



DocAve® 6 Content Manager

User Guide

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What's New in this Guide

- Updated information about the **Exclude user/group without permission** option in [Configuring Default Copy Settings](#), [Configuring Default Move Settings](#), [Building Plans Using Wizard Mode](#), [Building Plans Using Form Mode](#), and [Importing Content](#).

About Content Manager

DocAve Content Manager for SharePoint 2010 and SharePoint 2013 provides administrators with the ability to comprehensively move, copy, and restructure SharePoint sites, Apps for SharePoint, content, and topology within or across SharePoint on-premises and online environments. Through a centralized, highly intuitive management console, featuring familiar ribbon-based controls and wizard-based, step-by-step guidance, administrators can seamlessly manage and restructure SharePoint content with minimal interruption to business processes in order to quickly respond to evolving information governance requirements.

***Note:** AvePoint is not responsible for any circumvention of a SharePoint app's license that may occur from moving an app from one site collection to another or one farm to another. It is the customer's responsibility to ensure that all licenses for the app have been purchased and deployed properly.

Complementary Products

Many products and product suites on the DocAve 6 platform work in conjunction with one another. The following products are recommended for use with Content Manager:

- **DocAve Connector** for collaborating upon network file shares and cloud storage resources directly through SharePoint without migration. Connected content appears as normal SharePoint content, and can be leveraged exactly as if it were residing within a SharePoint document library.
- **DocAve Replicator** for SharePoint for copying SharePoint content within the same SharePoint farm or from one SharePoint farm to another.
- **DocAve Report Center** for SharePoint to examine pain points in the SharePoint infrastructure and report on SharePoint user behavior and changes.
- **DocAve Data Protection** for setting backup and recovery points prior to adjusting SharePoint governance policies in this product.

Submitting Documentation Feedback to AvePoint

AvePoint encourages customers to provide feedback regarding our product documentation. You can [Submit Your Feedback](#) on our website.

Before You Begin

Refer to the sections to review the system requirements for DocAve Content Manager.

AvePoint's Testing Policy and Environment Support

Supported Hardware

AvePoint is committed to maintaining a hardware agnostic platform to ensure that DocAve operates on common Windows file sharing and virtualization platforms. To ensure that DocAve is hardware agnostic, AvePoint tests hardware that is intended to support SharePoint and DocAve infrastructure, storage targets, and hardware-based backup and recovery solutions, as supported by AvePoint's partnerships. AvePoint directly integrates with the following platforms: any Net Share, IBM Storwize Family, FTP, Amazon S3, AT&T Synaptic, Caringo Storage, Del DX Storage, EMC Centra, HDS Hitachi Content Platform, Rackspace Cloud Files, TSM, and Windows Azure Storage.

All other hardware platforms that support UNC addressable storage devices are supported.

***Note:** Most of the hardware partnerships referenced in this guide are intended to make use of advanced functionality (such as snapshot mirroring, BLOB snapshots, indexing, long-term storage, WORM storage, etc.), and are not indications that any changes to the product are required for basic support. In most cases, hardware can be supported with no change to the product.

Supported Backup and Recovery

DocAve supports BLOB backup storage according to the list of hardware platforms above. BLOB snapshot functionality, however, is currently only supported on OEM versions and NetApp hardware.

DocAve supports SQL content and Application database backups via the SharePoint Volume Shadow Copy Service (VSS) on all Windows and SQL server platforms listed above. DocAve also supports snapshot-based SharePoint VSS on all hardware listed above where the hardware partner has certified support with Microsoft.

DocAve supports application and configuration server backups for all the supported software environments listed above. DocAve 6 supports VM backup via Hyper-V/VMWare for the following operating systems: Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2, and Microsoft Hyper-V Server 2012 R2.

Configuration

In order to use Content Manager, the DocAve 6 platform must be installed and configured properly on your farm.

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

Required Permissions

To install and use Content Manager properly, ensure that the Agent account has the following permissions:

Local System Permissions: These permissions are automatically configured by DocAve during installation. Refer to [Local System Permissions](#) for a list of the permissions automatically configured upon installation. If there are no strict limitations on the permissions, you can simply add the DocAve Agent account to the local **Administrators** group to apply all of the required permissions.

1. SharePoint Permissions: These permissions must be manually configured prior to using DocAve 6 Content Manager; they are not automatically configured.
 - 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 most complete quality of service.
 - Full Control to all zones of all Web applications via User Policy for Web Applications

***Note:** To copy or move the Microfeed list in SharePoint 2013, the Agent account must be **granted Full Control** and **account operates as system account** for all zones of all Web applications via User Policy for Web Applications. However, system account cannot be used as Agent account for copying/moving SharePoint apps. To copy/move SharePoint apps, you must ensure that the Agent account is not a system account.
 - Full Control to the User Profile Service

***Note:** This permission is required to copy or move My Sites to a destination. However, to ensure a successful copy or move action on My Site, grant the User Profile Service that is associated with the destination Web application **Full Control** and **Administrator with Full Control** permissions to the Application pool account of the destination Web application.
 - User Policy for Web Application:
 - Full Control to all zones with Account operates as System option selected. This permission is required to restore the newsfeed.

***Note:** To deploy apps, the Agent account cannot be a system account.
 - User Profile Service Application permission:
 - For SharePoint 2010
 - Use Personal Features
 - Create Personal Site

- Use Social Features
 - For SharePoint 2013
 - Create Personal Site (required for personal storage, newsfeed, and followed content)
 - Follow People and Edit Profile
 - Use Tags and Notes
 - Managed Metadata Service: Term Store Administrator
 - Search Service: Full Control
 - Business Data Connectivity Service: Full Control
2. SQL Permissions: These permissions must be manually configured prior to using DocAve 6 Content Manager; they are not automatically configured.
- **db_owner** database role in all of the databases related to SharePoint, including Content, Configuration, Central Administration content, User Profile Service, and App Management databases.
 - **db_owner** database role in the Nintex Workflow databases, including configuration and content databases.

If a Web application enables the forms-based authentication and uses the database as the method of forms-based authentication, ensure at least one condition:

- The Agent account has the **db_owner** database role in the FBA database.
- Select a user in the **connectionString** node in this Web application's **web.config** profile that has the access to the FBA database.

Local System Permissions

Some local system permissions are automatically configured during DocAve 6 installation. The user will be set up as a member of the following local groups:

- IIS WPG (for IIS 6.0) or IIS IUSRS (for IIS 7.0)
- Performance Monitor Users
- DocAve Users (this group is created by DocAve automatically with the following permissions):
 - Full Control to the Registry of
HKEY_LOCAL_MACHINE\SOFTWARE\AvePoint\DocAve6
 - Full Control to the Registry of
HKEY_LOCAL_MACHINE\System\CurrentControlSet\Services\EventLog
 - Full Control to the Communication Certificate

- Permission of **Log on as a batch job** (navigate to: *Control Panel > Administrative Tools > Local Security Policy > Security Settings > Local Policies > User Rights Assignment*)
- Full Control to the DocAve Agent installation directory

Licensing and Permissions of Content Manager for SharePoint Online

Before using Content Manager for SharePoint Online, ensure that you meet the following prerequisites:

- You have purchased the corresponding license for Content Manager for SharePoint Online.
- You have created the SharePoint Sites Group in **Control Panel** and added one or more SharePoint on-premises or SharePoint Online site collections to the group. For more information, refer to the [Control Panel Reference Guide](#).

Required Permissions for Agent Account

The permission requirements for the Agent account used for Content Manager for SharePoint Online are as follows:

Local System Permissions: To install and use Content Manager properly, ensure that the Agent account has the proper Local System Permissions. DocAve automatically configures some permissions during installation. Refer to [Local System Permissions](#) for more details. .

If there are no strict limitations on the permissions, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.

Required Permissions for the User Used to Register the Site Collection

The permission requirements for the user selected when adding the site collections to SharePoint Sites Group are as follows:

***Note:** The user must have the following permissions to each site collection added to the SharePoint Sites Group.

- Site Collection Administrator
- User Profile Service:
 - Follow People and Edit Profile
 - Use Tags and Notes
- Managed Metadata Service: Term Store Administrator
- The **Read** permission to the **Apps for SharePoint** library in the App Catalog Site Collection

Health Analyzer

AvePoint recommends using Health Analyzer to check the prerequisites you need to correctly use DocAve Content Manager.

***Note:** Only the users in the DocAve **Administrators** group can use Health Analyzer.

***Note:** For the rule **Agent Account Cannot be SharePoint System Account**, you can ignore the result of this rule if you are not going to deploy apps on the specific Web applications.

For more information about Health Analyzer, refer to the [DocAve 6 Installation Guide](#).

Getting Started

Refer to the sections below for important information on getting started with Content Manager.

***Note:** When logging into DocAve Manager and operating the Content Manager module using the users in the System groups, the users can only operate the:

- Farms to which it has permission.
- Functions to which it has permission.
- DocAve objects (such as, plans, jobs, registered SharePoint sites, and so on) to which it has permission.

Administrators or the users in the System groups can grant different permission levels to different farms. For more information on permission control of users in the System group, refer to the [Control Panel Reference Guide](#).

Launching Content Manager

To launch Content Manager and access its functionality, complete the following steps:

1. Click the **DocAve** tab to display all product suites for DocAve 6.
2. Click **Administration** to access the Administration modules.
3. Click **Content Manager** to launch this module.

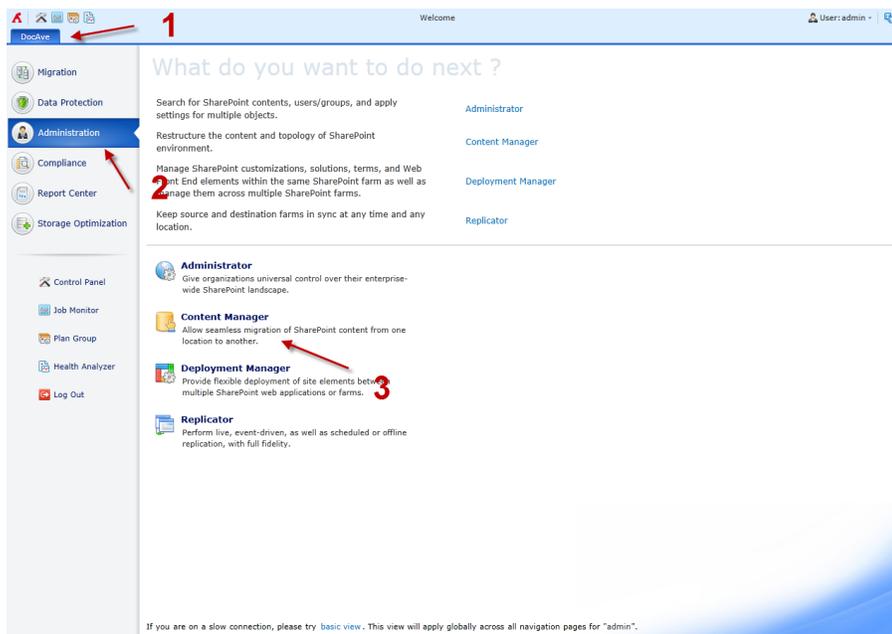


Figure 1: DocAve module launch window.

Navigating DocAve

DocAve mimics the look and feel of many Windows products, making for an intuitive and familiar working environment. While there are many windows, pop-up displays, and messages within DocAve products, they share similar features and are navigated in the same ways.

Below is a sample window in DocAve. It features a familiar, dynamic ribbon, and a searchable, content list view.

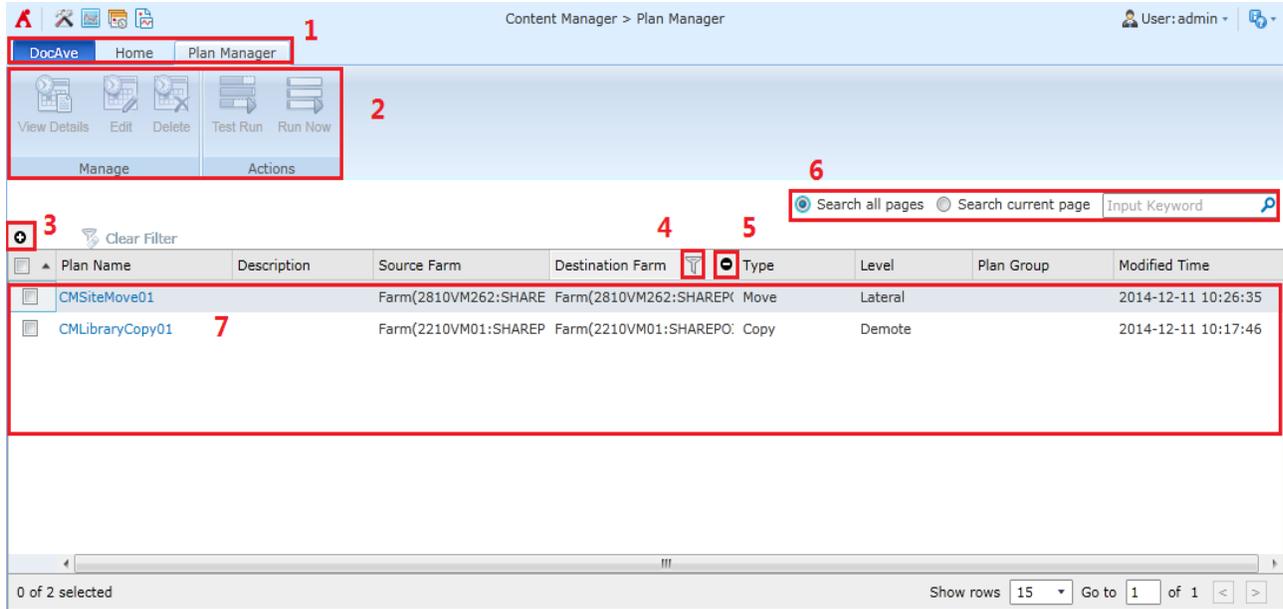


Figure 2: Navigating DocAve.

1. Ribbon Tabs— Allows users to navigate to the DocAve Welcome page and within the active module.
2. Ribbon Panes – Allows users to access the functionality of the active DocAve module.
3. Manage columns (⊕) – Allows users to manage which columns are displayed in the list. Click the manage columns (⊕) button, and then select the checkbox next to the column name in the drop-down list.
4. Hide the column (⊖) – Allows users to hide the selected column.
5. Filter the column (🔍) – Allows users to filter the information in the List View. Click the filter the column (🔍) button next to the column and then select the checkbox next to the column name.
6. **Search** – Allows users to search the List View pane for a keyword or phrase. You can select **Search all pages** or **Search current page** to define the search scope.
***Note:** The search function is not case sensitive.
7. Management Pane – Displays the actionable content of the DocAve module.

Content Manager Interface

The Content Manager user interface is made up of the following four main areas:

1. **Tab** – Navigate between the different tabs of Content Manager.
2. **Ribbon** – Toolbar where you can perform actions, configure settings, and access **Job Monitor** for Content Manager jobs.
3. **Source pane** – Access the SharePoint objects at different levels of your farms with content that you want to copy or move.
4. **Destination pane** – Access the SharePoint objects at different levels of your farms with content that you want to copy or move.

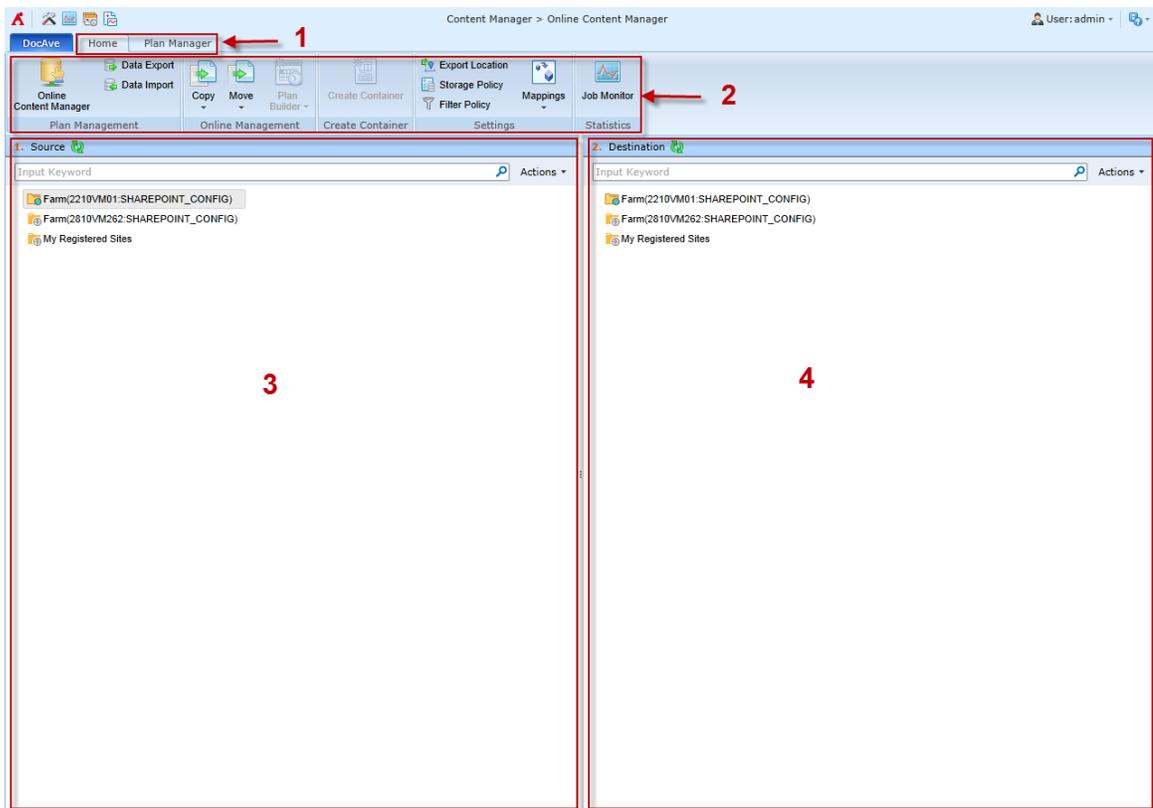


Figure 3: Content Manager Interface.

Basic Content Management Functions

While Content Manager allows you to create plans so that you can repeatedly copy and/or move jobs without having to reconfigure the settings each time, you can also perform these simple tasks without having to create an entire plan.

- **Copy** – When Content Manager runs a copy job, SharePoint content and securities are copied from the source nodes to the destination node based on the settings you configured in **Default Copy Settings**.
- **Move** – When Content Manager runs a move job, SharePoint content and securities are copied from the source nodes to the destination node based on the settings you configured in **Default Move Settings**. The source node content and securities are then deleted. The deletion of the source content and securities can be configured to occur automatically after the **Move** job is complete, or you may choose to manually delete the content.

***Note:** Only the items within lists are deleted in the source node content. The securities of the container level objects (e.g. Web application, site collection, site, list, and folder) are not deleted.
- **Create Container** – Content Manager allows you to create containers within SharePoint without having to leave the DocAve interface. The **Create Container** feature is useful in cases where you want to copy or move content from the source nodes to a new destination node without having to pre-create the destination node within SharePoint.

