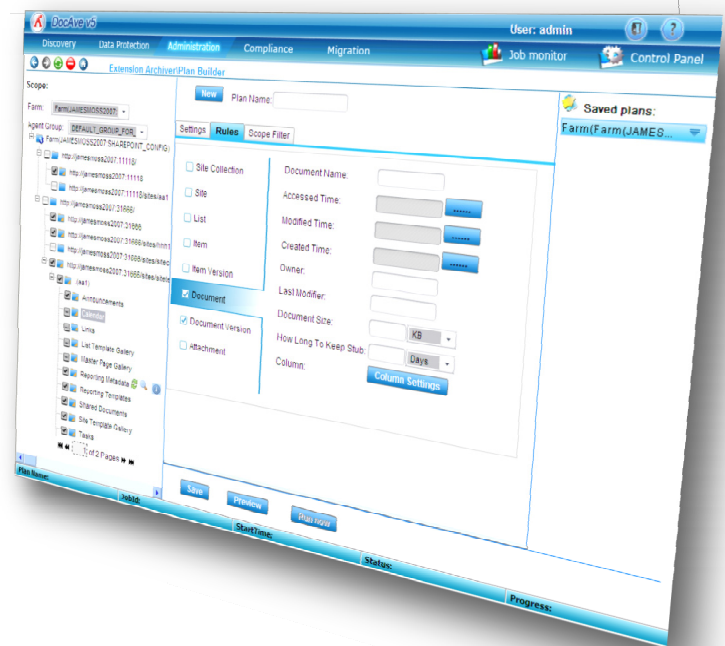


Quick Start Guide

Extension Archiver

Creating a Simple Archiving Plan Using the New DocAve®5 Platform

This document is intended for anyone wishing to familiarize themselves with the user interface and basic functionality of the DocAve *Extension Archiver* module 5. It is not intended to be used for advanced installation, configuration, or troubleshooting. All other modules and topics are covered in the User Guides located on <http://www.avepoint.com/support/user-guides/>.



Backup & Recovery

Administration & Replication

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Migration to SharePoint

DocAve Setup Basics

Device Configuration

This section details the simple steps required to enable the Archiving feature within DocAve 5. In order to run an Archiver job, you will need to configure the information below.

Enable Archiver

The Extension Archiver feature needs to be turned on at the Web Application level via the Settings page before creating any rules.

1. Go to the *Administration-> Extension Archiver-> Settings-> Install Archiver* tab and select the **Farm** you wish to set up Extension Archiver for on the left.
2. Check off the **Enable** box next to **Web Applications** to enable the feature on these sites.
3. You can choose whether or not to **keep archive data** (accessible only through DocAve) or **remove archive data** when a stub is deleted in SharePoint.
4. Choose to **Apply** these settings. This may take a while if you have selected more than one Web Application, please be patient.

Configuring Storage Drives

A logical device must be defined to store your archive data. Please refer to the Granular Backup Quick Start Guide for more information on configuring storage drives.

Creating an Extension Archiver Plan

This section will teach you a few simple steps to quickly setup a basic archival plan using the DocAve **Extension Archiver Plan Builder**.

Building a Plan

Plans can be configured with many options to meet your business needs. The details below show the minimum input required to configure an archive plan and quickly optimize SQL storage space. Using the tabs along the top of the Extension Archiver Plan Builder, you can configure plan options such as *Settings*, *Rules*, and *Scope Filters*.

Settings

Using the tabs along the side of Settings, you can configure Storage Devices, Encryption and Compression, E-mail notification, and several others. To build a plan, follow the steps below:

1. Navigate to the *Administration -> Extension Archiver -> Plan Builder* tab.






2. Define a **Plan Name** using the field on top of the GUI. Make sure you label your plans clearly, as these will be used to reference the Archive data in the Restore Controller.
3. Select one of the previously configured **Logical Devices** from the dropdown list.
4. An archive data **Retention** policy must be selected. The default retention policy keeps all stubs and data indefinitely.
5. E-mail Notification, and Compression, and Encryption are not required fields, and do not need to be selected. These settings are all described in the DocAve v5 User Guide.
6. Under the *Advanced* tab, you can choose whether or not to **Create Stubs** (which will allow archived content to be accessed from SharePoint), **Test Archiving**, or **Generate Index** (to provide a full-text index for this plan).

