appear so that you can target content more precisely. By setting up and saving filter policies, you can apply the same filter policies to different plans without having to recreate them each time.

To access Filter Policy for DocAve in the Control Panel interface, click **Filter Policy** under the Filter Policy heading. Click **Close** on the ribbon to close the Filter Policy interface.

In the Filter Policy interface, you will see a list of previously configured filter policies. You can customize how these filter policies are displayed in the following ways:

- **Search** – Filters the filter policies displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the filter policy you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).
- **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name you want to filter, then click the filter the column button ( ), and then select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

Managing Filter Policies

In Filter Policy, you can create a new filter policy, view details about a filter policy, edit a previously configured filter policy, or delete a previously configured filter policy. For details on creating or editing a filter policy, see the Configuring Filter Policies section of this guide.

Click **Edit** on the ribbon to change the configurations for this filter policy. For details on editing configurations for filter policy, see the Configuring Filter Policies section of this guide.

To view a filter policy for DocAve, select it from the list of previously configured filter policies, and then click **View Details** on the ribbon. To delete a filter policy for DocAve, select it from the list of previously configured filter policies, and then click **Delete** on the ribbon. A confirmation window will pop up and ask if you are sure you want to proceed with the deletion. Click **OK** to delete the selected filter policy, or click **Cancel** to return without deleting it.

Configuring Filter Policies

To create a new filter policy, click **Create** on the ribbon. To modify a previously configured filter policy, select the filter policy, and then click **Edit** on the ribbon. In the Create Filter Policy or Edit Filter Policy interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for the filter policy. Then enter an optional **Description** for future reference.
2. **Criteria** – Select specific objects or data within each SharePoint level (from site collection down to attachment). Each level has a unique set of rules that can be applied to enhance configurations. Refer to Appendix A for examples of filter policies that users can configure.
    a. Click **Add a Filter Level Group** to add a new rule of the specified level and then click **Add a Criterion** to add criteria for the new rule by completing the fields below, and click ✕ to delete the rule that is no longer needed.
        - **Rule** – Select the new rule you want to create from the drop-down list.

          ***Note:** The site level filter policy using the **Created By** rule cannot be used for SharePoint Online environment.
        - **Condition** – Select the condition for the rule.
        - **Value** – Enter a value you want the rule to use in the text box.

    b. To add more filters to the filter policy, repeat the previous step.

       ***Note:** Depending on the filters you enter, you can change the logical relationships between the filter rules. There are currently two logical relationships: **And** and **Or**. By default, the logic is set to **And**. To change the logical relationship, click on the logical relationship link. The **And** logical relationship means that the content which meets all the rules will be filtered and included in the result. The **Or** logic means that the content which meets any one of the rules will be filtered and included in the result.
3. **Basic Filter Condition** – View the logical relationship of the filter rules in this area.

   For example, if the logical relationship is ((1 And 2) Or 3) in the Basic Filter Condition area, the contents that meet both the filter rule 1 and filter rule 2, or meet the filter rule 3, will be filtered and included in the result.

Click **OK** to save the configurations and return to the Filter Policy interface, or click **Cancel** to return to the Filter Policy interface without saving any changes.

Mapping Manager

Mapping Manager allows you to map properties of the source node to the properties of the destination node. There are eight types of mappings you can create in Mapping Manager:

- **Domain Mapping** – Maps a source domain to a destination domain. The destination domain name will be replaced by the configured source domain name, and the user in the source group will be mapped to the destination user of the same name. By creating a rule for domain mapping, any plans using the rule can repeat the process without having to manually re-enter the settings.

  ***Note:** It is not supported to use Domain Mapping to map the source AD group to the destination SharePoint Online farm. Use Group Mapping instead to map the AD group to the destination SharePoint Online farm.

  For example, company A has a subsidiary B. Company B's employees all have their domain accounts in company A's domain and vice versa. When you want to replicate A's sites to the internal sites of B, you can use domain mapping to bulk map these users to their accounts in B's domain. In other words, you can use domain mapping to bulk change the users' domain when two domains have the same user accounts.

- **User Mapping** – Maps a source user to a target user. This way, if the same user has a different username in Domain A than in Domain B, or if you want to migrate an individual user's content, permissions, and metadata in Domain A to another user in Domain B, the user's permissions and metadata will not be lost when content is moved.

  For example, company A takes over company B; however, the two companies have their own domains. If you want to replicate company B's employee site to the internal site of company A, you can use user mapping to map this user's account in B's domain to A's domain. In other words, user mapping can map the user's account in two different domains, so the permissions and metadata in SharePoint will not be lost after moving one user's SharePoint content to another domain.

- **Language Mapping** – Displays the source content in a different language than the destination node.

  For example, company A has a subsidiary B in a different country. When replicating A's sites to B's SharePoint farm, you can use language mapping to make sure all the list and column names are displayed in B's language. In other words, you can use language mapping to change the display language after replicating the source content to another SharePoint farm in a different country.

- **Column Mapping** (used by Content Manager, SharePoint 2007 to 2013 Migration, SharePoint 2010 to 2013 Migration, and SharePoint 2007 to 2010 Migration) – Maps a source column to a target column. The destination column name will be replaced by the configured source column name, and you are able to add value mapping. By creating a condition on different levels, you can create the rule you want.

For example, column A is on the source side and column B is on the destination side. If you want to replicate column A to column B, you can use column mapping to map this column's metadata to the destination.

- **Content Type Mapping** (only used by Content Manager, and Migration) – Maps a source content type to a target content type. The source content type will be replaced by the configured destination content type.

  For example, content type A is on the source side and content type B is on the destination side. If you want to replicate content type A to content type B, you can use content type mapping to map this content type to the destination.

- **Template Mapping** (only used by Content Manager, and Migration) – Maps a source template to a target template. The destination content type will be replaced by the configured destination template. You will be able to create mapping at the site level and list level.

  For example, template A is on the source side and template B is on the destination side. If you want to replicate template A to template B, you can use template mapping to map this template to the destination.

- **Group Mapping** (only used by non-SharePoint Migration) – Maps a source group to a target group. The source group will be replaced by the configured group.

  For example, group A is on the source side and group B is on the destination side. If you want to replicate group A to group B, you can use group mapping to map this group to the destination.

- **List Name Mapping** – Maps a source list name to a destination list name. The source list name will be replaced by the configured list name.

  For example, list A is on the source side and list B is on the destination side. If you want to replicate list A to list B, you can use list name mapping to map this list to the destination.

Domain Mapping

To access **Domain Mapping** for DocAve, click **Domain Mapping** under the **Mapping Manager** heading in the **Control Panel** interface. You will be brought to the **Domain Mapping** interface. Click **Close** on the ribbon to close **Mapping Manager**.

In the Domain Mapping configuration interface, you will see a list of previously configured domain mappings. You can customize how these domain mappings are displayed in the following ways:

- **Search** – Filters the domain mappings displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the domain mapping you want to display. You can select to **Search all pages** or **Search current page**.

- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).

Managing Domain Mappings

In the **Domain Mapping** interface, you can create a new domain mapping, view details about a domain mapping, edit a previously configured domain mapping, delete a previously configured domain mapping, or export a domain mapping. For details on creating or editing a domain mapping, see the Configuring Domain Mappings section of this guide.

To see the configurations of a domain mapping, select it from the list of previously configured domain mappings, and then click **View** on the ribbon. The configuration details will appear. Click **Export** on the ribbon to export this domain mapping, or click **Edit** to change the configurations.

To change the configurations of a domain mapping, select it from the list of previously configured domain mappings, and then click **Edit** on the ribbon. For details on editing configurations for a domain mapping, see the Configuring Domain Mappings section of this guide.

To export a domain mapping to an XML file, select it from the list of previously configured domain mappings, then click **Export** on the ribbon. Exported domain mappings can be imported when creating or editing a domain mapping to expedite the process.

Configuring Domain Mappings

To create a new domain mapping, click **Create** on the ribbon. To modify a previously configured domain mapping, select the checkbox next to the domain mapping, then click **Edit** on the ribbon. In the Create Domain Mapping or Edit Domain Mapping interface, complete the following steps:

1. Configure the following settings for the domain mapping:
    - **Name and Description** – Enter the **Name** as you want it to appear for the new domain mapping profile. Enter an optional **Description** for this domain mapping profile for future reference.
    - **Add Mapping Rules** – Specify the **Source Domain Name** and the **Destination Domain Name**. The specified source domain name will be replaced by the specified destination domain name after the corresponding job completes.
2. Click **Add**. The new rule appears in the **Source Domain Name** and **Destination Domain Name** display table.

    To delete a mapping rule, select the checkbox next to the mapping rule(s) you want to delete, then click **Delete**.

3. Click **Save** to save the configurations for this domain mapping and return to the Domain Mapping interface in Mapping Manager, or click **Cancel** to return without saving any of your changes.

User Mapping

To access User Mapping for DocAve in the **Control Panel** interface, click **User Mapping** under the **Mapping Manager** heading. You will be brought to the **User Mapping** interface. Click **Close** on the ribbon to close **Mapping Manager**.

In the User Mapping configuration interface, you will see a list of previously configured user mappings. You can customize how these user mappings are displayed in the following ways:

- **Search** – Filters the user mappings displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the user mapping you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).

Managing User Mappings

In the **User Mapping** interface, you can create a new user mapping, view details about a previously configured user mapping, edit a previously configured user mapping, delete a previously configured user mapping, or export a user mapping. For details on creating or editing a user mapping, see the Configuring User Mappings section of this guide.

To see the configurations of a user mapping, select it from the list of previously configured user mappings, then click **View** on the ribbon. The configuration details will appear. Click **Export** on the ribbon to export this user mapping, or click **Edit** to change the configurations.

To change the configurations of a user mapping, select it from the list of previously configured user mappings, then click **Edit** on the ribbon. For details on editing configurations for a user mapping, see the Configuring User Mappings section of this guide.

To export a user mapping to an XML file, select it from the list of previously configured user mappings, then click **Export** on the ribbon. Exported user mappings can be imported when creating or editing a user mapping to expedite the process.

Configuring User Mappings

To create a new user mapping, click **Create** on the ribbon. To modify a previously configured user mapping, select the user mapping, then click **Edit** on the ribbon. In the **Create User Mapping** or **Edit User Mapping** interface, complete the following steps:

1. Configure the following settings for the user mapping:
    - **Name and Description** – Enter the **Name** as you want it to appear for the new user mapping profile. Enter an optional **Description** for this user mapping profile for future reference.
    - **Add Mapping Rules** – Configure the user mapping by entering the Source Username and Destination Username into the provided field. The specified Source Username will be replaced by the specified Destination Username after the corresponding job completes. Enter the username in Source default user, Target default user and Destination Username according to the displayed formats.

