



DocAve® 6 Service Pack 1 Supplementary Tools

User Guide

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Before You Begin

Refer to the sections for system and farm requirements that must be in place prior to using any of the DocAve supplementary tools.

Configuration

In order to use DocAve tools, the DocAve 6 platform and applicable modules must be installed and configured properly on your farm. Some of the tools described in this guide will not function without the DocAve 6 platform and the applicable modules present on the farm.

For instructions on installing the DocAve Platform, DocAve Manager, and DocAve Agents, see the [DocAve 6 Installation Guide](#).

Submitting Documentation Feedback to AvePoint

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<http://www.avepoint.com/resources/documentation-feedback/?flush=1>

AgentToolSP2010ConnectorCreateList

The AgentToolSP2010ConnectorCreateList tool is used to create Connector lists in bulk. In addition, this tool can be used to create sites or site collections, which are needed in order to create the lists.

***Note:** If the name of a specified storage folder contains illegal characters that are forbidden by SharePoint, the corresponding list, site, or site collection is not able to be created in SharePoint.

The configuration files for this tool support English, German, and Japanese language environments. The corresponding configuration files are stored in three folders under ... \AvePoint\DocAve6\Agent\data\SP2010\Connector\ConnectorCreateListTool in *EN*, *GE*, and *JP* folders, respectively. Configure the desired configuration files depending on the language of the environment where your Agent is installed.

Using the tool involves the following steps:

1. [Generating an Encrypted Password](#).
2. Configuring the .csv file according to your requirements. Only one .csv file is needed to run a command; however, multiple .csv files can be configured to create the site collection, site, etc.
 - [Configuring AgentToolCreateList.csv](#) file to set up a Connector library.
 - [Configuring AgentToolCreateWeb.csv](#) file to set up a site with the specified Net Share path.
 - [Configuring AgentToolCreateSite.csv](#) file to set up a site collection with the specified Net Share path.
3. [Working with Configuration Files](#).
4. [Running the AgentToolSP2010ConnectorCreateList](#) tool.

Before using this tool, make sure that the BLOB Provider and EBS/RBS settings are properly configured and that the Connector solutions are successfully deployed.

Generating an Encrypted Password

Prior to creating any Connector libraries using the tool, the password used to connect to the file system must be encrypted using the **AgentToolConnectorEncryptPassword.exe** tool. The encrypted password is entered into the .csv files in order to create the Connector libraries.

Refer to the steps below to encrypt your password using the tool.

***Note:** The account used to run this tool must be the local administrator.

1. By default, this tool is located in the Agent installation path ... \AvePoint\DocAve6\Agent\bin. Navigate to this location.
2. Double-click **AgentToolConnectorEncryptPassword.exe** to run the tool.

3. Enter the password for the file share and confirm the password when prompted.

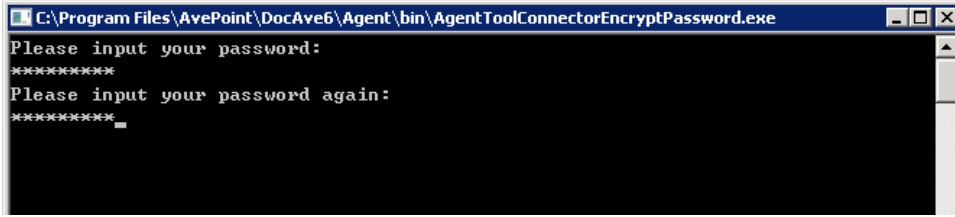


Figure 1: Password confirmation screen.

4. Press **Enter**. The encrypted password is generated.

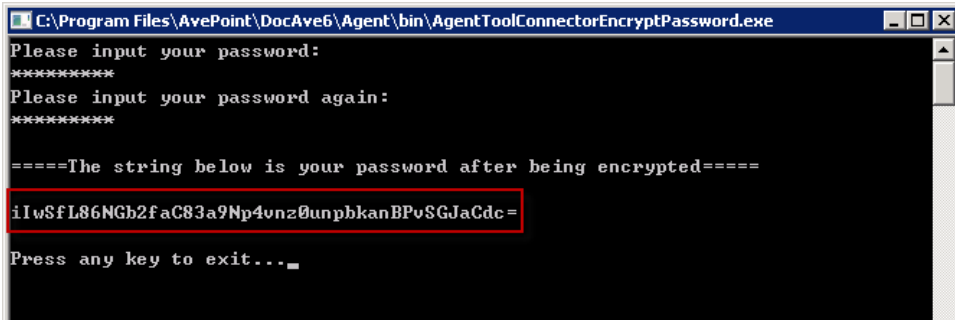


Figure 2: Generated encrypted password.

Configuring AgentToolCreateList.csv

Before creating Connector libraries using the **AgentToolSP2010ConnectorCreateList.exe** tool, it is necessary to first configure **AgentToolCreateList.csv**. This file is used to configure Connector libraries (Content Libraries and Media Libraries), and libraries that have been converted to Connector Libraries (Document Libraries, Asset Libraries, Form Libraries, and Picture Libraries ()) information

Refer to the steps below to configure **AgentToolCreateList.csv**.

1. By default, **AgentToolCreateList.csv** is located in the Agent installation path ...*\AvePoint\DocAve6\Agent\data\SP2010\Connector\ConnectorCreateListTool*. Navigate to this path and select the corresponding language folder.
2. Double-click **AgentToolCreateList.csv** to open the file.
3. Three example rows are displayed; these are examples used for creating Content Libraries, Media Libraries, Document Libraries, Asset Libraries, Form Libraries, and Picture Libraries. Remove these rows after entering your own information.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Web Url	FileSyste	Relative U	List Type	List Title	Load Metz	Load Perm	Keep Nam	Allow Larg	UserName	password	
2	http://ho	:\ip\d\$d\cc	fileshareL	0	contentlik	0	0	0	0	domain\n	Encryption password	
3	http://ho	:\ip\d\$d\m	mediaUrl	1	medialibr	0	0	0	0	domain\n	Encryption password	
4	http://ho	:\ip\d\$d\di	document	2	Documen	1	1	1	1	domain\n	Encryption password	

Figure 3: Example rows in AgentToolCreateList.csv file for English and Japanese Environments.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Web Url;FileSystem Path;Relative Url;List Type;List Title;Load Metadata;Load Permission;Keep Name Consistent;Allow Large File;UserName;password														
2	http://hostname:port/sites/SiteCollection1/;\\ip\d\$content\persondocs;fileshareUrl;0;contentlibrary;0;0;0;domain\netshareuser;Encryption password														
3	http://hostname:port/sites/SiteCollection1/;\\ip\dmedia;mediaUrl;1;medialibrary;0;0;0;domain\netshareuser;Encryption password														
4	http://hostname:port/sites/SiteCollection2/;\\ip\d\$docs;documentUrl;2;DocumentLibrary;1;1;1;domain\netshareuser;Encryption password														

Figure 4: Example rows in AgentToolCreateList.csv file for German Environment.

4. Refer to the following table for information that needs to be configured in this file.

Option	Description	Value
Web Url	The URL of the site where you want to create the library. *Note: The site specified here must be an existing one. If the site does not exist, create it using SharePoint or using this tool. See Configuring AgentToolCreateWeb.csv for more information.	http://ServerIP:Port/Managed Path/XX/XX
FileSystem Path	The physical storage path that will be connected to the newly-created library.	\\IP\c\$\FolderName
Relative Url	The relative URL of the library you want to create.	TestLibrary
List Type	The type of library you want to create. <ul style="list-style-type: none"> • 0 represents Content Library. • 1 represents Media Library. • 2 represents Document Library. • 3 represents Asset Library. • 4 represents Form Library. • 5 represents Picture Library. 	0/1/2/3/4/5
List Title	The title of the library you want to create.	TestLibrary
Load Metadata	Specify whether to load metadata from file system to Connector libraries during the first synchronization. <ul style="list-style-type: none"> • 0 represents False; does not load the metadata. • 1 represents True; load the metadata. 	0/1
Load Permission	Specify whether to load the files'/folders' permissions from the file system to Connector libraries during the first synchronization. <ul style="list-style-type: none"> • 0 represents None; does not load 	0/1/2

Option	Description	Value
	<p>permissions.</p> <ul style="list-style-type: none"> • 1 only loads the root folder's permissions to replace the permissions of the Connector library. All files and sub-folders under the Connector library inherit the new permissions of the parent node. • 2 loads all of the root folders' sub-folders', and files' permissions from the file system and breaks the permission inheritance of each level in the Connector library. 	
Keep Name Consistent	<p>Specify whether to keep the filenames and folder names in the Connector library and storage path consistent.</p> <ul style="list-style-type: none"> • 0 represents False; does not keep name consistent between Connector library and storage path. • 1 represents True; keeps name consistent between Connector library and storage path. 	0/1
Allow Large File	<p>Specify whether to allow data that is larger than 2 GB to be linked from the storage device and synchronized between the storage device and SharePoint.</p> <ul style="list-style-type: none"> • 0 represents False; does not allow user to upload files that are larger than 2GB to Connector library. • 1 represents True; allows users to upload files that are larger than 2 GB to Connector library. 	0/1
UserName	The account used to set up the access to the specified file system path.	DomainName\UserName
password	The encrypted password for the specified username.	r/6FHm/ jq1iAwlbaGRRTcstAs6HL

Configuring AgentToolCreateWeb.csv

AgentToolCreateWeb.csv is used to configure site information when creating sites with the specified Net Share path.

***Note:** If any Connector libraries are created while a site is being created using this configuration file, the newly-created Connector libraries inherit the following Connector settings configured on the site level:

- Load Metadata
- Load Permission
- Keep Name Consistent
- Allow Large File

Refer to the steps below to configure **AgentToolCreateWeb.csv**.

1. By default, **AgentToolCreateWeb.csv** is located in the Agent installation path ...*AvePoint*\DocAve6\Agent\data\SP2010\Connector\ConnectorCreateListTool. Navigate to this path and select the corresponding language folder.
2. Double-click **AgentToolCreateWeb.csv** to open the file.
3. By default, there is an example for each option. Remove the example row after entering your own information.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Site Collec	FileSystem	Relative U	Web Tem	Web Title	Load Meta	Load Perm	Keep Nam	Allow Larg	User Name	password	
2	http://hos	\\ip\d\$	cc webUrl	sts	webtitle	0	0	0	0	domain\n	Encryption	password

Figure 5: Example rows in AgentToolCreateWeb.csv file for English and Japanese Environments.

4. Refer to the following table for information that needs to be configured in this file.

Option	Description	Value
SiteCollection Url	The URL of the site collection where you want to create the site. *Note: The site collection specified here must be an existing one. If it does not exist, first create it using SharePoint or using this tool. Refer to Configuring AgentToolCreateSite.csv for more information.	http://ServerIP:Port/Managed Path/XX
FileSystem Path	The physical storage path that will be connected to the newly-created site.	\\IP\c\$\FolderName
Relative Url	The relative URL of the site being created.	TestSite
Web Template	The template of the site you want to create.	sts

Option	Description	Value
	<p>*Note: Site template is the name of the site definition. Site template can be STS, MPS, BLOG, SGS, or the name of a custom type of site. Refer to Template Parameter Values for more information.</p>	
Web Title	The title of the site you want to create.	TestSite
Load Metadata	<p>Specify whether to load metadata from file system to Connector libraries during the first synchronization.</p> <ul style="list-style-type: none"> • 0 represents False; does not load the metadata. • 1 represents True; load the metadata. 	0/1
Load Permission	<p>Specify whether to load the files'/folders' permissions from the file system to Connector libraries during the first synchronization.</p> <ul style="list-style-type: none"> • 0 represents None; does not load permissions. • 1 only loads the root folder's permissions to replace the permissions of the Connector library. All files and sub-folders under the Connector library inherit the new permissions of the parent node. • 2 loads all of the root folders' sub-folders', and files' permissions from the file system and breaks the permission inheritance of each level in the Connector library. 	0/1/2
Keep Name Consistent	<p>Specify whether to keep the filenames and folder names in the Connector library and storage path consistent.</p> <ul style="list-style-type: none"> • 0 represents False; does not keep name consistent between Connector library and storage path. • 1 represents True; keeps name consistent between Connector library and storage path. 	0/1

Option	Description	Value
Allow Large File	<p>Specify whether to allow data that is larger than 2 GB to be linked from the storage device and synchronized between the storage device and SharePoint.</p> <ul style="list-style-type: none"> • 0 represents False; does not allow user to upload files that are larger than 2GB to Connector library. • 1 represents True; allows users to upload files that are larger than 2 GB to Connector library. 	0/1
UserName	The account used to set up the access to the specified file system path.	DomainName\UserName
password	The encrypted password for the specified username.	r/6FHm/ jq1iAwIbaGRRTcstAs6HL

Configuring AgentToolCreateSite.csv

AgentToolCreateSite.csv is used to configure site collection information when creating site collections with the specified Net Share path.