***Note:** If you select the **Include New** checkbox in the **Source** pane, content created after the plan is saved will be included when the plan is executed.

***Note:** You can download the job details and related logs in **Job Monitor**. For more information, refer to [Job Monitor Reference Guide](#).

Copying Content

The following two sections explain how to configure **Default Copy Settings** and how to perform a simple copy of content.

Use the **Default Copy Settings** to customize a template for your copy settings. These settings will be applied to any new copy jobs you create. You will be able to edit these settings. To configure the default copy settings, complete the following steps:

1. In the **Home** tab of the **Content Manager** interface, click **Copy** on the ribbon.
2. Select **Default Copy Settings** from the drop-down menu. The **Default Copy Settings** tab appears.

To edit the configured default copy settings before running a copy job, complete the following steps:

1. In the **Home** tab of the **Content Manager** interface, click **Copy** on the ribbon.

2. Select **Copy** from the drop-down menu. The **Copy** tab appears.
3. Click **Edit** on the ribbon. The **Edit Copy Settings** interface appears.

***Note:** You can only modify the settings supported by the selected source and destination nodes in the **Edit Copy Settings** interface.

Configuring Default Copy Settings

In the **Default Copy Settings** tab or the **Edit Copy Settings** interface under the **Copy** tab, make your settings selections in the following fields:

1. **Action** – Select **Attach** to transfer the source node as a child node underneath the destination node, or select **Merge** to add the content, securities, and configurations of the source node to the destination node.
2. **Promote Method** – Choose to promote only the top-level site to the site collection or promote all of the selected sites to site collections.

This section only appears when satisfying all of the following conditions:

- Select the site collection level or site level nodes in the source tree and select the Web application node in the destination tree.
***Note:** When you select the site collection level nodes as the source, only the **Promote all sites to site collections** option is available.
- Select **Merge** as the **Action** option.

3. **Which managed path would you like to use in the destination?** –Select the **Change the managed path in destination** checkbox to configure the managed path you are about to use in the destination by entering the desired value in the **Enter an existing Wildcard Inclusion Managed Path** text box.

This section only appears when satisfying all of the following conditions:

- Select the site collection level or site level nodes in the source tree and select the Web application node in the destination tree.
 - Select **Merge** as the **Action** option.
4. **Filter Policy** – Select a filter policy from the drop-down list, or click **New Filter Policy** from the drop-down list. Filter policies allow you to select specific objects or data within each SharePoint level from site collection down to the item level. For information on creating a filter policy, see the [DocAve 6 Control Panel Reference Guide](#).

***Note:** When using the filter policy in SharePoint Online, the **Created By** rule is not supported. Exceptions will be recorded in the job report.

5. **Configuration** – Choose if you want to add migrate configurations to the destination:
 - Select the **Copy configuration** checkbox to copy the properties, descriptions, titles, settings, and features from the source node to the destination node. If you want to keep

the look and feel of the source site including the quick launch, top link bar, tree view, site theme, and master page, select the **Keep look and feel** checkbox.

***Note:** This function will only take effect when the followings are in place:

- The source node is a site and the destination node is a top-level site or a site collection.
- **Merge** is selected as the action to take in the **Action** field.
- Leave the **Copy configuration** checkbox deselected if you do not want to migrate configuration to the destination. Then, choose from the following options:
 - Select **Copy the item-dependent columns and content types to maintain item integrity**. Then, select a conflict resolution method for these items' columns and content types from the drop-down list:
 - **Do not copy the columns and content types, or the corresponding items** – Ignores the conflicting columns, content types, and corresponding items, and do nothing on the source and destination nodes.
 - **Overwrite the columns and content types** – Overwrites the destination columns and content types with the source node.
 - **Append the columns and content types to destination** – Keeps the destination columns and content types when there is a conflict. In addition, copies the source columns and content types to the destination node with a numerical suffix added (for example, ColumnName_1, ColumnName_2, etc.).
 - Select **Do not copy the item-dependent columns or content types. Report the items if the corresponding column or content type is not found in destination**. The corresponding items are not copied to the destination. The job report will show items if the corresponding column or content type is not found in the destination node.
- 6. **Security** – Select the **Copy security** checkbox if you want to copy the user and/or group permissions from the source node to the destination node, including SharePoint permission level and permission inheritance of SharePoint objects. Additionally, select the **Exclude user/group without permission** checkbox if you want to exclude users and/or groups that do not have permissions.

***Note:** The definition of users or groups without permission varies with the selected source node:

- If the source node is a site collection, the users or groups that meet the following two conditions are the users or groups without permissions:
 - Users or groups that exist in the source node, but are not Site Collection Administrators.

- Users or groups that exist in the source node, but have no permissions to the top-level site or any sites of the site collection.

***Note:** If the source node is a Web application, the permissions of each site collection are handled individually, and you can refer to the definition above.

- If the source node is a site, users or groups without permissions refer to the users or groups that exist in the source node, but have no permissions to this site.
- If the source node is an object whose level is lower than the site level, users or groups without permissions refer to the users or groups that exist in the source node, but have no permissions to the site where the source object resides.

You cannot view these types of users or groups in the **People and Groups – [SiteName] Members** page of a site, but you can view them in the **People and Groups – All People** page. To go to the **People and Groups – All People** page, modify the value of **MembershipGroupId** in the URL of the **People and Groups – [SiteName] Members** page to **MembershipGroupId=0**, then you are brought to the **People and Groups – All People** page.

7. **Content** – Select the **Copy content** checkbox if you want to copy content in the libraries, folders, and items from the source node to the destination node. Select **Include list attachment** if you want to also copy the attached content in lists.
8. **User Profile** – Select the **Copy user profile** checkbox if you want to copy user profiles from the source node to the destination node.

***Note:** This function will only take effect when the source node level is equal to or higher than the site collection level because users are saved in the top-level site.

9. **Workflow** – Select the **Include workflow definition** checkbox to copy the definition of existing workflows for the selected content from the source node to the destination node. Select the **Include workflow instance** to copy the state, history, and tasks of existing workflows for the selected content. By default, the **Include completed instance** checkbox is selected to copy the completed instance. You can select the **Include running instance** checkbox if you want to copy the currently running instance in the source node to the destination node, and then select one of the following radio buttons:

- **Cancel workflows** – Cancel the copied or moved running workflow in the destination node after the Content Manager jobs.
- **Restart workflows** – Restart the copied or moved running workflow in the destination node after the Content Manger jobs.

***Note:** Content Manager does not support the workflow instances associated with checked-out files.

10. **Managed Metadata Service Setting** – Select the **Copy Managed Metadata Service** checkbox if you want to copy the related managed metadata services from the source node to the destination node, and then select one of the following radio buttons:

- **Term** – Copy terms that are used in the source, their parent terms, the term sets where the used terms reside, and the names of the groups where the used terms reside to the destination.
 - **Term set** – Copy the whole term sets where the used terms reside in the source (regardless if the terms in the term sets are used by the source node or not) to the destination.
 - **Managed Metadata Service** – Copy the whole Managed Metadata Services that are related to the source node to the destination.
11. **Preserve the Null Column Values** – Select **Yes** to preserve the null values of item columns (such as newly created columns), or select **No** to replace null values with default values in the destination node.
 12. **Folder Structure Management** – Choose if you want to collapse the folder structure of the copied or moved content. Select the **Collapse Folder Structure** checkbox to enable this feature. DocAve also allows you to add a column to the destination for displaying the source folder path or parent folder name. Select the **Add a column to display the source folder path or parent folder name** checkbox to enable this feature as well.
 - **Column to display the source folder path** – Enter a column name in the text box to add a **Single Line of Text** column to display the source folder path.
 - **Column to display the parent folder name** – Enter a column name in the text box to add a **Single Line of Text** column to display the source parent folder name.
 13. **Data Compression** – Select the **Compression** checkbox if you want to compress the data when it is copied. If you choose to compress the data, use the slider to select the compression rate. Fastest compression rates results in a larger data sets. Lower compression rates create smaller better quality data sets, however the compression takes more time to perform.

***Note:** Smaller data sets take longer to backup and recover.
 14. **Column Mapping** – Maps source columns to the configured columns in the destination, or change the column name to another one. The specified source columns will be mapped according to the selected column type, and the column values will be mapped according to the added value mappings. The column can also be changed to **Managed Metadata** or **Lookup**. Select a column mapping from the drop-down list, or click **New Column Mapping**. For information on creating a column mapping, see the [DocAve 6 Control Panel Reference Guide](#).

***Note:** If you select the column type **Change to Lookup** while setting up your column mapping, make sure that the **Lookup** column can only be associated with the list or list column that exists in the destination.
 15. **Content Type Mapping** –Select a content type mapping from the drop-down list, or click **New Content Type Mapping**. For information on creating a content type mapping, see the [DocAve 6 Control Panel Reference Guide](#).
 16. **Template Mapping** – Replaces site and list templates. By inputting or selecting a template ID, the source template is changed to the destination template. Select a template mapping from

the drop-down list, or click **New Template Mapping**. For information on creating a template mapping, see the [DocAve 6 Control Panel Reference Guide](#).

17. **User Mapping** – Maps a source user to a target user. If the same user has a different username in Domain A than in Domain B, or if you want to copy an individual user’s content, permissions, and metadata in Domain A to another user in Domain B, the user’s permissions and metadata will not be lost when content is moved. Select a user mapping from the drop-down list, or click **New User Mapping**. For information on creating a user mapping, see the [DocAve 6 Control Panel Reference Guide](#).
18. **Domain Mapping** – Maps a source domain to a destination domain. The source domain name will be replaced by the configured destination domain name, and the user in the source domain will be mapped to the destination user with the same login name. Select a domain mapping from the drop-down list, or click **New Domain Mapping**. For information on creating a domain mapping, see the [DocAve 6 Control Panel Reference Guide](#).
19. **Language Mapping** – Displays the destination node in a different language than the source node after the plan has been executed. Select a language mapping from the drop-down list, or click **New Language Mapping**. For information on creating a language mapping, see the [DocAve 6 Control Panel Reference Guide](#).
20. **List Name Mapping** – Changes the existing source lists of the copied or moved objects to your designated lists in the destination. Select a list name mapping from the drop-down list, or click **New List Name Mapping**. For information on creating a list name mapping, see the [DocAve 6 Control Panel Reference Guide](#).
21. **Backup Environment Before Running Plan** – Select the **Backup the destination environment** checkbox if you want to create a copy of the destination node prior to performing the copy. If you choose to back up the destination environment before performing a copy, you must designate a storage policy. Select the **Backup the destination environment** checkbox. The **Storage policy** drop-down list appears. Select a storage policy from the drop-down list or click **New Storage Policy** to create a new one.

***Note:** Content Manager only supports the Backup type storage policy for the retention rule. For more information on storage policies, see the [DocAve 6 Control Panel Reference Guide](#).
22. **Conflict Resolution** – Choose **Skip**, **Merge**, or **Replace** from the **Container level conflict resolution** drop-down list. Select the **Check lower objects** checkbox if you want to configure content level conflict resolution, then choose **Skip**, **Overwrite**, **Overwrite by Last Modified Time**, or **Append** from the **Content level conflict resolution** drop-down list. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A: Conflict Resolution](#).
23. **Apps Conflict Resolution** – Choose **Skip**, **Update App Only**, or **Replace App and AppData** from the **Apps conflict resolution** drop-down list. For detailed information on how Content Manager resolves apps conflicts based on these configurations, see [Apps Conflict Resolution](#).

***Note:** **Apps Conflict Resolution** only takes effect on the app instances.
24. **Notification** –Select a notification profile from the drop-down list. Click **View** beside the drop-down list to view details of the notification profile, or click **New Notification Profile**. For information on creating a notification profile, see the [DocAve 6 Control Panel Reference Guide](#).

In the **Default Copy Settings** tab, click **Save** to save these configurations and return to the **Home** tab of Content Manager, or click **Cancel**.

Performing a Simple Copy

To perform a simple copy in Content Manager, select the node you want to copy from the **Source** pane, and select the desired destination node from the **Destination** pane. You can use **Advanced Search** functionality in the source and destination trees. For more information, refer to [Using Advanced Search in the Source and Destination Trees](#).

***Note:** For the SharePoint on-premises environment, make sure that the source node and the destination node are in the same version of SharePoint. If the site within SharePoint 2013 is a site with 2010 experience version, it can only be copied to the site with the same experience version.

***Note:** If the **Record Declaration Settings** in the destination node conflict with the **Record Declaration Settings** in the source node, by default the **Record Declaration Settings** in the destination node will be overwritten by the source node settings.

Click **Copy** on the ribbon, and then select **Copy** from the drop-down list. You will be brought to the **Copy** tab. The **Copy** tab provides the following tools:

- **View** – Click **View** on the ribbon if you want to review the copy settings.
***Note:** If the selected source nodes or destination node is in the SharePoint on-premises environment, the **Agent Group** setting appears in the **View** tab. The Agent group in the SharePoint on-premises environment will be loaded as the corresponding Agent group to execute the simple copy.
- **Edit** – Click **Edit** on the ribbon to make changes to the settings. You will be brought to the **Edit Copy Settings** page. To configure the settings, refer to [Configuring Default Copy Settings](#).
- **Preview** – Click **Preview** on the ribbon to see what the data tree of the destination node will look like after the job is run. The source node is marked by a prompt message: **From Source**.
***Note:** This function supports Web application, site collection, and site level objects.
- **Run Now** – Click **Run Now** on the ribbon. Your copy job will begin immediately, and you will be brought back to the **Home** tab of Content Manager.
- **Cancel** – Click **Cancel** on the ribbon to close the **Copy** tab without running the **Copy** job.

Moving Content

The following two sections explain how to configure **Default Move Settings** and perform a simple move of content.

Use the **Default Move Settings** feature to customize a template for your move settings. These settings will be applied to any new move jobs you create. You will be able to edit these settings before running the move job. To configure default move settings, complete the following steps:

1. In the **Home** tab of the **Content Manager** interface, click **Move** on the ribbon.
2. Select **Default Move Settings** from the drop-down menu. The **Default Move Settings** tab appears.

To edit the configured default move settings, complete the following steps:

1. In the **Home** tab of the **Content Manager** interface, click **Move** on the ribbon.
2. Select **Move** from the drop-down menu. The **Move** tab appears.
3. Click **Edit** on the ribbon to edit the default copy settings. The **Edit Move Settings** interface appears.

***Note:** Before running a move job, you can only modify the settings supported by the selected source and destination nodes in the **Edit Move Settings** interface.

Configuring Default Move Settings

In the **Default Move Settings** tab or the **Edit Move Settings** interface under the **Move** tab, make your settings selections in the following fields:

1. **Action** – Select **Attach** to transfer the source node as a child node underneath the destination node, or select **Merge** to add the content, securities, and configurations of the source node to the destination node.
2. **Promote Method** – Choose to promote only the top-level site to the site collection or promote all of the selected sites to site collections.

This section only appears when satisfying all of the following conditions:

- Select site collection level or site level nodes in the source tree and select the Web application node in the destination tree.

***Note:** When you select site collection level nodes as the source, only the **Promote all sites to site collections** option is available.

- Select **Merge** as the **Action** option.

3. **Which managed path would you like to use in the destination?** – Select the **Change the managed path in destination** checkbox to configure the managed path you are about to use by entering the desired value in the **Enter an existing Wildcard Inclusion Managed Path** text box.

This section only appears when satisfying all of the following conditions:

- Select site collection level or site level nodes in the source tree and select the Web application node in the destination tree.

- Select **Merge** as the **Action** option.

4. **Filter Policy** – Select a filter policy from the drop-down list, or click **New Filter Policy**. Filter policies allow you to select specific objects or data within each SharePoint level from site

collection down to the item level. For information on creating a filter policy, see the [DocAve 6 Control Panel Reference Guide](#).

***Note:** When using the filter policy in SharePoint Online, the **Created By** rule is not supported. Exceptions will be recorded in the job report.

5. **Configuration** – Choose if you want to migrate the configurations to the destination:

- Select the **Move configuration** checkbox to move the properties, descriptions, titles, settings, and features from the source node to the destination node. If you want to keep the look and feel of the source site including the quick launch, top link bar, tree view, site theme, and master page, and then select the **Keep look and feel** checkbox.

***Note:** This function will only take effect when the followings are in place:

- The source node is a site, the destination node is a top-level site or a site collection.
- **Merge** is selected as the action to take in the **Action** field.
- Leave the **Move configuration** checkbox deselected if you don't want to migrate the configuration to the destination. Then, choose from the following options:
 - Select **Move the item-dependent columns and content types to maintain item integrity**. Then, select a conflict resolution method for these items' columns and content types from the drop-down list:
 - **Do not move the columns and content types, or the corresponding items** – Ignores the conflicting columns, content types, and the corresponding items, and do nothing on the source and destination node.
 - **Overwrite the columns and content types** – Overwrites the destination columns and content types with the source node.
 - **Append the columns and content types to destination** – Keeps the destination columns and content types when there is a conflict. In addition, copies the source columns and content types to the destination node with a numerical suffix added (for example, ColumnName_1, ColumnName_2, etc.).
 - Select **Do not move the item-dependent columns or content types. Report the items if the corresponding column or content type is not found in destination**. The corresponding items are not moved to the destination. DocAve will report the items if the corresponding column or content type is not found in the destination node.

6. **Security** – Select the **Move security** checkbox to move the user and/or group permissions from the source node to the destination node, including SharePoint permission level and permission inheritance of SharePoint objects. Select the **Exclude user/group without permission** checkbox to not copy users and/or groups that have no permissions.

***Note:** The definition of users or groups without permission varies with the selected source node:

- If the source node is a site collection, the users or groups that meet the following two conditions do not have permissions:
 - Users or groups that exist in the source node, but are not Site Collection Administrators.
 - Users or groups that exist in the source node, but have no permissions to any sites of the site collection.

***Note:** If the source node is a Web application, the permissions of each site collection are handled individually, and you can refer to the definition above.

- If the source node is a site, users or groups without permissions refer to the users or groups that exist in the source node, but have no permissions to this site.
- If the source node is an object whose level is lower than the site level, users or groups without permissions refer to the users or groups that exist in the source node, but have no permissions to the site where the source object resides.

You cannot view these types of users or groups in the **People and Groups – [SiteName] Members** page of a site, but you can view them in the **People and Groups – All People** page. To go to the **People and Groups – All People** page, modify the value of **MembershipGroupId** in the URL of the **People and Groups – [SiteName] Members** page to **MembershipGroupId=0**. You will be brought to the **People and Groups – All People** page.

7. **Content** – Select the **Move content** checkbox to move content in libraries, folders, and items from the source node to the destination node. Select the **Include list attachment** to also move the attached content in lists.
8. **User Profile** – Select the **Move user profile** checkbox to move user profiles from the source node to the destination node.
9. **Workflow** – Select the **Include workflow definition** checkbox to move the definition of the existing workflows for the selected content and/or select the **Include workflow instance** to move the state, history, and tasks of existing workflows for the selected content. By default, the **Include completed instance** checkbox is selected to copy the completed instance from the source node to the destination node. You can select the **Include running instance** checkbox if you want to copy the currently running instance, and then select one of the following radio buttons:
 - **Cancel workflows** – Cancel the copied or moved running workflow in the destination node after the Content Manager jobs.
 - **Restart workflows** – Restart the copied or moved running workflow in the destination node after the Content Manger jobs.

