

AvePoint RevIM 3.2.1

Installation and Configuration Guide

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What's New in This Guide

- AvePoint RevIM supports SharePoint 2016.
- Add the [Using the AvePoint Update Manager Tool to Uninstall Hotfixes](#) section.

About AvePoint RevIM

AvePoint RevIM is a record and information management solution that manages content in SharePoint. This includes creating and maintaining a business classification scheme, retention and disposal schedules, and out-of-the-box reporting.

AvePoint RevIM acts as a management platform for SharePoint rather than being intrinsically linked within SharePoint. This allows the product to seamlessly serve different audiences and provide them with an integrated information management experience.

AvePoint RevIM supports SharePoint 2013, SharePoint 2016, and SharePoint Online environments.

Installation Requirements

Refer to the sections below for AvePoint RevIM hardware and software requirements.

***Note:** AvePoint RevIM is integrated with DocAve and DocAve Governance Automation. To use AvePoint RevIM functions properly, make sure the version of the integrated DocAve and DocAve Governance Automation is DocAve 6 SP8 CU2 and above.

Hardware Requirements

The following specifications are the minimum required. AvePoint recommends exceeding these values for improved AvePoint RevIM performance.

Refer to the following tables for the hardware requirements for each of the AvePoint RevIM components:

DocAve 6 and AvePoint RevIM Services on the Same Server

Component	Minimum Specification
Number of CPU Cores	64-Bit, 4 Cores
Physical Memory	8 GB (Available)
Available Disk Space	50 GB or above

Dedicated, Single-Instance SQL Server

Component	Minimum Specification
Number of CPU Cores	64-Bit, 4 Cores
Physical Memory	8 GB (Available)
Available Disk Space	60 GB or above

Server Requirements for DocAve Agents

For some operations, AvePoint RevIM leverages DocAve Agents. Ensure the Agent servers meet or exceed the following specifications.

Component	Minimum Specification
Number of CPU Cores	64-Bit, 4 Cores
Physical Memory	4 GB (Available)
Available Disk Space	50 GB or above

Software Requirements

Refer to the table below for the software recommendations for AvePoint RevIM.

Component	Supported
Operating Systems	Windows Server 2012 R2 Windows Server 2012 RTM Datacenter
SharePoint Versions	Microsoft SharePoint Server 2013 (up to and including Service Pack 1) SharePoint Online
SQL Server Versions	SQL Server 2012 SP2 Enterprise SQL Server 2012 SP1 Enterprise SQL Server 2014 SP1 Enterprise
.Net Framework Versions	.NET Framework 4.5 or above
Web Browsers	Internet Explorer 9 or above Google Chrome 47.0.2526.106 or above Firefox 43.0.4 or above Opera 34.0.2036.50 or above
IIS Admin Service	IIS Admin Service is started IIS version must be 7 or above

Permission Requirements

To install and use AvePoint RevIM properly, ensure that the following permission requirements are in place.

Required Permissions for AvePoint RevIM Application Pool Account

The application pool account that is configured when installing AvePoint RevIM must have the following permissions:

- The **Full Control** permission to the private key of DocAve. For instructions on how to grant these permissions, refer to [Assigning Full Control Permission to the DocAve Private Key](#).
- The **Read** and **Write** permissions to the **RevIM** folder in AvePoint RevIM installation directory ... \AvePoint\RevIM.
- The **Read** permission to the DocAve Archiver database.
- A member of the local **Administrators** group.

Assigning Full Control Permission to the DocAve Private Key

In order for AvePoint RevIM to communicate with the DocAve Control service, the user for the application pool must have the **Full Control** permission to the DocAve private key. To assign the user **Full Control** to the DocAve private key, complete the following steps:

1. Navigate to the server where AvePoint RevIM is installed.
2. Navigate to **Start > Run**, enter **mmc** in the **Open** text box, and click **OK**.

3. In the pop-up window, click **File > Add/Remove Snap-in....**
4. Select **Certificates** on the left pane and click **Add>**.
5. Select **Computer account** for the local machine, click **Next**, and then click **Finish**.
6. Click **OK** and the **Add or Remove Snap-ins** window is closed.
7. On the left pane, expand the **Certificates (Local Computer)** node, and then expand the **Personal** node.
8. Click the **Certificates** node.
9. Right-click the certificate **DocAve** on the right pane, then select **All Tasks > Manage Private Keys**.
10. In the pop-up window, respectively select the service account for application pool, then select the **Allow** checkbox for **Full control**.
11. Click **Apply** to apply the configurations.
12. Click **OK** to save the application.