***Note:** If any Connector libraries are created while a site is being created using this configuration file, the newly-created Connector libraries inherit the following Connector settings configured on the site level:

- Load Metadata
- Load Permission
- Keep Name Consistent
- Allow Large File

Refer to the steps below to configure **AgentToolCreateSite.csv**.

1. By default, **AgentToolCreateSite.csv** is located in the Agent installation path ... \AvePoint\DocAve6\Agent\data\SP2010\Connector\ConnectorCreateListTool. Navigate to this path and select the corresponding language folder.
2. Double-click **AgentToolCreateSite.csv** to open the file.
3. By default, there is an example for each option. Remove the example row after entering your own information.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	WebApp Url	FileSystem Path	Relative Url	Web Template	Site Title	Load Metadata	Load Permission	Keep Name Consistent	Allow Large File	Site Administrator	Username	password	
2	http://ho:\ip\d\$d/sites/site:sts		site1			0	0	0	0	domain\si	domain\n	Encryption password	

Figure 6: Example rows in AgentToolCreateSite.csv file for English and Japanese Environments.

4. Refer to the following table for the information that needs to be configured in this file.

Option	Description	Value
WebApp Url	The URL of the web application where you want to create the site collection. *Note: The web application specified here must be an existing one. If it does not exist, you must first create it using SharePoint.	http://ServerIP:Port/
FileSystem Path	The physical storage path that will be connected to the newly-created site collection.	\\IP\c\$\FolderName
Relative Url	The relative URL of the site collection you want to create. *Note: The managed path must be added in front of the relative URL of the site	Managed Path/TestSiteCollection

Option	Description	Value
	collection.	
Web Template	<p>The template of the top-level site of the site collection you want to create.</p> <p>*Note: Site template is the name of the site definition. Site template can be STS, MPS, BLOG, SGS, or the name of a custom type of site.</p> <p>Refer to Template Parameter Values for more information.</p>	sts
Site Title	The title of the site collection.	TestSiteCollection
Load Metadata	<p>Specify whether to load metadata from file system to Connector libraries during the first synchronization.</p> <ul style="list-style-type: none"> • 0 represents False; does not load the metadata. • 1 represents True; load the metadata. 	0/1
Load Permission	<p>Specify whether to load the files'/folders' permissions from the file system to Connector libraries during the first synchronization.</p> <ul style="list-style-type: none"> • 0 represents None; does not load permissions. • 1 only loads the root folder's permissions to replace the permissions of the Connector library. All files and sub-folders under the Connector library inherit the new permissions of the parent node. • 2 loads all of the root folders' sub-folders', and files' permissions from the file system and breaks the permission inheritance of each level in the Connector library. 	0/1/2
Keep Name Consistent	<p>Specify whether to keep the filenames and folder names in the Connector library and storage path consistent.</p> <ul style="list-style-type: none"> • 0 represents False; does not keep name consistent between Connector 	0/1

Option	Description	Value
	library and storage path. <ul style="list-style-type: none"> • 1 represents True; keeps name consistent between Connector library and storage path. 	
Allow Large File	Specify whether to allow data that is larger than 2 GB to be linked from the storage device and synchronized between the storage device and SharePoint. <ul style="list-style-type: none"> • 0 represents False; does not allow user to upload files that are larger than 2GB to Connector library. • 1 represents True; allows users to upload files that are larger than 2 GB to Connector library. 	0/1
SiteAdmin	The account used to create and manage the site collection.	DomainName\UserName
UserName	The account used to set up the access to the specified file system path.	DomainName\UserName
password	The encrypted password for the specified username.	r/6FHm/jq1iAwlbaGRRtcstAs6HL

Working with Configuration Files

When creating site collections or sites using the `AgentToolSP2010ConnectorCreateList` tool, the file system path must be provided in the corresponding `.csv` files. If there are sub-folders under the specified file system path, by default, the sub-folders are created as Content Libraries in SharePoint. However, the sub-folder can also be converted to other types of libraries or sites by editing the two configuration files, **AgentToolConnectorList.config** and **AgentToolConnectorWeb.config**.

The two configuration files, **AgentToolConnectorList.config** and **AgentToolConnectorWeb.config**, are located in `... \AvePoint\DocAve6\Agent\data\SP2010\Connector\ConnectorCreateListTool`. To edit these files, see the appropriate section below.

AgentToolConnectorList.config

To create a sub-folder to use as a Connector library (Content Library/Media Library), Document Library, Asset Library, Form Library, or Picture Library, modify the **AgentToolConnectorList.config** file as described below.

1. By default, **AgentToolConnectorList.config** is located in the Agent installation path ... \AvePoint\DocAve6\Agent\data\SP2010\Connector\ConnectorCreateListTool. Navigate to this path.
2. Right-click **AgentToolConnectorList.config** and choose to open the file with Notepad.

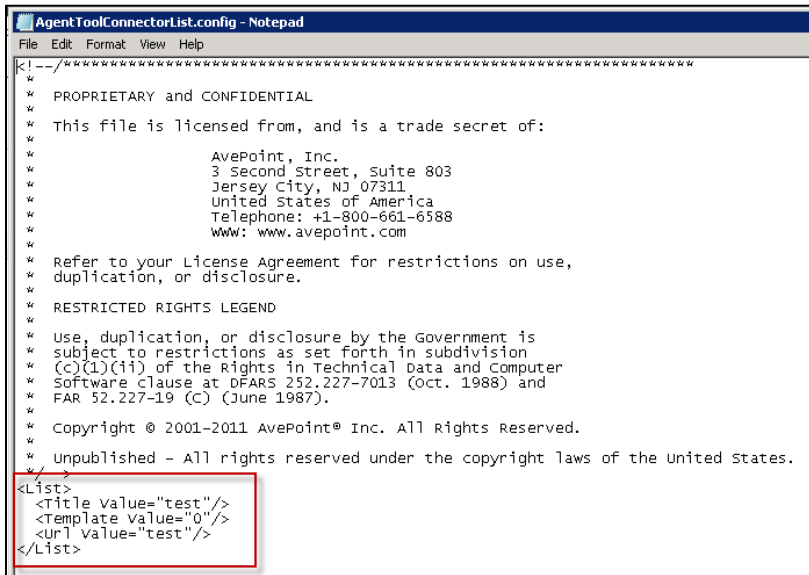


Figure 7: Values to modify in AgentToolConnectorList.config file.

3. In the `<List>` node, modify the *Title Value*, *Template Value*, and *Url Value* according to your requirements.

Property	Description	Value
Title Value	The name of the library you want to create.	test
Template Value	The template of the library you want to create. <ul style="list-style-type: none"> • 0 represents Content Library. • 1 represents Media Library. • 2 represents Document Library. • 3 represents Asset Library. • 4 represents Form Library. • 5 represents Picture Library. 	0/1/2/3/4/5
Url Value	The relative URL of the library you want to create.	test

4. When finished, copy the modified **AgentToolConnectorList.config** file to the target sub-folder.

AgentToolConnectorWeb.config

To create the sub-folder as a site, modify the **AgentToolConnectorWeb.config** file as described below:

1. By default, **AgentToolConnectorWeb.config** is located in the Agent installation path ... \AvePoint\DocAve6\Agent\data\SP2010\Connector\ConnectorCreateListTool. Navigate to this path.
2. Right-click **AgentToolConnectorWeb.config** and choose to open the file with Notepad.

```

AgentToolConnectorWeb.config - Notepad
File Edit Format View Help
<!--*****
*
* PROPRIETARY and CONFIDENTIAL
*
* This file is licensed from, and is a trade secret of:
*
*           AvePoint, Inc.
*           3 Second Street, Suite 803
*           Jersey City, NJ 07311
*           United States of America
*           Telephone: +1-800-661-6588
*           www: www.avepoint.com
*
* Refer to your License Agreement for restrictions on use,
* duplication, or disclosure.
*
* RESTRICTED RIGHTS LEGEND
*
* Use, duplication, or disclosure by the Government is
* subject to restrictions as set forth in subdivision
* (c)(1)(ii) of the Rights in Technical Data and Computer
* Software clause at DFARS 252.227-7013 (Oct. 1988) and
* FAR 52.227-19 (C) (June 1987).
*
* Copyright © 2001-2011 AvePoint® Inc. All Rights Reserved.
*
* Unpublished - All rights reserved under the copyright laws of the United States.
*/-->
<web>
<Title value="test"/>
<Template value="STS"/>
<Url value="test"/>
</web>

```

Figure 8: Values to modify in AgentToolConnectorWeb.config file.

3. In the **<Web>** node, modify the **Title Value**, **Template Value**, and **Url Value** according to your requirements.

Property	Description	Value
Title Value	The title of the site you want to create.	test
Template Value	The template of the site you want to create. *Note: Site template is the name of the site definition. Site template can be STS, MPS, BLOG, SGS, or the name of a custom type of site. Refer to Template Parameter Values for more information.	sts
Url Value	The relative URL of the site you want to create.	test

4. When finished, copy the modified **AgentToolConnectorWeb.config** file to the target sub folder.

Configuring Inheritance

Use the files **AgentToolConnectorList.config** and **AgentToolConnectorWeb.config** to configure the URL of the current folder (the folder that will house the configuration file) to inherit the folder name from file system or break the inheritance.

- If the node `<Url Value=""/>` in the configuration file is set to “null” or the name of the current folder, the URL inherits the name of the current folder from the file system.
- If the node `<Url Value=""/>` in the configuration file is set to other values instead of the name of the current folder, the URL breaks the inheritance and creates a relative URL using the URL value you provide.

Template Parameter Values

Refer to the following table for the parameter value of each top-level site template.

Template Name	Parameter Value
Team Site	STS#0
Blank Site	STS#1
Document Workspace	STS#2
Blog	BLOG#0
Group Work Site	SGS#0
Visio Process Repository	visprus#0
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
Document Center	BDR#0
Records Center	OFFILE#1
Business Intelligence Center	BICenterSite#0
Enterprise Search Center	SRHCEN#0
My Site Host	SPSMSITEHOST#0
Basic Search Center	SRHCENTERLITE#0/SRHCENTERLITE#1
FAST Search Center	SRHCENTERFAST#0
Publishing Portal	BLANKINTERNETCONT
Enterprise Wiki	ENTERWIKI#0

Refer to the following table for the parameter value of each site template.

Template Name	Parameter Value
Team Site	STS#0
Blank Site	STS#1
Document Workspace	STS#2
Blog	BLOG#0

Template Name	Parameter Value
Group Work Site	SGS#0
Visio Process Repository	visprus#0
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
Document Center	BDR#0
Records Center	OFFILE#1
Basic Search Center	SRCHCENTERLITE#1
Assets Web Database	ACCSRV#1
Charitable Contributions Web Database	ACCSRV#3
Contacts Web Database	ACCSRV#4
Issues Web Database	ACCSRV#6
Personalization Site	SPSMSITE#0
Projects Web Database	ACCSRV#5

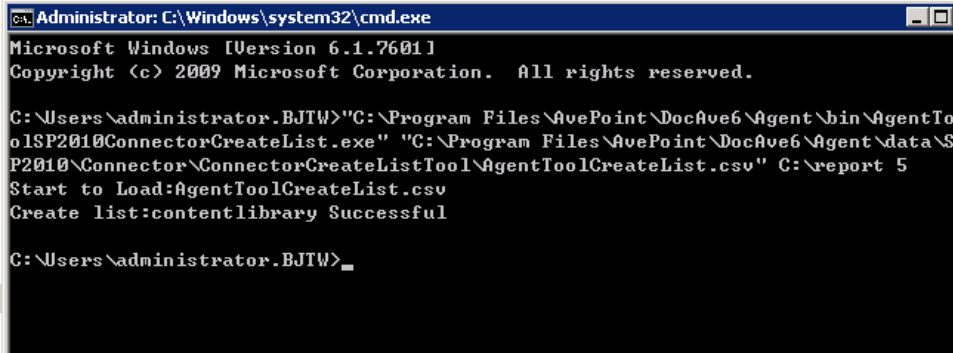
Running the AgentToolSP2010ConnectorCreateList

After completing the necessary configurations, refer to the steps below to create Connector libraries using the **AgentToolSP2010ConnectorCreateList.exe** tool.