***Note:** Content Manager does not support the workflow instances associated with checked-out files.

10. **Managed Metadata Service Setting** – Select the **Copy Managed Metadata Service** checkbox if you want to copy the related managed metadata services from the source node to the destination node, and then select one of the following radio buttons:
 - **Term** – Copy terms that are used in the source, their parent terms, the term sets where the used terms reside, and the names of the groups where the used terms reside to the destination.
 - **Term set** – Copy the whole term sets where the used terms reside in the source (regardless if the terms in the term sets are used by the source node or not) to the destination.
 - **Managed Metadata Service** – Copy the whole Managed Metadata Services that are related to the source node to the destination.
11. **Preserve the Null Column Values** – Select **Yes** to preserve the null values of item, or select **No** to replace null values with default values in the destination node.
12. **Folder Structure Management** – Choose if you want to collapse the folder structure of the copied or moved content. Select the **Collapse Folder Structure** checkbox to enable this feature. DocAve also allows you to add a column to the destination for displaying the source folder path or parent folder name. Select the **Add a column to display the source folder path or parent folder name** checkbox to enable this feature as well.
 - **Column to display the source folder path** – Enter a column name in the text box to add a **Single Line of Text** column to display the source folder path.
 - **Column to display the parent folder name** – Enter a column name in the text box to add a **Single Line of Text** column to display the source parent folder name.
13. **Data Compression** – Select the **Compression** checkbox if you want to compress the data when it is moved. If you choose to compress the data, use the slider to select the compression rate. Fastest compression rate results in a larger data set. Best compression rate results in a Slower Compression rates result in smaller, better quality data sets.

***Note:** Smaller data sets take longer to backup and recover.
14. **Column Mapping** – Maps source columns to the configured columns in the destination, or change the column name. The selected source columns will be mapped according to the selected column type, and the column values will be mapped according to the added value mappings. The column can also be changed to Managed Metadata or Lookup. Select a column mapping from the drop-down list, or click **New Column Mapping**. For information on creating a column mapping, see the [DocAve 6 Control Panel Reference Guide](#).

***Note:** If you select the column type **Change to Lookup** while setting up your column mapping, make sure that the **Lookup** column can only be associated with the list or list column that exists in the destination.
15. **Content Type Mapping** – Select a content type mapping from the drop-down list, or click **New Content Type Mapping**. For information on creating a content type mapping, see the [DocAve 6 Control Panel Reference Guide](#).

16. **Template Mapping** – Replaces site and list templates. By inputting or selecting a template ID, the source template is changed to the destination template. Select a template mapping from the drop-down list, or click **New Template Mapping**. For information on creating a template mapping, see the [DocAve 6 Control Panel Reference Guide](#).
17. **User Mapping** – Maps a source user to a target user. If the same user has a different username in Domain A than in Domain B, or if you want to move an individual user’s content, permissions, and metadata in Domain A to another user in Domain B, the user’s permissions and metadata will not be lost when content is moved. Select a user mapping from the drop-down list, or click **New User Mapping**. For information on creating a user mapping, see the [DocAve 6 Control Panel Reference Guide](#).
18. **Domain Mapping** – Maps a source domain to a destination domain. The source domain name will be replaced by the configured destination domain name, and the user in the source domain will be mapped to the destination user which has the same login name. Select a domain mapping from the drop-down list, or click **New Domain Mapping**. For information on creating a domain mapping, see the [DocAve 6 Control Panel Reference Guide](#).
19. **Language Mapping** – Displays the destination node in a different language than source node after the plan has been executed. Select a language mapping from the drop-down list, or click **New Language Mapping**. For information on creating a language mapping, see the [DocAve 6 Control Panel Reference Guide](#).
20. **List Name Mapping** – Changes the existing source lists of the copied or moved objects to your designated lists in the destination. Select a list name mapping from the drop-down list, or click **New List Name Mapping**. For information on creating a list name mapping, see the [DocAve 6 Control Panel Reference Guide](#).
21. **Source Deletion Method** – Select **Manual** to delete the source content once the job is complete. To delete it manually, select the move job in Job Monitor, then click **Delete** on the ribbon and select **Delete Content** from the drop-down list. Select **Automatic** to have DocAve delete the source content.
22. **Delete Source Checked Out Documents** – Select **Yes** to have DocAve delete the checked out documents on the source node when the source content is deleted. By default, **No** is selected.
23. **Backup Environment Before Running Plan** – Select the **Backup the source environment** checkbox if you want to create a copy of the source node prior to performing the. If you choose to back up the source and/or destination environment before performing a copy, you must designate a storage policy. Select storage policy or click **New Storage Policy**.

***Note:** Content Manager only supports the Backup type storage policy for retention rule. For more information on storage policies, see the [DocAve 6 Control Panel Reference Guide](#).

***Note:** The source node is deleted as the second step in a move job. If Backup the source environment is not selected, you will not be able to restore the source node to its state prior to the move job.
24. **Conflict Resolution** – Choose **Skip**, **Merge** or **Replace** from the **Container level conflict resolution** drop-down list. Select the **Check lower objects** checkbox to configure content level conflict resolution, then choose **Skip**, **Overwrite**, **Overwrite by Last Modified Time**, or **Append**

from the **Content level conflict resolution** drop-down list. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A](#).

25. **Apps Conflict Resolution** – Choose **Skip**, **Upgrade App Only**, or **Replace App and AppData** from the **Apps conflict resolution** drop-down list. For detailed information on how Content Manager resolves apps conflicts based on these configurations, refer to [Apps Conflict Resolution](#).

***Note:** **Apps Conflict Resolution** only takes effect on the app instances.

26. **Notification** –Select a notification profile from the drop-down list. Click **View** beside the drop-down list to view details of the notification profile, or click **New Notification Profile**. For information on creating a notification profile, see the [DocAve 6 Control Panel Reference Guide](#).

27. In the **Default Move Settings** tab, click **Save** to save these configurations and return to the **Home** tab of Content Manager, or click **Cancel**.

Performing a Simple Move

To perform a simple move in Content Manager, select the node you want to move from the **Source** pane, and select the destination node from the **Destination** pane. You can use the **Advanced Search** functionality in the source and destination trees. For more information, refer to [Using Advanced Search in the Source and Destination Trees](#).

***Note:** For the SharePoint on-premises environment, make sure that the source node and the destination node are in the same version of SharePoint. If the site within SharePoint 2013 is a SharePoint 2010 mode site, it can only be moved to the same mode site.

***Note:** If the **Record Declaration Settings** in the destination node conflict with the **Record Declaration Settings** in the source node, by default the **Record Declaration Settings** in the destination node will be overwritten by the source node settings. The records that have been blocked from deletion in the source node will not be deleted after the **Move** job.

Click **Move** on the ribbon, and then select **Move** from the drop-down list. You will be brought to the **Move** tab. The Move interface provides the following tools:

- **View** – Click **View** on the ribbon to review your settings.
***Note:** If the selected source nodes or destination node is in the SharePoint on-premises environment, the **Agent Group** setting appears in the **View** tab. The Agent group in the SharePoint on-premises environment will be loaded as the corresponding Agent group to execute the simple move.
- **Edit** – Click **Edit** on the ribbon to make changes to the move settings. You will be brought to the Edit Move Settings page. To configure the settings in the **Edit Move Settings** interface, refer to [Configuring Default Move Settings](#).
- **Preview** – Click **Preview** on the ribbon to see what the data tree of the destination node will look like after the move job is run. The source node is marked by a prompt message: **From Source**.

***Note:** The preview function supports Web application, site collection, and site level objects.

- **Run Now** – Click **Run Now** on the ribbon to execute the move job. Your move job will begin immediately, and you will be brought back to the **Home** tab of Content Manager.
- Click **Cancel** on the ribbon to close the **Move** tab without running the **Move** job.

Creating Containers

Use the **Create Container** feature to create containers in SharePoint without leaving the DocAve interface. This feature allows you to continue performing content management tasks without having to create all of the necessary containers before using Content Manager.

***Note:** **Create Container** can be used to create site collections, sites, lists, and folders in the SharePoint on-premises environments. You can create sites, lists, and folders in the SharePoint Online environments.

***Note:** If the destination farm is a FBA or ADFS farm, when manually creating a site collection, a pop-up window will appear to let you select the administrator of the site collection you are about to create.

To create a container, enter the name of a new container in the available field in the **Destination** pane, and then click **Create Container**. The **Create Container** interface appears. Configure the settings for each type of container according to the following sections.

***Note:** When creating a folder, you do not need to configure the settings. When you click **Create Container** at the folder level, you will create a folder immediately.

Creating a Site Collection

Configure these settings on the **Create Container** interface:

1. **Title and Description** – Enter the **Title** of the new site collection, and an optional description.
2. **Web Site Address** – Displays the URL of the site collection you are about to create.
3. **Template Selection** – Select the desired language from the **Select a language** drop-down list, and then select a site template for this new site collection. Click on a tab to access the templates listed in that category, or click on the **Custom** tab and select **<Select Template Later ...>** to not choose a template upon creation.
4. **Primary Site Collection Administrator** – Enter the **Username** of the primary administrator for this site collection.
5. **Secondary Site Collection Administrator** – Enter the **Username** of the secondary administrator for this site collection.
6. **Quota Template** – Select the storage quota template to apply to this site collection. To add a new quota template, click the **Manage Quota Templates** link. The **Manage Quota Templates** interface appears. Configure the following settings:

- a. **Template Name** – Edit an existing quota template or create a new template.
 - **Edit an existing template** – Select this radio button if you want to edit an existing quota template. You can only edit the Personal Site here.
 - **Create a new quota template** – Select this radio button if you want to create a new quota template.
 - **Template to start from** – Select **[New Blank Template]** or **Personal Site** from the drop-down list.
 - **New template name** – Enter a name for the new template.
 - b. **Storage Limit Values** – Choose if you want to limit the amount of storage available on a site collection. Set the maximum amount of storage and a warning level. When the warning level or maximum storage level is reached, an email alert is sent to the site administrators to inform them of the issue.
 - **Limit site storage to a maximum of _MB** – Enter a positive integer less than 1 terabyte in the text box.
 - **Send warning e-mail when site collection storage reaches _MB** – Enter a positive integer smaller than the entered maximum storage quota.
 - c. **Sandboxed Solutions with Code Limits** – Choose if you want sandboxed solutions with code for this site collection. When the warning level is reached, an email alert is sent. When the maximum usage limit is reached, sandboxed solutions with code are disabled for the rest of the day and an email alert is sent to the site administrator.
 - **Limit maximum usage per day to _points** – Enter a positive integer less than 1 million in the text box.
 - **Send warning e-mail when usage per day reaches _points** – Enter a positive integer less than or equal to the maximum usage.
 - d. Click **Save** to save your configurations and return to the **Create Container** interface or click **Cancel** to return to the **Create Container** interface without saving any changes.
7. **Content Database** – Select the content database for this site collection.
 8. Click **Save** to create the new site collection, or click **Cancel** to close the **Create Container** interface.

Creating a Site

Configure these settings on the **Create Container** interface:

1. **Title and Description** – Enter the **Title** of the new site, and an optional description.
2. **Web Site Address** – Displays the URL of the site you are about to create.

3. **Template Selection** – Select the desired language from the **Select a language** drop-down list, and then select a site template for this new site. Click on a tab to access the templates listed in that category.
4. **Permissions** – Select **Use unique permissions** to allow a unique set of users access to this new site, or select **Use same permissions as parent site** to allow the same users who can access the parent site to access this new site.
5. **Navigation** – Select the **Yes** or **No** radio button to determine whether or not to display this site on the Quick Launch and the top link bar of the parent site.
6. **Navigation Inheritance** – Select the **Yes** or **No** radio button to determine whether or not use the top link bar from the parent site.
7. Click **Save** to create the new site, or click **Cancel** to close the **Create Container** interface.

Creating a List/Library

Configure these settings in the **Create Container** interface:

1. **Object Type** – Choose if you want to create a **List** or a **Library**.
2. **Category** – Select the category type for the new list or library from the drop-down list.
3. **Navigation**– Determine if you want to display this list or library on the Quick Launch.
4. Click **Save**, or click **Cancel** to close the **Create Container** interface.

Using Advanced Search in the Source and Destination Trees

If working with a large SharePoint environment, use Advanced Search in the destination tree to find the desired node by completing the following steps:

1. In the **Source** or **Destination** pane, click the farm name to expand the data tree.
2. Right-click a farm level node, a Web application level node, the **Lists** virtual node, the **Sites** virtual node, or the **Folders** virtual node.
3. Select **Advanced Search** from the drop-down menu. The **Advanced Search** interface appears.
4. Customize the filter rules and conditions.
 - a. Click **Add a Criterion** to add a new filter condition.
 - b. If you have multiple filter conditions, click **And** or **Or** in the **And/Or** column to change the logical relationship among the filter conditions.
 - c. Hover over a previously added filter condition.
 - d. Click the delete (✖) button to delete the filter condition.
5. Click **Search** to start the search, or click **Cancel** to exit the **Advanced Search** interface without saving any configurations.

Building Plans

In Content Manager, you can create plans to copy or move content so that you can repeat the process without having to reconfigure all of the settings. Plans also allow you the flexibility of performing the job at a scheduled time. You can create plans in one of the following two ways:

- **Wizard Mode** – For users who are not familiar with creating Content Manager plans, Wizard Mode provides step-by-step guidance when creating a plan.
- **Form Mode** – For more advanced users, Form Mode provides more flexibility in which settings you configure first.

Building Plans Using Wizard Mode

To create a plan using Wizard Mode, click **Online Content Manager** on the ribbon in the **Home** tab to enter the online mode. Then select the source node in the **Source** pane, and select the destination node in the **Destination** pane.

***Note:** For the SharePoint on-premises environment, make sure that the source node and the destination node are in the same version of SharePoint. If the site within SharePoint 2013 is a site with 2010 experience version, it can only be copied or moved to the site with the same experience version.

Click **Plan Builder** on the ribbon, and then select **Wizard Mode** from the drop-down menu. You will be brought to the **Wizard Mode** tab. To create your plan, complete the following steps:

1. **Plan Name** – Enter the new **Plan Name**, and an optional description. Click **Next**.
2. **Method** – Configure the method and action for this plan:
 - a. **Method** – Select **Copy** or **Move** for the type of job you want Content Manager to run when this plan is executed. If you select **Move**, you may also configure the following settings:
 - **Source Deletion Method** – Select **Manual** to delete the source content yourself once the copy/move job is complete (select the copy/move job in Job Monitor, then click **Delete** on the ribbon and select **Delete Content** from the drop-down list), or select **Automatic** to have DocAve delete the source content once the copy/move job is complete.
 - **Delete Source Checked Out Documents** – By default, **No** is selected. Select **Yes** if you want to have DocAve delete the checked out documents on the source node when source content is deleted.
 - b. **Action** – Select **Attach** to transfer the source node as a child node underneath the destination node, or select **Merge** to add the content, securities, and configurations of the source node to the destination node. To see what the data tree of the destination node will look like after the job is executed, click **Show Preview**. The source node is marked by a prompt message: **From Source**.

- c. **Promote Method** – Choose to promote only the top-level site to the site collection or promote all of the selected sites to site collections. This section only appears when satisfying all of the following conditions:
 - Select site collection level or site level nodes in the source tree and select the Web application node in the destination tree.
***Note:** When you select site collection level nodes as the source, only the **Promote all sites to site collections** option is available.
 - Select **Merge** as the **Action** option.
- d. **Which managed path would you like to use in the destination?** – Changes the managed path in the destination. Select the **Change the managed path in destination** checkbox to configure the managed path you are about to use by entering the desired value in the **Enter an existing Wildcard Inclusion Managed Path** text box. This section only appears when satisfying all of the following conditions:
 - Select site collection level or site level nodes in the source tree and select the Web application node in the destination tree.
 - Select **Merge** as the **Action** option.
3. When you have finished configuring the method for this plan, click **Next**.
4. **Data Selection** – Configure the following settings:
 - a. **Filter Policy** – Select a filter policy from the drop-down list, or click **New Filter Policy**. Filter policies allow you to select specific objects or data within each SharePoint level from site collection down to the item level. For information on creating a filter policy, see the [DocAve 6 Control Panel Reference Guide](#).
***Note:** When using the filter policy in SharePoint Online, the **Created By** rule is not supported. Exceptions will be recorded in the job report.
 - b. **Configuration** – Choose if you want to migrate the configurations to the destination:
 - Select the **Copy/Move configuration** checkbox to copy or move the properties, descriptions, titles, settings, and features from the source node to the destination node. If you want to keep the look and feel of the source site including the quick launch, top link bar, tree view, site theme, and master page, and then select the **Keep look and feel** checkbox.
***Note:** This function will only take effect when the followings are in place:
 - The source node is a site, the destination node is a top-level site or a site collection.
 - **Merge** is selected as the action to take in the **Action** field.
 - Leave the **Copy/Move configuration** checkbox deselected if you don't want to migrate the configuration to the destination. For more information on how to

configure the Configuration section, refer to [Configuring the Configuration Section](#).

- c. **Security** – Select the **Copy/Move security** checkbox to copy or move the user and/or group permissions from the source node to the destination node, including SharePoint permission level and permission inheritance of SharePoint objects. Select the **Exclude user/group without permission** checkbox to not copy or move users and/or groups that have no permissions.

***Note:** The definition of users or groups without permission varies with the selected source node:

- If the source node is a site collection, the users or groups that meet the following two conditions are the users or groups without permissions:
 - Users or groups that exist in the source node, but are not Site Collection Administrators.
 - Users or groups that exist in the source node, but have no permissions to the top-level site or any sites of the site collection.

***Note:** If the source node is a Web application, the permissions of each site collection are handled individually, and you can refer to the definition above.

- If the source node is a site, users or groups without permissions refer to the users or groups that exist in the source node, but have no permissions to this site.
- If the source node is an object whose level is lower than the site level, users or groups without permissions refer to the users or groups that exist in the source node, but have no permissions to the site where the source object resides.

You cannot view these types of users or groups in the **People and Groups – [SiteName] Members** page of a site, but you can view them in the **People and Groups – All People** page. To go to the **People and Groups – All People** page, modify the value of **MembershipGroupId** in the URL of the **People and Groups – [SiteName] Members** page to **MembershipGroupId=0**. You will be redirected to the **People and Groups – All People** page.

- d. **Content** – Select the **Copy/Move content** checkbox to copy/move content in libraries, folders and items from the source node to the destination node. Select the **Include list attachment** to also copy/move attached content in lists.
- e. **User Profile** – Select the **Copy/Move user profile** checkbox if you want to move user profiles from the source node to the destination node.

***Note:** This section will only appear if the source node level is equal to or higher than the site collection level because users are saved in the top-level site.