Required Permissions for AvePoint RevIM Database Account

The database account that is configured when installing AvePoint RevIM must have the database role of **db_owner**. If the configured database does not exist, the database account must have the database role of **db_creator**.

Required Permissions for Registering Site Collections

For the registered SharePoint On-Premises site collections, the site collection users (specified when registering site collections) must have the following permissions:

- User is a member of the **Site Collection Administrators** group
- Managed Metadata Service: Term Store Administrator
- User Profile Service: User Profile Service Administrator

For the registered SharePoint Online site collections, the site collection users (specified when registering site collections) must have the following permissions:

- User is a member of the **Site Collection Administrators** group
- The Global administrator role
- Managed Metadata Service: Term Store Administrator
- User Profile Service: User Profile Service Administrator

***Note:** To run incremental jobs on SharePoint Online personal sites or self-service created sites, make sure the SharePoint admin center setting **Custom Script** is enabled.

***Note:** When site collections are registered using the **Scan Mode**, the site collection user must have the **SharePoint administrator** role.

Installing AvePoint RevIM

To install AvePoint RevIM, complete the following steps:

1. Download the **AvePoint_RevIM_Number.zip** file by contacting an AvePoint representative for links to this package.
2. Copy the **AvePoint_RevIM_Number.zip** file to a server with network connection.
3. Extract the **AvePoint_RevIM_Number.zip** file on the server. The **Setup.exe** file appears in the extracted folder.
4. Double-click the **Setup.exe** file.
5. After the welcome screen appears, click **Next**.
6. Enter your name and the organisation into the provided field. Click **Next**.
7. Carefully review the AvePoint RevIM License Agreement. After you have read the agreement, check the **I accept the terms in the license agreement** checkbox, and click **Next**.
8. Click the **Browse** button. Select the location for the AvePoint RevIM installation. By default, the installation location is *C:\Program Files\AvePoint*. Click **Next**.
9. Set up the **Service Configuration**:
 - a. **AvePoint RevIM Address** – Configure the AvePoint RevIM Host. Enter the hostname or IP address of the machine where AvePoint RevIM will be installed. By default, the hostname of the machine where the **Setup.exe** is run will be automatically entered in the **AvePoint RevIM Address** field.
 - b. **IIS Website Settings** – Configure the IIS website settings for the AvePoint RevIM. You can select to use an existing IIS website or create a new IIS website. The IIS website is used to access AvePoint RevIM.
 - **Use an existing IIS website** – Select an existing IIS website from the drop-down list, and if necessary, you can adjust the **Website Port** used to access AvePoint RevIM.
 - **Create a new IIS website** – Enter the website name for creating a new IIS website for AvePoint RevIM. The default **Website Port** number used to access AvePoint RevIM is **18000**, you do not need to change it unless a known port conflict exists.
 - **Website Port** – Enter the port number for AvePoint RevIM communication. The default port number is **18000**.
 - c. **Application Pool Settings** – Configure the IIS application pool that will collect and manage requests that are sent to the website configured in the step above. You can select an existing application pool or create a new application pool.

- **Use an existing application pool** – Select an existing application pool from the drop-down list. If you choose to use an existing application pool, the Application Pool Account settings are grayed out and cannot be changed.
- **Create a new application pool** – Enter the application pool name and application pool account settings to create a new IIS application pool for the corresponding website. In the **Application Pool Account** field, enter the username and password for the account.

***Note:** For the required permissions of the application pool account, refer to [Required Permissions for AvePoint RevIM Application Pool Account](#).

10. Click **Next** to start the databases configurations for AvePoint RevIM.

11. Set up the **Configuration Database Settings**:

- a. **Database Settings** – Select a Configuration Database for AvePoint RevIM to store its settings and configurations.
 - **Database Server** – Enter the server name or IP address of the database server you wish to connect to.
 - **Database Name** – Enter a name for the AvePoint RevIM Database. If the database does not exist, it will be automatically created in the entered database server.
- b. **Database Credentials** – Select Windows Authentication or SQL Authentication for the AvePoint RevIM Configuration Database that is to be used when connecting to the SQL server.
 - **Windows Authentication** – Use this method when you want the user’s identity to be confirmed by Windows.
 - **SQL Authentication** – SQL server will confirm the user identity itself based on the entered account and password.