Setting the Scope

The first step in setting up a plan is to set the scope. This is easy to define, and can be set using the **Checkbox** next to each Web Application, Site Collection, and lower. Clicking the checkbox once will select the parent node with all children, while selecting the checkbox a second time will select only the parent node.

1. In the left-hand column, select a **Farm** and an **Agent Group**. This will load the data tree.
2. Begin by expanding the Farm, Web Application, Site Collection, and other levels to locate the content you wish to include in the archive scope.

There are several things to take note of in the data tree:

- “” – The refresh button next to each level will refresh any sub-trees for this node.
- “” – The search button will allow you to refine the contents shown in any sub-tree. The results will be returned beneath the selected node.
- “” – This icon will allow you to view the items located beneath a list or library in a pop-up.
- “ 1 of 2 Pages ” – This page browser indicates that the sub-tree has been split across multiple pages. This is done to increase the load performance of the SharePoint tree. Using the numbers or paging icons available, please scroll left or right as necessary to find the data you’d like.

Scope Filter

You can filter below the levels set in the scope using business rules. Navigate to the *Scope Filter* tab and uncheck the box next to “No Filtering.” You can now apply filter rules to specific site collections, sites, and lists. Multiple rules configured will follow AND logic.

Archiving Rules

This section allows you to define *what* will get archived, whereas all previous sections defined *where* to look. Navigate to the *Rules* tab and specify the business rules for all desired content based on Name, Last modified time, Size, Version, Owner, Last accessed, etc. Rules for multiple levels will follow OR logic.

Running a Plan

In order to run the plan, enter a Plan Name on top and simply click **Save**. By selecting **Preview**, a pop-up window will display the content that will be archived.

Schedule Options

You can enter a **Schedule** under the *Settings* tab, or in the **Run Now** pop-up window. You can configure the archive plan to run once, or on an interval. A schedule is not required to run a plan (click “Run Now”), but if you wish to setup a schedule, please follow these simple steps:

1. Using the Calendar Icon (📅) set a **Start Time** for this job.
2. Using the **Interval** options, you can make this a recurring job or have it run only once.

Viewing the Progress

After a plan has been initiated, you can view the progress from the Job Monitor.

1. Navigate to the **Job Monitor** using the menu bar at the top of the interface.
2. From the dropdown menu on the top left, select **Extension Archiver Backup** and browse through the resulting table. This will display the current status and results of your archive jobs.

Restoring Data to SharePoint

Documents and Document Versions archived will retain stubs in SharePoint allowing you to continue to access and restore these items. However, if you wish to restore in a single step, or restore content that no longer has a stub, you can quickly accomplish this with the Restore Controller.

Selecting Content for Restore

In order to perform a restore, follow these few simple steps:

1. Navigate to *Administration -> Extension Archiver -> Restore Controller*
2. Select a **Farm** using the drop-down.
3. Browse the tree structure and **select the content** you want to restore. To restore individual items or documents and their versions, click the “🔍” icon next to a list or library.
4. Select an **Agent Group** to perform this restore from the bottom of the screen.
5. Set a **Start Time** for this restore job.
6. Choose a **Restore Option**. By default “Not-Overwrite” is selected. Please refer to the user guide for more details on these options.
7. Select **Go**.

Congratulations!

The Extension Archiver module can greatly enhance the performance of your SQL storage space with efficient management. For more guides like this on DocAve's other features, or detailed guidance regarding the this module, please reference the DocAve 5 User Guides at <http://www.avepoint.com/support/user-guides>.

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