- f. **Workflow** – Select the **Include workflow definition** checkbox to copy/move the definition of existing workflows for the selected content from the source node to the destination node. Select the **Include workflow instance** to copy/move the state, history and tasks of existing workflows for the selected content from the source node to the destination node. By default, the **Include completed instance** checkbox is selected. You can select **Include running instance** checkbox if you want to copy the currently running instance in the source node to the destination node, and then select one of the following radio buttons:
- **Cancel workflows** – Cancel the copied or moved running workflows in the destination node after the Content Manager jobs.
 - **Restart workflows** – Restart the copied or moved running workflows in the destination node after the Content Manger jobs.
- *Note:** Content Manager does not support the workflow instances associated with checked-out files.
- g. **Managed Metadata Service Setting** – Select the **Copy Managed Metadata Service** checkbox if you want to copy the related managed metadata services from the source node to the destination node, and then select one of the following radio buttons:
- **Term** – Copy terms that are used in the source, their parent terms, the term sets where the used terms reside, and the names of the groups where the used terms reside to the destination.
 - **Term set** – Copy the whole term sets where the used terms reside in the source (regardless if the terms in the term sets are used by the source node or not) to the destination.
 - **Managed Metadata Service** – Copy the whole Managed Metadata Services that are related to the source node to the destination.
5. When you have finished configuring the data selection settings, click **Next**.
6. **Schedule** – Configure a schedule for this plan:
- If you selected **Copy** in the **Method** section, choose one of the following options:
 - Select **No Schedule** to manually execute this plan.
 - Select **Start Time** if you want to have the plan executed at a selected time. If applicable, you can change the time zone by clicking on the hyperlink to select a different time zone.
 - If you selected **Move** in the **Method** section, choose one of the following options:
 - Select **No Schedule** to manually execute this plan.
 - Select **Configure the schedule myself** to determine the frequency to run this recurring schedule. Configure the following sections:
 - **Start time** – Select the time when this plan is executed.

- **Interval** – Specify the interval for this plan.
 - **No end date** – The **Move** jobs will run on a configured schedule until you manually end it.
 - **End after __ occurrences** – The **Move** jobs will stop running after the number of times you select here.
 - **End by __** – The **Move** jobs will end on the date and time you enter here.
7. When you have finished configuring the schedule, click **Next**.
8. **Advanced** – Configure the following advanced settings:
- a. **Preserve the Null Column Values** – Select **Yes** to preserve the null values of item columns, or select **No** to replace null values with default values in the destination node.
 - b. **Folder Structure Management** – Choose if you want to collapse the folder structure of the copied or moved content. Select the **Collapse Folder Structure** checkbox to enable this feature. DocAve also allows you to add a column to the destination for displaying the source folder path or parent folder name. Select the **Add a column to display the source folder path or parent folder name** checkbox to enable this feature. .
 - **Column to display the source folder path** – Enter a column name in the text box to add a **Single Line of Text** column to display the source folder path.
 - **Column to display the parent folder name** – Enter a column name in the text box to add a **Single Line of Text** column to display the source parent folder name.

***Note:** This section only appears when you selected list or folder level nodes in the source tree.
 - c. **Data Compression** – Select the **Compression** checkbox if you want to compress the data when it is copied. If you choose to compress the data, use the slider to select the compression rate. Faster compression rate results in larger data sets. The best compression rate is a smaller, better quality data set. However, the compression takes more time to perform.
- *Note:** Smaller data sets take longer to backup and recover.
- d. **Column Mapping** – Maps source columns to the configured columns in the destination, or change the column name to another one. The source columns will be mapped according to the selected column type, and the column values will be mapped according to the added value mappings. According to the column type, the source column and the destination column can be the same or different. The column can also be changed to Managed Metadata or Lookup. Select a column mapping from the drop-down list, or click **New Column Mapping**. For information on creating a column mapping, see the [DocAve 6 Control Panel Reference Guide](#).

***Note:** If you select the column type **Change to Lookup** while setting up your column mapping, make sure that the **Lookup** column can only be associated with the list or list column that exists in the destination.

- e. **Content Type Mapping** – Maps source content types to the configured content types in destination, or change the content type name to another one, according to the condition that you set up. Select a content type mapping from the drop-down list, or click **New Content Type Mapping**. For information on creating a content type mapping, see the [DocAve 6 Control Panel Reference Guide](#).

***Note:** Make sure that the source content type and the destination content type are compatible.

- f. **Template Mapping** – Replaces site and list templates. By inputting or selecting a template ID, the source template is changed to the destination template. Select a template mapping from the drop-down list, or click **New Template Mapping**. For information on creating a template mapping, see the [DocAve 6 Control Panel Reference Guide](#).
- g. **User Mapping** – Replaces an existing source node username with an existing destination node username or a default username in the destination. You can also add a place holder account to keep user metadata even if the user no longer exists. Select a user mapping from the drop-down list, or click **New User Mapping**. . For information on creating a user mapping, see the [DocAve 6 Control Panel Reference Guide](#).
- h. **Domain Mapping** – Maps a source domain to a destination domain. The source domain name will be replaced by the configured destination domain name, and the user in the source domain will be mapped to the destination user which has the same login name. Select a domain mapping from the drop-down list, or click **New Domain Mapping**. For information on creating a domain mapping, see the [DocAve 6 Control Panel Reference Guide](#).
- i. **Language Mapping** – Choose if you want to display destination node in a different language other than source node after the plan has been executed. Select a language mapping from the drop-down list, or click **New Language Mapping**. For information on creating a language mapping, see the [DocAve 6 Control Panel Reference Guide](#).
- j. **List Name Mapping** – Choose if you want to change the existing source lists of the copied or moved objects to your designated lists in the destination. Select a list name mapping from the drop-down list, or click **New List Name Mapping**. For information on creating a list name mapping, see the [DocAve 6 Control Panel Reference Guide](#).
- k. **Backup Environment Before Running Plan** – Choose from the following configurations:
 - o Select the **Backup the source environment** checkbox to create a copy of the source node prior to performing the move. This is only when moving jobs.

- o Select the **Backup the destination environment** checkbox to create a copy of the destination node prior to performing the copy. If you choose this option, you must designate a storage policy. Select a storage policy or click **New Storage Policy** to create a new one.

***Note:** Content Manager only supports the Backup type storage policy for retention rule. For more information on storage policies, see the [DocAve 6 Control Panel Reference Guide](#).
 - l. **Conflict Resolution** – Choose **Skip**, **Merge**, or **Replace** from the **Container level conflict resolution** drop-down list. Select the **Check lower objects** checkbox if you want to configure content level conflict resolution, then choose **Skip**, **Overwrite**, **Overwrite by Last Modified Time**, or **Append** from the **Content level conflict resolution** drop-down list. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A: Conflict Resolution](#).
 - m. **Apps Conflict Resolution** – Choose **Skip**, **Upgrade App Only**, or **Replace App and AppData** from the **Apps conflict resolution** drop-down list. This only appears when the selected source and destination nodes are in the SharePoint 2013 environments. For detailed information on how Content Manager resolves apps conflicts based on these configurations, see [Apps Conflict Resolution](#).

***Note: Apps Conflict Resolution** only takes effect on the app instances.
 - n. **Agent Group** – Select a source or a destination Agent group to execute the Content Manager job.
 - o **Source Agent Group** – Select a source Agent group to back up the data in the selected source nodes. This option only appears when the selected source node are in the SharePoint on-premises environments.
 - o **Destination Agent Group** – Select a destination Agent group to restore the backed up source data to the destination node. This option only appears when the selected destination node is in the SharePoint on-premises environment.
 - o. **Notification** – Choose the type of notification report and designate which DocAve user will receive the email notification. Select a notification profile from the drop-down list. Click **View** beside the drop-down list to view details of the notification profile, or click **New Notification Profile**. For information on creating a notification profile, see the [DocAve 6 Control Panel Reference Guide](#).
 - p. **Associated Plan Group** – Adds the plan to one or more plan groups to manage the plans with common settings. Select a plan group from the drop-down list, or click **New Plan Group**. For information on creating a plan group, see the [DocAve 6 Control Panel Reference Guide](#).
9. When you have finished configuring the advanced settings, click **Next**.

10. **Overview** – Once you have finished configuring this plan, you can review and edit the various settings for this plan. In the **Settings** tab of the Overview pane, click **Edit** in any section to make changes to the settings in that section. In the Preview tab, click **Show Preview** to see what the data tree of the destination will look like after the job is run. The source node is marked by a prompt message: **From Source**.
11. After you have reviewed all of the settings and scopes in the **Overview** pane, click **Finish** on the ribbon, and then select **Finish** from the drop-down list to save the plan. To save the plan and execute it right away, click **Finish** on the ribbon, and then select **Finish and Run Now** from the drop-down list.
12. At any time, click **Cancel** on the ribbon to return to the **Home** tab of Content Manager.

Configuring the Configuration Section

Refer to this section on how to configure the **Configuration** section. After deselecting the **Copy/Move configuration** checkbox, choose from the following options:

- Select **Copy/Move the item-dependent columns and content types to maintain item integrity**. Then, select a conflict resolution method for these items' columns and content types from the drop-down list:
 - **Do not copy/move the columns and content types, or the corresponding items** – Ignores the conflicting columns, content types, and the corresponding items, and do nothing on the source and destination node.
 - **Overwrite the columns and content types** – Overwrites the destination columns and content types with the source node.
 - **Append the columns and content types to destination** – Keeps the destination columns and content types when there is a conflict. Copies the source columns and content types to the destination node with a numerical suffix added (for example, ColumnName_1, ColumnName_2, etc.).
- Select **Do not copy/move the item-dependent columns or content types**. The corresponding item-dependent columns or content types are not copied/moved to the destination. If the item-dependent columns or content types do not exist in the destination, the items will not be copied/moved to the destination. If the item-dependent columns or content types already exist in the destination, the items will be copied/moved to the destination. The job report will show items if the corresponding column or content type is not found in the destination node.

Building Plans Using Form Mode

To create a plan using Form Mode, click **Online Content Manager** on the ribbon in the **Home** tab. Select the source node in the **Source** pane, and select a destination node in the **Destination** pane.

***Note:** For the SharePoint on-premises environment, make sure that the source node and the destination node are in the same version of SharePoint. If the site within SharePoint 2013 is a

SharePoint 2010 mode site, it can be copied or moved to the same on-premises mode site, or a SharePoint Online site.

Click **Plan Builder** on the ribbon, and then select **Form Mode** from the drop-down list. You will be redirected to the **Form Mode** tab. To create your plan, complete the following steps:

1. **Plan Name** – Enter the new **Plan Name**, then enter an optional description. Click **Next**.
2. **Method** – Select **Copy** or **Move** for the type of job you want to run. If you select **Move**, you may also configure the following settings:
 - **Source Deletion Method** – Select **Manual** to delete the source content yourself once the copy/move job is complete (select the copy/move job in Job Monitor, then click **Delete** on the ribbon and select **Delete Content** from the drop-down list), or select **Automatic** to have DocAve delete the source content once the job is complete.
 - **Delete Source Checked Out Documents** – By default, **No** is selected. Select **Yes** if you want to have DocAve delete the checked out documents on the source node when source content is deleted.
3. **Action** – Select **Attach** to transfer the source node as a child node underneath the destination node, or select **Merge** to add the content, securities, and configurations of the source node to the destination node. To see what the data tree of the destination node will look like after the job is executed, click **Show Preview**.
4. **Promote Method** – Choose to promote only the top-level site to the site collection or promote all of the selected sites to site collections. This section only appears when satisfying all of the following conditions:
 - Select site collection level or site level nodes in the source tree and select the Web application node in the destination tree.
***Note:** When you select site collection level nodes as the source, only the **Promote all sites to site collections** option is available.
 - Select **Merge** as the **Action** option.
5. **Which managed path would you like to use in the destination?** – . Select the **Change the managed path in destination** checkbox to configure the managed path you are about to use by entering the desired value in the **Enter an existing Wildcard Inclusion Managed Path** text box. This section only appears when satisfying all of the following conditions:
 - Select site collection level or site level nodes in the source tree and select the Web application node in the destination tree.
 - Select **Merge** as the **Action** option.
6. **Backup Environment Before Running Plan** – Configure the following configurations:
 - Select the **Backup the source environment** checkbox to create a copy of the source node prior to performing the move. This option only appears for move jobs.

- Select the **Backup the destination environment** checkbox to create a copy of the destination node prior to performing the copy. If you choose to back up the destination environment before performing a copy, you must designate a storage policy. Select a storage policy or click **New Storage Policy** to create a new one.

***Note:** Content Manager only supports the Backup type storage policy for retention rule. For more information on storage policies, see the [DocAve 6 Control Panel Reference Guide](#).

7. **Schedule** – Configure a schedule for this plan:

- If you selected **Copy** in the **Method** section, choose one of the following options:
 - Select **No Schedule** to manually execute this plan.
 - Select **Start Time** to have this plan execute at a specified time. You may change the time zone by clicking on the hyperlink next to Start Time.
- If you selected **Move** in the **Method** section, choose one of the following options:
 - Select **No Schedule** to manually execute this plan.
 - Select **Configure the schedule myself** to specify the frequency to run this recurring schedule. Configure the following settings:
 - **Start time** – Specify the time when this plan is executed.
 - **Interval** – Select the interval for this plan.
 - **No end date** – The **Move** jobs will run on a configured schedule until you manually end it.
 - **End after __ occurrences** – The **Move** jobs will stop running after the number of times you enter here.
 - **End by __** – The **Move** jobs will end on the date and time you specify here.

8. Click **Advanced** to configure more options.

9. **Filter Policy** – Select a filter policy from the drop-down list, or click **New Filter Policy**. Filter policies allow you to select specific objects or data within each SharePoint level from site collection down to the item level. For information on creating a Filter Policy, see the [DocAve 6 Control Panel Reference Guide](#).

***Note:** When using the filter policy in SharePoint Online, the **Created By** rule is not supported. Exceptions will be recorded in the job report.

10. **Configuration** – Choose if you want to migrate the configurations to the destination:

- Select the **Copy/Move configuration** checkbox to copy/move the properties, descriptions, titles, settings, and features from the source node to the destination node. If you want to keep the look and feel of the source site including the quick launch, top link bar, tree view, site theme, and master page. Then select the **Keep look and feel** checkbox.

***Note:** This function will only take effect when the followings are in place:

- The source node is a site, the destination node is a top-level site or a site collection.
- **Merge** is selected as the action to take in Step 1.
- Leave the **Copy/Move configuration** checkbox deselected if you don't want to migrate the configurations to the destination. Then, choose from the following options:
 - Select **Copy/Move the item-dependent columns and content types to maintain item integrity**. Select a conflict resolution method for these items' columns and content types from the drop-down list:
 - **Do not copy/move the columns and content types, or the corresponding items** – Ignores the conflicting columns, content types, and the corresponding items, and do nothing on the source and destination node.
 - **Overwrite the columns and content types** – Overwrites the destination columns and content types with the source node.
 - **Append the columns and content types to destination** – Keeps the destination columns and content types when there is a conflict. Copies the source columns and content types to the destination node with a numerical suffix added (for example, ColumnName_1, ColumnName_2, etc.).
 - Select **Do not copy/move the item-dependent columns or content types**. The corresponding item-dependent columns or content types are not copied/moved to the destination. The job report will show items if the corresponding column or content type is not found in the destination node.

11. **Security** – Select the **Copy/Move security** checkbox to copy/move the user and/or group permissions from the source node to the destination node, including SharePoint permission level and permission inheritance of SharePoint objects. Select the **Exclude user/group without permission** checkbox to not copy or move users and/or groups that have no permissions.

***Note:** The definition of users or groups without permission varies with the selected source node:

- If the source node is a site collection, the users or groups that meet the following two conditions are the users or groups without permissions:
 - Users or groups that exist in the source node, but are not Site Collection Administrators.
 - Users or groups that exist in the source node, but have no permissions to the top-level site or any sites of the site collection.

***Note:** If the source node is a Web application, the permissions of each site collection are handled respectively, and you can refer to the definition above.

- If the source node is a site, users or groups without permissions refer to the users or groups that exist in the source node, but have no permissions to this site.
- If the source node is an object whose level is lower than the site level, users or groups without permissions refer to the users or groups that exist in the source node, but have no permissions to the site where the source object resides.

You cannot view this kind of user/group in the **People and Groups – [SiteName] Members** page of a site, but you can view it in the **People and Groups – All People** page. To go to the **People and Groups – All People** page, modify the value of **MembershipGroupId** in the URL of the **People and Groups – [SiteName] Members** page to **MembershipGroupId=0**. You will be brought to the **People and Groups – All People** page.

12. **Content** – Select the **Copy/Move content** checkbox to copy/move content in libraries, folders and items from the source node to the destination node. Select the **Include list attachment** to also copy/move attached content in lists.
13. **User Profile** – Select the **Copy/Move user profile** checkbox if you want to move user profiles from the source node to the destination node.

***Note:** This section will only appear if the source node level is equal to or higher than the site collection level because users are saved in the top-level site.
14. **Workflow** – Select the **Include workflow definition** checkbox to copy/move the definition of existing workflows for the selected content from the source node to the destination node. Select the **Include workflow instance** to copy/move the state, history and tasks of existing workflows for the selected content from the source node to the destination node. The **Include completed instance** checkbox is selected to copy the completed instance from the source node to the destination node. You can select **Include running instance** checkbox if you want to copy the currently running instance, and then select one of the following radio buttons:
 - **Cancel workflows** – Cancel the copied or moved running workflows in the destination node after the Content Manager jobs.
 - **Restart workflows** – Restart the copied or moved running workflows in the destination node after the Content Manger jobs.

***Note:** Content Manager does not support the workflow instances associated with checked-out files.
15. **Managed Metadata Service Setting** – Select the **Copy Managed Metadata Service checkbox** if you want to copy the related managed metadata services from the source node to the destination node, and then select one of the following radio buttons:
 - **Term** – Copy terms that are used in the source, their parent terms, the term sets where the used terms reside, and the names of the groups where the used terms reside to the destination.
 - **Term set** – Copy the whole term sets where the used terms reside in the source (regardless if the terms in the term sets are used by the source node or not) to the destination.

- **Managed Metadata Service** – Copy the whole Managed Metadata Services that are related to the source node to the destination.
16. **Preserve the Null Column Values** – Select **Yes** to preserve the null values of item columns (such as newly created columns), or select **No** to replace null values with default values in the destination node.
 17. **Folder Structure Management** – Choose if you want to collapse the folder structure of the copied or moved content. Select the **Collapse Folder Structure** checkbox to enable this feature. DocAve also allows you to add a column to the destination for displaying the source folder path or parent folder name. Select the **Add a column to display the source folder path or parent folder name** checkbox to enable this feature as well.
 - **Column to display the source folder path** – Enter a column name in the text box to add a **Single Line of Text** column to display the source folder path.
 - **Column to display the parent folder name** – Enter a column name in the text box to add a **Single Line of Text** column to display the source parent folder name.

***Note:** The **Folder Structure Management** field only appears when you've selected list or folder level nodes in the source tree.
 18. **Data Compression** – Select the **Compression** checkbox if you want to compress the data when it is copied. If you choose to compress the data, use the slider to select the compression rate. Faster compression rate result in a larger data sets. The best option is a smaller, better quality data set, but the compression takes more time to perform.