***Note:** For the required permissions of the database account, refer to [Required Permissions for AvePoint RevIM Database Account](#).

12. Click **Next** to go to the advanced configuration step.

13. Set up the **Advanced Configuration** to select a Secure Socket Layer (SSL) certificate that is used for the communication between AvePoint RevIM and DocAve.

- **Built-in Certificate** – Use the certificate provided by AvePoint RevIM. No additional configuration is required.
- **User-defined Certificate** – AvePoint cannot guarantee support for user-defined certificates used with AvePoint RevIM because these certificates are managed outside

of AvePoint RevIM's control. AvePoint strongly recommends testing user-defined certificates prior to production deployments.

***Note:** If selecting a user-defined certificate, you must manually copy two configuration files to AvePoint RevIM directories after the installation completes.

14. In the **Ready to Install AvePoint RevIM** page, all information configured in the previous steps is listed. Click **Install** to begin the installation. Click **Back** to return to the previous page. Click **Cancel** to exit the installation wizard without saving any of the configurations.
15. Once AvePoint RevIM is successfully installed, click **Finish** to exit the installation wizard.

Configuring Settings for AvePoint RevIM

Refer to the following sections to configure settings for AvePoint RevIM.

Launching Control Panel

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

1. Log into AvePoint RevIM.
***Note:** After you finish installing AvePoint RevIM, you can use the Local System login method to log into AvePoint RevIM using the built-in account (user ID: **admin**, password: **admin**).
2. Click **MENU** on the upper-right corner and click **Control Panel** to launch the Control Panel.

Understanding Control Panel

The Control Panel has two key groups of components:

- **System Settings** – Configure communication between the DocAve Manager and AvePoint RevIM, configure general settings, and global storage settings.
- **Account Management** – Manage login methods and users or groups who have access to AvePoint RevIM.

Managing System Settings

System Settings in the Control Panel allow you to customize the way AvePoint RevIM interacts with DocAve, manage general settings, and configure global storage settings.

- **DocAve Connection** – Configure the connection between the DocAve Manager and AvePoint RevIM.
- **General Settings** – Configure general settings such as time zone for AvePoint RevIM.
- **Global Storage Settings** – Configure global storage settings for disposed data in AvePoint RevIM.

Configuring DocAve Connection

DocAve Connection allows you to configure settings for the communication between the DocAve Manager and AvePoint RevIM.

To access **DocAve Connection**, on the **Control Panel** page, click **DocAve Connection**.

Refer to the steps below to connect DocAve Manager with AvePoint RevIM:

1. **DocAve Control Service Host** – Enter the hostname or IP address of the machine where DocAve Manager is installed.
2. **DocAve Control Service Port** – Enter the port number used to access DocAve Manager.
3. **DocAve User** – The username of a DocAve account to connect to DocAve and retrieve data and settings from DocAve.
4. **Password** – Enter the password of the DocAve account.
5. Click **Save** to save the configurations, or click **Cancel** to return to the **Control Panel** page without saving any configurations.

If the DocAve Manager changes, you need to update the DocAve connection information in order for AvePoint RevIM to function. For more information on updating DocAve connection information, refer to [Appendix A: Updating DocAve Connection Information](#).

Registering SharePoint Site Collections

After configuring the connection between DocAve Manager and AvePoint RevIM, SharePoint sites groups where SharePoint 2013/2016 or SharePoint Online site collections are added will be automatically synchronised into AvePoint RevIM. If there are no registered SharePoint 2013/2016 or SharePoint Online site collections in DocAve Manager, you must manually register the SharePoint 2013/2016 and/or SharePoint Online site collections on which you want to use AvePoint RevIM's functionalities.

For detailed information on registering SharePoint site collections in DocAve Manager, refer to the [DocAve Control Panel Reference Guide](#).

Configuring General Settings

General Settings allows you to configure general settings including time zone, date and time format, and the session timeout setting for AvePoint RevIM.

To access **General Settings**, on the **Control Panel** page, click **General Settings**.

Configure the following settings for the general settings in AvePoint RevIM:

1. **Session Timeout** – Enter a whole number and select a unit from the drop-down list: **Minutes** or **Hours**. The default value is 30 minutes.
2. **Time Zone** – Select the display time zone for AvePoint RevIM.
 - **Automatically adjust clock for Daylight Saving Time** – Select or clear the checkbox to define whether or not to enable the Daylight Saving Time.
***Note:** This checkbox appears only when the selected time zone supports Daylight Saving Time.
3. **Date Format** – Select the date format that will be displayed in AvePoint RevIM.