***Note:** The account used to run this tool must be the Farm administrator.

1. Navigate to the tool location; by default, this tool is located in the Agent installation path ... \AvePoint\DocAve6\Agent\bin.
2. In the Command Line Window, enter the command including the path of the tool **AgentToolSP2010ConnectorCreateList.exe**, the path of the .csv file **AgentToolCreateList.csv**, the path where you want to store the report file generated by this tool, and the thread number that specifies how many libraries you want to create concurrently. The thread number cannot be more than 5. For example,

```
"X:\... \AvePoint\DocAve6\Agent\bin\AgentToolSP2010ConnectorCreateList.exe"
"X:\... \AvePoint\DocAve6\Agent\data\SP2010\Connector\ConnectorCreateList
Tool\AgentToolCreateList.csv" "X:\... \report" X
```



```
Administrator: C:\Windows\system32\cmd.exe
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Users\administrator.BJTW>"C:\Program Files\AvePoint\DocAve6\Agent\bin\AgentToolSP2010ConnectorCreateList.exe" "C:\Program Files\AvePoint\DocAve6\Agent\data\SP2010\Connector\ConnectorCreateListTool\AgentToolCreateList.csv" C:\report 5
Start to Load:AgentToolCreateList.csv
Create list:contentlibrary Successful

C:\Users\administrator.BJTW>_
```

Figure 9: Example of running the AgentToolSP2010ConnectorCreateList.exe.

***Note:** The command for creating the site/site collection that is connected to the specified path is similar to the command for creating the Connector library. However, ensure that you change the .csv file to **AgentToolCreateWeb.csv** or **AgentToolCreateSite.csv** accordingly and remove the thread number, as only one site/site collection can be created concurrently.

Manager Tool Dell DX Client

Use the **ManagerToolDELLDXClient** tool to display and update the **retention time**, **compression type**, and the **date of deferred compression** of DocAve Archiver data that is saved on a Dell DX Storage server.

***Note:** Only **Completed** jobs can be loaded in the farm tree and processed by this tool. The data of **Completed with Exception** jobs or **Failed** jobs will not be loaded nor processed.

Environment Requirements

- .Net Framework 3.5 or above.
- The machine on which you run this tool must be within the same subnet as the Dell DX Storage server.

Using the Manager Tool Dell DX Client

Refer to the steps below to use the tool.

1. Navigate to ... \AvePoint\DocAve6\Manager\Shared\Tools\DELLDXClient\ and locate the **ManagerToolDELLDXClient.exe** file.
2. Right-click **ManagerToolDELLDXClient.exe** and select **Run as administrator** to run the tool.
3. Enter the **hostname** or **IP address** of the DocAve Control Service in the **DocAve Control Service Host** field.
4. Enter the DocAve Control Service port into the **DocAve Control Service Port** field. By default, DocAve uses **14000** as the Control Service port.
5. Enter the username and the password that are used to log into DocAve into the **Username** and **Password** fields, respectively.
6. Select a DocAve module from the **Component** drop-down box. By default, **Archiver** is selected.
7. Click **Load** to load the jobs' information of the specified module. The information for all of the completed jobs is shown on the left side of the screen. Click **Reset** to clear or reset all of the information in the two areas to their default values.
8. Double-click one job on the tree; the **Original Retention Date**, **Original Compression Type**, and the **Original Defer Compression** date of the specified job is shown in the corresponding area on the right.
9. Select one or several jobs on the tree. You can modify the retention date, compression type, and the date that the compression is deferred to in the right area of the interface.

***Note:** You can select several jobs to run at the same time, but only the jobs that meet the conditions will be processed by this tool. Refer to the report to view the job status.

- **Month to Extend** – Enter a positive integer in the field and click **Update Retention Date** to postpone the original retention date for the specified number of month(s).

For example, enter **3** in the **Month to Extend** textbox. If the **Original Retention Date** displayed in the tool is **Sat, 13 Aug 2011 02:28:32 GMT**, after clicking the **Update Retention Date** button, the original retention date will be postponed for 3 months. The new retention date is **Sun, 13 Nov 2011 02:28:32 GMT**.

***Note:** If no retention time was set initially, no action will be performed by the tool.

- **New Compression Type** – Select the new compression type from the drop-down box and click **Update Compression Type**. The original compression type is replaced with the new one.
 - **No** means that the data will not be compressed.
 - **Fast** means that the compression time is shorter, but the size of the data will not be reduced too much because the compress rate is low.
 - **Best** means the size of the data will be greatly reduced; however, the compression time is longer.

***Note:** If the new compression type you selected is the same as the old one, no action will be performed by the tool.

- **Delay Compression Until** – Enter a positive integer in the field and click **Update Defer Compression**. The original date that the compression is deferred to will be postponed for the specified day(s).

For example, enter **3** in the **Delay Compression Until** text box.

- If the compression setting is not enabled or the file is already compressed, no action will be performed by the tool.
- If the compression setting is enabled and the file is not compressed, the compression time will be reset to three days later from the current time.

10. The progress of the update job is shown in the progress bar at the bottom of the tool.

11. After all of the update jobs finish, click **Exit** to exit the tool. You can view the logs and detailed reports of the jobs in the **logs.txt** and **reports.txt** files, accordingly. The files reside in the same folder as the **ManagerToolDELLDXClient.exe** file.

Manager Tool HCP Client

This tool is used to display and update the properties (Retention time, Hold, Shred, and Index) of DocAve Archiver data that is saved on an HDS Hitachi Content Platform server.

Environment Requirements

- .Net Framework 3.5 or above.

Using the Manager Tool HCP Client

Refer to the steps below to use the tool.

1. Navigate to ... \AvePoint\DocAve6\Manager\Shared\Tools\HCPClient on the DocAve Control server to locate the **ManagerToolHCPClient.exe** file.
2. Right-click **ManagerToolHCPClient.exe** and select **Run as administrator** to run the tool.
3. Enter the **hostname** or **IP address** of the DocAve Control server in **DocAve Control Service Host** text box.
4. Enter the DocAve Control service **port** into the **DocAve Control Service Port** text box. By default, DocAve uses **14000** as the Control service port.
5. Enter the username and the password that are used to login DocAve into the **Username** and **Password** text boxes.
6. Select a **module** in the **Component** drop-down box. By default, **Archiver** is selected.
7. Click **Load** to load the jobs' information of the specified module. The information of all the completed jobs will be shown in the left area. Click **Reset** to and all the information displayed in the tool will be cleared or reset to the default value.
8. Double-click one job on the tree; detailed information on the selected job will be shown in the corresponding area on the right.
9. Select one or several jobs on the tree. You can modify the following settings in the right area.
 - **Index** – Select whether to enable the index feature on the HDS Hitachi Content Platform server. If this value is set to **true**, the detailed metadata of archived data can be searched using the index. By default, this feature is enabled.
Select **true** to enable this feature and select **false** to disable it.
 - **Shred** – Select whether to enable the shred feature of the HDS Hitachi Content Platform server. By default, this feature is not enabled.
 - If you configure this vaue as **true** and run the update, archived data will be deleted thoroughly when the retention time is reached. The deleted data cannot not be restored.

- If you configure this value as **true** and run the update, the value cannot be configured as **false** in later jobs.

Select **true** to enable this feature and select **false** to disable it.

- **Month/Day/Hour to Extend** – Enter a positive integer in the text box and click **Update**. The original retention date will be postponed for the specified time.


If the original retention date (**Retention** column) displayed in the tool is **Thursday, 19 Jan 2012 02:28:32 GMT** and you enter 3 in the **Month to Extend** text box, after clicking the **Update** button, the original retention date will be postponed for 3 months. The new retention date is **Thursday, 19 Apr 2012 02:28:32 GMT**.

***Note:** If no retention time has been set in the past, no action will be performed by the tool.

- **Hold** – Enable the **Hold** feature to protect the data from being deleted. Once the data is held, it cannot be deleted by end-users, and any retention job will affect the held data. You cannot expand the retention date of the held data.

Select **true** to enable this feature and select **false** to disable it.

10. Click **Update** to run the update job. The status of the update job will be shown at the bottom of the tool.

After all update jobs finish, click the **Report** button to view the summary report of the job or click **Show Details** button to view details of the job in the tool. Click  to exit the tool.

AgentToolSP2010MoveStub

The AgentToolSP2010MoveStub tool can be used for the following three purposes:

- **MoveSPSite** – Move one site collection from the original content database where it resides to another content database. Then, move the stub information stored in the original stub database to the stub database configured for the destination content database.
- **MoveStub** – Move stub information stored in the original stub database to the stub database of the specified content database where the corresponding site collection resides.

Use this command after you have moved a site collection to another content database using the SharePoint STSADM operation **Mergecontentdbs** or Windows PowerShell cmdlet **Move-SPSite**.

- **ChangeStubDB** – Change the stub database of the specified SharePoint object(s) and move all related stub information from the old stub database to the new stub database.

Running the AgentToolSP2010MoveStub Tool

The AgentToolSP2010MoveStub tool directly accesses databases. As a result, only an account with sufficient permissions should be used to run the tool. Refer to the following for detailed information on the permissions required:

- Local System Permissions: Member of the local **Administrators** group.
- SharePoint Permissions:
 - User is a member of the Farm Administrators group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.
 - Full control to all zones of all Web applications via User Policy for Web Applications
- SQL Permissions:
 - Database Role of db_owner for all the databases related with SharePoint, including content databases, stub databases, SharePoint configuration database and Central Administration content database.
 - Database Role of dbcreator to the corresponding SQL Server, this permission is only required when you use the **ChangeStubDB** command and the entered new stub database does not exist on the specified SQL server.

Refer to the steps below to run this tool.