***Note:** Smaller data sets take longer to backup and recover.
 19. **Column Mapping** – Maps source columns to the configured columns in the destination, or change the column name to another one, according to the condition that you set up. The specified source columns will be mapped according to the selected column type, and the column values will be mapped according to the added value mappings. According to the column type, the source column and the destination column can be the same or different. The column can also be changed to Managed Metadata or Lookup. Select a column mapping from the drop-down list, or click **New Column Mapping**. For information on creating a column mapping, see the [DocAve 6 Control Panel Reference Guide](#).

***Note:** If you select the column type **Change to Lookup** while setting up your column mapping, make sure that the **Lookup** column can only be associated with the list or list column that exists in the destination.
 20. **Content Type Mapping** – Replaces source content types with destination content types according to the condition that you set up. Select a content type mapping from the drop-down list, or click **New Content Type Mapping**. For information on creating a content type mapping, see the [DocAve 6 Control Panel Reference Guide](#).
 21. **Template Mapping** – Replaces site and list templates. By inputting or selecting a template ID, the source template is changed to the destination template. Select a template map from the

drop-down list, or click **New Template Mapping**. For information on creating a template mapping, see the [DocAve 6 Control Panel Reference Guide](#).

22. **User Mapping** – Maps a source user to a target user. If the same user has a different username in Domain A than in Domain B, or if you want to copy or move an individual user’s content, permissions, and metadata in Domain A to another user in Domain B, the user’s permissions and metadata will not be lost when content is moved. Select a user mapping from the drop-down list, or click **New User Mapping**. For information on creating a user mapping, see the [DocAve 6 Control Panel Reference Guide](#).
23. **Domain Mapping** – Maps a source domain to a destination domain. The source domain name will be replaced by the configured destination domain name. The user in the source domain will be mapped to the destination user which has the same login name. Select a domain mapping from the drop-down list, or click **New Domain Mapping**. For information on creating a domain mapping, see the [DocAve 6 Control Panel Reference Guide](#).
24. **Language Mapping** – Displays the destination node in a different language than source node after the plan has been executed. Select a language mapping from the drop-down list, or click **New Language Mapping**. For information on creating a language mapping, see the [DocAve 6 Control Panel Reference Guide](#).
25. **List Name Mapping** – Changes the existing source lists of the copied or moved objects to your designated lists in the destination. Select a list name mapping from the drop-down list, or click **New List Name Mapping**. For information on creating a list name mapping, see the [DocAve 6 Control Panel Reference Guide](#).
26. **Conflict Resolution** – Choose **Skip**, **Merge**, or **Replace** from the **Container level conflict resolution** drop-down list. Select the **Check lower objects** checkbox, then choose **Skip**, **Overwrite**, **Overwrite by Last Modified Time**, or **Append** from the **Content level conflict resolution** drop-down list. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A: Conflict Resolution](#).
27. **Apps Conflict Resolution** – Choose **Skip**, **Upgrade App Only**, or **Replace App and AppData** from the **Apps conflict resolution** drop-down list. This field will only appear when the selected source and destination nodes are in the SharePoint 2013 environments. For detailed information on how Content Manager resolves apps conflicts based on these configurations, see [Apps Conflict Resolution](#).

***Note: Apps Conflict Resolution** only takes effect on the app instances.
28. **Agent Group** – Select a source or a destination group to execute the Content Manager job.
 - **Source Agent Group** – Select a source Agent group to back up the data in the selected source nodes. This option only appears when the selected source nodes are in the SharePoint on-premises environments.
 - **Destination Agent Group** – Select a destination Agent group to restore the backed up source data to the destination node. This option only appears when the selected destination node is in the SharePoint on-premises environment.
29. **Notification** – Choose the type of notification report and designate which DocAve user will receive an email notification. Select a notification profile from the drop-down list. Click **View** beside the drop-down list to view details of the notification profile, or click **New Notification**

Profile from the drop-down list. For information on creating a notification profile, see the [DocAve 6 Control Panel Reference Guide](#).

30. **Associated Plan Group** – Add the plan to one or more plan groups to manage plans with common settings. Select a plan group from the drop-down list, or click **New Plan Group**. For information on creating a plan group, see the [DocAve 6 Control Panel Reference Guide](#).
31. Click **Save** on the ribbon, and then select **Save** from the drop-down list to save the plan. To save the plan and execute it right away, click **Save** on the ribbon, and then select **Save and Run Now** from the drop-down list.
32. At any time, click **Cancel** on the ribbon to abandon the new plan's configuration and return to the **Home** tab of Content Manager.

Managing Plans

Content Manager allows you to create plans so that you can repeat copy/move jobs without having to reconfigure settings each time. When a plan is created, it will appear in Plan Manager. To access Plan Manager, click the **Plan Manager** tab at the top of the DocAve interface.

You may perform any of the following actions on a selected plan:

- **View Details** – To view detailed information of the selected plan:
 - Select the plan by selecting the corresponding checkbox, and then click **View Details** on the ribbon. The **View Details** interface appears.
 - Click the down arrow () button in the **Plan Name** column, and then select **View Details** from the drop-down menu. The **View Details** interface appears with the following options:
 - Click **Edit** on the ribbon to make changes to the plan's settings. The **Edit** tab appears.
 - Click **Source & Destination** on the ribbon to change the source and destination nodes for this plan, or click **Settings** on the ribbon, and then edit the plan's settings. For more information on how to edit the plan settings, refer to [Building Plans Using Form Mode](#).
 - Click **Save** on the ribbon, and then select **Save** from the drop-down list to save the plan. To save the plan and execute it right away, select **Save and Run Now** from the drop-down list. To save a changed plan as a new one, click **Save** on the ribbon, and then select **Save As** from the drop-down list.
 - Click **Cancel** on the ribbon at any time to return to the Plan Manager.
- **Edit** – Edit the plan settings of the selected plan:
 - Select the plan by selecting the corresponding checkbox, and then click **Edit** on the ribbon. The **Edit** tab appears.

- Click the down arrow () button in the **Plan Name** column, and then select **Edit** from the drop-down menu. The **Edit** tab appears.
 - Click **Source & Destination** on the ribbon, and then change the source and destination nodes for this plan, or click **Settings** on the ribbon, and then edit the plan's settings. For more information on how to edit the plan settings, refer to [Building Plans Using Form Mode](#).
 - Click **Save** on the ribbon, and then select **Save** from the drop-down list to save the plan. To save the plan and execute it right away, click **Save** on the ribbon, then select **Save and Run Now** from the drop-down list. To save a changed plan as a new one, click **Save** on the ribbon, and then select **Save As** from the drop-down list.
 - Click **Cancel** on the ribbon at any time to return to the Plan Manager.
- **Delete – Delete** the selected plan:
 - Select the plan to delete by selecting the corresponding checkbox, and then click **Delete** on the ribbon. A warning message will appear to confirm the deletion. Click **OK** to delete the selected plan, or click **Cancel**.
 - Click the down arrow () button in the **Plan Name** column, and then select **Delete** from the drop-down menu. A warning message will appear to confirm the deletion. Click **OK** to delete the selected plan, or click **Cancel**.
- **Test Run** – Click **Test Run** on the ribbon to simulate the execution of the selected plan. You can see the results of the test run in Job Monitor. For more information, see the [DocAve 6 Job Monitor Reference Guide](#).
- **Run Now** – Click **Run Now** on the ribbon to execute the plan immediately. You can see the review details about the plan's execution in Job Monitor. For more information, see the [DocAve 6 Job Monitor Reference Guide](#).

Using Data Import and Data Export

In cases where the desired source and destination nodes cannot communicate with each other (for example, if there is a firewall), Content Manager allows you to export the content from the source node to an Export Location, and then import it into the destination node.

Exporting Content

To export the content to an export location, click **Data Export** on the ribbon in the **Home** tab. Then select the desired source node in the **Source** pane, and then click **Export** on the ribbon. The **Destination** pane will be replaced with the **Create a New Plan** interface. Configure the following settings to export content:

1. **Plan Name** – Enter the new **Plan Name**, then enter an optional description.
2. **Export Location** – Select an export location in Control Panel, or click **New Export Location** to create a new one. For information on creating export locations, see the [DocAve 6 Control Panel Reference Guide](#).
3. **Schedule** – Configure a schedule for this plan by selecting one of the following options:
 - Select **No Schedule** to manually execute this plan.
 - Select **Start Time** to have this plan execute at a specified time. If applicable, you may change the time zone by clicking on the hyperlink to select a different time zone.
4. Click **Advanced** to configure additional options.
 - a. **Filter Policy** – Select a filter policy from the drop-down list, or click **New Filter Policy**. Filter policies allow you to select specific objects or data within each SharePoint level from site collection down to the item level. For information on creating a filter policy, see the [DocAve 6 Control Panel Reference Guide](#).

***Note:** When using the filter policy in SharePoint Online, the **Created By** rule is not supported. Exceptions will be recorded in the job report.
 - b. **Content** – Select the **Export content** checkbox to export content in libraries, folders, and items from the source node to the destination node. Select the **Include list attachment** to also export attached content in lists.
 - c. **User Profile** – Select the **Export user profile** checkbox to move user profiles from the source node to the destination node.

***Note:** This section will only appear if the source node level is equal to or higher than the site collection level because users are saved in the top-level site.
 - d. **Data Compression** – Select the **Compression** checkbox to compress the data when it is exported. If you choose to compress the data, use the slider to select the compression

rate. Faster compression rates result in larger data sets. The best compression rate is a smaller better quality data set, but the compression takes more time to perform.

***Note:** Smaller data sets take longer to backup and recover.

- e. **Data Encryption** – Select the **Encryption** checkbox to encrypt the data. Then select the **Default Security Profile** or a security profile from the drop-down list to protect your backup data using the security keys generated by the specified encryption method. Or click **New Security Profile** to create a new one. For details on creating a security profile, refer to the [DocAve 6 Control Panel Reference Guide](#). Note that encrypted data takes longer to backup and recover.
- f. **Workflow** – Select the **Include workflow definition** checkbox to export the definition of existing workflows for the selected content from the source node to the destination node. Select the **Include workflow instance** checkbox to also export the state, history, and tasks of existing workflows for the selected content from the source node to the destination node.

***Note:** Content Manager does not support the workflow instances associated with checked-out files.
- g. **Managed Metadata Service Setting** – Select the **Copy Managed Metadata Service** checkbox if you want to copy the related managed metadata services from the source node to the destination node, and then select one of the following radio buttons:
 - **Term** – Copy terms that are used in the source, their parent terms, the term sets where the used terms reside, and the names of the groups where the used terms reside to the destination.
 - **Term set** – Copy the whole term sets where the used terms reside in the source (regardless if the terms in the term sets are used by the source node or not) to the destination.
 - **Managed Metadata Service** – Copy the whole Managed Metadata Services that are related to the source node to the destination.
- h. **Generate Metadata File** – Select the **Generate Metadata File** checkbox to generate Microsoft Excel files with metadata for each library or list. The metadata files are stored in the export location you configured. You can edit the metadata file to add, edit, or delete the metadata of items in batch.
- i. **Agent Group** – Select an Agent group to execute the export job. This option only appears when the selected source nodes are in the SharePoint on-premises environments.
- j. **Notification** – Choose the type of notification report and designate which DocAve user will receive an email notification. Select a notification profile from the drop-down list. Click **View** beside the drop-down list to view details of the notification profile or click

New Notification Profile. For information on creating a notification profile, refer to the [DocAve 6 Control Panel Reference Guide](#).

- k. **Associated Plan Group** – Add the plan to one or more plan groups to manage plans with common settings. Select a plan group from the drop-down list or click **New Plan Group** from the drop-down list to create a new one. For information on creating a plan group, refer to the [DocAve 6 Control Panel Reference Guide](#).
5. Click **Save** to save the export plan. To save the export plan and execute it right away, click **Save**, and then select **Save and Run Now**.
6. Click **Cancel** at any time to abandon the new export plan's configuration and return to the **Home** tab of Content Manager.

Importing Content

To import content from an export location, click **Data Import** on the ribbon in the **Home** tab. Then select the desired destination node in the **Destination** pane. The **Source** pane will be replaced with the Import configuration interface. To import content, configure the following settings:

1. **Plan Name** – Enter the new **Plan Name**, then enter an optional description.
2. **Browse** – In the **Browse** tab, click on the export location to expand its data tree. Select the exported content. Click the **Details** tab to see what content is included.
3. **Action** – Select **Attach** to transfer the source node as a child node underneath the destination node, or select **Merge** to add the content, securities, and configurations of the source node to the destination node. To see what the data tree of the destination node will look like after the job is executed, click **Show Preview**.
4. **Schedule** – Configure a schedule for this plan by choosing one of the following options:
 - Select **No Schedule** to manually execute this plan.
 - Select **Start Time** to have this plan execute at a specified time. If applicable, you may change the time zone by clicking on the hyperlink to select a different time zone.
5. Click **Advanced** to configure further options.
 - a. **Conflict Resolution** – Choose **Skip**, **Merge**, or **Replace** from the **Container level conflict resolution** drop-down list. Select the **Check lower objects** checkbox if you want to configure content level conflict resolution, then choose **Skip**, **Overwrite**, **Overwrite by Last Modified Time**, or **Append** from the **Content level conflict resolution** drop-down list. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A: Conflict Resolution](#).
 - b. **Configuration** – If you want to import the properties, descriptions, titles, settings, and features from the source node to the destination node, select the **Import configuration** checkbox. If you do not want to import the configurations, leave the checkbox deselected, and configure the following options:

- Select the **Import the item-dependent columns and content types to maintain item integrity** radio button to import the item dependent columns and content types to destination and choose one of the following options from the **Conflict resolution for dependent items** drop-down list:
 - **Do not copy/move the columns and content types, or the corresponding items** – Ignores the conflicting columns, content types, and the corresponding items and do nothing on the source and destination node.
 - **Overwrite the columns and content types** – Overwrites the destination columns and content types with that of the source node.
 - **Append the columns and content types to destination** – Keeps the destination columns and content types when there is a conflict. In addition, copy the source columns and content types to the destination node with a numerical suffix added (for example, ColumnName1, ColumnName2, etc.).
- Select the **Do not Import the item-dependent columns or content types** radio button to not import item dependent columns or content types. The corresponding items will not be imported to the destination. DocAve will report the items if the corresponding column or content type is not found in the destination node.
- c. **Security** – Select the **Import security** checkbox to import the user and/or group permissions from the source node to the destination node, including SharePoint permission level and permission inheritance of SharePoint objects. Select the **Exclude user/group without permission** checkbox to not import users and/or groups that have no permissions.

***Note:** The definition of users or groups without permission varies with the selected source node:

- If the source node is a site collection, the users or groups that meet the following two conditions are the users or groups without permissions:
 - Users or groups that exist in the source node, but are not Site Collection Administrators.
 - Users or groups that exist in the source node, but have no permissions to the top-level site or any sites of the site collection.

***Note:** If the source node is a Web application, the permissions of each site collection are handled individually, and you can refer to the definition above.

- If the source node is a site, users or groups without permissions refer to the users or groups that exist in the source node, but have no permissions to this site.

- If the source node is an object whose level is lower than the site level, users or groups without permissions refer to the users or groups that exist in the source node, but have no permissions to the site where the source object resides.

You cannot view these types of users or groups in the **People and Groups – [SiteName] Members** page of a site, but you can view them in the **People and Groups – All People** page. To go to the **People and Groups – All People** page, modify the value of **MembershipGroupId** in the URL of the **People and Groups – [SiteName] Members** page to **MembershipGroupId=0**. You will be brought to the **People and Groups – All People** page.

- d. **Managed Metadata Service Setting** – Select the **Copy Managed Metadata Service** checkbox if you want to copy the related managed metadata services from the source node to the destination node. Select **Term set** to copy the whole term sets where the used terms reside in the source (regardless if the terms in the term sets are used by the source node or not) to the destination.
- e. **Preserve the Null Column Values** – Select **Yes** to preserve the null values of item columns, or select **No** to replace null values with default values in the destination node.
- f. **Folder Structure Management** – Choose whether or not to collapse the folder structure of the copied or moved content. Select the **Collapse Folder Structure** checkbox to enable this feature. DocAve also allows you to add a column to the destination for displaying the source folder path or parent folder name of the source folder. Select the **Add a column to display the source folder path or parent folder name** checkbox to enable this feature as well.
 - **Column to display the source folder path** – Enter a column name in the text box to add a **Single Line of Text** column to display the source folder path.
 - **Column to display the parent folder name** – Enter a column name in the text box to add a **Single Line of Text** column to display the source parent folder name.

***Note:** The **Folder Structure Management** field only appears when the source nodes of the exported data you selected are the list or folder level ones.

- g. **Column Mapping** – Maps source columns to destination columns by using a customized column mapping or an existing metadata file which is generated in Export Location. Choose **Use Column Mapping** and select a column mapping from the drop-down list, or click **New Column Mapping** from the drop-down list. For information on creating a column mapping, refer to the [DocAve 6 Control Panel Reference Guide](#). To apply an existing metadata file in the Export Location to this import job, choose **Use existing metadata file**.

***Note:** If you choose to change a column to a **Lookup** column, make sure that the **Lookup** column can only be associated with the list or list column that exists in the destination.

- h. **Content Type Mapping** – Maps source content types to entered content types in the destination, or change the content type name to another one. Select a content type mapping from the drop-down list, or click **New Content Type Mapping**. For information on creating a content type mapping, refer to the [DocAve 6 Control Panel Reference Guide](#).
- i. **Template Mapping** – Replaces site templates and list templates. By inputting or selecting a template ID, the source template is changed to the destination template. Select a template mapping from the drop-down list, or click **New Template Mapping**. For information on creating a template mapping, see the [DocAve 6 Control Panel Reference Guide](#).
- j. **User Mapping** – Maps a source user to a target user. If the same user has a different username in Domain A than in Domain B, or if you want to move an individual user's content, permissions, and metadata in Domain A to another user in Domain B, the user's permissions and metadata will not be lost when the content is moved. Select a user mapping from the drop-down list, or click **New User Mapping**. For information on creating a user mapping, see the [DocAve 6 Control Panel Reference Guide](#).
- k. **Domain Mapping** – Maps a source domain to a destination domain. The source domain name will be replaced by the configured destination domain name, and the user in the source domain will be mapped to the destination user which has the same login name. Select a domain mapping from the drop-down list, or click **New Domain Mapping**. For information on creating a domain mapping, see the [DocAve 6 Control Panel Reference Guide](#).
- l. **Language Mapping** – Displays the destination node in a different language than the source node after the plan has been executed. Select a language mapping from the drop-down list, or click **New Language Mapping**. For information on creating a language mapping, see the [DocAve 6 Control Panel Reference Guide](#).
- m. **List Name Mapping** – Changes the existing source lists of the copied or moved objects to your designated lists in the destination. Select a list name mapping from the drop-down list, or click **New List Name Mapping**. For information on creating a list name mapping, see the [DocAve 6 Control Panel Reference Guide](#).
- n. **Backup Environment Before Running Plan** – Select the Backup the destination environment checkbox to create a copy of the destination node prior to performing the copy). If you choose this option, you must designate a storage policy. Select a storage policy or click **New Storage Policy** to create a new one.