4. **Time Format** – Select the time format that will be displayed in AvePoint RevIM.
5. Click **Save** to save the configurations, or click **Cancel** to return to the **Control Panel** page without saving any configurations.

Configuring Global Storage Settings

In this section, you can configure the global storage settings for AvePoint RevIM, including where to store disposed data, the processing pool for the jobs, data compression settings, and data encryption settings.

***Note:** The Global Storage Settings below are synchronised from DocAve. To configure Global Storage Settings, you need to configure a DocAve Connection first.

To access **Global Storage Settings**, in the **Control Panel** page, click **Global Storage Settings**.

Configure the following settings for the global storage settings in AvePoint RevIM:

1. **Where would you like to store the data prior to disposal?** – Select a storage policy from the drop-down list where you want to store the data before it has been disposed. All storage policies in DocAve Manager will be synchronised and listed in the drop-down list. If there is no existing storage policy in DocAve Manager, you must manually create one in DocAve Manager and then select it here. For detailed information on creating a storage policy in DocAve Manager, refer to the **Storage Policy** section of the [DocAve 6 Control Panel Reference Guide](#).
2. **Where would you like to store the exported data?** – Select an export location from the drop-down list in which to store the exported data from SharePoint. All export locations in DocAve Manager will be synchronised and listed in the drop-down list. If there is no existing export location in DocAve Manager, you must manually create one in DocAve Manager and then select it here. For detailed information on configuring an export location in DocAve Manager, refer to the **Configuring Export Locations** section of the [DocAve 6 Control Panel Reference Guide](#).
3. **Please select a processing pool for the jobs.** – Select a processing pool from the drop-down list to define the number of disposal jobs that can be run simultaneously. All processing pools in DocAve Manager will be synchronized and listed in the drop-down list. If there is no processing pool in DocAve Manager, you must manually create one in DocAve Manager and then select it here. For detailed information on configuring a processing pool in DocAve Manager, refer to the **Configuring Processing Pool** section of the [DocAve 6 Archiver Reference Guide](#).
4. **Data Compression** – If you want to enable data compression, select the **Compression** checkbox, choose a compression level using the slider, and then select whether or not to leverage the DocAve Media Server (**Media Service**) resources or SharePoint Server (**SharePoint Agent**) resources for compression.

***Note:** A low compression level results in a faster compression rate but a larger data set. A high compression level results in a slower compression rate but a smaller and better quality data set. Small data sets may cause slower backup and recovery times. The default value is **5**.

5. **Data Encryption** – If you want to enable data encryption, select the **Encryption** checkbox, and configure the following options:
 - *Note:** Encrypting data causes slower backup and recovery times.
 - Choose whether or not you want to leverage the DocAve Media Server (**Media Service**) resources or SharePoint Server (**SharePoint Agent**) resources for encryption.
 - Choose a security profile from the **Security profile** drop-down list. All security profiles listed here are synchronised from DocAve Archiver.
6. Click **Save** to save the configurations, or click **Cancel** to return to the **Control Panel** page without saving any configurations.

Managing Account Management

Account Management allows you to manage login methods and configure which users and groups can access AvePoint RevIM.

Configuring Authentication Management

Use **Authentication Management** to manage login methods and domains in AvePoint RevIM. AvePoint RevIM currently only supports two login methods: **AD Integration** and **Local System**.

Configuring AD Integration and Local System Login Methods

By default, the Local System login method is enabled. Currently, AvePoint RevIM provides a built-in AvePoint RevIM account to log into AvePoint RevIM.

***Note:** Currently, AvePoint RevIM does not support adding local users.

To grant AD users and groups the permission to access AvePoint RevIM, the AD Integration login method must be enabled in AvePoint RevIM.

To access **Authentication Management**, in the **Control Panel** page, click **Authentication Management**.

- **Local System** – Use the Local System login method to log into AvePoint RevIM.
 - *Note:** The Local System login method cannot be disabled.
- **AD Integration** – Use the AD Integration login method to login to AvePoint RevIM. To enable the AD Integration login method, click **Enable** next to the **AD Integration** login method to enable the **AD Integration** login method.
- You can click **Disable** to disable the AD Integration login method, or click **Set as Default** to set this login method as the default login method.