1. Navigate to ...*AvePoint*\DocAve6\Agent\bin and locate **AgentToolSP2010MoveStub.exe**.
2. Double-click the tool to run it. A command-line interface (CLI) appears.
3. From within the CLI, enter a command applicable to you requirements:
 - **–MoveSPSite** – Enter this command to move one site collection from the original content database where it resides to another content database, and then move the stub

information stored in the original stub database to the stub database configured for the destination content database. This is done so that all stubs can be accessed from SharePoint and operated in DocAve and SharePoint normally after the corresponding site collection is moved to the specified content database. Enter the **-MoveSPSite** command and press **Enter**. Then enter the following command according to the prompt message appears on the tool interface:

**-MoveSPSite [Site Collection URL] [DestinationDatabaseName]
[SourceRbsProvider]<optional> [DestinationRbsProvider]<optional>**

Such as, **-MoveSPSite http://avepoint/sites/docave DestinationStubDB**, or **-MoveSPSite http://avepoint/sites/docave DestinationStubDB SP2010RBSProvider SP2010RBSProvider**

- **Site Collection URL** – The complete URL of the site collection that you want to move to the specified content database.
- **DestinationDatabaseName** – The name of the destination database that you want to move the specified site collection to.
- **SourceRbsProvider (Optional)** – If the original content database where the specified site collection has RBS enabled. Enter the RBS Provider used by the original database here. Only **SP2010RBSProvider** can be entered here, and the value is case sensitive.
- **DestinationRbsProvider (Optional)** – If the destination content database where the specified site collection will be moved to has enabled RBS, enter the RBS Provider used by the destination database here. Only **SP2010RBSProvider** can be entered here and the value is case sensitive.
- **-MoveStub** – Enter this command to move the stub information stored in the original stub database to the stub database of the specified content database where the corresponding site collection resides. This action is done so that all of the old stubs can be accessed from SharePoint and operated in DocAve and SharePoint normally after the corresponding site collection is moved to a new content database. Enter the **-MoveStub** command and press **Enter**. Then, configure the following parameters according to the prompt messages that appear on the tool interface:
 - **Site Collection URL** – Enter the complete URL of the site collection that has been moved to another content database.
 - **Original Content Database Name** – Enter the name of the original content database where this site collection resided.
- **-ChangeStubDB** – Enter this command to change the stub database of the specified SharePoint object(s) and move all related stub information from the old stub database to the new stub database.. All of the old stubs can be accessed from SharePoint and operated in DocAve and SharePoint normally after the stub database of the corresponding SharePoint object(s) is changed. Enter the **-ChangeStubDB** command and press **Enter**. Then, configure the following parameters according to the prompt messages that appear on the tool interface:

- **Change stub database mode** – Enter the mode used to change the stub database. Entering **0** changes the stub database without copying the existing data in the old stub database to the new one; entering **1** changes the stub database and then copies the existing data in the old stub database to the new one. A value of **1** is required if you wish for all of the old stubs to remain accessible and operational after changing the stub database.
 - **WebApplication URLs** – Enter the complete URL of the Web application where you want to change the content database's stub database. Multiple Web application URLs can be entered here when separated by spaces. An asterisk (*) represents all of the web applications in the specified farm. If you enter *, the stub database of all of the Web applications' content databases will be changed to the specified stub database.
 - **Content database names** – Enter the name(s) of the content database(s) associated with the Web application(s) that you specified using the **WebApplication URLs** command. The stub database(s) of these content database(s) will be changed. Multiple names can be entered here when separated by spaces. An asterisk (*) represents all of the content databases in the specified Web application(s).
 - **Destination SQL Server instance** – Enter the name/IP address of the SQL Server instance where the new stub database will reside.
 - **SQL Server authentication mode** – Specify the authentication mode used to access the SQL Server instance. The value **0** represents **Windows Authentication** mode, and the value **1** represents **SQL Authentication** mode. If the **SQL Authentication** mode is used, you will be asked to enter the username and password used to access the SQL instance.
 - **Stub database name** – Enter the name of the new stub database. If the specified stub database does not exist, it will be automatically created on the specified SQL Server instance when the move operation takes place.
- *Note:** The database name is not case sensitive.
4. Once all of the necessary parameters have been configured, press **Enter** to run the command.
 5. To exit the tool when finished, follow the instructions on the interface. You can also enter **exit** and press **Enter** to exit the tool. To continue using the tool, press any key (other than **Enter** or **Q**) to enter another command.

AgentToolSP2010eDiscoveryMapping

The AgentToolSP2010eDiscoveryMapping tool is used to map the crawl property to the managed property of a specified column, and save the property mapping to the Compliance database in order to enable the customized metadata filter rule in the advanced SharePoint search conditions.

***Note:** This tool only supports SharePoint 2010.

Running the AgentToolSP2010eDiscoveryMapping tool

Refer to the steps below to run the AgentToolSP2010eDiscoveryMapping tool.

1. Navigate to ...*AvePoint\DocAve6\Agent\bin* and locate **AgentToolSP2010eDiscoveryMapping.exe**.
2. Right-click on the tool and click **Run as administrator**. The AgentToolSP2010eDiscoveryMapping interface appears.
3. Configure the following settings in the AgentToolSP2010eDiscoveryMapping interface:
 - a. Select a column: Refer to the steps below to locate the column that you want to map.
 - **Web Application** – Select a web application from the web application drop-down list. All of the site collections under the specified web application will be loaded in the site collection drop-down list for selection.
 - **Site Collection** – Select a site collection from the site collection drop-down list. All of the sites under the specified site collection will be loaded in the site drop-down list for selection.
 - **Site** – Select a site from the site drop-down list. All of the site columns under the specified site will be loaded in the column title drop-down list for selection.
 - **Column Title** – Select a column from the column title drop-down list.
 - b. Choose to map the current version's crawl property or the history version's crawl property for the selected column by checking the corresponding checkbox at the right corner of the interface.
 - c. Click **Enable** to start the mapping. The mapping status is displayed in the Colum Mapping field.
 - **Yes** indicates that the corresponding crawl property of the specified column's current version or history version has been mapped successfully and saved in the Compliance database.
 - **No** indicates that the corresponding crawl property of the specified column's current version or history version has not been mapped, or not saved in the Compliance database.

***Note:** A full crawl of the web application where the mapped column resides must be performed after running this tool to make the customized metadata filter rule effective.

AgentToolSP2010Connector

The **AgentToolSP2010Connector** tool is used to upgrade Connector document versions from DocAve 6.0 (including DocAve 6.0, 6.0.1 and 6.0.2) to DocAve 6 Service Pack 1 or later versions.

For documents that reside in Connector libraries, the real files of the document versions are stored in a hidden folder named **.fsdl** in the connected storage path. The **AgentToolSP2010Connector** tool only upgrades the real files of the document versions, but does not upgrade the version links in Connector libraries.

If the documents stored in your Connector libraries have history versions, you must run this tool to upgrade document versions because the following changes are made to the stub database of DocAve 6 Service Pack 1 and later versions.

Before DocAve 6 Service Pack 1 (and later versions), one document version in the storage path may have several records in the stub database. However, from DocAve 6 Service Pack 1 on, one document version in the storage path can only have one record in the stub database.

This tool makes copies of the document versions in the storage path, and makes sure the relationship between the document version and the stub database record is a one-to-one mapping.

After the upgrade from DocAve 6.0 to DocAve 6 Service Pack 1 or later versions, you will then be able to open the old document versions successfully.

If the documents stored in your Connector libraries do not have any history versions, there is no need to run this tool.

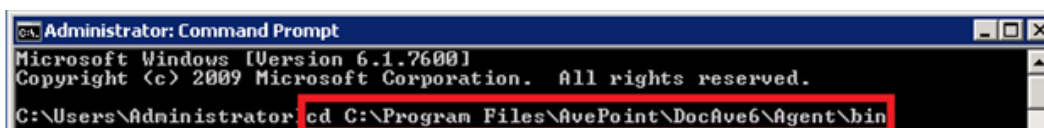
Before using this tool, make sure that the BLOB Provider and the EBS/RBS settings are properly configured and that the Connector solutions are successfully deployed.

***Note:** The account used to run this tool must have the same permissions as the Agent Account.

Running the AgentToolSP2010Connector

By default, the **AgentToolSP2010Connector.exe** file is located in the Agent installation path: `...\\AvePoint\\DocAve6\\Agent\\bin`. Follow the steps below to run this tool:

1. Right-click the **AgentToolSP2010Connector.exe** file, and select **Run as Administrator**.
2. In the Command Line Interface, enter the command with the location of the **AgentToolSP2010Connector.exe** file as follows, and press **Enter**.



```
Administrator: Command Prompt
Microsoft Windows [Version 6.1.7600]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.
C:\Users\Administrator>cd C:\Program Files\AvePoint\DocAve6\Agent\bin
```

Figure 10: Location of the AgentToolSP2010Connector tool.

3. Input the following command to get the help information of the **AgentToolSP2010Connector** tool.

AgentToolSP2010Connector.exe –help

After entering the command above, the commands provided by this tool, the command parameters, and some examples are displayed in the Command Line Interface.

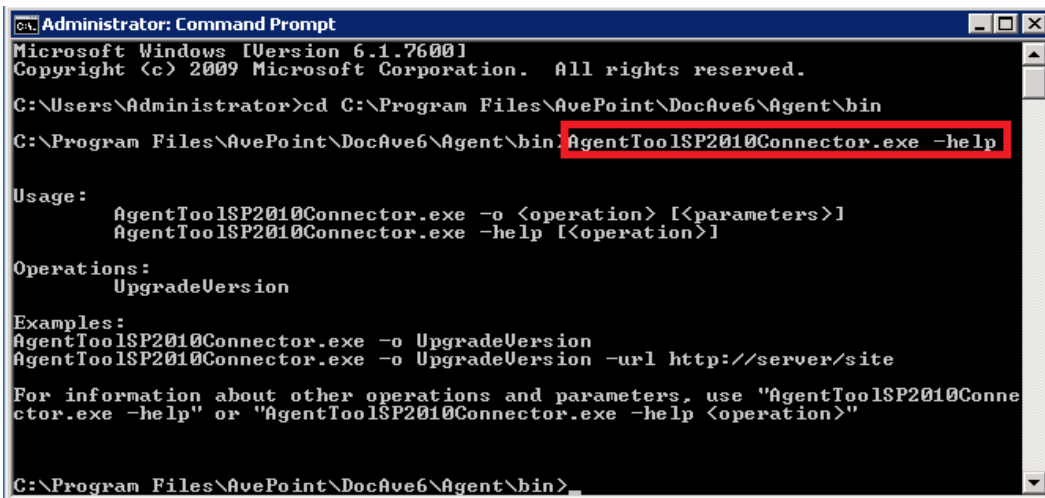


Figure 11: Help information of the AgentToolSP2010Connector tool.

4. Use the following command to upgrade the document versions:

AgentToolSP2010Connector.exe –o <operation> [<parameters>]

- Change the **<operation>** in the command to **UpgradeVersion** and do not enter any other parameter to upgrade the document versions in all Connector libraries in the SharePoint farm from DocAve 6.0 to DocAve 6 Service Pack 1 or later versions.

The command is: **AgentToolSP2010Connector.exe –o UpgradeVersion**

- You can add a parameter in this command to specify a SharePoint scope. If this is done, only the document versions of the Connector libraries within the specified scope will be upgraded.

The supported SharePoint scopes are Web applications, site collections, sites, and libraries. Enter the absolute URL of the supported scope as the parameter value.

For example:

AgentToolSP2010Connector.exe –o UpgradeVersion –url http://hostname/sites/test

***Note:** Quote the parameter value with double quotation marks if there are spaces in the parameter value.

Checking the Job Status

After running the upgrade job using this tool, you can check the job status in the Summary Report and Detail Report that are generated in the Agent installation path, which is ... \AvePoint\DocAve6\Agent\Logs\Connector by default.

If there are some versions that the tool failed to upgrade, you can check the detailed reasons in the Detail Report.

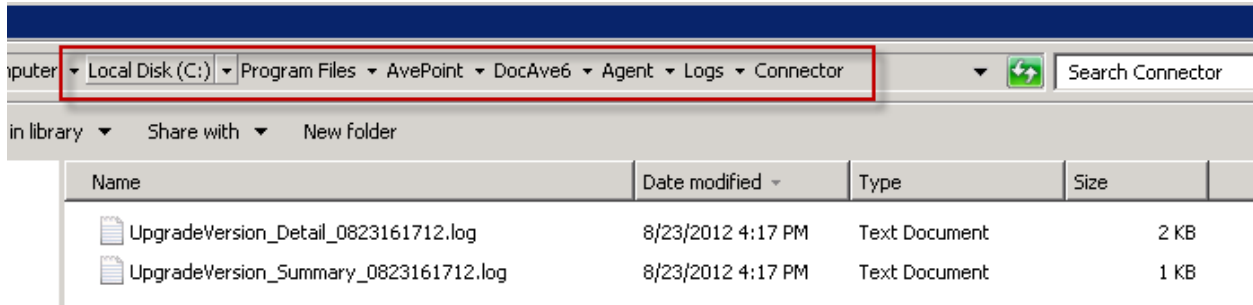


Figure 12: Job reports.

AgentToolSP2010OrphanStubClean

The **AgentToolSP2010OrphanStubClean** tool is used to search for and clean up orphan stubs that exist in the SharePoint2010 environment.

Orphan stubs are stubs whose real content have been deleted or stubs that are not able to connect to their real content.

You can perform the following two functions using this tool:

- Search for orphan stubs in your SharePoint 2010 environment and generate an Orphan Stub report for your environment.
- Clean up orphan stubs according to the orphan stub report generated in the function above.