      ***Note:** The mapping rules examples of each kind of users or groups are provided as:

        - **Classic Windows User & Group** – Domain (NETBIOS)\username (e.g. domain\user)
        - **FBA User & Role** – Provider: username (e.g. ldapMembershipProvider:user, sqlRoleProvider:role)
        - **SharePoint Online User** – (e.g. membership:pm@domainbeta.onmicrosoft.com, i:0#.f|membership|pm@domainbeta.onmicrosoft.com)
        - **Claim (Exclude FBA) User & Role** – full login name (e.g. i:0#.w|domain\user, c:0!.s|window, c:0+.w|s-1-5-27-0123456789-0123456789-0123456789-0123, i:05.t|adfs|user@domain.com, c:05.t|adfs|role)
2. Click **Add**. The new rule appears in the **Source Username** and **Destination Username** display table.

   To delete a mapping rule, select the mapping rule(s) you want to delete by selecting the checkbox. Click **Delete**.
3. Click **Save** to save the configurations for this user mapping, and return to the User Mapping interface in Mapping Manager, or click **Cancel** to return to without saving any of your changes.

User Mapping Discrepancy Resolutions

There are situations where the **Source Username** cannot be mapped to the **Destination Username**. In the **Add Mapping Rules** section, you may choose to use the default resolution, or customize the settings for resolving such discrepancies.

***Note**: The **Source default user** and **Source place holder** for the source node are only used in two-way replication.

To have the non-existent destination user replaced by the DocAve agent account, deselect the checkbox next to **Customize settings if the user does not exist in destination**.

To have the non-existent destination user replaced by a user of your choice, select the **Customize settings if the user does not exist in the destination** checkbox, select **Add a default destination user**, and specify a default destination user in the **Target Default User** text box.

To have the non-existent destination user replaced by the corresponding source users, add a place holder account in the destination **Active Directory**, then perform the following operations:

1. Select the Customize settings if the user does not exist in the destination checkbox.
2. Select **Add a place holder account to keep metadata even if the user no longer exists** (Not supported for SharePoint Online environments.)
3. Specify the place holder account that you added in the Active Directory in the **Target place holder** text box.

***Note**: If the Default User and the Place Holder Account have been added in the Active Directory of the destination, you can set up the user mapping profile in DocAve directly. If not, before setting up the user mapping profile in DocAve, you must manually add the Target Default User and the Target Place Holder Account in the Active Directory of the destination. For security reasons, it is recommended that you specify a user who exists in the destination Active Directory but does not exist as the placeholder account in SharePoint to avoid unintentionally giving a SharePoint user access to any data assigned to the placeholder account.

***Note**: Receiving notification that **The user does not exist in destination** means one of the following scenarios is true:

- The destination user's account is no longer active/valid.
- The source user and the destination user are in different domains, and there is no domain mapping or user mapping for these two domains.
- The source user and the destination user are in different domains, and the specified user cannot be mapped using any of the configured domain mapping or user mapping.
- The source user and the destination user are in different domains, and there is a domain mapping for these two domains, but there is no destination user with the same name as the source user.

Language Mapping

To access Language Mapping for DocAve in the Control Panel interface, click **Language Mapping** under the Mapping Manager heading. You will be brought to the Language Mapping interface. Click **Close** on the ribbon to close Mapping Manager.

In the Language Mapping configuration interface, you will see a list of previously configured language mappings. You can customize how these language mappings are displayed in the following ways:

- **Search** – Filters the language mappings displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the language mapping you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).
- **Filter the column** ( ) – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over the column name you want to filter, then click the filter the column button ( ), and then select the checkbox next to the item name to have that item shown in the list. To remove all of the filters, click **Clear Filter**.

Managing Language Mappings

In the **Language Mapping** interface, you can create a new language mapping, view details about a previously configured language mapping, edit a previously configured language mapping, delete a previously configured language mapping, or export a language mapping. For details on creating or editing a language mapping, see the Configuring Language Mappings section of this guide.

To see the configurations of a language mapping, select it from the list of previously configured language mappings, then click **View** on the ribbon. The configuration details will appear. Click **Export** on the ribbon to export this language mapping, or click **Edit** to change the configurations.

To change the configurations of a language mapping, select it from the list of previously configured language mappings, then click **Edit** on the ribbon. For details on editing configurations for a language mapping, see the Configuring Language Mappings section of this guide.

To export a language mapping to an XML file, select it from the list of previously configured language mappings, then click **Export** on the ribbon. Exported language mappings can be imported when creating or editing a language mapping to expedite the process.

Configuring Language Mapping

To create a new language mapping, click **Create** on the ribbon. To modify a previously configured language mapping, select the language mapping, then click **Edit** on the ribbon. In the Create Language Mapping or Edit Language Mapping interface, complete the following steps:

1. Configure the following settings for the language mapping:
    a. **Name and Description** – Enter the **Name** as you want it to appear for the new language mapping profile. Enter an optional **Description** for this language mapping profile for future reference.
    b. **Source language** and **Target language** – Select the language from the drop-down menu that the source node is displayed in and the language that you want to have the destination node display. After running a plan with this Language Mapping Rule, the destination node will be displayed in the **Target language** field.

    ***Note**: The following languages are available for mapping: English, Japanese, and German.

    c. **Add Mapping Rules** – Select **List** or **Column** from the drop-down menu. Enter the name of the list or column used in the source language in the text box. Enter the name of the list or column you want the target language to use in the destination node. The source column or list name will be replaced by the specified destination column or list name.
2. Click **Add**. The new rule appears in the **Type**, **Source Language**, and **Target Language** display table.

    To delete a mapping rule, select the checkbox next to the mapping rule(s) you want to delete. Click **Delete**.
3. Click **Save** to save the configurations for this language mapping, and return to the Language Mapping interface in Mapping Manager, or click **Cancel** to return without saving any of your changes.

Column Mapping

To access Column Mapping for DocAve in the Control Panel interface, click **Column Mapping** under the Mapping Manager heading. You will be brought to the Column Mapping interface. Click **Close** on the ribbon to close Mapping Manager.

In the Column Mapping configuration interface, you will see a list of previously configured column mappings. You can customize how these column mappings are displayed in the following ways:

- **Search** – Filters the column mappings displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the column mapping you want to display. You can select to **Search all pages** or **Search current page**.

- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).

Managing Column Mappings

In the **Column Mapping** interface, you can create a new column mapping, view details about a previously configured column mapping, edit a previously configured column mapping, delete a previously configured column mapping, or export a column mapping. For details on creating or editing a column mapping, see the Configuring Column Mappings section of this guide.

To see the configurations of a column mapping, select it from the list of previously configured column mappings, and then click **View** on the ribbon. The configuration details will appear. Click **Export** on the ribbon to export this column mapping, or click **Edit** to change the configurations.

To change the configurations for this column mapping, select it from the list of previously configured column mappings, and then click **Edit** on the ribbon. For details on editing configurations for a column mapping, see the Configuring Column Mappings section of this guide.

To export a column mapping to an XML file, select it from the list of previously configured column mappings, and then click **Export** on the ribbon. Exported column mappings can be imported when creating or editing a column mapping to expedite the process.

Configuring Column Mapping

To create a new column mapping, click **Create** on the ribbon. To modify a previously configured column mapping, select the column mapping, and then click **Edit** on the ribbon. In the Create Column Mapping or Edit Column Mapping interface, complete the following steps:

1. Configure the following settings for the column mapping:
    a. **Name and Description** – Enter the **Name** as you want it to appear for the new column mapping profile. Enter an optional **Description** for this column mapping profile for future reference.
    b. **Condition** – Filters the condition for site, list, and item level.
        - In the site level, click **Add a Condition**. In the first drop-down list, you can select **URL** or **Site Content Type** as a rule. In the second drop-down list, you can select **Equals**, **Does Not Equal**, **Contains**, or **Does Not Contain** as the condition. In the third textbox, you can enter the value you want to filter. If you want to configure another site condition, click + to add a new site condition configuration tab. Click ▾ to select the site condition you previously configured.
        - In the list level, click **Add a Condition**. In the first drop-down list, you can select **Template ID**, **List Title**, or **List Content Type** as a rule. In the second drop-down

list, you can select **Equals**, **Does Not Equal**, **Contains**, or **Does Not Contain** as condition. If you select **Template ID** as a rule, you can view commonly used templates. If you cannot find all the templates you want, select **Customized** at the bottom of the drop-down list and enter the template name you want in the text box on the right. If you select **List Title** or **List Content Type** as a rule, you can enter the value you want to filter in the text box. If you want to configure another list condition, click + to add a new list condition configuration tab. Click ▾ to select the List condition you previously configured.

***Note:** The source list and destination list must have the same name.

- In the item level, click **Add a Condition**. You can select **Document Name** in the first drop-down list. In the second drop-down list, you can select **Equals**, **Does Not Equal**, **Contains**, or **Does Not Contain** as condition. In the third text box, you can enter the value you want to filter. If you want to configure another site condition, click + to add a new item condition configuration tab. Click ▾ to select the item condition you previously configured.

  ***Note**: Regarding relation between different conditions, refer to the tips below:

  - If you keep null for the text boxes in all levels, column mappings will be deployed into site columns and list columns.
  - If you only enter condition on site level, the site column and list column meet this condition will deploy the mapping.
  - If you only enter condition for list and item level, the list column meet this condition will use the mapping.
  - If a site column and list column meet conditions for multiple mappings, the first mapping will be deployed.

  ***Note**: Regarding the relation between different mappings and levels, refer to the tips below:

  - The relation between different mappings is **OR**. If an object meets the condition of the first mapping, it will not compare with the second mapping.
  - The relation between different levels is **AND**. But under the same level, for example, under list level, the relation between list 1 and list 2 is **OR**.
  - On the same level and same tab, the relation between conditions is **AND** by default, you can click **AND** and it will change to **OR**.

c. **Column Mapping** – Configure more column mapping settings by completing the following steps:

- Click ▾ in the Column Type field. In the drop-down list, select Same Type, Change to Destination, Change to Managed Metadata, or Change to Lookup.
  - If you select **Same Type**, the source and destination column type must be the same, or you cannot use mapping. If the column types are the

same on source and destination, the column type on the source will be mapped to the destination. If the column type(s) is different on source and destination, DocAve will create a new column(s) on the destination.