***Note:** Content Manager only supports the Backup type storage policy. For more information on storage policies, see the [DocAve 6 Control Panel Reference Guide](#).

- o. **Agent Group** – Select an Agent group to execute the import job. This option only appears when the selected destination node is in the SharePoint on-premises environments.
 - p. **Notification** – Choose the type of notification report and designate which DocAve user will receive an email notification. Select a notification profile from the drop-down list. Click **View** beside the drop-down list to view details of the notification profile or click **New Notification Profile**. For more information on creating a notification profile, see the [DocAve 6 Control Panel Reference Guide](#).
 - q. **Associated Plan Group** – Add the plan to one or more plan groups to manage plans with common settings. Select a plan group from the drop-down list or click **New Plan Group**. For information on creating a plan group, see the [DocAve 6 Control Panel Reference Guide](#).
6. Click **Save** to save the export plan. To save the export plan and execute it right away, click **Save**, and then select **Save and Run Now**.
 7. Click **Cancel** at any time to return to the **Home** tab of Content Manager.

***Note:** Exported Content Manager data can only be imported into SharePoint through the same version of DocAve that was used to export the data.

Editing Metadata File

You can edit the metadata file to add, edit, or delete metadata in batch. To edit the metadata file, complete the following steps:

1. Open the folder **Content Manager 2010** in the Export Location, and then open the folder named by Job ID with a **_001** suffix.
2. Inside that folder, open the subfolder that is named by GUID to see a list of Microsoft Excel files. Each library or list generates an Excel file. Columns, items, and their corresponding column values of a library or list are displayed in the Excel file.
3. You can add, edit, and delete the metadata file in the Excel file.

***Note:** The column **Content Type: = Computed** and the corresponding value cannot be edited.

- Add the metadata. Add a column, specify its column type, and set a value for the item in the Excel file. The newly added column will be imported to the destination view.

For example, add a new column next to the existing column on the first row, enter **Comments: = Multiple lines of text** and set the value of an item as **It needs to be updated**. Here **Comments** is the column name, **Multiple lines of text** is the column type, and **It needs to be updated** is the corresponding value for the item. After the import

job, the column will be added to the destination default view and the column **Comments** and the value will also be added as new metadata for the item.

- Edit the metadata. Edit the column name and column type of an item, and modify the corresponding value in the Excel file.

For example, in the Excel file, the column name, column type of an item is **Name: = File** and the corresponding value is **Document A**. You can modify the item name by modifying the value **Document A** to **Document B**. After the import job, the item name will be displayed as **Document B** in the destination.

- Delete the metadata. Delete the column name, column type of an item, and the corresponding value in the Excel file.

For example, in the Excel file, the column name and column type of an item is **Title: = Single line of text** and the corresponding value is **Custom List**. If you do not want this column title or type and the value for this item to be associated with the item in the destination after being imported, delete the column name, column type, and the corresponding value from the cells.

Advanced Settings

Content Manager offers these additional settings that can be applied to Content Manager plans:

- **Mappings** – The available mappings for Content Manager plan are:
 - **List Name Mapping** allows you to change the existing source lists of the copied or moved objects to your designated lists in the destination. Select a list name mapping from the drop-down list, or click **New List Name Mapping**.
 - **Column Mapping** is used to replace source columns with destination columns. According to column type, the source and destination column type can be the same or different. The column can be changed to Managed Metadata or Lookup.
 - **Content Type Mapping** allows you to replace the source content types with the destination content type according to the condition that you set up.
 - **Template Mapping** helps you achieve replacing site template and list template. By inputting or selecting a template ID, the source template is changed to the destination template.
 - **User Mapping** is beneficial for migrating groups of users from one domain to another and for migrating an individual user's content and permissions to another user.
 - **Domain mapping** is used to replace a source domain name with a domain name in the destination. The user in the source group will be mapped to the destination user with the same name.
 - **Language Mapping** allows you to set a different language for the destination than the language used in the source. By creating a language mapping rule, any plans using the rule can repeat the process without having to manually reenter the settings.
- **Export Location** allows you to configure locations on external system storage where you want Content Manager to export the data. By configuring an external system storage, you can also export design elements to the file system. This feature is useful in cases where two farms are unable to communicate with each other. You can use export locations to perform offline deployments to deploy from an external device.
- **Storage Policy** allows you to specify which logical device to use when storing content or when performing imports and exports for offline deployment.
***Note:** Content Manager only supports the Backup type storage policy.
- **Filter Policy** allows you to set up filter rules so you can control what objects and data within any SharePoint level appear so that you can target content to migrate more precisely. By setting up and saving filter policies, you can apply the same filter policies to different plans without having to recreate them each time.

Content Manager for SharePoint Online

Content Manager allows you to copy/move content from Microsoft SharePoint 2010/SharePoint 2013 to SharePoint Online. To perform this function properly, you must configure your SharePoint sites in Control Panel. For more detailed information about this configuration, see the **Registered SharePoint Sites** section in the [DocAve 6 Control Panel Reference Guide](#).

Before using Content Manager for SharePoint Online, make sure you have purchased the corresponding Content Manager for SharePoint Online licenses.

For details about how to perform a simple copy, run a simple move, perform a data export, perform a data import, or build a plan, refer to [Copying Content](#), [Moving Content](#), [Exporting Content](#), [Importing Content](#), and [Building Plans](#).

Certain settings are different when the destination node is in a SharePoint Online environment. To review supported settings for SharePoint Online, refer to [Appendix C: Supported and Unsupported Content Manager Settings for SharePoint Online](#).

Content Manager for SharePoint Online only supports the Create Container function for site, list, and folder levels in a SharePoint Online destination node.

If given the corresponding permissions, users in the Tenant groups can view and modify a DocAve plan, profile, or job created by the other users that are also in this group. For detailed information on the permission control of the users in the Tenant groups, refer to the [DocAve 6 Control Panel Reference Guide](#).

When selecting the source node and the destination node to perform a Content Manager job, make sure that the source node and the destination node are in the same version of SharePoint. However, the Content Manager for SharePoint Online supports to copy or move the contents from a SharePoint 2013 site with SharePoint 2010 experience version to a SharePoint 2013 site. For more information, refer to the [Appendix H: The Supported and Unsupported Methods to Copy or Move Sites of Different SharePoint Experience Versions](#).

Content Manager for SharePoint Online supports copying or moving the Apps for SharePoint. However, there are some limitations for the apps that are not added from the SharePoint App Store:

- Because of the Client API limitation, DocAve cannot obtain the app stream stored in the Microsoft server database. Therefore, DocAve cannot automatically create an app definition in the destination **App Catalog Site Collection**.
 - When backing up the app definition, DocAve cannot back up all of the app definition's installation components. Instead, DocAve obtains and backs up some properties, such as the **Product ID**, and **Product Version**.

- An app definition that is the same as the source must exist in the destination **App Catalog Site Collection** so DocAve can restore the source app and AppData normally.
- Make sure that the user used to register all of the site collections under the **My Registered Sites** node in the tree has **Read**, or above permission to the **Apps for SharePoint** library in the **App Catalog Site Collection**. Otherwise, DocAve cannot load the **Apps** node in the tree.

You can use the DocAve Agent that cannot connect to the internet to run a Content Manager job using SharePoint Online nodes. To do so, you must configure the **Agent Proxy Settings** in **Control Panel**. For more information, refer to the [DocAve 6 Control Panel Reference Guide](#).

Content Manager for SharePoint Online supports copying or moving the SharePoint 2013 Workflow platform. However, only the list level workflows are currently supported. DocAve does not support reusable workflow template.

Appendix A: Conflict Resolution

Container Level Conflict Resolution

Resolution	Object	Conflict	No Conflict
Skip	Configuration	Ignore the conflicting configuration and do nothing on the source and destination.	A new SharePoint object will be created.
	Security	Ignore the conflicting security and do nothing on the source and destination.	A new SharePoint object will be created.
Merge	Configuration	Overwrite the settings in the destination node with settings from the source node.	A new SharePoint object will be created.
	Security	<ul style="list-style-type: none"> Source permissions that do not already exist in the destination node will be added to the destination node. Permission levels from the source node will replace those in the destination node. 	A new SharePoint object will be created.
Replace	Configuration	<ul style="list-style-type: none"> Site collection level, site level, or folder level – Content, configurations, and securities of the destination node will be replaced with those in the source node. Root site level, list/library level, or root folder level – All objects under the conflicting container will be deleted and replaced with source content, and configurations. The securities under the conflicting container will be merged to the destination. <p>*Note: Root site level and sub-site level are regarded as the same level. That is, if the conflict exists at the root site level, the sub-site will not be deleted.</p>	A new SharePoint object will be created.
	Security	Conflicting securities on the destination node will be overwritten with that of the source node.	A new SharePoint object will be created.

Content Level Conflict Resolution

Resolution	Object	Conflict	No Conflict
Skip	Content	Ignore the conflicting content and do nothing on source and destination.	A new SharePoint object will be created.
Overwrite	Content	Delete the conflicting content on destination first and overwrite it with the source content.	A new SharePoint object will be created.
Overwrite by Last Modified Time	Content	If the last modified time of source conflicting content is later than that of destination one, it will overwrite the destination content by source one; otherwise, do nothing on the source and destination node.	A new SharePoint object will be created.
Append	Content	The conflicting content will not be deleted; the conflicting document will be transferred to the destination by adding a suffix to the document name (_1, _2, ..., increasing in numerical value), and the conflicting item will be transferred to the destination by adding 1 to the item ID.	A new SharePoint object will be created.

Apps Conflict Resolution

Resolution	Object	Conflict	No Conflict
Skip	App	Ignore the conflicting app instance and do nothing on source and destination.	The source app instance is created in the destination.
	AppData	Ignore the conflicting AppData and do nothing on source and destination.	The source AppData is created in the destination.
Update App Only	App	The latest version app instance will be kept in the destination.	The source app instance is created in the destination.
	AppData	Ignore the conflicting AppData and do nothing on source and destination. *Note: This will cause the version of the app	The source AppData is created in the destination.

Resolution	Object	Conflict	No Conflict
		and that of the AppData to not be the same version in the destination after the Content Manager job. The app may not work well.	
Replace App and AppData	App	The destination app instance is deleted while the source app is created in the destination.	The source app instance is created in the destination.
	AppData	The destination AppData is deleted while the source AppData is created in the destination.	The source AppData is created in the destination.

Appendix B: Supported Online and Offline Content Manager Settings for SharePoint On-Premises

Refer to the following sections for more information.

Supported Online Content Manager Settings

The following table identifies the supported settings for copy and move jobs using SharePoint on-premises nodes.

***Note:** The options that only exist for moves have been marked as **(Move Only)**. The options that only exist for **Merge** have been marked as **(Merge Only)**.

Supported Online Settings			
Action	Attach		
	Merge		
	Preview		
Promote Method (Merge Only)	Promote top-level site to site collection		
	Promote all sites to site collections		
Which managed path would you like to use in the destination? (Merge Only)			
Filter Policy			
Select Source Components	Configuration	Copy/Move configuration	Keep look and feel
		Deselect Copy/Move configuration	Do not copy/move the columns and content types, or the corresponding items
		Copy/Move the item dependent columns and content types to maintain item integrity	Overwrite the columns and content types
		Do not copy/move the item dependent columns or content types. Report the items if the corresponding column or content type is not found in destination.	Append the columns and content types to destination
	Security	Exclude user/group without permission	
	Content	Include list attachment	
User Profile			

Supported Online Settings			
Workflow	Include workflow definition		
	Include workflow instance	Include completed instance	
		Include running instance	Cancel workflows
			Restart workflows
Managed Metadata Service Setting	Copy Managed Metadata Service	Term	
		Term set	
		Managed Metadata Service	
Schedule	No schedule		
	Configure the schedule myself		
Preserve the Null Column Values			
Folder Structure Management	Collapse Folder Structure	Add a column to display the source folder path or parent folder name	Column to display the source folder path
			Column to display the parent folder name
Data Compression			
Column Mapping			
Content Type Mapping			
Template Mapping			
Domain Mapping			
User Mapping			
Language Mapping			
List Name Mapping			
Source Deletion Method (Move Only)	Manual		
	Automatic		
Delete Source Checked Out Documents (Move Only)			
Backup Environment Before Running Plan	Backup the source environment (Move Only)		
	Backup the destination environment		
Conflict Resolution	Container level conflict resolution	Skip	
		Merge	
		Replace	
	Check lower objects		
		Skip	

Supported Online Settings		
	Content level conflict resolution	Overwrite
		Overwrite by Last Modified Time
		Append
Apps Conflict Resolution	Skip	
	Update App Only	
	Replace App and AppData	
Agent Group	Source Agent Group	
	Destination Agent Group	
Notification		
Associated Plan Group		

Supported Offline Content Manager Settings

The following table identifies the supported settings for copy jobs performed for Data Export and Data Import.

Export Settings

Refer to the following table for more information.

Export Settings			Support Status	Comment
Filter Policy			Supported	
Select Source Components	Content	Include list attachment	Supported	
	User Profile		Supported	
Data Compression			Supported	
Data Encryption			Supported	
Workflow	Include workflow definition		Supported	
	Include workflow instance		Supported	
Managed Metadata Service Setting	Term		Supported	
	Term set		Supported	
	Managed Metadata Service		Supported	
Generate Metadata File			Supported	
Agent Group			Supported	

Export Settings		Support Status	Comment
Notification		Supported	
Associated Plan Group		Supported	

Import Settings

Refer to the following table for more information.

Import Settings				Support Status	Comment
Action	Attach			Supported	
	Merge			Supported	
	Preview			Supported	
Conflict Resolution	Container level conflict resolution	Skip		Supported	
		Merge		Supported	
		Replace		Supported	
	Check lower objects			Supported	
	Content level conflict resolution	Skip		Supported	
		Overwrite		Supported	
		Overwrite by Last Modified Time		Supported	
Append		Supported			
Apps Conflict Resolution	Skip			Partially Supported	Unsupported for SharePoint 2010
	Update App Only			Partially Supported	
	Replace App and AppData			Partially Supported	
Select Source Components	Configuration	Import configuration		Supported	
		Deselect Import configuration	Import the item-dependent columns and content types	Do not copy/move the columns and content types, or the corresponding items	Supported

Import Settings				Support Status	Comment	
			to maintain item integrity Conflict resolution for dependent items:	Overwrite the columns and content types	Supported	
				Append the columns and content types to destination	Supported	
				Do not import the item-dependent columns or content types. Report the items if the corresponding column or content type is not found in destination	Supported	
	Security	Import security	Exclude user/group without permission	Supported		
Workflow	Include workflow definition			Supported		
	Include workflow instance	Include completed instance		Supported		
		Include running instance	Cancel the workflow		Supported	
			Restart the workflow		Supported	
Managed Metadata Service Setting	Copy Managed Metadata Service		Term	Supported		
			Term set	Supported		
			Managed Metadata Service	Supported		
Preserve the Null Column Values				Supported		
Folder Structure Management				Supported		
Column Mapping	Using Column Mapping			Supported		
	Use existing metadata file			Supported		
Content Type Mapping				Supported		
Template Mapping				Supported		
Domain Mapping				Supported		
User Mapping				Supported		

Import Settings		Support Status	Comment
Language Mapping		Supported	
List Name Mapping		Supported	
Backup Environment Before Running Plan	Backup the destination environment	Supported	
Agent Group		Supported	
Notification		Supported	
Associated Plan Group		Supported	

Appendix C: Supported and Unsupported Content Manager Settings for SharePoint Online

Refer to the following sections for more information.

Supported Online Content Manager Settings

The following table identifies the supported and unsupported Content Manager settings for SharePoint Online environments for copy and move jobs.

***Note:** Options that only exist in Move have been marked as **(Move Only)**.

Functionality Name				Support Status	Comment
Action	Attach			Supported	
	Merge			Supported	
	Preview			Supported	
Source Deletion Method (Move Only)	Manual			Supported	
	Automatic			Supported	
Delete Source Checked Out Documents (Move Only)				Supported	
Filter Policy				Supported	
Select Source Components	Configuration	Copy/Move configuration	Keep look and feel	Supported	
		Deselect Copy/Move configuration	Do not copy/move the columns and content types, or the corresponding items	Partially Supported	This setting is not supported when the source content type does not have parent content type.
		Copy/Move the item-dependent columns	Overwrite the columns and content types	Supported	

Functionality Name				Support Status	Comment	
		and content types to maintain item integrity	Append the columns and content types to destination	Partially Supported	This setting is not supported when the source content type does not have parent content type.	
		Do not copy/move the item-dependent columns or content types. Report the items if the corresponding column or content type is not found in destination.		Supported		
	Security	Copy/Move security		Supported		
		Exclude user/group without permission		Partially Supported	This setting is not supported when the source node is from My Registered Sites.	
	Content	Include list attachment		Supported		
	User Profile			Supported		
Schedule	No schedule			Supported		
	Start time			Supported		
	Configure the schedule myself (Move Only)	Start time		Supported		
		Interval: __ Days		Supported		
		No end date		Supported		
		End after __ occurrences		Supported		
End by __		Supported				
Workflow	Include workflow definition			Supported		
	Include workflow instance	Include completed instance		Unsupported		
		Include running instance	Cancel workflows		Unsupported	
			Restart workflows		Unsupported	
Managed Metadata Service Setting	Copy Managed Metadata Service	Term		Partially Supported		
		Term set		Partially Supported		

Functionality Name			Support Status	Comment	
		Managed Metadata Service	Partially Supported	Unsupported when the source and destination nodes are from SharePoint 2010.	
Preserve the Null Column Values			Supported		
Folder Structure Management			Supported		
Data Compression			Supported		
Column Mapping			Supported		
Content Type Mapping			Supported		
Template Mapping			Supported		
User Mapping	Normal User Mapping		Supported		
	Add a default destination user		Supported		
	Add a place holder account to keep metadata even if the user no longer exists		Unsupported		
Domain Mapping			Supported		
Language Mapping			Supported		
List Name Mapping			Supported		
Backup Environment Before Running Plan	Backup the source environment (Move Only)		Supported		
	Backup the destination environment		Supported		
	Rollback		Partially Supported	For the site collection node, Content Manager will empty the site collection instead of deleting it when rolling back in the Replace way.	
Conflict Resolution	Container Level	Skip	Supported		
		Merge	Supported		
		Replace	Supported		
	Check lower objects		Supported		
	Content Level	Skip		Supported	
		Overwrite		Supported	
		Overwrite by Last Modified Time		Supported	
Append		Unsupported			

Functionality Name		Support Status	Comment
Apps Conflict Resolution	Skip	Partially Supported	Unsupported when running a Content Manager job from the SharePoint Online node to a SharePoint on-premises node.
	Update App Only	Partially Supported	
	Replace App and AppData	Partially Supported	
Notification		Supported	
Associated Plan Group		Supported	
Create Container		Partially Supported	Unsupported for site collection.

Supported Offline Content Manager Settings

The following table identifies the supported settings for copy jobs performed for Data Export and Data Import.

Export Settings

Refer to the following table for more information.