Managing Domains

You can manage domains in the **Authentication Management** page. After adding domains, the users in the domains can login to AvePoint RevIM.

To access **Authentication Management**, in the **Control Panel** page, click **Authentication Management**.

- **Add Domain** – To add domains to AvePoint RevIM, click **Add Domain**. You are redirected to the **Add Domain** page.
 - i. **Domain** – Enter the domain name you wish to add into the text box.
 - ii. **Username** – Enter the username of user in the domain.
 - iii. **Password** – Enter the password.
 - iv. Click **Save** to save the configurations, or click **Cancel** to return to the **Authentication Management** page without saving any configurations.
 - v. Repeat the steps above to add more domains.
- **Edit** – To edit settings of a domain in AvePoint RevIM, select the domain, then click **Edit**. You are redirected to the **Edit Domain** page. For more information, refer to the steps in **Add Domain**.
- **Delete** – Delete domains from AvePoint RevIM.
- **Enable** – Enable domains in AvePoint RevIM.
- **Disable** – Disable domains in AvePoint RevIM.

Configuring Account Management

Use **Account Management** to manage AD domain users or groups who will have access to AvePoint RevIM. In **Account Management**, you can add, edit, or delete domain users or groups.

To access **Account Management**, in the **Control Panel** page, click **Account Management**.

You can perform the following actions in the **Account Management** page:

- **Add Users/Groups** – To add users or groups to AvePoint RevIM, click **Add Users/Groups**. You will be brought to the **Add Users/Groups** page.
 - i. Enter the name of an AD user or group that you want to add in the **Please enter the names of the users or groups** text box. The system will search for the AD user/group with the entered name within all enabled domains in Authentication Management and provide the matching users/groups as suggestions.
 - ii. Select a user or group that you want to add from the listed suggestions.
***Note:** If you manually enter the full name of a user/group, enter a semicolon right behind the name and start the search within all enabled domains. If the

entered user/group is invalid, the name will be underlined as in the following example: 

- iii. To delete a user or group, click the Delete () button next the name.
 - iv. Click **Save** to save the configurations, or click **Cancel** to return to the **Account Management** page without saving any configurations.
- **Edit** – To change the password of the **Admin** account, click **Edit** next to **Admin**. The **Edit User** page appears.
 - i. **Username** – The name of the local administrator. The username cannot be modified.
 - ii. **Old Password** – Enter your old password in the text box.
 - iii. **New Password** – Enter your new password in the text box. The strength of your new password is displayed beside the **New Password** text box. The password strength is divided into three levels: **weak**, **strong**, and **very strong**.
 - iv. **Confirm New Password** – Enter your new password in the text box again.
 - v. Click **Validation Test** to test the validation of the password.
 - vi. Click **Save** to save the configurations, or click **Cancel** to return to the **Account Management** page without saving any configurations.
 - **Delete** – To delete AD users or groups from AvePoint RevIM, select the AD users or groups, then click **Delete**. A confirmation window will appear and ask if you are sure you want to proceed with the deletion. Click **OK** to delete the selected AD users or groups, or click **Cancel** to return to the **Account Management** page without deleting the selected AD users or groups.
- *Note:** The built-in **admin** account of the Local System login method cannot be deleted.

End User Solution

The End User Solution is used to create AvePoint RevIM site collections or sites in SharePoint 2013/2016 or SharePoint Online.

After creating a new AvePoint RevIM site collection or site, two groups named **RMO Group** and **End-User Group**, a document library named **Records Repository**, a custom list named **Requests**, and a task list named **Tasks** will be automatically created in the site collection or site.

***Note:** You can use the End User Solution multiple times to create more physical libraries in SharePoint. However, we do not recommend using the End User Solution to create an AvePoint RevIM site under a site collection that is also created by using the End User Solution.

***Note:** After creating the site collection or site, the permission inheritance of the newly created **Requests** list is broken from its parent site.

For detailed information on groups in AvePoint RevIM, refer to [Supported AvePoint RevIM Groups](#).

Required Permissions

To create AvePoint RevIM site collections or sites using the End User Solution, ensure that the user account that runs the scripts has the following permissions.

Permission Requirement for SharePoint 2013/2016

To create SharePoint 2013/2016 site collections or sites using the End User Solution, ensure the user account who runs the scripts has the following permissions:

1. Local System Permissions:
 - A member of the local **Administrators** group.
 - The **Full Control** permission to the End User Solution folder.
2. SharePoint Permissions:
 - A member of the Farm **Administrators** group.
 - The **site collection owner** role (specified when creating AvePoint RevIM sites).