- If you select **Change to Destination**, it represents that the column type can be different on source to destination.

  ***Note:** If the column already exists on destination, the source column type will be mapped to the destination. If the column type does not exist in the destination, DocAve will create a new column in the destination.

- If you select **Change to Managed Metadata**, the column type mapping to the destination is Managed Metadata.

  ***Note:** If the column existing on the destination is a Managed Metadata column, the source column type will be mapped to the destination. If the column existing in the destination is not a Managed Metadata column, DocAve will create a new a Managed Metadata column in the destination with the same name as the source column. If the column does not exist on the destination, DocAve will create a new Managed Metadata column.

To separate character strings into different columns, click **Settings** to configure **Allow multiple term values** and **Migrate string separated with ; into columns**. These two options are selected by default. You can enter any character into the **;** text box to separate the columns. In **Term set path**, you can enter the term path to locate the term. The character string you enter should be in an acceptable format, for example **Term Group; Term Set; Term**.

If you select **Change to Lookup**, it represents that you want to map the source column to the lookup column in destination. If the Lookup Column does not exist on the destination, DocAve will create a new lookup column according to your settings on the destination.

To separate character strings into different columns, click **Settings** to configure **Allow multiple term values** and **Migrate string separated with ; into columns**. In the **List title** text box, you can enter the list title. In the **Column name** text box, you can enter the column name.

- In the **Column Mapping** table, you can enter the **Column Name** and **Internal Name** for source and destination. The column name is the display name. If you enter both the column name and the internal name, DocAve will recognize the internal name first. You must enter at least one group of source/destination in order to add a value mapping or save the profile. Click **Add a Value Mapping** and enter the column value you want to map from the source to destination.

***Note**: If you enter a value in the source side but keep it null in the destination side, this column will not be migrated to the destination. If you keep it empty in source side and enter a value in destination, DocAve will migrate the empty value of the source to the value you configured in the destination.

2. Click **Save** to save the configurations for this column mapping, and return to the Column Mapping interface in Mapping Manager, or click **Cancel** to return without saving any of your changes.

Content Type Mapping

To access Content Type Mapping for DocAve in the **Control Panel** interface, click **Content Type Mapping** under the Mapping Manager heading. You will be brought to the Content Type Mapping interface. Click **Close** on the ribbon to close Mapping Manager.

In the Content Type Mapping configuration interface, you will see a list of previously configured content type mappings. You can customize how these content type mappings are displayed in the following ways:

- **Search** – Filters the content type mappings displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the content type mapping you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).

Managing Content Type Mappings

In the Content Type Mapping interface, you can create a new content type mapping, view details about a previously configured content type mapping, edit a previously configured content type mapping, delete a previously configured content type mapping, or export a content type mapping.

To see the configurations of a content type mapping, select it from the list of previously configured content type mappings, then click **View** on the ribbon. The configuration details will appear. Click **Export** on the ribbon to export this content type mapping, or click **Edit** to change the configurations.

To change the configurations for this content type mapping, select it from the list of previously configured content type mappings, then click **Edit** on the ribbon. For details on editing configurations for a content type mapping, see the Configuring Content Type Mapping section of this guide.

To export a content type mapping to an XML file, select it from the list of previously configured content type mappings, and click **Export** on the ribbon. Exported content type mappings can be imported when creating or editing a content type mapping to expedite the process.

Configuring Content Type Mappings

To create a new content type mapping, click **Create** on the ribbon. To modify a previously configured content type mapping, select the content type mapping, then click **Edit** on the ribbon. In the Create Content Type Mapping or Edit Content Type Mapping interface, complete the following steps:

1. Configure the following settings for the column mapping:
    a. **Name and Description** – Enter the name as you want it to appear for the new column mapping profile. Enter an optional description for this column mapping profile for future reference.
    b. **Condition** – Filter the condition for site and list level.
        - In the site level, click **Add a Condition** to add a new condition. In the first drop-down list, you can select **URL** as rule. In the second drop-down list, you can select **Equals**, **Does Not Equal**, **Contains**, or **Does Not Contain** as a condition. In the third text box, you can enter the value you want to filter. If you want to configure another site condition, click + to add a new site condition configuration tab. Click ▾ to select the site condition you previously configured.
        - In List level, click **Add a Condition** to add a new condition. In the first drop-down list, you can select **Template ID** and **List Title** as rule. In the second drop-down list, you can select **Equals**, **Does Not Equal**, **Contains**, or **Does Not Contain** as a condition. If you select **Template ID** as a rule, you can view all templates you have deployed and select the templates you want as a condition. If you select **List Title** as a rule, you can enter the value you want to filter in the text box. If you want to configure another list condition, click + to add a new list condition configuration tab. Click ▾ to select the list condition you previously configured.
    c. **Content Type Mapping** – In the content type mapping table, you can enter content type names in the source and destination. Click **Add a Content Type Mapping** to add a new mapping.
2. Click **Save** to save the configurations for this content type mapping, and return to the Content Type Mapping interface in Mapping Manager, or click **Cancel** to return without saving any of your changes.

Template Mapping

To access Template Mapping for DocAve in the Control Panel interface, click **Template Mapping** under the Mapping Manager heading. You will be brought to the Template Mapping interface. Click **Close** on the ribbon to close Mapping Manager.

In the Template Mapping configuration interface, you will see a list of previously configured template mappings. You can customize how these template mappings are displayed in the following ways:

- **Search** – Filters the template mappings displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the

keyword for the template mapping you want to display. You can select to **Search all pages** or **Search current page**.

- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).

Managing Template Mappings

In the Template Mapping interface, you can create a new template mapping, view details about a previously configured template mapping, edit a previously configured template mapping, delete a previously configured template mapping, or export a template mapping.

To see the configurations of a template mapping, select it from the list of previously configured template mappings, then click **View** on the ribbon. The configuration details will appear. Click **Export** on the ribbon to export this template mapping, or click **Edit** to change the configurations.

To change the configurations for this template mapping, select it from the list of previously configured template mappings, then click **Edit** on the ribbon. For details on editing configurations for a template mapping, see the Configuring Template Mapping section of this guide.

To export a template mapping to an XML file, select it from the list of previously configured template mappings, and click **Export** on the ribbon. Exported template mappings can be imported when creating or editing a template mapping to expedite the process.

Configuring Template Mappings

To create a new template mapping, click **Create** on the ribbon. To modify a previously configured template mapping, select the template mapping, then click **Edit** on the ribbon. In the Create Template Mapping or Edit Template Mapping interface, complete the following steps:

1. Configure the following settings for the template mapping:
    a. **Name and Description** – Enter the name as you want it to appear for the new column mapping profile. Enter an optional description for this template mapping profile for future reference.
    b. **Mappings** – Set up template mappings on site or list level.
        - On the Site Template Mapping tab, click **Add a Site Template Mapping**. In the table, you can enter a template ID into the **Source** textbox or select a template ID from the drop-down list. To add another site template mapping, click **Add a Site Template Mapping**. You must enter at least one mapping into the template mapping table.

- On the List Template Mapping tab, click **Add a List Template Mapping**. In the table, you can enter a template ID into the textbox or select a template ID from the drop-down list. To add another site template mapping, click **Add a List Template Mapping**. You must enter at least one mapping into the template mapping table.

2. Click **Save** to save the configurations for this template mapping, and return to the Template Mapping interface in Mapping Manager, or click **Cancel** to return without saving any changes made.

Group Mapping

To access Group Mapping for DocAve in the Control Panel interface, click **Group Mapping** under the Mapping Manager heading. You will be brought to the Group Mapping interface. Click **Close** on the ribbon to close Mapping Manager.

In the Group Mapping configuration interface, you will see a list of previously configured group mappings. You can customize how these group mappings are displayed in the following ways:

- **Search** – Filters the group mappings displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the group mapping you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).

Managing Group Mappings

In the Group Mapping interface, you can create a new group mapping, view details about a previously configured group mapping, edit a previously configured group mapping, delete a previously configured group mapping, or export a group mapping. For details on creating or editing a group mapping, see the Configuring Group Mappings section of this guide.

To see the configurations of a group mapping, select it from the list of previously configured group mapping, then click **View** on the ribbon. The configuration details will appear. You can click **Export** on the ribbon to export this group mapping, or click **Edit** to change the configurations.

To change the configurations of a group mapping, select it from the list of previously configured group mappings, click **Edit** on the ribbon. For details on editing configurations for a group mapping, see the Configuring Group Mappings section of this guide.

To export a group mapping to an XML file, select it from the list of previously configured group mappings, and click **Export** on the ribbon. Exported group mappings can be imported when creating or editing a group mapping to expedite the process.

Configuring Group Mappings

To create a new group mapping, click **Create** on the ribbon. To modify a previously configured group mapping, select the group mapping, and then click **Edit** on the ribbon. In the Create Group Mapping or Edit Group Mapping interface, complete the following steps:

1. Configure the following settings for the Group Mapping:
    a. **Name and Description** – Enter the name as you want it to appear for the new group mapping profile. Enter an optional description for this group mapping profile for future references.
    b. **Add Mapping Rules** – Maps the source group with destination group. Enter the **Source Group Name** and **Destination Group Name** into the table. Click ✕ to delete a previously configured group mapping. You can also select the checkbox next to Source Group Name, then click **Delete Selected Mapping(s)**. You can also click **Add a Group Mapping** to add a Group.
2. Click **Save** to save the configurations for this group mapping, and return to the Group Mapping interface in Mapping Manager, or click **Cancel** to return without saving any of your changes.

List Name Mapping

To access List Name Mapping for DocAve in the Control Panel interface, click **List Name Mapping** under the Mapping Manager heading. You will be brought to the **List Name Mapping** interface.

In the List Name Mapping configuration interface, you will see a list of previously configured list name mappings. You can customize how these list name mappings are displayed in the following ways:

- **Search** – Filters the list name mappings displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the list name mapping you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).

Managing List Name Mappings

In the List Name Mapping interface, you can create a new list name mapping, view details about a previously configured list name mapping, edit a previously configured list name mapping, delete a previously configured list name mapping, or export a list name mapping. For details on creating or editing a list name mapping, refer to Configuring List Name Mappings.

To see the configurations of a list name mapping, select it from the list of previously configured list name mapping, and then click **View** on the ribbon. The configuration details will appear. You can click **Export** on the ribbon to export this list name mapping, or click **Edit** to change the configurations.