Export Settings			Support Status	Comment
Filter Policy			Supported	
Select Source Components	Content	Include list attachment	Supported	
	User Profile		Supported	
Data Compression			Supported	
Data Encryption			Supported	
Workflow	Include workflow definition		Supported	
	Include workflow instance		Unsupported	

Export Settings		Support Status	Comment
Managed Metadata Service Setting	Term	Partially Supported	Unsupported when the source and destination nodes are from SharePoint 2010.
	Term set	Partially Supported	
	Managed Metadata Service	Partially Supported	
Generate Metadata File		Supported	
Notification		Supported	
Associated Plan Group		Supported	

Import Settings

Refer to the following table for more information.

Import Settings			Support Status	Comment
Action	Attach		Supported	
	Merge		Supported	
	Preview		Supported	
Conflict Resolution	Container level conflict resolution	Skip	Supported	
		Merge	Supported	
		Replace	Supported	
	Check lower objects		Supported	
	Content level conflict resolution	Skip	Supported	
		Overwrite	Supported	
		Overwrite by Last Modified Time	Supported	
Append		Unsupported		
Apps Conflict Resolution	Skip		Partially Supported	Unsupported for SharePoint 2010
	Update App Only		Partially Supported	
	Replace App and AppData		Partially Supported	
	Configuration	Import configuration	Supported	

Import Settings				Support Status	Comment	
Select Source Components		Deselect Import configuration	Import the item-dependent columns and content types to maintain item integrity Conflict resolution for dependent items:	Do not copy/move the columns and content types, or the corresponding items	Partially Supported	Do not support this setting when the source content type does not have parent content type.
				Overwrite the columns and content types	Supported	
				Append the columns and content types to destination	Partially Supported	Do not support this setting when the source content type does not have parent content type.
				Do not import the item-dependent columns or content types. Report the items if the corresponding column or content type is not found in destination	Supported	
	Security	Import security	Exclude user/group without permission	Partially Supported	Do not support this setting when the source node is from My Registered Sites.	
Workflow	Include workflow definition			Supported		
	Include workflow instance	Include completed instance		Unsupported		
		Include running instance	Cancel the workflow		Unsupported	
			Restart the workflow		Unsupported	
Managed Metadata Service Setting	Copy Managed Metadata Service	Term		Partially Supported	Unsupported when the source and destination nodes	
		Term set		Partially Supported		
		Managed Metadata Service		Partially Supported		

Import Settings		Support Status	Comment
			are from SharePoint 2010.
Preserve the Null Column Values		Supported	
Folder Structure Management		Supported	
Column Mapping	Using Column Mapping	Supported	
	Use existing metadata file	Supported	
Content Type Mapping		Supported	
Template Mapping		Supported	
Domain Mapping		Supported	
User Mapping		Supported	
Language Mapping		Partially Supported	Keeping user's metadata is not supported for SharePoint Online.
List Name Mapping		Supported	
Backup Environment Before Running Plan	Backup the destination environment	Supported	
Notification		Supported	
Associated Plan Group		Supported	

Appendix D: Supported and Unsupported Elements for Content Manager

The following table lists the currently supported and unsupported elements for Content Manager.

Source	Type	Status	Comment
Libraries	Document Library	Supported	
	Form Library	Supported	
	Wiki Page Library	Supported	
	Picture Library	Supported	
	Translation Management Library	Supported	
	Data Connection Library	Supported	
	Slide Library	Supported	
	Report Library	Supported	
	Asset Library	Supported	
	DocAve Content Library	Supported	
DocAve Media Library	Supported		
Communications List	Announcements	Supported	
	Contacts	Supported	
	Discussion Board	Supported	
Tracking Lists	Links	Supported	
	Calendar	Supported	
	Tasks	Supported	
	Project Tasks	Supported	
	Issue Tracking	Supported	
	Survey	Supported	
Custom Lists	Custom List	Supported	
	Custom List in Datasheet View	Supported	
	Language and Translators	Supported	
	KPI Lists (in SharePoint 2010)	Supported	
	Status Lists (in SharePoint 2013)	Unsupported	
	Import Spreadsheet	Supported	
Web Pages	Basic Page	Supported	
	Web Part Page	Supported	

Source	Type	Status	Comment
	sites and Workspaces	Supported	
Workflow *Note: Content Manager does not support the workflow instances associated with the checked-out files.	SharePoint 2010 Workflow Platform	Partially Supported	Support both workflow definition and instance for SharePoint on-premises. Only support the workflow definition for SharePoint Online.
	SharePoint 2013 Workflow Platform	Partially Supported	Support both workflow definition and instance for SharePoint on-premises. Only support workflow definition for SharePoint Online.
	SharePoint Designer 2010 Workflow	Partially Supported	Support the workflow definition for both SharePoint on-premises and SharePoint Online.
	SharePoint Designer 2013 Workflow	Partially Supported	Support the workflow definition for both SharePoint on-premises and SharePoint Online.

Source	Type	Status	Comment
	Nintex 2010 Workflow	Partially Supported	Unsupported for SharePoint Online.
	Nintex 2013 Workflow	Partially Supported	Unsupported for SharePoint Online.
	Visual Studio 2010 Workflow	Unsupported	
	Visual Studio 2012 Workflow	Unsupported	
	Visio Workflow	Unsupported	
	Azure Workflow	Unsupported	
RSS		Supported	
Alerts		Partially Supported	Unsupported when the source nodes are from My Registered Sites.
Metadata	Single line of text	Supported	
	Multiple lines of text	Supported	
	Choice (menu to choose from)	Supported	
	Number	Supported	
	Currency	Supported	
	Date and Time	Supported	
	Look up	Supported	
	Yes/No	Supported	
	Person or Group	Supported	
	Hyperlink or Picture	Supported	
	Calculated	Supported	
	Business Data	Supported	
Managed Metadata	Partially Supported	Unsupported for the SharePoint 2010 on-premises node from My Registered Sites.	
Security & Properties	Version Settings	Supported	

Source	Type		Status	Comment
	Column Settings		Supported	
	Permissions		Supported	
Version Histories	Documents		Supported	
	Lists		Supported	
Apps for SharePoint	SharePoint-hosted Apps		Supported	
	Provider-hosted Apps		Partially Supported	Unsupported for SharePoint on-premises.
	Auto-hosted Apps		Partially Supported	Unsupported for SharePoint on-premises.
User Profile	Colleagues	Back up	Supported	
		Restore	Supported	
	Membership	Back up	Partially Supported	Unsupported for SharePoint Online
		Restore	Partially Supported	Unsupported for SharePoint Online
	Organization	Back up	Partially Supported	Unsupported for SharePoint Online
		Restore	Partially Supported	Unsupported for SharePoint Online
	Tags/Comments	Back up	Partially Supported	Unsupported for SharePoint Online
		Restore	Unsupported	
	Quick Links	Back up	Partially Supported	Unsupported for SharePoint Online
		Restore	Partially Supported	Unsupported for SharePoint Online
	Other basic properties	Back up	Supported	
		Restore	Partially Supported	For SharePoint Online sites, properties can only

Source	Type		Status	Comment
				be restored when Allow User to edit values for this property is set to Yes .
	Customized properties	Back up	Partially Supported	Unsupported for SharePoint Online
		Restore	Partially Supported	Unsupported for SharePoint Online
	Create User Profile		Partially Supported	Unsupported for SharePoint Online
Site	Blog Site		Supported	

***Note:** By default, Content Manager does not support copying or moving the Metadata Navigation setting of the SharePoint 2013 site collections. However, Content Manager supports it after modifying the Content Manager configuration file. To modify the Content Manager configuration file, complete the following steps:

1. Log into the server where DocAve Agent resides.
2. Go to the ... \AvePoint\DocAve6\Agent\data\SP2010\ContentManager directory.
3. Open the **SP2010CMConfiguration.xml** file using Notepad.
4. Locate the **<RestoreMetadataNavigation value="false"/>** node.
5. Change its value to **true**.
6. Save the changes and close the file.

Appendix E: Supported and Unsupported SharePoint 2013 Social Features

Social Feature		Status	Note
My Site		Partially Supported	The head portraits of the users are not supported.
SkyDrive Pro (or named OneDrive for Business)		Supported	
Blog		Supported	
Tag		Supported	The #Tag is stored in Managed Metadata Service as System Term.
Microblog and Feed	Post	Partially Supported	Unsupported for SharePoint Online
	Reply	Partially Supported	
	Like	Partially Supported	
	Picture	Partially Supported	
	Link	Partially Supported	
	@	Partially Supported	
	Mentions	Partially Supported	
	Tag	Partially Supported	
Follow	People	Supported	
	Site	Unsupported	
	Document	Unsupported	
	Tag	Unsupported	
Community Site	Categories	Supported	
	Discussion Board	Supported	
	Members	Supported	
	Budge	Supported	
	Reputation	Supported	
	Best Reply	Supported	
	Question	Supported	
	Community Setting	Supported	
Community Portal		Supported	

Appendix F: Accessing Hot Key Mode

In order to work faster and improve your productivity, DocAve supports hot key mode for you to perform corresponding actions quickly by only using your keyboard. To access hot key mode from the Content Manager interface, press the key combination of **Ctrl + Alt + Z** (simultaneously) on your keyboard.

The following table provides a list of hot keys for the top level. Each time you want to go back to the top level after accessing the interface of lower level, press on the keyboard. For example, continue pressing **H** to jump to Content Manager Home Page.

Operation Interface	Hot Key
Content Manager Home Page	H
Content Manager Plan Manager	P
DocAve Home Page	1
DocAve Online Community	2
Control Panel	3
Job Monitor	4
Plan Group	5
Health Analyzer	6
Account Information	9
Help and About	0

Home Page

To access the **Home** page by using hot keys in the Content Manager interface, press the **Ctrl + Alt + Z** key combination to access the hot key mode, and then press **H** on the keyboard to enter the **Home** page.

The following table is a list of hot keys for the functionalities on the ribbon of the **Home** page. For example, continue pressing **O** to jump to the **Data Export** interface.

Functionality Name and Hot Key	
Online Content Manager	L
Copy	C
Move	M

Functionality Name and Hot Key			
Data Export			O
Data Import			I
Create Container			N
Plan Builder			P
Export Location			E
Storage Policy			S
Filter Policy			F
Mappings	A	Column Mapping	CL
		Content Type Mapping	CT
		Template Mapping	T
		User Mapping	U
		Domain Mapping	D
		Language Mapping	LM
		List Name Mapping	LN
Job Monitor	J		

Copy

Functionality Name and Hot Key			
Copy	C	View	V
		Edit	E
		Preview	P
		Run Now	R
		Cancel	C
Default Copy Settings	D	OK	O
		Cancel	C

Move

Functionality Name and Hot Key			
Move	M	View	V
		Edit	E
		Preview	P
		Run Now	R
		Cancel	C
Default Move Settings	D	OK	O
		Cancel	C

Plan Builder

Functionality Name and Hot Key					
Wizard Mode	W	Back	B		
		Next	N		
		Finish	F	Finish and Run Now	R
				Finish	F
		Cancel	C		
Form Mode	F	OK	OK and Run	R	
			OK	O	
		Cancel	C		

Plan Manager Page

To access the **Plan Manager** page by using hot keys in the Content Manager interface, press the **Ctrl + Alt + Z** key combination to access the hot key mode, and then press **P** on the keyboard to jump to the **Plan Manager** page.

The following table provides a list of hot keys for the functionalities on the ribbon of the **Plan Manager** page. For example, continue pressing **V** to jump to the View Details interface.

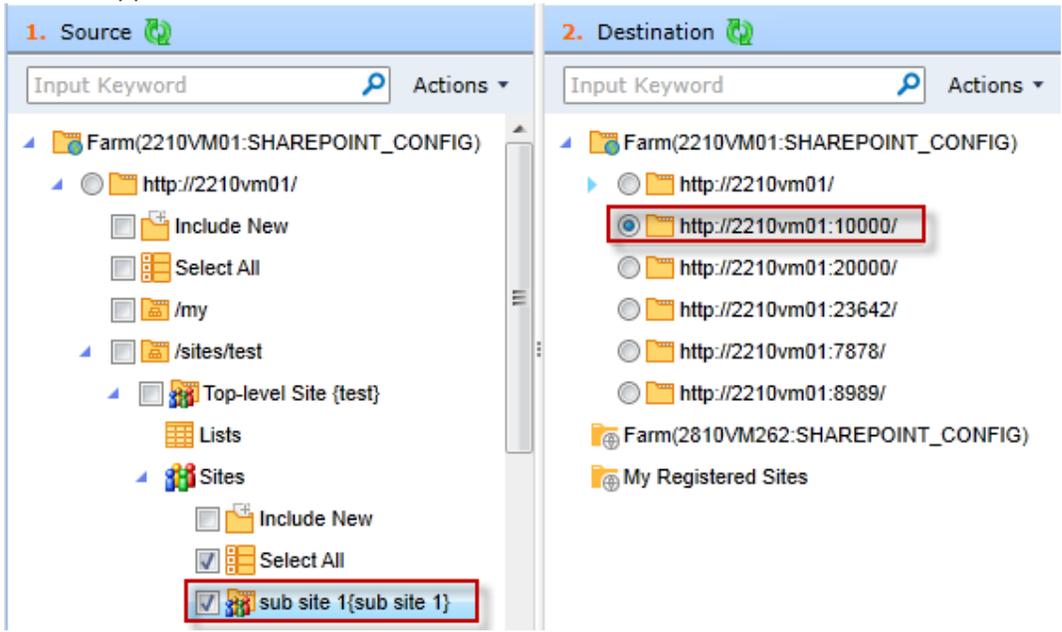
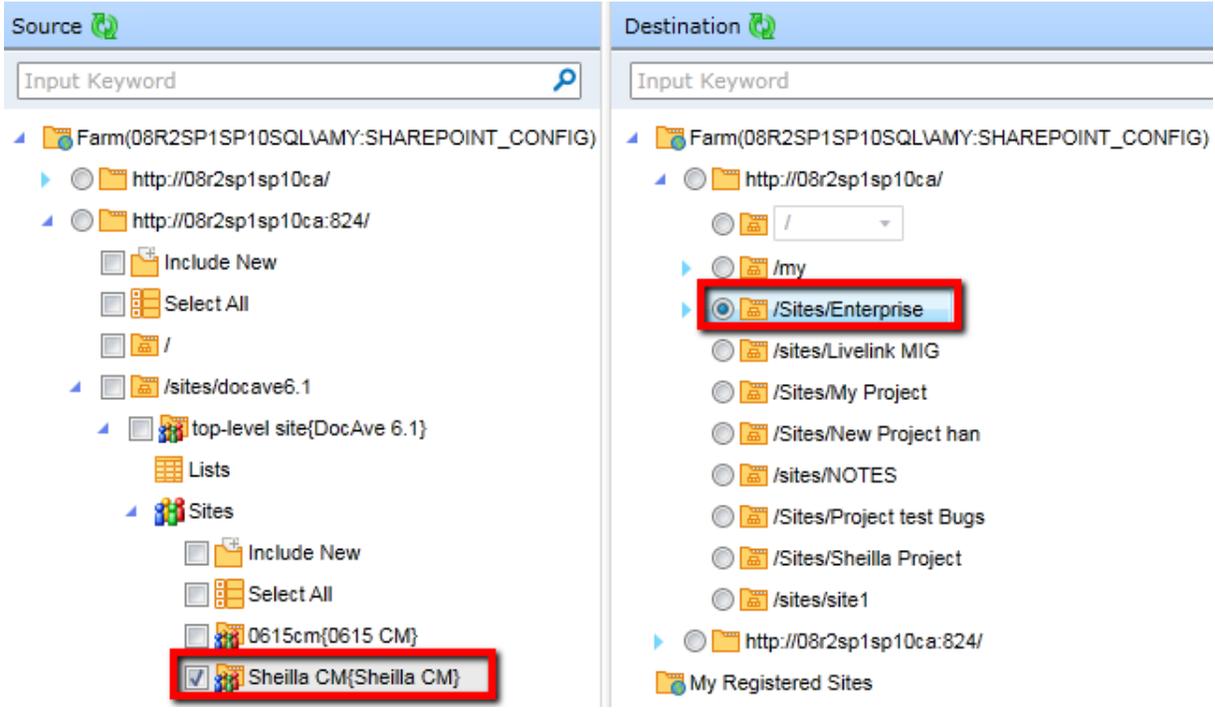
Functionality Name and Hot Key					
View Details	V	Source & Destination		D	
		Settings		S	
		Edit		E	
		Test Run		T	
		Run Now		R	
		Close		X	
Edit	E	Create Container		N	
		Save	S	Save	S
				Save As	A
				Save and Run Now	R
Cancel		C			
Delete		D			
Test Run		T			
Run Now		R			

Appendix G: Content Manager Customization Support Table

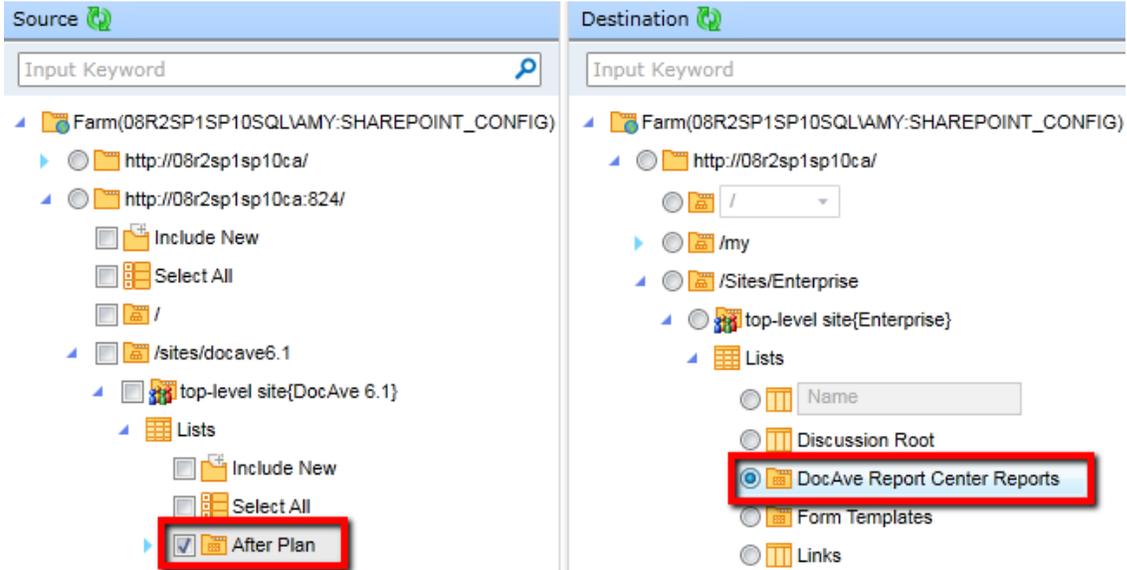
The following is the customization support table of Content Manager. √ means the corresponding SharePoint object is supported to be copied or moved to the corresponding SharePoint objects.