***Note:** Make sure the user account is not a system account in the Web applications where you want to create the AvePoint RevIM site collections or sites.

3. SQL Permissions:
 - The Database Role of **db_owner** to the Content Databases of SharePoint.

- The Database Role of **SharePoint_Shell_Access** to the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, and Central Administration Content Database.

***Note:** The **SharePoint_Shell_Access** role can only be assigned via SharePoint 2013 Management Shell. For instructions on how to assign this role to a user, refer to the following Microsoft technical article: <https://technet.microsoft.com/en-us/library/ff607596.aspx>.

Permission Requirement for SharePoint Online

To create SharePoint Online site collections or sites using the End User Solution, ensure the user account who runs the scripts and the admin credentials required during the execution process have the following permissions.

1. Permissions for the user account who runs the scripts:
 - A member of the local **Administrators** group.
 - The **Full Control** permission to the AvePoint RevIM installation directory.
2. Permissions for the admin credentials required during the execution process:
 - A member of the **Site Collection Administrators** group (specified when creating AvePoint RevIM sites).
 - The **Global administrator** role.

Creating AvePoint RevIM Site Collections or Sites in SharePoint 2013/2016

To create a new AvePoint RevIM site collection or site in SharePoint 2013/2016 using the End User Solution, refer to the steps below:

1. On a machine with AvePoint RevIM installed, navigate to the ... \RevIM\RevIMWeb directory to find the **End_User_Solution** folder.
2. Copy the **End_User_Solution** folder to any one of the Web front-end servers or the Central Administration server of SharePoint 2013/2016 where you want to create a new site collection or site.
3. Open the **End_User_Solution** folder.
4. Find the **InstallEndUserSolution.ps1** file in the **InstallScript** folder, and find the **PhysicalRecord.wsp** file in the **SolutionFile** folder.
5. On the SharePoint Web front-end server or Central Administration server where the copied **End_User_Solution** folder resides, locate **Windows PowerShell**.

6. Right-click **Windows PowerShell**, and then select **Run as Administrator**. The **Windows PowerShell** pop-up window appears.
7. In the pop-up window, enter the following commands:

***Note:** You can access information on how to use Windows PowerShell to create a new site collection or site. To view the help information, enter `.\InstallEndUserSolution.ps1`, and then press **Enter** on the keyboard.

```
PS C:\Program Files\AvePoint\RevIM\RevIMWeb\EndUserSolution\InstallScript> .\InstallEndUserSolution.ps1
Start=====
Please check parameters.
Create site example:
.\InstallEndUserSolution.ps1 -Type "Site" -SolutionPath "C:\PhysicalRecord.wsp" -SiteCollectionUrl "https://intranet.mydomain.com/sites/targetsite" -SiteUrl "https://intranet.mydomain.com/sites/targetsite/site"
Create site collection example:
.\InstallEndUserSolution.ps1 -Type "SiteCollection" -SolutionPath "C:\PhysicalRecord.wsp" -SiteCollectionUrl "https://intranet.mydomain.com/sites/targetsite" -SiteCollectionOwner "domain\name"
End=====
Press any key to exit ...
```

Figure 1: Using Windows PowerShell.

- a. Enter `cd "full path"`, and then press **Enter** on the keyboard. Replace **full path** with the full path of the **InstallEndUserSolution.ps1** file.
- b. Enter the following commands:
 - o To create a new site collection, refer to the following commands:


```
.\InstallEndUserSolution.ps1 -Type "SiteCollection" -SolutionPath "C:\PhysicalRecord.wsp" -SiteCollectionUrl "https://intranet.mydomain.com/sites/targetsite" -SiteCollectionOwner "domain\name"
```

 - **"https://intranet.mydomain.com/sites/targetsite"** – Replace the parameter with the site collection URL that you want to create.
 - **"domain\name"** – Replace the parameter with the account information of the site collection owner.