To change the configurations of a list name mapping, select it from the list of previously configured list name mappings, click **Edit** on the ribbon. For details on editing configurations for a list name mapping, refer to Configuring List Name Mappings.

To export a list name mapping to an XML file, select it from the list of previously configured list name mappings, and click **Export** on the ribbon. Exported list name mappings can be imported when creating or editing a list name mapping to expedite the process.

Configuring List Name Mappings

To create a new list name mapping, click **Create** on the ribbon. To modify a previously configured list name mapping, select the list name mapping, and then click **Edit** on the ribbon. In the Create List Name Mapping or Edit List Name Mapping interface, complete the following steps:

1. Configure the following settings for the List Name Mappings:
    a. **Name and Description** – Enter the name as you want it to appear for the new list name mapping profile. Enter an optional description for this list name mapping profile for future reference.
    b. **Condition** – Filters the condition for site and list level.
        - In the site level, click **Add a Condition**. In the first drop-down list, you can select **URL** as a rule. In the second drop-down list, you can select **Equals**, **Does Not Equal**, **Contains**, or **Does Not Contain** as the condition. In the third text box, you can enter the value you want to filter. If you want to configure another site condition, click **Add a Condition** to add a new site condition configuration tab.
        - In the list level, click **Add a Condition**. In the first drop-down list, you can select **Template ID** as a rule. In the second drop-down list, you can select **Equals**, **Does Not Equal**, **Contains**, or **Does Not Contain** as condition. You can view commonly used templates in the third text box. If you cannot find all of the templates you want, select **Customized** at the bottom of the drop-down list and enter the template name you want in the text box on the right. Click **Add a Condition** to add a new list condition configuration tab.

    On the same level and same tab, the relation between conditions is **AND** by default. You can click **AND** and it will change to **OR**.

c. **List Name Mapping** – Maps the source list name with destination list name. Enter the **Source List Name** and **Destination List Name** into the table. Click ✕ to delete a previously configured list name mapping. You can also click **Add a List Name Mapping** to add a new list name mapping.

2. Click **Save** to save the configurations for this list name mapping, and return to the List Name Mapping interface in Mapping Manager, or click **Cancel** to return without saving any of your changes.

Click **Close** on the ribbon to close Mapping Manager.

Plan Group

Plan Group provides an interface to collect plans and form them into groups according to your setup. The plans will run simultaneously or in sequence instead of you running the plans manually. In the DocAve GUI, Plan Group is located next to Job Monitor on the home screen. Click the icon to enter the Plan Group GUI.

***Note**: A plan group contains plans from multiple DocAve products. Only when you have valid licenses for the corresponding products can you use the plan group functions normally. In the Plan Group configuration interface, you will see a list of previously configured plan groups. You can customize how these plan groups are displayed in any of the following ways:

- **Search** – Filters the plan groups displayed by the keyword you designate; the keyword must be contained in a column value. At the top of the viewing pane, enter the keyword for the column mapping you want to display. You can select to **Search all pages** or **Search current page**.
- **Manage columns** (⊕) – Manages which columns are displayed in the list so that only the information you want to see is displayed. Click the manage columns button (⊕), then select the checkbox next to the column name to have that column shown in the list.
- **Hide the column** (⊖) – Hover over the column name you want to hide, and then click the hide the column button (⊖).

Security Trimming for Plan Group

Plan Group also follows the security trimming rule of DocAve 6. For instructions on how to configure permission levels, refer to Security Trimming Users.

Regarding permission control for Plan Group, if the specified user does not have permission to a product, this user will not be able to view or select the specific product in the **Module** drop-down list from the **Add Plan(s)** interface. If the user previously had permission to a specified product and he/she created a plan group including the plans of the specified product, then he/she can still view the settings of the previously created plan group after the permission to this product has been removed. However, the user

cannot modify the settings of the plans for the specified product (where he/she does not have permission) anymore.

Managing Plan Group

In the **Plan Group** interface, you can create a new plan group, view details about a plan group, edit a previously configured plan group, or delete a previously configured plan group. For details on creating a plan group, see the Configuring the Plan Group section of this guide.

To view details about a plan group, select it from the list of previously configured plan groups, and click **View Details** on the ribbon. The previously configured settings for this plan group will appear. You can view all the plans you have added to the plan group in the **Plan Viewer** and view the settings of the plan group itself in the **Group Settings** view.

Click **Edit** on the ribbon to change the configurations for this plan group. For details on editing configurations for a plan group, see the Configuring the Plan Group section of this guide.

To delete a plan group from DocAve, select it from the list of previously configured plan groups, and click **Delete** on the ribbon. A confirmation window will pop up and ask if you are sure you want to proceed with the deletion. Click **OK** to delete the selected plan groups, or click **Cancel** to return to the **Plan Group** interface without deleting the selected plan groups.

To run the plans in the specified plan group, select it and click **Run Now** on the ribbon. Then you will be able to view the corresponding jobs in the **Job Monitor** interface by clicking the **Job Monitor** link or clicking **Job Monitor** on the ribbon.

Configuring the Plan Group

In the **Create a New Plan Group** interface, complete the following steps to configure the settings:

***Note**: Even if you currently have no plans configured in DocAve, you can still create an empty plan group containing no plans and save it for future use.

1. **Plan Group Name** – Enter a group name in the **Plan group name** textbox and enter an optional description in the **Description** textbox for future reference.

   Click **Next** on the ribbon or the **Next** button to go to the next step.

   ***Note:** You cannot create a plan group whose name is the same with an existing plan group created by another user in different DocAve groups.

2. **Add Plan(s) to Group** – Adds plans to the plan group and manages your existing plans. Click **Add Plans** on the ribbon to enter the **Add Plan(s)** interface.

   ***Note:** If you have too many plans, DocAve recommends you create multiple plans groups instead of adding all of the plans to one plan group.

Here you can configure the following settings:

- **Module** – Select the module where you want to add plans. Select one module from the **Module** drop-down list, and all the previously saved plans of the selected module will be displayed in the corresponding tab.

  Now the plans from **Content Manager**, **Deployment Manager**, **Migration**, **Replicator**, **Granular Backup** and **Platform Backup** modules are available to be added in a plan group.

  Choose a tab and perform the following actions:

  ***Note**: When you are viewing or editing a plan in the corresponding interface, the plan group window will be minimized to the bottom-left of your screen. You can maximize it when you finish viewing or editing.

  - **Create a New Plan** – Creates a new plan for the selected tab. After clicking this button, you will be redirected to the corresponding product interface to create a new plan.
  - **View Details** – Views detailed information of the selected plan. After clicking this button, you will be redirected to the **View Details** interface in the plan manager of the corresponding module to view the detailed plan settings.

    ***Note:** Only Content Manager, Migration, Granular Backup, and Platform Backup modules are supported for View Details.

  - **Edit** – Edits the saved settings of the selected plan. After clicking this button, you will be redirected to the **Edit** interface in the plan manager of the corresponding module where you can edit the settings of the specified plan.
  - **Refresh** – Refreshes the information displayed in the selected tab. Newly created plans can be displayed and the information of the modified plans will be updated.
  - **Add to Group** – Adds the selected plans to the plan group you are configuring. The same plan can be added to the same plan group as many times as you wish.

    ***Note**: When you want to add multiple plans to the plan group, only click this button after you have selected all the desired plans in the corresponding tabs.

  - **Cancel** – Cancels the operation to go back to the **Add Plan(s) to Group** step.

    After you go back to the **Add Plan(s) to Group** step, you can view all the plans which have already been added to the plan group. Select one plan and click **View Details** on the ribbon to view its detailed information, click **Edit** to edit its configuration, or click **Remove** to delete it from the current plan group you are creating. You can also change the order of the listed plans by specifying the order manually from the drop-down list in the **Order** column.

After you are satisfied with the settings, click **Next** on the ribbon or the **Next** button to go to the next step.

3. **Advanced** – Choose a group type to specify how to run the plans in the plan group. Select **Sequential** or **Parallel** as the group type of the plan group.

    - **Sequential** – Runs the plans one by one according to their order in the plan group. When a job is skipped, failed, or stopped, all of the later jobs will be skipped. Otherwise, the later jobs will run normally.
    - **Parallel** – Runs the plans in one plan group simultaneously according to their order in the plan group and the specified **Concurrent Plans** count. You can specify the number of the concurrent plans by entering a positive integer in the **Plan count** textbox. The default concurrent plan number is 5, which means as many as 5 plans can be run simultaneously; all the other plans with the order larger than 5 will wait until any of the 5 former plans is completed, and then the plan with the smaller order will be run first. When using this group type, the status of jobs in the plan group will not affect the execution of each other.

      ***Note:** For File System Migration, DocAve recommends you run at most 7 plans simultaneously to maximize efficiency.

      Click **Next** on the ribbon or the **Next** button to go to the next step.

4. **Schedule** – Configure the schedule settings for the plan group by choosing one of the following options:

    - **No schedule** – Do not configure a schedule for the plan group.
    - **Configure the schedule myself** – Customize schedules for the plan group in the **Schedule Settings** field. To preview the added schedules, click **Calendar View** to view them by **Day**, by **Week**, or by **Month** in a pop-up calendar. To configure a new schedule for the plan group, click **Add Schedule** and refer to the instructions below:

        - **Type** – Select the time unit of the time interval for this schedule from **By hour**, **By day**, **By week**, or **By month**.
        - **Schedule Settings** – Configure the frequency of the time interval for this schedule by entering a positive integer in the text box. If you want to set up a more specific schedule, select the **Advanced** checkbox, and refer to the instructions below.

          If you select **By hour**, select one of the following options and configure its settings:

            - **Specify production time**: **From __ to __** – Specify the production time. It will run the plan groups in the specified production time frame.

***Note**: All plan group jobs that started within this time frame will finish even if the end time is reached.

- **Select time below** – Specify the time you want to run the plan group. To add several time points, click **Add**.

If you select **By Day**, enter the frequency in terms of days into the text box.

If you select **By week**, configure the following settings:

- **Every __ week(s)** – Enter the frequency **in** terms of weeks.
- **On __** – Specify **the** days of the week to run the plan group on.