***Note:** The account used to run this tool must have the same permissions as the Agent Account.

Searching for the Orphan Stubs

Follow the steps below to search for orphan stubs in your SharePoint environment:

1. By default, the **AgentToolSP2010OrphanStubClean.exe** file is located in the Agent installation path: ...*\AvePoint\DocAve6\Agent\bin*. Navigate to this location.
2. Double-click the **AgentToolSP2010OrphanStubClean.exe** file to run this tool.
3. Input the following commands to search for the orphan stubs in your SharePoint environment and generate the orphan stub report:

- Use the **RBSOrphanCleanUp** command if you enabled RBS for your environment in order to use DocAve Storage Optimization modules.

RBSOrphanCleanUp -WebApp http://hostname/ **-ContentDB** WSS_Content -
SiteCollection http://hostname/sites/test **-Action** Report **-File** C:\OrphanStubReport.csv
-AfterTime 2012-1-1

- Use the **EBSOrphanCleanUp** command if you enabled EBS for the farm in order to use DocAve Storage Optimization modules.

EBSOrphanCleanUp -WebApp http://hostname/ **-ContentDB** WSS Content -
SiteCollection http://hostname/sites/test **-Action** Report **-File** C:\OrphanStubReport.csv
-AfterTime 2012-1-1

This table below contains detailed information on each of the parameters:

Parameter	Type	Description
-WebApp	Required	The URL of the Web application where you want to search for or delete the orphan stubs.

Parameter	Type	Description
-ContentDB	Optional	<p>The name of the content database where the orphan stubs reside.</p> <p>This is an optional parameter. If you use this parameter, only the specified content database is searched. If you do not use this parameter, the entire Web application is searched.</p>
-SiteCollection	Optional	<p>The URL of the site collection where you want to search for or delete the orphan stubs.</p> <p>This is an optional parameter. If you use this parameter, only the specified site collection is searched. If you do not use this parameter, the entire Web application is searched.</p>
-Action	Required	<p>This action generates an orphan stub report that displays the orphan stubs discovered by this command.</p> <p>The value of this parameter is Report.</p>
-File	Required	<p>The full path where you want to save the orphan stub report. The path must be detailed to the name of the report file. For example, <i>C:\OrphanStubReport.csv</i>.</p> <p>The report file is generated automatically if it does not exist. If there is already a file with the same name existing in the specified location, the newly-generated report file will overwrite the existing one.</p> <p>*Note: This command only supports generation of report files in .csv format.</p>
-AfterTime	Required	<p>Only the orphan stubs generated after the specified date searched for. The date must be in the format of <i>YYYY-MM-DD</i>.</p> <p>Y stands for year, M stands for month, and D stands for day.</p>

4. Press **Enter** to run the tool.
5. After the search job completes, you can check the orphan stub report under the location specified in the command.

Cleaning up the Orphan Stubs

Follow the steps below to clean up the orphan stubs discovered in the [Searching for the Orphan Stubs](#) section.

1. Input the following Command to clean up the orphan stubs:

OrphanCleanUp -Action Clean -File C:\OrphanStubReport.csv

2. This table contains the detailed information for each of the parameters:

Parameter	Type	Description
-Action	Required	This action is used to clean up the orphan stubs. The value of this parameter is Clean .
-File	Required	The full path where the orphan stub report resides. The path must be detailed to the name of the report file. For example, <i>C:\OrphanStubReport.csv</i> .

3. Press **Enter** to run the tool. After the job completes, the orphan stubs recorded in the specified orphan stub report are deleted from your SharePoint environment.

SP2010ReplicatorAnalyzer

The SP2010ReplicatorAnalyzer tool deletes failed jobs' Profile Settings configuration from the DocAve6_ReplicatorDatabase. After deleting the Profile Settings configuration, incremental replication can be performed successfully.

Regardless of whether a Replicator job is finished or failed, Profile Setting mappings are generated in the DocAve6_ReplicatorDatabase during the job process. When performing an incremental replication after a failed replication job, the Profile Settings configuration of this incremental replication is compared with the Profile Settings configuration of the former failed replication. Since all settings, content types, columns, and other configurations are the same this incremental replication is skipped and the contents are not replicated. However, the corresponding contents do not exist in the destination since the former job failed. This tool is used to delete the useless Profile Settings configuration from failed jobs, thus ensuring that the incremental replication completes successfully.

Running the SP2010ReplicatorAnalyzer

By default, the **SP2010ReplicatorAnalyzer.exe** file is located in the Agent installation path: ... \AvePoint\DocAve6\Agent\bin. Follow the steps below to run this tool:

1. Use a DocAve Agent Account to run this tool. Right-click **SP2010ReplicatorAnalyzer.exe** file, and select **Run as Administrator**.
2. In the Command Line Interface, enter the command to browse to the **SP2010ReplicatorAnalyzer.exe** file, and press **Enter**.

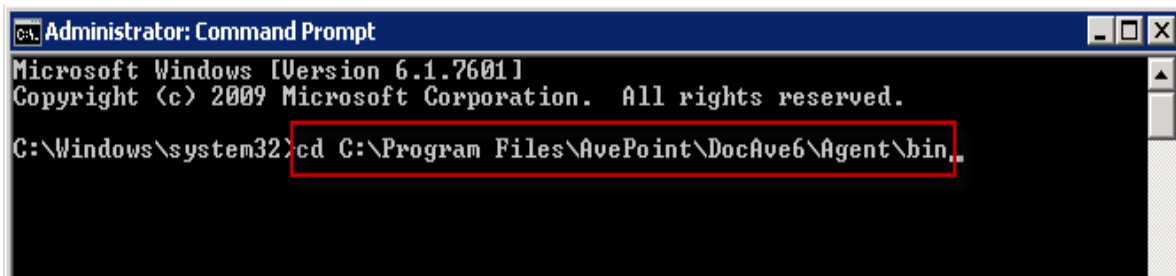


Figure 13: Location of the SP2010ReplicatorAnalyzer Tool

3. Input the following command to delete the configuration according to the specified condition. The format of the command is **SP2010ReplicatorAnalyzer -type CMD -data DeleteDirtyDesign -mappingid [MappingID] -itemid [ItemID] -designType [DesignType]**
 - **SP2010ReplicatorAnalyzer** – Execute the **SP2010ReplicatorAnalyzer** tool.
 - **-type CMD** – Run the tool by CMD command.
 - **-data DeleteDirtyDesign** – Enable the function of deleting configuration.

- **-mappingid[MappingID]** – Get configuration according to specified Mapping ID. **[MappingID]** is required to be entered. The following steps describe how to find the Mapping ID of your desired job.
 - a. In DocAve Manager, click **Job Monitor** to enter the interface.
 - b. In the Job Monitor interface, select your desired job, and then click **View Mappings** on the ribbon. The View Mappings tab appears.
 - c. In the **Job ID** column, the character strings after **_** is the Mapping ID. For example, the Job ID is **RP20120830041514729574_2db64471-d275-4746-88c4-89d17bec612a**. The Mapping ID is **2db64471-d275-4746-88c4-89d17bec612a**.
- **-itemid[ItemID]** (Optional) – Filter configuration according to specified Item ID. Item ID is the ID of a SharePoint object and it can be found in SharePoint Content Database.
- **-designType[DesignType]** (Optional)– Further filter configuration according to specified Design Type. Design Type is the type of configuration. It is strongly recommended contacting with our technical staff to help you gain Design Type if you need to delete configuration of a specified Design Type in a Mapping.

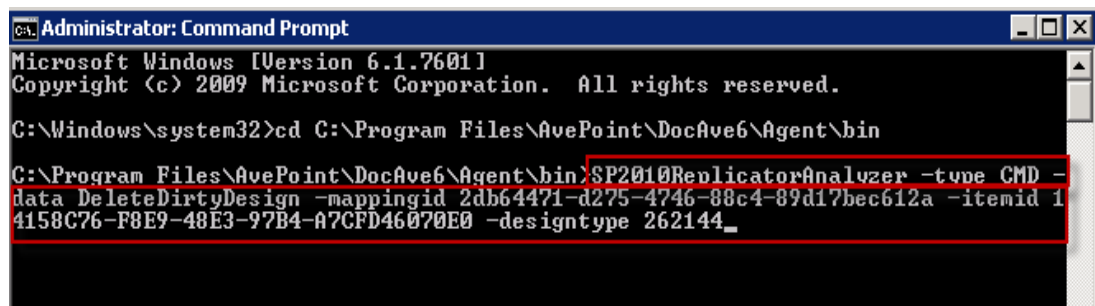


Figure 14: Example of running the SP2010ReplicatorAnalyzer.exe

***Note:** If you only set Mapping ID as the condition, enter the command like this
SP2010ReplicatorAnalyzer -type CMD -data DeleteDirtyDesign -mappingid 2db64471-d275-4746-88c4-89d17bec612a

4. Press **Enter** to run the tool and delete the failed job's configuration.

DocAve Migrator Tool

The DocAve Migrator Tool is mainly designed to scan the source data for migration, generate the scan report for your reference, and set up security mapping that can be used when performing a DocAve migration job.

You can use the Migrator Tool to scan source data from Lotus Notes, eRoom, File System, Exchange Public Folder, and Livelink. For different sources, refer to the different sections for details of how to use the tool.

Accessing DocAve Migrator Tool

To access the DocAve Discover Tool and leverage its functionalities, follow the steps below:

1. Go to the installation directory of DocAve Agent, and browse to ... \AvePoint\DocAve5\Agent\bin.
2. Double-click **MigratorTool.exe** to start this tool. The main interface appears.

File System Migration

On the Migrator Tool main interface, select the **File Migration** checkbox and then click **Next** to start. For File System migration, use the Migrator Tool to perform the following operations:

- **Net Share Test** – Tests the connection to the Net Share path.
- **File Explorer** – Explores the file information of permissions and properties.
- **File Migration Test** – Runs a test migration job to scan the source data.
- **Security Mapping** – Configures the domain mapping, group mapping, and user mapping and then generate the XML file, which can be used in DocAve File System Migrator.

Net Share Test

Follow the steps below to test the connection to the Net Share path.

1. Navigate to **Migrator Tool > File Migration > Net Share Test**.
2. Configure the following settings:
 - a. **Username** and **Network Password** – Enter the username and the corresponding password for the connection.
 - b. **Path** – Enter the Net Share path.
3. Click **Open Connection** to open the connection with the path you specified.
4. After the test is successful, click **Dispose Connection** to close the connection.

File Explorer

Follow the steps below to explore the file information of permissions and properties.



1. Navigate to **Migrator Tool > File Migration > File Explorer**.
2. The disks on the local machine are listed on the left pane. Click the node to expand the data tree and locate the specific folder. The files contained in the folder are displayed on the right pane, including the information of name, size, data modified, and location.
3. Select the file you want to view. The information of permissions and properties are displayed in the **Permissions** and **Details** area.

File Migration Test

Follow the steps below to run a test migration job for the specified source contents. The File Migration Test function is the same as the **Test Run** function in DocAve.

1. Navigate to **Migrator Tool > File Migration > File Migration Test**.
2. Click **Job** in the menu bar and select **New Job** to create a new test job.
3. Click **Contents** in the menu bar to specify the source contents.
 - Click **Browse Folder** to select a single folder and the files in it are the source contents.
 - Click **Browse Multiple Folders** to select multiple folders and the files in them are the source contents.
 - Click **Net Work Drive** to specify the location by entering the information of location, domain, username, and the corresponding password.

After specifying the source contents, the folder path or the Net Share path you selected is displayed in the message area.

4. If you want to test whether the file/folder name exceeds the limitation of SharePoint URL length, configure the settings as follows. Otherwise, skip this step and go the next step.
 - **SharePoint URL** – Enter the destination URL where the source contents will be migrated.
 - Configure the maximum length of the SharePoint URL, the file name, and the folder name.
5. If you want to filter the specified source contents to be included in the test job, configure the filter settings as follows. Otherwise, skip this step and go to the next step.
 - **File Filter** – Filter the files according to the file name and the extension name by the entered file filter rule in the text box.
 -  is used to include the files which match the file filter rule, and  is used to exclude the files which match the file filter rule. Click the icon to change it.
 - The examples of the file filter rule: **file.*** represents the files whose file name is **file**; ***.doc** represents the files whose extension name is **doc**; **file.doc** represents the specific file.