***Note:** To create the AvePoint RevIM site collection, make sure the site collection owner account is the current user that runs the scripts.
 - o To create a new site, refer to the following commands:


```
.\InstallEndUserSolution.ps1 -Type "Site" -SolutionPath "C:\PhysicalRecord.wsp" -SiteCollectionUrl "https://intranet.mydomain.com/sites/targetsite" - SiteUrl "https://intranet.mydomain.com/sites/targetsite/site"
```

 - **"https://intranet.mydomain.com/sites/targetsite"** – Replace the parameter with an existing site collection URL under which you want to create a new site.
 - **"https://intranet.mydomain.com/sites/targetsite/site"** – Replace the parameter with the site URL that you want to create.
- c. Press **Enter** on the keyboard to execute the commands entered above.

- After Windows PowerShell completes the execution, the AvePoint RevIM site collection or site will be created in SharePoint 2013/2016.

***Note:** After creating a new AvePoint RevIM site collection or site in SharePoint 2016 using the End User Solution, you must manually publish all corresponding workflows using SharePoint Designer 2013.

***Note:** If the AvePoint RevIM site collection or site fails to be created, the reason for the failure will be recorded in the **InstallEndUserSolution.log** file in the same directory as the **InstallEndUserSolution.ps1** file.

Creating AvePoint RevIM Site Collections or Sites in SharePoint Online

To create a new AvePoint RevIM site collection or site in SharePoint Online using the End User Solution, refer to the steps below:

- On a machine with AvePoint RevIM installed, navigate to the ...*RevIM*\RevIMWeb directory to find the **End_User_Solution** folder.
- Open the **End_User_Solution** folder.
- Find the **InstallEndUserSolutionFor365.ps1** file in the **InstallScript** folder, and find the **PhysicalRecord.wsp** file in the **SolutionFile** folder.
- On the machine where the **End_User_Solution** folder resides, locate **Windows PowerShell**.
- Right-click **Windows PowerShell**, and then select **Run as Administrator**. The **Windows PowerShell** pop-up window appears.
- In the pop-up window, enter the following commands:

***Note:** You can access help information on how to use Windows PowerShell to create a new SharePoint Online site collection or site. To view the help information, enter

`.\InstallEndUserSolutionFor365.ps1`, and then press **Enter** on the keyboard.

```
PS C:\Users\sp admin> cd "C:\Users\sp admin\Desktop\TWEndUserSolution\InstallScript"
PS C:\Users\sp admin\Desktop\TWEndUserSolution\InstallScript> .\InstallEndUserSolutionFor365.ps1
Start-----
Please check parameters.
Create subsite example:
.\InstallEndUserSolutionFor365.ps1 -Type "Site" -InstallPath "C:\Program Files\AvePoint" -SiteCollectionUrl "https://intranet.mydomain.com/sites/targetsite" -SiteName "PhysicalRecord"
Create site collection example:
.\InstallEndUserSolutionFor365.ps1 -Type "SiteCollection" -InstallPath "C:\Program Files\AvePoint" -SiteCollectionUrl "https://intranet.mydomain.com/sites/targetsite" -CentralAdminUrl "https://intranet.mydomain.com"
End-----
Press any key to exit ...
```

Figure 2: Using Windows PowerShell.

- Enter `cd "full path"`, and then press **Enter** on the keyboard. Replace **full path** with the full path of the **InstallEndUserSolutionFor365.ps1** file.
- Enter the following commands:

- To create a new site collection, refer to the following commands:

```
.\InstallEndUserSolutionFor365.ps1 -Type "SiteCollection" -  
InstallPath "C:\Programme Files\AvePoint" -SiteCollectionUrl  
"https://intronet.mydomain.com/sites/targetsite" -CentralAdminUrl  
"https://intronet.mydomain.com"
```

- **"C:\Programme Files\AvePoint"** – Replace the parameter with the full path of the location where AvePoint RevIM is installed.
- **"https://intronet.mydomain.com/sites/targetsite"** – Replace the parameter with the site collection URL that you want to create.
- **"https://intronet.mydomain.com"** – Replace the parameter with the Central Admin URL of SharePoint Online where you want to create the site collection.

- To create a new site, refer to the following commands:

```
.\InstallEndUserSolutionFor365.ps1 -Type "Site" -InstallPath  
"C:\Programme Files\AvePoint" -SiteCollectionUrl  
"https://intronet.mydomain.com/sites/targetsite" -CentralAdminUrl  
"https://10122016-admin.sharepoint.com"
```

- **"C:\Programme Files\AvePoint"** – Replace the parameter with the full path of the location where AvePoint RevIM is installed.
- **"https://intronet.mydomain.com/sites/targetsite"** – Replace the parameter with an existing site collection URL under which you want to create a new site.
- **"PhysicalRecord"** – Replace parameter with the site name that you want to create.