If you select **By month**, select one of the following options and configure its settings:

- **On day __ of __** – Select the day of the specific month(s) to run the plan group. For example, if you select **On day 3 of January** and **July**, the plan groups will run on the third of January and July.
- **Day __ of every __ month(s)** – Select the day of the month, and frequency in terms of months to run the plan group on. For **example**, if you select **Day 3 of every 3 month(s)**, the plan groups will run every three months, on the third of the month.
- **The __ __of every __ month(s)** – Specify on which occurrence of what day(s) of the month, and the frequency in terms of months to **run** the plan groups. For example, if you select **The First Monday of every 3 month(s)**, the plan groups will run every three months, on the first Monday of the month.
- **The __ __ of __** – Specify on which occurrence of which day(s) of which month to run the plan groups. For example, if you select **The First Monday of January** and **July**, the plan groups will run on the first Monday of January and July.

- **Range of Recurrence** – Specify the **Start time** for plan group jobs. Select one of the following options for the end time, and configure its settings:
  - **No end date** – The plan groups will run on the configured schedule until you manually end it.
  - **End after __ occurrence(s)** – The plan groups will stop running after the number of times you specify here.
  - **End by __** – The plan groups will end running on the date and time you specify here.
- **Default Settings** – The default settings on how to run plans in the plan groups for each module. Click **Edit** to customize the settings. Refer to Configuring the Default Settings Section for more information.

When you are finished configuring the new schedule you wish to add, click **OK** to save, or click **Cancel** to close the Add Schedule interface without saving.

In the Summary table, you can view the schedules you configured. To delete an existing schedule, click the delete button ( ).

Click **Next** on the ribbon or the **Next** button to go to the next step.

5. **Overview** – Review and edit the plan group settings on this page.
    - To edit settings, click the **Edit** link above the section you want to change.
    - To save the configuration, click the **Finish** button. If you want to run the plan groups job now, select **Finish and Run Now**. If you do not want to run the job immediately, select **Finish**.

Configuring the Default Settings Section

Refer to this section on how to configure the **Default Settings** section. The default settings for each module are:

- **Granular Backup** – The default **Option** for all of the Granular Backup plans is **Full Backup**.
- **Platform Backup** – The default **Option** for all of the Platform Backup plans is **Full Backup**, the default **Restore Granularity Level** for all of the Platform Backup plans is **Site Collection Level**, and the default **Job Report** for all of the Platform Backup plans is **Detailed**.
- **SharePoint Migration** – The default **Option** for all of the SharePoint Migration plans is **Full migration**, the default **Container Level Conflict Resolution** for all of the SharePoint Migration plans is **Skip**, the default **Check Lower Objects for Conflicts** for all of the SharePoint Migration plans is **Yes,** and the default **Content Level Conflict Resolution** for all of the SharePoint Migration plans is **Skip**.
- **Non-SharePoint Migration** – The default **Option** for all of the Non-SharePoint Migration plans is **Full Migration**, the default **Container Level Conflict Resolution** for all of the Non-SharePoint Migration plans is **Merge**, the default **Check Lower Objects for Conflicts** for all of the Non-SharePoint Migration plans is **Yes,** and the default **Content Level Conflict Resolution** for all of the Non- SharePoint Migration plans is **Overwrite**.
- **Replicator** – The default **Option** for all of the Granular Backup plans is **Full replication**.

Click the **Edit** link to edit the settings. You will be brought to the **Edit** interface.

To edit the settings for each module, click the corresponding tab:

- **Granular Backup** – Select the option from the drop-down list to configure the **Option** for all of the Granular Backup plans.
    - **Full Backup** – A full backup of the selected source.

- **Incremental Backup** – A partial backup backs up only the content that has been updated since the last backup, whether it's Full, Incremental, or Differential.
- **Differential Backup** – A partial backup backs up only the data that has been updated since the last full backup.

- **Platform Backup** – Configures the settings of **Option**, **Restore Granularity Level**, **Back up Stub Database for Selected Scope**, **Back up BLOB for Selected Scope**, and **Job Report**.
  - **Option** – Configures how to run all of the Platform Backup plans.
    - **Full Backup** – Select **Full Backup** from the drop-down list to perform a full backup of the selected objects and log files.
    - **Incremental Backup** – Select **Incremental Backup** from the drop-down list to perform a fractional backup backs up and truncates only the transaction log. This is the only backup that truncates the transaction log.
    - **Differential Backup** – Select **Differential Backup** from the drop-down list to perform a fractional backup backs up only the data that has been added since the last Full backup.
    - Select the **Transfer data from snapshot to media server** checkbox to copy the snapshot data from the hardware to the corresponding logical device. If this checkbox is deselected, no backup data is written to the logical device. This is not supported by the incremental backup.

      ***Note:** If no persistent snapshot is created during the backup job, the snapshot data is always copied to the corresponding logical device regardless of whether this checkbox is selected or not.

      If desired, you can select the optional **Defer transferring data from persistent snapshot** checkbox to not copy the snapshot data to the logical device during the backup job. If you select the **Defer transferring data from persistent snapshot** checkbox, the snapshot data is copied to the corresponding logical device in a scheduled/manual maintenance job that is run after the backup job completes.

    - Select the **Defer generating InstaMount mapping** checkbox to generate the InstaMount mapping for the backup data in the corresponding logical device. This is not supported by the incremental backup.
  - **Restore Granularity Level** – Select the restore granularity level from the drop-down list for the Platform Backup plans. After selecting the Restore Granularity Level, you can expand the tree to the level you specified when running a restore job. If you select **None**, no granular restore index is generated.
    - **Defer generating granular restore index** – Selecting this option does not generate a granular restore index for the backup data in the corresponding logical device. The index can be generated using a

scheduled or manual maintenance job that is run after the backup job completes.

- **Back up Stub Database for Selected Scope** – Choose whether or not to back up the stub database along with the contents you have selected to back up.
- **Back up BLOB for Selected Scope –** Choose whether to back up the BLOB content generated by Storage Manager and the files in the connected path of Connector. Select the corresponding checkboxes if you wish to back up the specified BLOB data.
- **Job Report** – Specify the job report type. **Simplified** means to create a summary of the contents restored to SharePoint. **Detailed** means to create a detailed report that contains all of the information of the objected restored to SharePoint.

- **SharePoint Migration** – Configure the migration type and the conflict resolution for all of the SharePoint Migration plans.
  - **Option** – Specify the migration type for all of the SharePoint Migration plans.
    - **Full migration** – Migrates all contents from the source node to the destination node according to the profile.
    - **Incremental migration** – Migrates only the modified content (add and modify) to the destination based on content or time.

      ***Notes:** The **Incremental Type** cannot be configured here. If desired, configure the incremental type for each plan.
  - **Conflict Resolution** – Specify the conflict resolution when the item name in the source SharePoint environment conflicts with an existing item name in the destination SharePoint environment. For **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. **Merge** requires you to check lower objects for conflicts, and configure content level conflict resolution. **Skip** provides the configuration of the **Content Level** resolution optional. For more information on Conflict Resolution, refer to **Appendix D: Conflict Resolution** in the DocAve 6 Migrators User Guide.

- **Non-SharePoint Migration** – Configure the migration type, conflict resolution, and job status option for all of the Non-SharePoint Migration plans.
  - **Option** – Specify the migration type for all of the Non-SharePoint Migration plans.
    - **Full migration** – Migrates all contents from the source node to the destination node according to the profile.
    - **Incremental migration** – Migrates only the modified content (add and modify) to the destination.
  - **Conflict Resolution** – Specify the conflict resolution when the object name in the source environment conflicts with an existing object name in the destination SharePoint environment. For **Container Level**, the conflict resolutions provided

are **Merge** and **Skip**. **Merge** requires you to check lower objects for conflicts, and configure content level conflict resolution. **Skip** provides the optional configuration of the **Content Level** resolution. For more information on Conflict Resolution, refer to **Appendix D: Conflict Resolution** in the DocAve 6 Migrators User Guide.

***Note:** If you select **Incremental migration** in the **Option** section, the **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job** checkbox appears. If desired, select this checkbox to remigrate the objects whose metadata/securities failed to be migrated in the last migration job.

- **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to be migrated and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

- **Replicator** – Choose the replication mode for all of the Replicator plans.
  - **Options – Full replication** replicates all of the source content to the destination, while **Incremental Replication** only replicates the modified content (**Add**, **Delete**, and **Modify**) since last incremental or full replication. If selecting **Incremental Replication**, the following options come enabled.
  - **Modifications** – Choose whether or not to replicate the medications since last jobs.
  - **Deletions** – Choose whether or not to replicate the deletions since last job.
  - **Reference Time** – Choose whether or not to replicate contents created or modified at a specified interval. If you choose to use a reference time, specify the time to replicate contents created or modified. Enter an integer into the textbox and select **Minute(s)**, **Hour(s)**, or **Day(s)** from the drop-down list.

    ***Note**: It is **recommended** specifying a reference time when the recurrence schedule configured in **Range of Recurrence** is **End after 1 occurrence**.

Appendix A – Examples of Filter Policies

***Note**: The **Equals** Condition is not case sensitive.

Hierarchy Level	Rule	Condition	Value	Result
Site Collection Site (The site collection level is used in the examples.)	URL	Contains	test	The site collection whose URL contains *test* will be filtered and included in the result. For example, http://webapp:20000/sites/test and http://webapp:20000/sites/testA will be filtered and included in the result.
		Does Not Contain	test	The site collection whose URL does not contain *test* will be filtered and included in the result. For example, http://spapp:20000/sites/AP will be filtered and included in the result.
		Equals	http://webapp:20000/sites/test	The site collection whose URL is *http://webapp:20000/sites/test* will be filtered and included in the result.
		Does Not Equal	http://webapp:20000/sites/test	The site collection whose URL is not *http://webapp:20000/sites/test* will be filtered and included in the result.
		Matches	http://tes*collectionA	The site collection whose URL begins with *http://tes* and ends with *collectionA* will be filtered and included in the result. For example, http://tesABC:11111/sitecollectionA will be filtered and included in the result.
			http://test:20000/sites/sitecollecti?nA	The site collection whose URL is the same as *http://test:20000/sites/sitecollecti?nA* except character **?** will be filtered and included in the result. For example, http://test:20000/sites/sitecollectionA and http://test:20000/sites/sitecollectiBnA will both be filtered and included in the result.
		Does Not Match	http://tes*collectionA	All the site collections except those whose URLs begin with *http://tes* and end with *collectionA* will be filtered and included in the result. For example, http://webapp:20000/sites/test will be filtered and included in the result.
			http://test:20000/sites/sitecollecti?nA	All the site collections except those whose URLs are the same as *http://test:20000/sites/sitecollecti?nA* except character **?** will be filtered and included in the result. For example, http://webapp:20000/sites/test will be filtered and included in the result.
	Title	Contains	test	The site collection whose title contains *test* will be filtered and included in the result.