- **File Size** – Filter the files according to the file size. Select the **File Size** checkbox to use the file size filter.
 - Select a condition. The **greater than** condition represents to include the files whose size is greater than the specified size. The **less than** condition represents to include the files whose size is less than the specified size.
 - Specify the file size and the unit. Enter the file size in the text box and then select a unit from **KB**, **MB**, and **GB**.
- **File Time Range** – Filter the files according to the last modified time. Select the **File Time Range** checkbox to use the file time range filter.
 - Select a condition. **Before** means to include the files whose last modified time is before the specified time. **From...To...** means to include the files whose last modified time is within the specified time range. **Later than** means to include the files whose last modified time is later than the specified time.
- **Customized Metadata** – Filter the files according to the metadata. Select the **Customized Metadata** checkbox to use the customized metadata filter.
 - a. Enter the property name in the **Field** text box.
 - b. Select the property type from the **Type** drop-down list. For different types, there are respective conditions to be used.
 - c. Specify the condition that you want to use.

If you select **Contains**, the file whose property value contains the entered value matches the filter rule, and it will be included;

If you select **Is(exactly)**, the file whose property value is exactly the entered value matches the filter rule, and it will be included;

If you select **Word Starts With**, the file whose property value starts with the entered value matches the filter rule, and it will be included;

If you select **Ends With**, the file whose property value ends with the entered value matches the filter rule, and it will be included.
 - d. Enter the value in the **Value** text box.

After configuring the filter settings, click **Set** to save the settings and the filter settings are displayed in the message area. You can click **Reset** to clear the settings, or click **Cancel** to cancel the filter settings.



6. Click **Job** in the menu bar and select **Run Job** to run the test job immediately. You can also click **Save Job** to save the test job and open it by clicking **Open Existing Job**.
7. After clicking **Run Job**, the test job starts. The detailed information is displayed in the message area. To save the job report, click **Report** in the menu bar and select **Save Report** to save the report to your local disk.

Security Mapping

Follow the steps below to configure the domain mapping, group mapping, and user mapping. You can generate the XML file for the mapping settings, which can be used in DocAve File System Migrator.

1. Navigate to **Migrator Tool > File Migration > Security Mapping**. The Mapping Config window appears.
2. In order to use domain/group/ user mapping, configure the LDAP (Lightweight Directory Access Protocol) settings. Click **LDAP Settings** on the top and the LDAP Setting window appears.
3. In the LDAP Config area, select the **Source Domain/ Destination Domain** option and configure the following settings.
 - **LDAP Path** – Enter the IP address or host name where the domain controller is installed.
 - **LDAP UserName** and **LDAP PassWord** – Specify the credentials.
4. Click **Submit** to submit the LDAP settings. The domain information is displayed in the Destination/Source Domains list.
5. After configuring the LDAP settings for source domain and destination domain, click **Save and Close** to save the settings and return to the Mapping Config window.
6. The domains you specified are listed in the Source/Destination Domains field. Configure the mappings as follows.
 - a. **Domain Mapping** – Select a source domain from the Source Domains list and a destination domain from the Destination Domains list, then click **>>** to add the domain mapping to the Domain Mapping list. You can click **<<** to cancel the selected domain mapping.
 - b. **Group Mapping** – Select a source domain and then click **Source Group Filter** tab to filter the groups to be displayed in the Source Groups list. Select a destination domain and then click **Destination Group Filter** tab to filter the groups to be displayed in the Destination Groups list.
 - **Source/Destination Group Filter** – You can filter the groups by the group name. **All** represents to display all groups; **Start With** represents to display the groups whose name starts with the entered value; **Contains** represents to display the groups whose name contains the entered value; **By Regex** represents to display the groups whose name matches the regular expression.Select a source group from the Source Groups list and a destination group from the Destination Groups list, then click then click **>>** to add the group mapping to the Group Mapping list. You can click **<<** to cancel the selected group mapping.
 - c. **User Mapping** – Select a source domain and then click **Source Users Filter** tab to filter the users to be displayed in the Source Users list. Select a destination domain and then click **Destination Users Filter** tab to filter the users to be displayed in the Destination Users list.

- **Source/Destination Users Filter** – You can filter the users by the user’s login/first/last/display name. **All** represents to display all users; **Start With** represents to display the users whose name starts with the entered value; **Contains** represents to display the users whose name contains the entered value; **By Regex** represents to display the users whose name matches the regular expression.

Select a source user from the Source Users list and a destination user from the Destination Users list, then click then click  to add the user mapping to the User Mapping list. You can click  to cancel the selected user mapping.

7. After configuring the mappings, click **Save Mapping to XML File** and the mapping settings are saved to the **SecurityMapping.xml** file in the ... \AvePoint\DocAve6\Agent\data directory. You can upload the XML file to DocAve to apply the mapping settings.

Public Folder Migration

On the Migrator Tool main interface, select the **Public Folder Migration** checkbox and then click **Next** to start. For Exchange Public Folder migration, you can use the **EPF Scan Tool** to scan source contents selected for migration and generate the customized report to view the information. Follow the steps below to configure the Exchange Public Folder connection, customize the information to be displayed, scan the specific source contents, and view the report.

1. Navigate to **Migrator Tool > Public Folder Migration > EPF Scan Tool**. The EPF Analyzer window appears.
2. Configure the Exchange Public Folder connection.
 - a. **Access Method** – Select the access method according to the Exchange Server.
 - Select **WebDAV** if using Exchange Server 2000/2003/2007.
 - Select **Web Services** if using Exchange Server 2007/2010.

For Exchange Server 2007, both **WebDAV** and **Web Services** are applicable.
 - b. **Username** and **Password** – Enter the username (domain\username) and the password for accessing Exchange Public Folder. It is recommended to specify an administrator here in order to have the required permission to load all data, perform the operations on the data.
 - c. **Exchange URL** – Enter the URL of the Exchange Public Folder that the agent accesses to.
3. After configuring the connection, click **Load** to verify the connection and load the source contents. You can click **Save as profile** and enter a profile name to save the connection configurations.
4. The Public Folders node appears on the data tree. Expand the data tree to select the source contents.
5. Click **Options** to customize the information to be displayed in the report. For folder level, configure the following conditions:

- If you want to display the information of the folder whose contained items are more than the specified number, select the **Having more than ... items** checkbox and set the number. By default, the number is 2000.
- If you want to display the information of the folder whose folder structure exceeds the specified levels in full path, select the **Having more than ... in full path** checkbox and set the number. By default, the number is 15.
- If you want to display the information of the folder whose full path exceeds the specified characters, select the **Having more than ... characters in full path** and set the number. By default, the number is 200.
- If you want to display the information of the folder whose folder path contains the invalid characters, select the **Having invalid characters in path**. The invalid characters are /, :, ?, <, >, |, &, ~, #, %, {, }, *, ., ", ', and \.

For item level, configure the following conditions. The information of the item which matches the condition you set will be displayed in the report.

- **Larger than ... KB** – The item whose size is larger than the specified size. The default value is 40000.
- **Having more than ... characters in subject** – The item whose subject exceeds the specified characters. The default value is 100.
- **Having attachment(s) larger than ... KB** – The item whose attachment is larger than the specified size. The default value is 40000.

This option is greyed out, and you must select the **Load attachment information** checkbox first. When scanning the attachment information, the related item must be open which leads to more time cost.

- **Having more than ... attachments** – The item whose attachments are more than the specified number. The default value 20.

This option is greyed out, and you must select the **Load attachment information** checkbox first. When scanning the attachment information, the related item must be open which leads to more time cost.

- **Having invalid characters in name** – The item whose name contains the invalid characters. The invalid characters are /, :, ?, <, >, |, &, ~, #, %, {, }, *, ., ", ', and \.
- **Scan hidden items** – The items that are hidden.

6. Click **OK** to save the settings and return to the EPF Analyzer window. You can click **Default** to use the default settings.
7. Click **Scan** to start scanning.
8. After the scanning completes, the results are displayed in the Scan Result area.
 - **Contains** – Display the number of the folders and items contained in the selected data.
 - **Total Size** – Display the total size of the selected data in the source.

- **Folder** – In the Folder tab, the folder type information is displayed, including the folder type contained in the selected source data, the number of folders for each folder type, and the total size of each folder type.
 - **Items** – In the Items tab, the item type information is displayed, including the item type contained in the selected source data, the number of items for item type, and the total size of each item type.
 - **Exceptions** – In the Exceptions tab, display the information of the folders and files that match the conditions you set in the Options settings.
9. Click **Save** to save the report to the specified location. The report directory is named as the following format: **INFO_PFSCAN_TOOL_Serial_Number**, for example, **INFO_PFSCAN_TOOL_20120730173320**.
 10. In the report directory, you can find three files, **BasicInfoReprot.csv**, **FoldersInfoReport.csv**, and **ItemsInfoReport.csv**.
 - **BasicInfoReprot.csv** – In this file, the basic information of the scan is displayed, including the information of the Exchange connection, the folders you scanned, the scan results, the folder details, and so on.
 - **FoldersInfoReport.csv** – In this file, the folder that matches the conditions you set in the **Options** settings will be displayed, including the information of the condition name, the folder name, the number of items contained in the folder, the folder type, the folder size, and the folder full URL.
 - **ItemsInfoReport.csv** – In this file, the item that matches the conditions you set in the **Options** settings will be displayed, including the information of the condition name, the item name, the item type, the item size, and the item full URL.

Lotus Notes Migration

On the Migrator Tool main interface, select the **Lotus Notes Migration** checkbox and then click **Next** to start. For Lotus Notes migration, use the Migrator Tool to perform the following operations:

- **Net Share Test** – Test the Net Share path.
- **Lotus Notes** – Configure the Lotus Notes connection, the content type mapping, the user mapping, and the InfoPath mapping. Besides, analyze the database and generate the report.

Net Share Test

Follow the steps below to test the Net Share path.

1. Click **Net Share Test** to start using the Net Share test function.
2. Configure the following settings:
 - a. **Path** – Enter the Net Share path for connection.

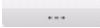

- b. **Username** and **Network Password** – Enter the username and the corresponding password for the connection.
3. Click **Test Connection** to open the connection you specified.
4. After the test is successful, click **Dispose Connection** to close the connection.

Lotus Notes

Follow the steps below to configure the Lotus Notes connection, the content type mapping, the user mapping, and the InfoPath mapping. Besides, analyze the database and generate the report.

Configuring Connections

Follow the steps below to configure the Lotus Notes connection.

1. Navigate to **Migrator Tool > Lotus Notes Migration > Lotus Notes**, and the DocAve Notes Pre-scan Tool window appears.
2. Click **File** in the menu bar and select **New Database Connection**. The New Database Connection window appears.
3. Configure the settings as follows:
 - **INI File** – The .ini file can be found in the path where the valid users of Lotus Notes are saved. By default, the path is *C:\Program Files\lotus\notes\notes.ini*. You can click the  icon to set a new path. After you specify the .ini file, the User ID files will be loaded in the Notes User ID drop-down list.
 - **Notes User ID** – Select a User ID file from the drop-down list. You can click the  icon to select another User ID file.
 - **Notes Password** – Enter the password of the user that you have selected in User ID file.
 - **Domino Server** – Click **Load** to select the Domino server.
 - **Language** – Select the language the Lotus Notes uses.
 - **Browse .nsf from local device** – Browse the specific .nsf file from your local device.
4. Click **Test** to verify the connection configurations and then click **Connect** to connect and load the databases.
5. On the DocAve Notes Pre-scan Tool window, the Lotus Notes databases are displayed and grouped by **Category** and **Template**. The following information of each database is displayed: the title, the server where it is, the created time, the last modified time, the number of the documents in it, the total size, the template, the category, and the database file name.

Configuring Content Mapping Settings

Follow the steps below to configure the content type mapping.

1. Select a database and then click **Mapping > Notes-SharePoint Content Type Mapping > New Mapping**. The Notes-SharePoint Content Type Mapping window appears. You can also click **Edit an Existing Mapping** to edit the existing mapping settings.