Copy/Move To What to Copy/Move	Web Application	Site Collection	Site	List	Folder	Note	What to select when copying/moving
Web application	√					Merge	<p>The screenshot displays the Content Manager interface for a 'Merge' operation. It is divided into two main sections: 'Source' and 'Destination'.</p> <p>Source Section: Shows a search bar 'Input Keyword' and a tree view under 'Farm(08R2SP1SP10SQLVAMY:SHAREPOINT_CONFIG)'. Two folders are listed: 'http://08r2sp1sp10ca/' (selected with a red box) and 'http://08r2sp1sp10ca:824/'.</p> <p>Destination Section: Shows a search bar 'Input Keyword' and a tree view under 'Farm(08R2SP1SP10SQLVAMY:SHAREPOINT_CONFIG)'. Two folders are listed: 'http://08r2sp1sp10ca/' and 'http://08r2sp1sp10ca:824/' (selected with a red box).</p> <p>To Web application: This section shows the source selection for the web application. It includes a search bar 'Input Keyword' and a tree view under 'Farm(08R2SP1SP10SQLVAMY:SHAREPOINT_CONFIG)'. Two folders are listed: 'http://08r2sp1sp10ca/' and 'http://08r2sp1sp10ca:824/'. Below the tree view are three checkboxes: 'Include New', 'Select All', and '/'. The folder '/sites/docave6.1' is selected with a red box.</p>

Copy/Move To What to Copy/Move	Web Application	Site Collection	Site	List	Folder	Note	What to select when copying/moving
Site collection	√	√	√			<p>To Web application: Merge/Attach</p> <p>To site collection: Merge/Attach</p> <p>To site: Merge/Attach</p>	<div data-bbox="1422 311 2049 772"> <p>To site collection:</p> <p>Source </p> <p>Input Keyword <input type="text"/></p> <ul style="list-style-type: none"> Farm(08R2SP1SP10SQLVAMY:SHAREPOINT_CONFIG) <ul style="list-style-type: none"> http://08r2sp1sp10ca/ http://08r2sp1sp10ca:824/ <ul style="list-style-type: none"> Include New Select All / <input checked="" type="checkbox"/> /sites/docave6.1 </div> <div data-bbox="2049 311 2708 772"> <p>Destination </p> <p>Input Keyword <input type="text"/></p> <ul style="list-style-type: none"> Farm(08R2SP1SP10SQLVAMY:SHAREPOINT_CONFIG) <ul style="list-style-type: none"> http://08r2sp1sp10ca/ <ul style="list-style-type: none"> / /my <input checked="" type="checkbox"/> /Sites/Enterprise /sites/Livelink MIG /Sites/My Project </div> <div data-bbox="1422 807 2049 1429"> <p>To site:</p> <p>Source </p> <p>Input Keyword <input type="text"/></p> <ul style="list-style-type: none"> Farm(08R2SP1SP10SQLVAMY:SHAREPOINT_CONFIG) <ul style="list-style-type: none"> http://08r2sp1sp10ca/ http://08r2sp1sp10ca:824/ <ul style="list-style-type: none"> Include New Select All / <input checked="" type="checkbox"/> /sites/docave6.1 /sites/eroom /sites/g1 /sites/g2 </div> <div data-bbox="2049 807 2708 1429"> <p>Destination </p> <p>Input Keyword <input type="text"/></p> <ul style="list-style-type: none"> Farm(08R2SP1SP10SQLVAMY:SHAREPOINT_CONFIG) <ul style="list-style-type: none"> http://08r2sp1sp10ca/ <ul style="list-style-type: none"> / /my /Sites/Enterprise <ul style="list-style-type: none"> top-level site{Enterprise} <ul style="list-style-type: none"> Lists Sites <ul style="list-style-type: none"> URL Name <input type="text"/> <input checked="" type="checkbox"/> Project test Bugs{Project test Bugs} </div>

Site	v	v	v		<p>To Web application: Merge To site collection: Merge/Attach</p> <p>To site: Merge/Attach</p>	<p>To Web application:</p>  <p>To site collection:</p>  <p>To site:</p>
------	---	---	---	--	--	--

Copy/Move To What to Copy/Move	Web Application	Site Collection	Site	List	Folder	Note	What to select when copying/moving	
List			√	√		To site: Attach To list: Merge		

Copy/Move To What to Copy/Move	Web Application	Site Collection	Site	List	Folder	Note	What to select when copying/moving
							<p>To list:</p> 
Folder				√	√	<p>To list: Attach</p> <p>To folder: Merge/Attach</p>	To list:

Copy/Move To What to Copy/Move	Web Application	Site Collection	Site	List	Folder	Note	What to select when copying/moving
							<p>To folder:</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p>Source </p> <p>Input Keyword</p> <ul style="list-style-type: none"> ▶ Farm(08R2SP1SP10SQLVAMY:SHAREPOINT_CONFI ▶ <input type="radio"/> http://08r2sp1sp10ca/ ▶ <input type="radio"/> http://08r2sp1sp10ca:824/ <ul style="list-style-type: none"> <input type="checkbox"/> Include New <input type="checkbox"/> Select All <input type="checkbox"/> / ▶ <input type="checkbox"/> /sites/docave6.1 <ul style="list-style-type: none"> ▶ <input type="checkbox"/> top-level site{DocAve 6.1} <ul style="list-style-type: none"> ▶ <input type="checkbox"/> Lists <ul style="list-style-type: none"> <input type="checkbox"/> Include New <input type="checkbox"/> Select All ▶ <input type="checkbox"/> After Plan <ul style="list-style-type: none"> ▶ <input type="checkbox"/> Root Folder <ul style="list-style-type: none"> ▶ <input type="checkbox"/> Folders <ul style="list-style-type: none"> <input type="checkbox"/> Include New <input checked="" type="checkbox"/> Select All <input checked="" type="checkbox"/> CM <input type="checkbox"/> Items <input type="checkbox"/> Announcements <input type="checkbox"/> Approval Tasks </div> <div style="width: 48%;"> <p>Destination </p> <p>Input Keyword</p> <ul style="list-style-type: none"> ▶ <input type="radio"/> http://08r2sp1sp10ca/ ▶ <input type="radio"/> http://08r2sp1sp10ca:824/ <ul style="list-style-type: none"> <input type="checkbox"/> /sites/ <input type="text" value="URL"/> <input type="checkbox"/> / ▶ <input type="radio"/> /sites/docave6.1 <ul style="list-style-type: none"> ▶ <input type="checkbox"/> top-level site{DocAve 6.1} <ul style="list-style-type: none"> ▶ <input type="checkbox"/> Lists <ul style="list-style-type: none"> <input type="checkbox"/> Name <input type="text" value=""/> <input type="checkbox"/> After Plan <input type="checkbox"/> Announcements <input type="checkbox"/> Approval Tasks <input type="checkbox"/> Approval Workflow Tasks <input type="checkbox"/> Calendar <input type="checkbox"/> Customized Reports ▶ <input type="radio"/> Doc 6.1 <ul style="list-style-type: none"> ▶ <input type="checkbox"/> Root Folder <ul style="list-style-type: none"> ▶ <input type="checkbox"/> Folders <ul style="list-style-type: none"> <input type="checkbox"/> Name <input type="text" value=""/> <input type="checkbox"/> CM <input checked="" type="checkbox"/> CM Folder </div> </div>

Copy/Move To What to Copy/Move	Web Application	Site Collection	Site	List	Folder	Note	What to select when copying/moving
Item					√	Attach	<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p>Source</p> <p>Input Keyword</p> <ul style="list-style-type: none"> ▶ Farm(08R2SP1SP10SQLVAMY:SHAREPOINT_CONFI ▶ http://08r2sp1sp10ca/ ▶ http://08r2sp1sp10ca:824/ <ul style="list-style-type: none"> ▶ Include New ▶ Select All ▶ / ▶ /sites/docave6.1 <ul style="list-style-type: none"> ▶ top-level site{DocAve 6.1} <ul style="list-style-type: none"> ▶ Lists <ul style="list-style-type: none"> ▶ Include New ▶ Select All ▶ After Plan <ul style="list-style-type: none"> ▶ Root Folder <ul style="list-style-type: none"> ▶ Folders ▶ Items <ul style="list-style-type: none"> ▶ Include New ▶ Select All ▶ Test 2 ▶ Announcements </div> <div style="width: 48%;"> <p>Destination</p> <p>Input Keyword</p> <ul style="list-style-type: none"> ▶ http://08r2sp1sp10ca/ ▶ http://08r2sp1sp10ca:824/ <ul style="list-style-type: none"> ▶ /sites/ URL ▶ / ▶ /sites/docave6.1 <ul style="list-style-type: none"> ▶ top-level site{DocAve 6.1} <ul style="list-style-type: none"> ▶ Lists <ul style="list-style-type: none"> ▶ Name ▶ After Plan ▶ Announcements ▶ Approval Tasks ▶ Approval Workflow Tasks ▶ Calendar ▶ Customized Reports ▶ Doc 6.1 <ul style="list-style-type: none"> ▶ Root Folder <ul style="list-style-type: none"> ▶ Folders <ul style="list-style-type: none"> ▶ Name ▶ CM </div> </div>

Copy/Move To What to Copy/Move	Web Application	Site Collection	Site	List	Folder	Note	What to select when copying/moving
Apps		√	√			To site collection: When copying or moving to the destination site collection, the Apps are attached to the top-level site of the destination site collection. To site: Attach	
SharePoint Built-in Workflow	√	√	√	√		<p>If you want to copy or move the workflow, you must select the SharePoint objects that is associated with the workflow on the tree, and select the Include workflow definition/Include workflow instance.</p> <p>If the workflow in the source node is In Progress, by default the status in the destination node will be Canceled after being migrated. If you select the Restart the workflow radio button, the status in the destination node will still be In Progress after being migrated.</p> <p>*Note: Content Manager does not support the workflow instances associated with the checked-out files.</p> <p>Workflow Define how SharePoint workflows are migrated for the selected content. 'Definition' is the definition of existing source workflows. 'Instance' is the state, history, and tasks, for each item.</p>	
SharePoint designer workflow	√	√	√	√		<p>Reusable workflow template is only supported if the workflow has been applied in the Content Type.</p> <p>The In Progress workflow can be copied/moved to the destination, while its status is not kept.</p> <p>*Note: Content Manager does not support the workflow instances associated with the checked-out files.</p>	
Nintex workflow	√	√	√	√		<p>Reusable workflow template is only supported if the workflow has been applied in the Content Type.</p> <p>Schedule in Nintex Workflow is only supported when both Include workflow definition and Include workflow instance are selected.</p> <p>The In Progress workflow can be copied/moved to the destination, while its status is not kept.</p>	

Copy/Move To	Web Application	Site Collection	Site	List	Folder	Note	What to select when copying/moving
What to Copy/Move							
						<p>*Note: Content Manager does not support the workflow instances associated with the checked-out files.</p>	

Appendix H: The Supported and Unsupported Methods to Copy or Move Sites of Different SharePoint Experience Versions

Refer to the following table for the information of the SharePoint experience versions that are supported by Content Manager:

- **Source Experience Version** – The experience version of the source node.
- **Destination Experience Version**– The experience version of the destination node.
- **Supported Status** – Whether or not Content Manager supports to copy or move from the source SharePoint nodes to the destination SharePoint nodes.

Source Experience Version	Destination Experience Version	Supported Status
SharePoint 2010 on-premises	SharePoint 2010 on-premises	Supported
SharePoint 2013 on-premises with 2010 experience version	SharePoint 2013 on-premises with 2010 experience version	Supported
SharePoint 2013 on-premises with 2010 experience version	SharePoint 2013 on-premises with 2013 experience version	Unsupported
SharePoint 2013 on-premises with 2010 experience version	SharePoint 2013 Online with 2013 experience version	Partially supported
SharePoint 2013 on-premises with 2013 experience version	SharePoint 2013 on-premises with 2010 experience version	Unsupported
SharePoint 2013 on-premises with 2013 experience version	SharePoint 2013 on-premises with 2013 experience version	Supported
SharePoint 2013 on-premises with 2013 experience version	SharePoint 2013 Online with 2013 experience version	Supported
SharePoint 2013 Online with 2013 experience version	SharePoint 2013 on-premises with 2010 experience version	Unsupported
SharePoint 2013 Online with 2013 experience version	SharePoint 2013 on-premises with 2013 experience version	Supported
SharePoint 2013 Online with 2013 experience version	SharePoint 2013 Online with 2013 experience version	Supported

Unsupported SharePoint Elements for Partially Supported Methods

Refer to the following sections about the unsupported SharePoint elements for partially supported methods and the solutions for these unsupported SharePoint elements.

Master Page

The master pages in the SharePoint 2010 are different from those in the SharePoint 2013. When copying or moving the master pages from the source to the destination, the destination master pages will use the destination SharePoint experience version, and the master page gallery and the settings will be skipped.

Site Template

Some of the site templates in the SharePoint 2010 are not compatible with those in the SharePoint 2013. Refer to the table below for the supported and unsupported site templates when copying or moving the source node to destination node with a different SharePoint experience version.

- **ID** – The ID of the site template.
- **Name** – The name of the site template.
- **Title** – The title of the site template.
- **Supported Status** – Whether or not the site template is supported by Content Manager.

IDID	Name	Title	Supported Status
0	GLOBAL#0	Global template	Supported
1	STS#0	Team Site	Supported
1	STS#1	Blank Site	Supported
1	STS#2	Document Workspace	Supported
2	MPS#0	Basic Meeting Workspace	Supported
2	MPS#1	Blank Meeting Workspace	Supported
2	MPS#2	Decision Meeting Workspace	Supported
2	MPS#3	Social Meeting Workspace	Supported
2	MPS#4	Multipage Meeting Workspace	Supported
3	CENTRALADMIN#0	Central Admin Site	Supported
4	WIKI#0	Wiki Site	Supported
9	BLOG#0	Blog	Supported
15	SGS#0	Group Work Site	Supported
16	TENANTADMIN#0	Tenant Admin Site	Supported
2764	ACCSRV#0	Access Services Site	Supported
N/A	ACCSRV#1	Assets Web Database	Unsupported
N/A	ACCSRV#3	Charitable Contributions Web Database	Unsupported
N/A	ACCSRV#4	Contacts Web Database	Unsupported
N/A	ACCSRV#5	Projects Web Database	Unsupported
N/A	ACCSRV#6	Issues Web Database	Unsupported
7	BDR#0	Document Center	Supported
14483	OFFILE#0	(obsolete) Records Center	Supported
14483	OFFILE#1	Records Center	Supported
40	OSRV#0	Shared Services Administration Site	Supported
3100	PPSMASite#0	PerformancePoint	Supported

IDID	Name	Title	Supported Status
3200	BICenterSite#0	Business Intelligence Center	Supported
20	SPS#0	SharePoint Portal Server Site	Supported
21	SPSPERS#0	SharePoint Portal Server Personal Space	Supported
22	SPSMSITE#0	Personalization Site	Supported
30	SPSTOC#0	Contents area Template	Supported
31	SPSTOPIC#0	Topic area template	Supported
32	SPSNEWS#0	News Site	Supported
39	CMSPUBLISHING#0	Publishing Site	Supported
53	BLANKINTERNET#0	Publishing Site	Supported
53	BLANKINTERNET#1	Press Releases Site	Supported
53	BLANKINTERNET#2	Publishing Site with Workflow	Supported
33	SPSNHOME#0	News Site	Supported
34	SPSSITES#0	Site Directory	Supported
36	SPSCOMMU#0	Community area template	Supported
38	SPSREPORTCENTER#0	Report Center	Supported
47	SPSPORTAL#0	Collaboration Portal	Supported
50	SRHCEN#0	Enterprise Search Center	Supported
51	PROFILES#0	Profiles	Supported
52	BLANKINTERNETCONTAINER#0	Publishing Portal	Supported
54	SPSMSITEHOST#0	My Site Host	Supported
56	ENTERWIKI#0	Enterprise Wiki	Supported
90	SRHCENTERLITE#0	Basic Search Center	Supported
90	SRHCENTERLITE#1	Basic Search Center	Supported
N/A	SRHCENTERFAST#0	FAST Search Center	Unsupported

List Template

All the list templates can be copied or moved to the destination.

***Note:** Both the shared documents library and the document library (which is created automatically after activating the **SharePoint Server Publishing Infrastructure** feature in the SharePoint 2010 site collection) will be copied or moved to the destination documents library in SharePoint 2013 mode site.

Theme

When copying or moving the themes from the source to the destination, the destination themes will use the destination SharePoint experience version, and the theme gallery and the settings will be skipped.

Web Part

Refer to the table below for the supported and unsupported Web parts when copying or moving the source node to destination node with a different SharePoint experience version. The unsupported Web parts will be skipped.

- **Type** – The type of the Web part.
- **Title** – The title of the Web part.

Type	Title	SharePoint 2010	SharePoint 2013
Business Data	Business Data Actions	Y	Y
	Business Data Connectivity Filter	Y	Y
	Business Data Item	Y	N
	Business Data Item Builder	Y	Y
	Business Data List	Y	Y
	Business Data Related List	Y	Y
	Chart Web Part	Y	N
	Excel Web Access	Y	Y
	Indicator Details	Y	Y
	Status List	Y	Y
	Visio Web Access	Y	Y
Content Rollup	Categories	Y	Y
	Content Query	Y	Y
	Relevant Documents	Y	Y
	RSS Viewer	Y	Y
	Site Aggregator	Y	Y
	Sites in Category	Y	Y
	Summary Links	Y	N
	Table Of Contents	Y	N
	Web Analytics Web Part	Y	N
	WSRP Viewer	Y	Y
	XML Viewer	Y	Y
Filters	Apply Filters Button	Y	Y
	Choice Filter	Y	Y
	Current User Filter	Y	Y
	Date Filter	Y	Y
	Page Filed Filter	Y	N
	Query String (URL) Filter	Y	Y
	SharePoint List Filter	Y	Y
	SQL Server Analysis Service Filter	Y	N
	Text Filter	Y	Y
Forms	HTML Form Web Part	Y	Y
	InfoPath Form Web Part	Y	Y
Media and Content	Content Editor	Y	Y
	Image Viewer	Y	Y
	Media Web Part	Y	Y
	Page Viewer	Y	Y
	Picture Library Slideshow Web Part	Y	Y
	Silverlight Web Part	Y	Y
Outlook Web App	My Calendar	Y	N
	My contacts	Y	N

Type	Title	SharePoint 2010	SharePoint 2013
	My Inbox	Y	N
	My Mail Folder	Y	N
	My Tasks	Y	N
Search	Advanced Search Box	Y	N
	Dual Chinese Search	Y	N
	Federated Results	Y	N
	People Refinement Panel	Y	N
	People Search Box	Y	N
	People Search Core Results	Y	N
	Refinement Panel	Y	N
	Related Queries	Y	N
	Search Action Links	Y	N
	Search Best Bets	Y	N
	Search Box	Y	Y
	Search Core Results	Y	N
	Search Paging	Y	N
	Search Statistics	Y	N
	Search Summary	Y	N
Search Visual Best Bet	Y	N	
Top Federated Results	Y	N	
Social Collaboration	Contact Details	Y	Y
	Note Board	Y	Y
	Organization Browser	Y	N
	Site Users	Y	Y
	Tag Cloud	Y	Y
	User Tasks	Y	Y
SQL Server Reporting	SQL Server Reporting Services Report Viewer	Y	N

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