Hierarchy Level	Rule	Condition	Value	Result
		Does Not Contain	test	The site collection whose title does not contain *test* will be filtered and included in the result.
		Equals	test	The site collection whose title is *test* will be filtered and included in the result.
		Does Not Equal	test	The site collection whose title is not *test* will be filtered and included in the result.
		Matches	te*t	The site collection whose title begins with *te* and ends with *t* will be filtered and included in the result. For example, teABct will be filtered and included in the result.
			te?t	The site collection whose title is the same as *te?t* except character **?** will be filtered and included in the result. For example, test will be filtered and included in the result.
		Does Not Match	te*t	All the site collections except those whose titles begin with *te* and end with *t* will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
			te?t	All the site collections except those whose titles are the same as *te?t* except character **?** will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
	Modified Time	Before	2011-11-11 12:15:50	The site collection which is modified before *12:15:50 11/11/2011* will be filtered and included in the result.
		After	2011-11-11 12:15:50	The site collection which is modified after *12:15:50 11/11/2011* will be filtered and included in the result.
		On	2011-11-11 12:15:50	The site collection which is modified on *12:15:50 11/11/2011* will be filtered and included in the result.
		Within	5 Days	The site collection which is modified in last *5 days* will be filtered and included in the result.
		Older Than	5 Days	The site collection which is modified *5 days* ago will be filtered and included in the result.
	Created Time	Before	2011-11-11 12:15:50	The site collection which is created before *12:15:50 11/11/2011* will be filtered and included in the result.
		After	2011-11-11 12:15:50	The site collection which is created after *12:15:50 11/11/2011* will be filtered and included in the result.
		On	2011-11-11 12:15:50	The site collection which is created on *12:15:50 11/11/2011* will be filtered and included in the result.
		Within	5 Days	The site collection which is created in last *5 days* will be filtered and included in the result.
		Older Than	5 Days	The site collection which is created *5 days* ago will be filtered and included in the result.
	Created By	Contains	test\user	The site collection whose creators contain *test\user* will be filtered and included in the result.
		Equals	test\user	The site collection whose creator is *test\user* will be filtered and

Hierarchy Level	Rule	Condition		Value	Result
					included in the result.
	Template Name	Contains		Team	The site collection whose template name contains *Team* will be filtered and included in the result. For example, Team Site will be filtered and included in the result.
		Does Not Contain		Team	The site collection whose template name does not contain *Team* will be filtered and included in the result. For example, Blank Site will be filtered and included in the result.
		Equals		Blank Site	The site collection whose template name is *Blank Site* will be filtered and included in the result.
		Does Not Equal		Blank Site	The site collection whose template name is not *Blank Site* will be filtered and included in the result.
		Matches		B*Workspace	The site collection whose template name begins with *B* and ends with *Workspace* will be filtered and included in the result. For example, Basic Meeting Workspace and Blank Meeting Workspace will both be filtered and included in the result.
				Bl?g	The site collection whose template name is the same as *Bl?g* except character **?** will be filtered and included in the result. For example, Blog will be filtered and included in the result.
		Does Not Match		B*Workspace	All the site collections except those whose templates' names begin with *B* and ends with *Workspace* will be filtered and included in the result. For example, Team Site be filtered and included in the result.
				Bl?g	All the site collections except those whose templates' names are the same as *Bl?g* except character **?** will be filtered and included in the result. For example, Team Site will be filtered and included in the result.
	Template ID	Contains		STS#	The site collection whose template ID contains *STS#* will be filtered and included in the result. For example, STS#0 (Team Site) will be filtered and included in the result.
		Equals		STS#0	The site collection whose template ID is *STS#0* will be filtered and included in the result. Refer to Appendix B section for more detailed information of Template ID.
	Custom Property: Text	Text	Contains	test	The site collection whose *Text* property contains *test* will be filtered and included in the result.
			Does Not Contain	test	The site collection whose *Text* property does not contain *test* will be filtered and included in the result.
			Equals	test	The site collection whose *Text* property is *test* will be filtered and included in the result.
			Does Not Equal	test	The site collection whose *Text* property is not *test* will be filtered and included in the result.

Hierarchy Level	Rule	Condition		Value	Result
			Matches	test	The site collection whose *Text* property begins with *te* and ends with *t* will be filtered and included in the result. For example, teABct will be filtered and included in the result.
				test	The site collection whose *Text* property is the same as *te?t* except character **?** will be filtered and included in the result. For example, test will be filtered and included in the result.
			Does Not Match	test	All the site collections except those whose *Text* property begins with *te* and ends with *t* will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
				test	All the site collections except those whose *Text* property is the same as *te?t* except character **?** will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
	Custom Property: Number	Number	>=	5	The site collection whose *Number* property is not smaller than *5* will be filtered and included in the result. For example, 8 will be filtered and included in the result.
			<=	5	The site collection whose *Number* property is not bigger than *5* will be filtered and included in the result. For example, 2 will be filtered and included in the result.
			=	5	The site collection whose *Number* property is *5* will be filtered and included in the result.
	Custom Property: Yes/No	Choice	Equals	Yes	The site collection whose *Choice* property is *Yes* will be filtered and included in the result.
	Custom Property: Date/Time	Date	Before	2011-11-11 12:15:50	The site collection whose *Date* property is before *12:15:50 11/11/2011* will be filtered and included in the result.
			After	2011-11-11 12:15:50	The site collection whose *Date* property is after *12:15:50 11/11/2011* will be filtered and included in the result.
			On	2011-11-11 12:15:50	The site collection whose *Date* property is on *12:15:50 11/11/2011* will be filtered and included in the result.
			Within	5 Days	The site collection whose *Date* property is in last *5 days* will be filtered and included in the result.
			Older Than	5 Days	The site collection whose *Date* property is *5 days* ago will be filtered and included in the result.
List/Library Folder (The list/library level is used in the examples.)	Name	Contains		test	The site collection whose name contains *test* will be filtered and included in the result.
		Does Not Contain		test	The list/library whose name does not contain *test* will be filtered and included in the result.
		Equals		test	The list/library whose name is *test* will be filtered and included in the result.
		Does Not Equal		test	The list/library whose name is not *test* will be filtered and

Hierarchy Level	Rule	Condition	Value	Result
				included in the result.
		Matches	te*t	The list/library whose name begins with *te* and ends with *t* will be filtered and included in the result. For example, teABct will be filtered and included in the result.
			te?t	The list/library whose name is the same as *te?t* except character **?** will be filtered and included in the result. For example, test will be filtered and included in the result.
		Does Not Match	te*t	All the lists/libraries except those whose names begin with *te* and end with *t* will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
			te?t	All the lists/libraries except those whose names are the same as *te?t* except character **?** will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
	Modified Time	Before	Refer to the same filter rule for Site Collection level.	
		After		
		On		
		Within		
		Older Than		
	Created Time	Before	Refer to the same filter rule for Site Collection level.	
		After		
		On		
		Within		
		Older Than		
	Created By	Contains	Refer to the same filter rule in Site Collection level.	
		Equals		
Item	Title	Contains	test	The item whose title contains *test* will be filtered and included in the result.
		Does Not Contain	test	The item whose title does not contain *test* will be filtered and included in the result.
		Equals	test	The item whose title is *test* will be filtered and included in the result.
		Does Not Equal	test	The item whose title is not *test* will be filtered and included in the result.
		Matches	te*t	The item whose title begins with *te* and ends with *t* will be filtered and included in the result. For example, teABct will be filtered and included in the result.
			te?t	The item whose title is the same as *te?t* except character **?** will be filtered and included in the result. For example, test will be filtered and included in the result.
		Does Not Match	te*t	All the items except those whose titles begin with *te* and end with

Hierarchy Level	Rule	Condition	Value	Result
				t will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
			te?t	All the items except those whose titles are the same as *te?t* except character **?** will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
	Modified Time	Before	Refer to the same filter rule for Site Collection level.	
		After		
		On		
		Within		
		Older Than		
	Created Time	Before	Refer to the same filter rule for Site Collection level.	
		After		
		On		
		Within		
		Older Than		
	Created By	Contains	Refer to the same filter rule in Site Collection level.	
		Equals		
	Modified By	Contains	test\user	The items whose modifiers contain *test\user* will be filtered and included in the result.
		Equals	test\user	The item whose modifier is *test\user* will be filtered and included in the result.
	Content Type	Contains	Task	The item whose content type contains *Task* will be filtered and included in the result.
		Does Not Contain	Task	The item whose content type does not contain *Task* will be filtered and included in the result.
		Equals	Task	The item whose content type is *Task* will be filtered and included in the result.
		Does Not Equal	Task	The item whose content type is not *Task* will be filtered and included in the result.
		Matches	Ev*t	The item whose content type begins with *Ev* and ends with *t* will be filtered and included in the result. For example, Event will be filtered and included in the result.
			Ta?k	The item whose content type is the same as *Ta?k* except character **?** will be filtered and included in the result. For example, Task will be filtered and included in the result.
		Does Not Match	Ev*t	All the items except those whose content types begin with *Ev* and end with *t* will be filtered and included in the result. For example, Task will be filtered and included in the result.

Hierarchy Level	Rule	Condition		Value	Result
				Ta?k	All the items except those whose content types are the same as *Ta?k* except character **?** will be filtered and included in the result. For example, Event will be filtered and included in the result.
	Column: Text	Text	Contains	test	The item whose *Text* column value contains *test* will be filtered and included in the result.
			Does Not Contain	test	The item whose *Text* column value does not contain *test* will be filtered and included in the result.
			Equals	test	The item whose *Text* column value is *test* will be filtered and included in the result.
			Does Not Equal	test	The item whose *Text* column value is not *test* will be filtered and included in the result.
			Matches	test	The item whose *Text* column value begins with *te* and ends with *t* will be filtered and included in the result. For example, teABct will be filtered and included in the result.
				test	The item whose *Text* column value is the same as *te?t* except character **?** will be filtered and included in the result. For example, test will be filtered and included in the result.
			Does Not Match	test	All the items except those whose *Text* column values begin with *te* and end with *t* will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
				test	All the items except those whose *Text* column values are the same as *te?t* except character **?** will be filtered and included in the result. For example, DocAve will be filtered and included in the result.
	Column: Number	Number	>=	5	The item whose *Number* column value is not smaller than *5* will be filtered and included in the result. For example, 8 will be filtered and included in the result.
			<=	5	The item whose *Number* column value is not bigger than *5* will be filtered and included in the result. For example, 2 will be filtered and included in the result.
			=	5	The item whose *Number* column value is *5* will be filtered and included in the result.
	Column: Yes/No	Choice	Equals	Yes	The item whose *Choice* column value is *Yes* will be filtered and included in the result.
	Column: Date and Time	Date	Before	2011-11-11 12:15:50	The item whose *Date* column value is before *12:15:50 11/11/2011* will be filtered and included in the result.
			After	2011-11-11 12:15:50	The item whose *Date* column value is after *12:15:50 11/11/2011* will be filtered and included in the result.
			On	2011-11-11 12:15:50	The item whose *Date* column value is on *12:15:50 11/11/2011* will be filtered and included in the result.