2. In the left Notes Forms list, all forms are selected by default, which means each form will be mapped to corresponding SharePoint content type. You can click **Uncheck All** to clear the selection. If you want to map the specified forms to the destination, only check the checkbox before the form name.
3. Double-click a form and the default mapping settings are displayed. View the information below:
 - On the top pane, view the following information.
 - **SharePoint Content Type** – The name of the SharePoint content type that the form maps to. You can change the name by entering the customized name.
 - **Specified Title** – Use the value of a specified field as the title of an item in SharePoint. You can select a field from the drop-down list.
 - **Exclude/Include All** – If you want to exclude/include all the column mappings for the selected form, click **Exclude/Include All**.
 - **Use Default** – If you want to use the content type mapping as the default one, select the **Use Default** checkbox.
 - On the right pane, all fields contained in the selected form and the column mapping for each field are displayed
 - For each column mapping, the following information is displayed: the field name, the field type, the name of the SharePoint column that the field maps to, the SharePoint column type, and the order of the column. You can double-click the column name to edit it, select another column type from the drop-down list, and adjust the order by selecting the new order from the drop-down list.
 - For each column mapping, configure whether to use the column mapping by checking/unchecking the **Included** checkbox; configure whether to hide the column in the destination by checking/unchecking the **Hidden** checkbox; configure whether to show the column in the default view by checking/unchecking the **Show In Default View** checkbox.
4. If you want to add a new column mapping, click **Add Column** to set up a new column mapping. Enter the field title, the field type, the column name, specify the column type and the order, and configure the **Hidden**, **Included**, **Show In Default View** settings. If you want to delete a column mapping, select the mapping and click **Delete Column** to delete a column mapping. If you want to display the **Response To** column in the default view, select the **Show “Response To”** checkbox.
5. Click **Save** to save the current mapping settings to the default **LotusNotesContentType.Domino web access.xml** file (**Domino web access** is the database name). This file is saved in the ...*AvePoint\DocAve6\Agent\data\Migrator\LotusNotesMigratorMappings* directory. Note that only when the file is in this directory, it will take effect.
6. After saving the modifications, click **Close** to return to the DocAve Notes Pre-scan Tool window.
7. If you want to create mappings for multiple databases, refer to the following instructions:
 - a. Select multiple databases and then click **Mapping > Notes-SharePoint Content Type Mapping > Create Mapping for Multiple Databases**. The pop-up window appears.

- b. You can change the databases you selected on the data tree.
- c. Select **Overwrite existing mappings** to overwrite the existing mapping files in the ...*AvePoint\DocAve6\Agent\data\Migrator\LotusNotesMigratorMappings* directory or select **Not overwrite existing mappings** to not overwrite the existing mapping files.
- d. Specify the directory to save the mapping files. Only the mapping files in the default path, *C:\Program Files\AvePoint\DocAve6\Agent\data\Migrator\LotusNotesMigratorMappings*, can be used when performing the Lotus Notes migration job.
- e. Click **Generate** to generate the mapping files for the selected databases.
- f. After generating, click **Close** to return to the DocAve Notes Pre-scan Tool window.

Configuring User Mapping Settings

There are two kinds of user mappings: one is the mapping for domain users, and the other is the mapping for FBA users. Only when the source database type is **Address Book** (for example, the default name.nsf database), you are able to configure the user mapping.

Domain User Mapping

Follow the steps below to configure the domain user mapping.

1. Click **Mapping > Notes-SharePoint User Mapping > Configure LDAP**.
2. On the LDAP Configuration window, enter the information as follows:
 - **LDAP Path** – Enter the IP address or host name where the domain controller is installed.
 - **UserName** and **PassWord** – Specify the credentials.
3. Click **Test Connection** to verify the connection configurations. And then click **OK** to save the settings.
4. Select the **name.nsf** database and then click **Mapping > Notes-SharePoint User Mapping > New Mapping**. The Notes-SharePoint User Mapping window appears. You can also click **Edit an Existing Mapping** to edit the existing mapping settings.
5. On the Domain Users list, the domain user information is displayed. The Notes users are displayed in the right pane.
6. You can set up the mapping manually or automatically.
 - **Manually** – Select a Notes user and then double-click the domain user to create the mapping. The domain user appears in the SharePoint User column, and display name of the selected SharePoint user is updated in the User DisplayName column.
 - Click **Change Mapping Condition** to use the user filter. A pop-up window appears. In the Notes User Filter area, you can filter the users by the user's first name, the last name, and the e-mail address. Select the **Enable** checkbox to activate the corresponding filter.

All represents to display all users; **Start With** represents to filter the users whose name starts with the entered value; **Range** represents to filter the users

whose name's first character is within the specified range; **By Regex** represents to filter the users whose name matches the regular expression.

- For each mapping you created, you can select whether to use it by checking/unchecking the **Include** checkbox. If you want to exclude/include all the user mappings, click **Exclude/Include All**.
 - Click **Add Column** to add a new user mapping. Enter the Notes username and then double-click a domain user to create the mapping.
 - If you want to delete a user mapping, select the mapping and click **Delete Column** to delete a user mapping.
 - **Automatically** – Click **Change Mapping Condition** to set the conditions for matching the domain user and the Notes user automatically. There are three conditions:
 - **Matched by First Name** is used to automatically create the user mapping for the domain user and the Notes user who have the same first name; **Matched by Last Name** is used to automatically create the user mapping for the domain user and the Notes user who have the same last name; **Matched by Email Address** is used to automatically create the user mapping for the domain user and the Notes user who have the same e-mail address.
 - **Match Mode** – If selecting **Combine**, the user mapping will be automatically created when all selected conditions are matched; if selecting **Union**, the user mapping will be automatically created for the uses that matches one of the conditions.
7. If you want to set the user mapping as the default user mapping, select the **Use Default** checkbox on the top.
8. After configuring the user mapping, click **Save** to save the modifications to the XML file. You can select on the pop-up window to decide whether to save the user mapping settings to an XML file or to multiple XML files (which is convenient for editing).
- **Yes** – Save the user mapping settings to multiple XML files.
 - Files – The number of XML files that you want to get.
 - Records – The number of user mapping records in one XML file.
 - **No** – Save the user mapping settings to the default **LotusNotesUserInfo.default.xml** file, which is located in the ...*AvePoint\DocAve6\Agent\data\Migrator\LotusNotesMigratorMappings* directory.

FBA User Mapping

Follow the steps below to configure the FBA user mapping.

1. Click **Mapping > Notes-SharePoint User Mapping > Configure FBA**.
2. On the FBA Configuration window, enter the information as follows:
 - **Membership Provider Name** – Enter the name of the membership provider.
 - **Server** – The IP address or the host name of the SQL server.

- **Protocols** – Select a protocol from the drop-down list, you can select **TCP/IP** or **Named Pipes**. If you select TCP/IP, enter the port number of the SQL server.
 - **Database** – The FBA database name.
 - **Username** and **Password** – Specify the credentials to the FBA database.
3. Click **Test Connection** to verify the connection configurations. And then click **OK** to save the settings.
 4. Select the **name.nsf** database and then click **Mapping > Notes-SharePoint User Mapping > New FBA User Mapping**. The Notes-SharePoint FBA User Mapping window appears.
 5. On the FBA User list, the FBA user information is displayed. The Notes users are displayed in the right pane.
 6. Select a Notes user and then double-click the FBA user to create the mapping. The FBA user appears in the SharePoint User column. For each mapping you created, you can select whether to use it by checking/unchecking the **Include** checkbox. If you want to exclude/include all the user mappings, click **Exclude/Include All**.

InfoPath Mapping

Follow the steps below to configure the InfoPath mapping.

1. Select a database and then click **Mapping > Notes-InfoPath Template and Mapping Generation**. The Notes-InfoPath Mapping window appears.
2. Double-click a Notes form and the columns contained in it are displayed on the right pane, including the information of the column name and the column type. For each column, configure the column mapping as follows:
 - a. Double-click the InfoPath column name to edit it.
 - b. Specify the InfoPath column type from the drop-down list.
 - c. If you want to use the column mapping, select the **AddToInfoPath** checkbox. Otherwise, do not select this checkbox.
3. Enter the SharePoint URL in SharePoint URL text box by using the format below:

http://win-k8d12dge094:24222/sites/0718/test11212/Forms/template.xsn

http://win-k8d12dge094:24222/sites/0718/test11212 is the URL of the destination form library. The site collection where the form library resides is the destination site collection that you want to migrate the source contents to.
4. Click **Generate** to generate two files:
 - Generate the InfoPath file in the the *... \AvePoint\DocAve6\Agent\data\Migrator\LotusNotesMigratorMappings* directory. The file name is the same as the Notes form you selected.
 - Generate the XML file including the mapping settings. The XML file is located in the *... \AvePoint\DocAve6\Agent\data\Migrator\LotusNotesMigratorMappings* directory.

The name of the XML file is **LotusNotesInfoPathMapping.DB2.xml**. **DB2** is the name of the database you selected.

5. Public the InfoPath file to SharePoint and update the template of the destination form library. Then use DocAve to run the migration job to convert the source documents to InfoPath format.

Analyzing Databases

By analyzing the database, you can get the following kinds of information: Database Basic, Design Statistics, ACL, Content Statistics, Complexity, and Replica Comparison. Follow the steps below to analyze the database.




Besides, you can set the filter to filter out the undesired documents and specify the formula to find the desired documents in the specified databases.

1. Select the database(s) and then click **Analyzer > Analyze Database(s)** to analyze the selected database(s). The Analyze Database window appears. You can also right-click the selected database(s) and click Analyze Database(s) to analyze the selected database(s).
2. On the Analyze Database window, choose Database Summary Info to view the summary information of the selected database(s).
3. Choose one database from the drop-down list to show the information of the selected database. Then you can view the different kinds of information on the tabs. You can use the following filters to filter out the undesired documents (that matches the filter rule) contained in the database, and the database information will not include the information of the documents that are filtered out.
 - **Size Filter** – Specify the minimum and the maximum size from the drop-down list. You can select **Default** to restore the default setting. If you do not want to use this filter, select **Disable**.
 - **Time Filter** – Specify the range of the created time and the modified time. If you do not want to use this filter, select **Disable**.
 - **Form Filter** – Enter the form name and click **Add**. You can select an added form and click **Remove** to remove it. If you do not want to use this filter, select **Disable**.
4. To search the documents in the database, click **Analyzer > Search Documents > New Search Formula**. The Search Rule window appears.
5. Enter the formula and select the database(s) that the formula applies to.
6. Click **OK** to search the documents. The Notes Documents window appears to display the search result.

Report

After analyzing the database, you can check the report for the analyzed database. Click **Report** in the menu bar, and you can view the following reports: Database Summary Report, Database ACLs Report,

Database Data Element Report, Database Design Element Report, Database Replicas Comparison Report, and Database Design Element Comparison Report.

1. Select one report and the Reports window appears.
2. Select the database to view the report.
3. Click the  icon to save the report. You can export the report to be **PDF** file or **XLS** file by clicking the  icon next to .

eRoom Migration

On the Migrator Tool main interface, select the **eRoom Migration** checkbox and then click **Next** to start. For eRoom migration, you can use the **eRoom Migration Tool** to scan the source contents in eRoom. And generate the report to view the information of the scanned contents. Besides, you can configure the domain/user/group mapping and save the mapping settings to XML file.

To load the eRoom data, follow the steps:

1. Navigate to **Migrator Tool > eRoom Migration > eRoom Migration Tool**. The eRoom Migration Tool interface appears.
2. Specify a local eRoom user in the **eRoom Local System Account** text box and enter the corresponding password.
3. Click **Load eRoom Structure** to load the eRoom data.
4. Expand the data tree and select the node. The selected node is displayed in the **You choose to scan** text box in the Content Scan area. If you want to display the eRoom template, select the **Show eRoom Templates** checkbox.

For the selected node, refer to the following sections for details of how to configure the domain/user/group mapping and perform the scan.

Configuring Domain/User/Group Mapping

If you want to configure the domain/user/group mapping, follow the steps below to configure the LDAP settings first.

1. On the eRoom Migration Tool interface, click **LDAP Settings**. The LDAP Settings window appears.
2. On the LDAP Setting window, select **SharePoint Domain** to add the SharePoint domain, uncheck **SharePoint Domain** to add the trust domain. You must add a SharePoint domain to create the mapping. Enter the information as follows:
 - **LDAP Path** – Enter the IP address or host name where the domain controller is installed.
 - **LDAP UserName** and **Password** – Specify the credentials.
3. Click **Submit** to submit the settings. The added domain is displayed on the left.
4. Click **Save and Close** to return to eRoom Migration Tool interface.