Hierarchy Level	Rule	Condition		Value	Result	
			Within	5 Days	The item whose *Date* column value is in last *5 days* will be filtered and included in the result.	
			Older Than	5 Days	The item whose *Date* column value is *5 days* ago will be filtered and included in the result.	
	Workflow	Flow	Equals	Completed	The item associated with the *Flow* workflow whose status is *Completed* will be filtered and included in the result.	
				Customized	Deleted	The item associated with the *Flow* workflow whose status is *Deleted* will be filtered and included in the result.
			Does Not Equal	In Progress	The item associated with the *Flow* workflow whose status is not *In Progress* will be filtered and included in the result. For example, Completed will be filtered and included in the result.	
				Customized	Deleted	The item associated with the *Flow* workflow whose status is not *Deleted* will be filtered and included in the result. For example, Completed will be filtered and included in the result.
	Version	Only Latest [] Version(s)		3	The item's last *3* versions will be filtered and included in the result. For example, an item has the following versions: 1.0, 1.1, 2.0, 2.1, 2.2, and then version 2.0, 2.1, 2.2 will be filtered and included in the result.	
		Latest [] Major Versions and Current Version		3	The item's last *3* major versions will be filtered and included in the result. For example, an item has the following versions: 1.0, 2.0, 2.1, 2.2, 3.0, 3.1, and then the major version 1.0, 2.0, 3.0, and the current version 3.1 will be filtered and included in the result.	
		Major Versions and Current Version		N/A	All major versions and the current version will be filtered and included in the result.	
		Approved Versions and Current Version		N/A	All approved versions and the current version will be filtered and included in the result.	
Document	Name	Contains		test	The document whose name contains *test* will be filtered and included in the result. For example, test.docx will be filtered and included in the result.	
		Does Not Contain		test	The document whose name does not contain *test* will be filtered and included in the result. For example, DocAve.docx will be filtered and included in the result.	
		Equals		test.docx	The document whose name is *test.docx* will be filtered and included in the result.	
		Does Not Equal		test.docx	The document whose name is not *test.docx* will be filtered and included in the result.	

Hierarchy Level	Rule	Condition	Value	Result
		Matches	te*t.docx	The document whose name begins with *te* and ends with *t.docx* will be filtered and included in the result. For example, testDocAve.docx will be filtered and included in the result.
			te?t.docx	The document whose name is the same as *te?t* except character ? will be filtered and included in the result. For example, teAt.docx will be filtered and included in the result.
		Does Not Match	te*t.docx	All the documents except those whose names begin with *te* and end with *t.docx* will be filtered and included in the result. For example, DocAve.txt will be filtered and included in the result.
			te?t.docx	All the documents except those whose names are the same as *te?t.docx* except character ? will be filtered and included in the result. For example, DocAve.txt will be filtered and included in the result.
	Size	>=	1MB	The document whose size is not smaller than 1MB will be filtered and included in the result. For example, a 2MB document will be filtered and included in the result.
		<=	1MB	The document whose size is not bigger than 5 will be filtered and included in the result. For example, a 500KB document will be filtered and included in the result.
	Modified Time	Before	Refer to the same filter rule for Site Collection level.	
		After		
		On		
		Within		
		Older Than		
	Created Time	Before	Refer to the same filter rule for Site Collection level.	
		After		
		On		
		Within		
		Older Than		
	Created By	Contains	Refer to the same filter rule for Site Collection level.	
		Equals		
	Modified By	Contains	Refer to the same filter rule for Item level.	
		Equals		
	Content Type	Contains	Refer to the same filter rule for Item level.	
		Does Not Contain		
		Equals		
		Does Not Equal		
		Matches		
		Does Not Match		
	Column: Text	Text Contains	Refer to the same filter rule for Item level.	

Hierarchy Level	Rule	Condition		Value	Result
			Does Not Contain		
			Equals		
			Does Not Equal		
			Matches		
			Does Not Match		
	Column: Number	Number	>=	Refer to the same filter rule for Item level.	
			<=		
			=		
	Column: Yes/No	Choice	Equals	Refer to the same filter rule for Item level.	
	Column: Date and Time	Date	Before	Refer to the same filter rule for Item level.	
			After		
			On		
			Within		
			Older Than		
	Workflow		Equals	Refer to the same filter rule for Item level.	
			Does Not Equal		
	Version	Only Latest [] Version(s)		Refer to the same filter rule for Item level.	
		Latest [] Major Versions and Current Version			
		Major Versions and Current Version			
		Approved Versions and Current Version			
Attachment	Name	Contains		Refer to the same filter rule for Document level.	
		Does Not Contain			
		Equals			
		Does Not Equal			
		Matches			
		Does Not Match			
	Size	>=		Refer to the same filter rule for Document level.	
		<=			
	Created Time	Before		Refer to the same filter rule for Site Collection level.	
		After			
		On			
		Within			
		Older Than			
	Created By	Contains		Refer to the same filter rule for Site Collection level.	
		Equals			
	Column: Text	Text	Contains	Refer to the same filter rule for Item level.	
			Does Not Contain		
			Equals		

Hierarchy Level	Rule	Condition		Value	Result
			Does Not Equal		
			Matches		
			Does Not Match		
	Column: Number	Number	>=	Refer to the same filter rule for Item level.	
			<=		
			=		
	Column: Yes/No	Choice	Equals	Refer to the same filter rule for Item level.	
	Column: Date and Time	Date	Before	Refer to the same filter rule for Item level.	
			After		
			On		
			Within		
			Older Than		

Appendix B – Template Name and Template ID

Refer to the table below for the detailed mappings between the Template Name and Template ID.

Template Name	Template ID
Global template	GLOBAL#0
Team Site	STS#0
Blank Site	STS#1
Document Workspace	STS#2
Basic Meeting Workspace	MPS#0
Blank Meeting Workspace	MPS#1
Decision Meeting Workspace	MPS#2
Social Meeting Workspace	MPS#3
Multipage Meeting Workspace	MPS#4
Central Admin Site	CENTRALADMIN#0
Wiki Site	WIKI#0
Blog	BLOG#0
Group Work Site	SGS#0
Tenant Admin Site	TENANTADMIN#0
Access Services Site	ACCSRV#0
Assets Web Database	ACCSRV#1
Charitable Contributions Web Database	ACCSRV#3
Contacts Web Database	ACCSRV#4
Issues Web Database	ACCSRV#6
Projects Web Database	ACCSRV#5
Document Center	BDR#0
(obsolete) Records Center	OFFILE#0
Records Center	OFFILE#1
Shared Services Administration Site	OSRV#0
PerformancePoint	PPSMASite#0
Business Intelligence Center	BICenterSite#0
SharePoint Portal Server Site	SPS#0
SharePoint Portal Server Personal Space	SPSPERS#0
Personalization Site	SPSMSITE#0
Contents area Template	SPSTOC#0
Topic area template	SPSTOPIC#0
News Site	SPSNEWS#0
Publishing Site	CMSPUBLISHING#0
Publishing Site	BLANKINTERNET#0
Press Releases Site	BLANKINTERNET#1
Publishing Site with Workflow	BLANKINTERNET#2
News Site	SPSNHOME#0
Site Directory	SPSSITES#0
Community area template	SPSCOMMU#0
Report Center	SPSREPORTCENTER#0

Template Name	Template ID
Collaboration Portal	SPSPORTAL#0
Enterprise Search Center	SRCHCEN#0
Profiles	PROFILES#0
Publishing Portal	BLANKINTERNETCONTAINER#0
My Site Host	SPSMSITEHOST#0
Enterprise Wiki	ENTERWIKI#0
Basic Search Center	SRCHCENTERLITE#0
Basic Search Center	SRCHCENTERLITE#1
FAST Search Center	SRCHCENTERFAST#0
Visio Process Repository	visprus#0

Appendix C – Accessing Control Panel with Hot Keys

In order to work faster and improve your productivity, DocAve supports the hot key mode for you to perform corresponding actions quickly by only using your keyboard.

To access the hot key mode, press the **Ctrl** +**Alt** + **Z** key combination simultaneously on your keyboard while in the DocAve interface. Then press **3** to access the Control Panel.

The following sections provide lists of hot keys for the top level. Each time you want to go back to the top level after accessing the interface of lower level, press **Ctrl** + **Alt** + **Z** on the keyboard.

Manager Monitor

To access the hot key mode in the Manager Monitor interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **O** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key					
Configure	J	Add Cache Location	A	OK	O
				Cancel	C
		Refresh	R		
		Delete	D		
		OK	O		
		Cancel	C		
View Details	V	Close	B		
Notification Selection	N	OK	O		
		Cancel	C		
Restart	R				
Remove	M				
Deactivate	D				
Activate	A				
Close	X				

Agent Monitor

To access the hot key mode in the Agent Monitor interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **M** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key			
Configure	J	OK	O
		Cancel	C
Configuration File	C		
View Details	V	Close	X

Function Name and Hot Key			
Notification Selection	N	OK	O
		Cancel	C
Restart	R		
Remove	M		
Deactivate	D		
Activate	A		
Close	X		

System Option

To access the hot key mode in the System Option interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **Y** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key							
General	G						
Security	SC						
Security Information	SI	Backup	B				
		Manage Passphrase	MP	Modify	MD	OK	O
						Cancel	C
				Cancel	C		
		Cancel	C				
Save	S						
Close	X						

Authentication Manager

To access the hot key mode in the Authentication Manager interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **A** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key					
Windows Authentication	W	OK	O		
		Cancel	C		
AD Integration	AI	Add	A	OK	O
				Cancel	C
		Edit	E	OK	O
				Cancel	C
		Delete	D		
		Disable	DI		
		Enable	EN		
		Cancel	C		

Function Name and Hot Key					
ADFS Integration	AD	ADFS integration	A	Back	B
				Next	N
				Finish	F
				Cancel	C
				Export	E
		Add Federation Trust	F	OK	O
				Cancel	C
Close	X				

Account Manager

To access the hot key mode in the Account Manager interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **N** to activate hot keys for buttons on the ribbon.

Function Name and Hot Key									
Adding Group									
Groups	G								
Add Group	AG	Back	B						
		Next	N						
		Finish	F						
		Cancel	C						
Edit Group	E	OK	O						
		Cancel	C						
Show User(s)	S	Add User to Group	A	OK	O				
				Cancel	C				
		Remove User from Group	R						
		Cancel	C						
Delete Group	D								
Permission Level	P	Add	CA	OK	O	Add System Permission	AS	OK	O
								Cancel	C
				Cancel	C	Add Tenant Permission	AT	OK	O
								Cancel	C
		Edit	E	OK	O				
				Cancel	C				

Function Name and Hot Key									
		Delete	D						
		Cancel	C						
Current Logon Account (s)	C	Log Off	L						
		Back	B						
Authentication Manager			A						
Close	X								
Adding User									
Users	U								
Add User	AU	OK	O						
		Cancel	C						
Edit User	E	OK	O						
		Cancel	C						
Delete User	DU								
Activate	AC								
Deactivate	DA								
Permission Level	P	Add	A	OK	O	Add System Permission	AS	OK	O
								Cancel	C
				Cancel	C	Add Tenant Permission	AT	OK	O
								Cancel	C
		Edit	E	OK	O				
				Cancel	C				
		Delete	D						
		Cancel	C						
Current Logon Account (s)	C	Log Off	L						
		Cancel	C						
Authentication Manager	A								
Close	X								

License Manager

To access the hot key mode in the License Manager interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **Z** to activate the Hot Key of the buttons on the ribbon.

Function Name and Hot Key			
Import	I		
Export	E	License File	F
		License Report	R
Settings	S	OK	N/A
		Cancel	N/A
SharePoint Servers Usage	A	View Details	N/A
		OK	N/A

Function Name and Hot Key			
		Cancel	N/A
Close	X		

Update Manager

To access the hot key mode in the Update Manager interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **H** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key					
Check for Updates	C				
Manager Updates	M	View History	V	View Details	N/A
				Cancel	B
		Browse	U		
		Download	DL		
		Stop	S		
		Install	I		
		Delete	DE		
		Cancel	B		
View History	V	View Details	V		
		Cancel	B		
Update Settings	U	OK	O		
		Cancel	B		
Close	X				

Agent Group

To access the hot key mode in the Agent Group interface press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **G** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key					
Create	N	OK	O		
		Cancel	C		
View Details	O	Edit	E	Save	S
				Save As	A
				Cancel	C
		Cancel	C		
Edit	E	Save	S		
		Save As	A		
		Cancel	C		
Delete	D				

Function Name and Hot Key	
Close	X

User Notification Setting

To access the hot key mode in the User Notification Setting interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **V** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key							
Integration Settings	I						
Outgoing E-mail Settings	O						
Notification E-mail Settings	IE	Create	N	OK	O		
				Cancel	C		
		View Details	V	Edit	E	OK	O
						Cancel	C
				Cancel	C		
		Edit	E	OK	O		
				Cancel	C		
		Delete	D				
		Set as Default Profile	S				
		Close	X				
Save	S						
Close	X						

Job Pruning

To access the hot key mode in the Job Pruning interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **J** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key			
Prune Now	P		
Configure	C	OK	O
		Cancel	C
Job Monitor	J		
Save	S		
Close	X		

Log Manager

To access the hot key mode in the Log Manager interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **B** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key			
Log Settings	L	OK	O
		Cancel	C
Job Monitor	J		
Collect	C		
Close	X		

SharePoint Sites

To access the hot key mode in the SharePoint Sites interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **SS** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key					
Create	C	OK	O		
		Cancel	B		
View Details	V	Edit	E	OK	O
				Cancel	B
		Cancel	B		
Edit	E	OK	O		
		Cancel	B		
Delete	D				
Manage Remote Site Collection	M	Add	A	OK	O
				Cancel	B
		View	V		
		Edit	E		
		Delete	D		
		Add Site Collections	I		
		Cancel	B		
Close	X				

Security Profile

To access the hot key mode in the Security Profile interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **SP** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key			
Create	N	OK	O
		Cancel	C
Edit	E	OK	O
		Cancel	C
Delete	D		
Import	I		
Export	EP		
Close	X		

Solution Manager

To access the hot key mode in the Solution Manager interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **T** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key			
Install	I		
Deploy	D		
Retract	R		
Remove	M		
Solution Properties	S	Deploy	D
		Retract	R
		Back	B
Retrieve Version	V		
Upgrade	U		
Repair	F		
Close	X		

Storage Configuration

To access the hot key mode in the Storage Configuration interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **SC** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key					
Dashboard	B				
Create	N	Physical Device	P	OK	O

Function Name and Hot Key					
				Cancel	B
		Logical Device	L	OK	O
				Cancel	B
		Storage Policy	S	OK	O
				Cancel	B
View Details	T	Edit	E	OK	O
				Cancel	B
		Cancel	B		
Edit	E	OK	O		
		Test Status	T		
		Cancel	X		
Delete	D				
Refresh	R				
Close	X				

Index Manager

To access the hot key mode in the Index Manager interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **X** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key					
New Index Profile	N	OK	O		
		Cancel	C		
View Details	VD	Edit	E	OK	O
				Cancel	C
		Cancel	C		
Edit	E	OK	O		
		Cancel	C		
Delete	D				
Configure Workday	CW	OK	O		
		Cancel	C		
Job Monitor	J				
Close	X				

Export Location

To access the hot key mode in the Export Location interface, use the key combination of **Ctrl** +**Alt** + **Z** on the keyboard, press **P** to go to the Control Panel interface, or press **E** to activate the hot keys for buttons on the ribbon.

Function Name and Hot Key					
Create	N	OK	O		
		Cancel	C		
View Details	V	Edit	E	OK	O
				Cancel	C
		Cancel	C		
Edit	E	OK	O		
		Cancel	C		
Delete	D				
Close	X				

Filter Policy

To access the Hot Key mode, in the Filter Policy interface, press the key combination of **Ctrl** +**Alt** + **Z** on the keyboard, press **P** to go to the Control Panel interface, or press **F** to activate the Hot Key of the buttons on the ribbon.

Function Name and Hot Key					
Create	N	OK	O		
		Cancel	C		
View Detail	N/A	Edit	E	OK	O
				Cancel	C
		Cancel	C		
Edit	E	OK	O		
		Cancel	C		
Delete	D				
Close	X				

Mapping Manager

To access the hot key mode in the Mapping Manager interface, press the **Ctrl** + **Alt** + **Z** key combination on your keyboard, press **P** to go to the Control Panel interface, or press **I** to activate the hot keys for buttons on the ribbon.

Function name and Hot Key					
Domain Mapping	D	Create	N	Import	I
				Export	E
				Save	S
				Cancel	B

Function name and Hot Key							
		View Details	V	Export	p		
				Edit	E	Import	I
						Export	E
						Save	S
						Save As	A
						Cancel	B
				Cancel	B		
		Edit	E	Import	I		
				Export	E		
				Save	S		
				Save As	A		
				Cancel	B		
		Delete	R				
		Export	P				
		Close	X				
User Mapping	U	Create	N	Import	I		
				Export	E		
				Save	S		
				Cancel	B		
		View Details	V	Export	p		
				Edit	E	Import	I
						Export	E
						Save	S
						Save As	A
						Cancel	B
				Cancel	B		
		Edit	E	Import	I		
				Export	E		
				Save	S		
				Save As	A		
				Cancel	B		
		Delete	R				
		Export	P				
		Close	X				
Language Mapping	L	Create	N	Import	I		
				Export	E		
				Save	S		
				Cancel	B		
		View Details	V	Export	p		
				Edit	E	Import	I
						Export	E
						Save	S
						Save As	A
						Cancel	B
				Cancel	B		

Function name and Hot Key							
		Edit	E	Import	I		
				Export	E		
				Save	S		
				Save As	A		
				Cancel	B		
		Delete	R				
		Export	P				
		Close	X				
Column Mapping	N	Create	N	Import	I		
				Export	E		
				Save	S		
				Cancel	B		
		View Details	V	Export	p		
				Edit	E	Import	I
						Export	E
						Save	S
						Save As	A
						Cancel	B
				Cancel	B		
		Edit	E	Import	I		
				Export	E		
				Save	S		
				Save As	A		
				Cancel	B		
		Delete	R				
		Export	P				
		Close	X				
Content Type Mapping	O	Create	N	Import	I		
				Export	E		
				Save	S		
				Cancel	B		
		View Details	V	Export	p		
				Edit	E	Import	I
						Export	E
						Save	S
						Save As	A
						Cancel	B
				Cancel	B		
		Edit	E	Import	I		
				Export	E		
				Save	S		
				Save As	A		
				Cancel	B		
		Delete	R				
		Export	P				

Function name and Hot Key							
		Close	X				
Template Mapping	T	Create	N	Import	I		
				Export	E		
				Save	S		
				Cancel	B		
		View Details	V	Export	p		
				Edit	E	Import	I
						Export	E
						Save	S
						Save As	A
						Cancel	B
				Cancel	B		
		Edit	E	Import	I		
				Export	E		
				Save	S		
				Save As	A		
				Cancel	B		
		Delete	R				
		Export	P				
		Close	X				
Group Mapping	G	Create	N	Import	I		
				Export	E		
				Save	S		
				Cancel	B		
		View Details	V	Export	p		
				Edit	E	Import	I
						Export	E
						Save	S
						Save As	A
						Cancel	B
				Cancel	B		
		Edit	E	Import	I		
				Export	E		
				Save	S		
				Save As	A		
				Cancel	B		
		Delete	R				
		Export	P				
		Close	X				
List Name Mapping	LT	Create	N	Import	I		
				Export	E		
				Save	S		
				Cancel	B		
		View Details	V	Export	P		
				Edit	E	Import	I

Function name and Hot Key							
						Export	E
						Save	S
						Save As	A
						Cancel	B
				Cancel	B		
		Edit	E	Import	I		
				Export	E		
				Save	S		
				Save As	A		
				Cancel	B		
		Delete	R				
		Export	P				
		Close	X				

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