5. On the data tree, select a node that you want to set up the mapping.
6. Click **User Mapping** and the Mapping Config window appears. You can click the **User Mapping** tab to configure the user mapping and the domain mapping, and click **Group Mapping** to configure the group mapping.
7. To configure the **User Mapping** settings, follow the steps below.
 - a. On the User Mapping tab, select **Show Default Matched User** to view the user mapping that is created automatically, which is hidden by default. The created user mapping is for the eRoom user and the SharePoint user that have the same username. You can double-click the user mapping to cancel the mapping.
 - b. For other users, create the mapping manually. Select a user from the eRoom Users list.
 - c. Double-click a SharePoint user from the SharePoint Users list. The mapping between the two selected users are created and displayed on the user mapping list. When selecting users from the SharePoint Users list, you can use the following filters: Domain, Login Name, First Name, Last Name, Mail Address, and Display Name. For each filter, you can use the following conditions: By eRoom User, All, Start With, Range, By Regex.

For example, if you use Login Name filter, then, configure the conditions as follows:

- **By eRoom User** represents to display the SharePoint user that has the same login name as the selected eRoom user.
- **All** represents to display all users.
- **Start With** represents to display the users whose login name starts with the entered value.
- **Range** represents to display the users whose login name's first character is within the specified range.
- **By Regex** represents to display the users whose login name matches the regular expression.

After the settings, click **Apply** to apply the filter, and then the users who match the filter are displayed.

8. To configure the **Domain Mapping** settings, follow the steps below.
 - a. In the Domain Mapping area, the source domains which are related to the source users are displayed. Click a domain and enter the destination domain name in the pop-up window.
 - b. Click **OK** to create domain mapping. And then click Apply Domain Mapping. The domain users that have the same name will be mapped automatically. Check or uncheck **Show Domain Matched Users** to select whether to display the user mappings in the User Mapping list.
9. On the Group Mapping tab, the eRoom groups are displayed in the eRoom group list. To create the group mapping, enter the SharePoint group name in the SharePoint Group list. If you want to delete the group mapping, delete the group name.

10. After the mapping settings, select **Merge to DocAve Config File** to merge the mapping settings to the XML file which is configured in Mapping Options for eRoom migration, or select **Save Mappings to XML file** to save the mapping settings to an XML file.

Scanning

Follow the instructions below to scan the selected node.

1. Expand the data tree and select the node that you want to scan.
2. In the Content Scan Config area, enter the file type in the text box to specify the file types that are blocked in SharePoint. The blocked file type cannot be migrated to SharePoint.
3. Specify the URL length of the destination SharePoint site. You can enter the destination SharePoint site URL in the SharePoint Site URL text box or select the **SharePoint Site URL Length** option to enter the value of the length.
4. Configure the settings of **Maximum length of the file name**, **Maximum length of the folder name**, and **Maximum length of the SharePoint URL**. If the name/URL exceeds the limitation you set, the information will be displayed in the report when you select **All Content and Users** in the Scan Config area.
 - **Maximum Length of the folder name** – The default value is 60, and the scale you can set is from 1 to 128.
 - **Maximum Length of the file name** – The default value is 80, and the scale you can set is from 1 to 128.
 - **Maximum Length of the SharePoint URL** – The default value is 255, and the scale you can set is from 1 to 260. The length of the SharePoint URL is calculated from the first character of the managed path.
5. In the Scan Config area, you can select four kinds of information to be scanned, **Unsupported Content**, **Check-Out Files**, **All Content and Users**, and **User Mappings**. Select one or multiple, and you will get the information accordingly.
6. Click **Start Scan** to start scanning. The contents being scanned are displayed on the Current Item field.
7. After the scan completes, the Scan Result window appears. Select the Community and the Facility to view the scan report on the right pane.
8. Double-click the value in the scan report to view the details. You can click **Save Detail to XML File** to save the details to an XML file.

Livelink Migration

On the Migrator Tool main interface, select the **Livelink Migration** checkbox and then click **Next** to start. For Livelink migration, you can use the **Livelink Migration Tool** to scan the source data to view the data information. Besides, you can configure the domain/user mapping and save the mapping settings to XML file.

To load the Livelink data, follow the steps:

1. Navigate to **Migrator Tool > Livelink Migration > Livelink Migration Tool**. The Livelink Migration Tool interface appears.
2. Click **Livelink Connection Config** to configure the Livelink connection. The Livelink Connection window appears.
3. On the Livelink Connection window, the existing connection profiles are listed in the Connection Profile list. Double-click one to view and edit it. To create a new connection, enter the name for the connection file in the **Connection Profile Name** text box. You can also click **Connection Profile Browse** to select one from your local disk.
4. Check **Use HTTP Tunneling** to use the Http Tunneling connection mode, or not check to use the default connection mode.
 - **Http Tunneling**
 - **Proxy Option** – Select to use Proxy server or Web server to access to Livelink.
 - **Web Server** – If you select **Web Server**, specify the hostname or IP address of the Web server in the Web Server text box.
 - **Proxy Server** – If you select **Proxy Server**, specify the hostname or IP address of the Proxy server in the Proxy Server text box.
 - **Port** – Specify the port the server is using. By default, the port number is 80.
 - **Livelink CGI URL** – Enter the Livelink CGI URL.
 - **Livelink Username** – Enter a Livelink username for accessing Livelink.
 - **Livelink Password** – Enter the corresponding password.
 - **Livelink Domain** – Enter the Livelink domain name. If the specified Livelink user is in the Livelink system domain, leave this option blank.
 - **HTTP Username** – Enter the HTTP username and the password to set up access to the Web server.
 - **My Workspace** – My Workspace will be displayed, if you select **My Workspace**. If you do not select this option, **Enterprise Workspace** will be displayed.
 - **HTTP Password** – Enter the corresponding password.
 - **Default**
 - **Livelink Server** – Enter the hostname of the Livelink server.
 - **Port** – Specify the port the server is using. By default, the port number is 2099.
 - **Livelink Username** – Enter the Livelink username for accessing Livelink..
 - **Livelink Password** – Enter the corresponding password.
 - **Livelink Domain** – Enter the Livelink domain name. If the specified Livelink user is in the Livelink system domain, leave this value blank.

5. Click **Save and Apply** to save the configurations and return to the Livelink Migration Tool interface. The source data is loaded on the data tree. If you want to add other connections, click **Save** to save the configurations and continue to add a new connection. The connection profile will be displayed in the Connection Profile list. You can also select a connection profile and delete it by clicking **Delete**.

Configuring Domain/User/Group Mapping

If you want to configure the domain/user/group mapping, follow the steps below:

1. On the Livelink Migration Tool interface, click **LDAP Settings**. The LDAP Settings window appears.
2. On the LDAP Setting window, select **SharePoint Domain** to add the SharePoint domain, uncheck **SharePoint Domain** to add the optional trust domain. Enter the information as follows:
 - **LDAP Path** – Enter the IP address or host name where the domain controller is installed.
 - **LDAP UserName** and **Password** – Specify the credentials.
3. Click **Submit** to submit the settings. The added domain is displayed on the left.
4. Click **Save and Close** to save the settings and return to Livelink Migration Tool interface.
5. On the data tree, select the node(s) where you want to set up the mapping.
6. Click **User Mapping** and the Mapping Config window appears.
7. To configure the **User Mapping** settings, follow the steps below.
 - a. If you want to view the user mapping that is created automatically, select **Show Default Matched User** to view the user mapping, which is hidden by default. The created user mapping is for the Livelink user and the SharePoint user that have the same username. You can double-click the user mapping to cancel the mapping.
 - b. For other users, create the mapping manually. Select a user from the Livelink Users list.
 - c. Double-click a SharePoint user from the SharePoint Users list. The mapping between the two selected users are created and displayed on the User Mapping list. When selecting users from the SharePoint Users list, you can use the following filters: Domain, Login Name, First Name, Last Name, Mail Address, and Display Name. For each filter, you can use the following conditions: By Livelink User, All, Start With, Range, and By Regex.

For example, if you use Login Name filter, then, select the condition and configure it as follows:

- **By Livelink User** represents to display the SharePoint user that has the same login name as the selected eRoom user.
- **All** represents to display all users.
- **Start With** represents to display the users whose login name starts with the entered value.
- **Range** represents to display the users whose login name's first character is within the specified range.

- **By Regex** represents to display the users whose login name matches the regular expression.

After the settings, click **Apply** to apply the filter, and then the users who match the filter condition are displayed.

8. To configure the **Domain Mapping** settings, follow the steps below.
 - a. In the Domain Mapping area, the source domains which are related to the source users are displayed. Click a domain and enter the destination domain name in the pop-up window.
 - b. Click **OK** to create domain mapping, and then click **Apply Domain Mapping**. The domain users that have the same name will be mapped automatically. Check or uncheck **Show Domain Matched Users** to select whether to display the user mappings in the User Mapping list.
9. After the mapping settings, select **Merge to DocAve Config File** to merge the mapping settings to the XML file which is configured in Mapping Options in Livelink Migration, or select **Save Mappings to XML file** to save the mapping settings to an XML file.

Configuring Filter Settings

If you want to filter the source contents to be included in the scan, click **Filter Settings** to configure the filter settings.

1. Enter the name of the filter profile in the **Filter Profile Name** text box.
2. Configure the following filter settings. The source data that matches the filter rule will be displayed in the scan report.
 - **File Size** – Filter the files according to the file size. Select the **File Size** checkbox to use the file size filter.
 - Select a condition. The **greater than** condition represents to include the files whose size is greater than the specified size. The **less than** condition represents to include the files whose size is less than the specified size.
 - Specify the file size and the unit. Enter the file size in the text box and then select a unit from **KB**, **MB**, and **GB**.
 - **Time Range** – Filter the files according to the last modified time. Select the **File Time Range** checkbox to use the file time range filter.
 - Select a condition. **Before** means to include the files whose last modified time is before the specified time. **From...To...** means to include the files whose last modified time is within the specified time range. **Later than** means to include the files whose last modified time is later than the specified time.
 - **Customized Metadata** – Filter the files according to the metadata. Select the **Customized Metadata** checkbox to use the customized metadata filter.
 - a. Enter the property name in the **Field** text box.

- b. Select the property type from the **Type** drop-down list. For different types, there are respective conditions to be used.
- c. Specify the condition that you want to use.

If you select **Contains**, the file whose property value contains the entered value matches the filter rule and will be included;

If you select **Is(exactly)**, the file whose property value is exactly the entered value matches the filter rule and will be included;

If you select **Word Starts With**, the file whose property value starts with the entered value matches the filter rule and will be included;

If you select **Ends With**, the file whose property value ends with the entered value matches the filter rule and will be included.

- d. Enter the value in the Value text box.
3. After configuring the filter settings, click **Save** to save the settings and the filter profile are displayed in the Filter Profile list. You can click **Delete** to delete the selected filter profile.

Scanning

By performing the scan, you can view the following information: the users in source, the supported and unsupported content for migration, the checked-out files, the mapped and unmapped users, and the content size. Follow the instructions below to scan the selected node(s).

1. Select the node(s) on the source data tree.
2. If you want to scan the user mapping information of the selected node(s), select **Include User Mapping**.
3. If you want to use the filter profile, select **Include Filter Profile** and select a profile from the drop-down list.
 - Select whether to show all metadata information in the scan results by checking/unchecking **Show All Metadata in Scan Results**.
4. Select the log level from **Info** and **Debug**. When selecting **Debug** level, the log is more detailed than the **Info** level.
5. Click **Start Scan** to start scanning the source selected node(s).
6. After scanning, the Scan Results window appears to display the scan results.
7. Double-click the value in the scan results to view the details in the **Details** area. You can click **Save Detail to XML File** to save the details to an XML file. By default, the scan report is saved in the ...*AvePoint\DocAve6\Agent\bin* directory and it is named as **ScanResult[Serial_Number].xml**, for example, **ScanResult[20120801084334].xml**.

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