- c. Press **Enter** on the keyboard to execute the commands entered above.

***Note:** During the execution process, your admin credentials will be required. Enter your admin credentials to proceed.

7. After Windows PowerShell completes the execution, the AvePoint RevIM site collection or site will be automatically created in SharePoint Online.

***Note:** If the AvePoint RevIM site collection or site fails to be created, the reason for the failure will be recorded in the **InstallEndUserSolutionFor365.log** file in the same directory as the **InstallEndUserSolutionFor365.ps1** file.

Supported AvePoint RevIM Groups

AvePoint RevIM supports setting different roles when you process requests about physical items in a physical library.

***Note:** The site collection owner configured when using Windows PowerShell to create a site collection or site will be the default group member of the RMO Group and End-User Group.

Role Name	Description	Permission
RM Officer	Members of the built-in RMO Group. Users within this group can submit requests like End Users and also process requests created or submitted by End Users.	Site collection level permission: Contribute List level permission: Contribute
End User	Members of the built-in End-User Group. Users within this groups can submit requests.	Site collection level permission: Read List level permission: Contribute

Preparations before Using the SharePoint Physical Library

Before using the SharePoint physical library, you must complete the following preparations in SharePoint.

Outgoing E-mail Settings

When RM Officers and End Users submit or process requests in the SharePoint physical library, e-mail notifications will be sent. Before using the SharePoint physical library, outgoing e-mail server settings must be configured in the Central Administration of your SharePoint to send out e-mail notifications and the **Work email** setting must be configured for RM Officers and End Users in their user profiles so that they can receive e-mail notifications.

SharePoint Settings

In the SharePoint physical library, values of **Business Classification**, **Home Location**, and **Box Type** columns are retrieved from AvePoint RevIM. Before using the SharePoint physical library, you need to configure global settings for document level objects and custom settings for container level objects to retrieve values of these columns from AvePoint RevIM.

***Note:** We use **Business Classification** as an example. If you customise the column name when configuring global settings, the column name will be the customised one.

By creating a **Business Classification** column when configuring global settings for document level objects, **Managed Metadata** type of columns that use business classification terms as column values will be created in the physical library within the selected SharePoint sites group. You can classify physical files using the business classification terms, and manage physical files using rules that are associated with the business classification terms.

By selecting the **Mark the Physical Library** checkbox when configuring custom settings for container level objects, box types created in AvePoint RevIM will be synchronised to the SharePoint physical library as values of the **Box Type** column, and location terms created in AvePoint RevIM will be

connected with the **Home Location** column in the SharePoint physical library. After location synchronisation, location terms created in AvePoint RevIM will be synchronised to the SharePoint physical library as values of the **Home Location** column.

For more information on configuring global settings and custom settings, refer to the **Configuring Global Settings** and **Configuring Custom Settings** sections in the [AvePoint RevIM User Guide](#).

Using the AvePoint Update Manager Tool to Upgrade AvePoint RevIM

The AvePoint Update Manager tool can be used to upgrade AvePoint RevIM from the previous version to AvePoint RevIM 3.2.1. After being upgraded, new features of AvePoint RevIM 3.2.1 are available.

Complete the steps below to install the hotfix:

1. Download the **AvePoint_RevIM_3_SP2_CU1.zip** file to the server where AvePoint RevIM is installed. Contact an AvePoint representative for the link to this ZIP file.
***Note:** Make sure the **Net.TCP Port Sharing Service** is running on the server.
2. Extract the **AvePoint_RevIM_3_SP2_CU1.zip** file.
3. In the extracted folder, right-click the **RunUpgrade.bat** file and then select **Run as administrator** to start the AvePoint Update Manager tool. The **Requirement Pre-Scan** page appears, and the **Requirement Pre-Scan** starts automatically.
***Note:** If either of the two requirements has a status of **Failed**, update your environment and then click **Retry Scan** to scan your environment again.
4. After the status of all requirements is **Passed**, click **Continue**.
5. Click the **Upgrade** tile or the **Upgrade** tab.
6. In the **Patch Selection** step, select the checkbox next to the hotfix that you are about to install and then click **Next**.
7. In the **Service Selection** step, select the checkbox next to AvePoint RevIM where you want to install the hotfix and then click **Next**.
8. In the **Overview** step, the selected hotfix and the AvePoint RevIM website are displayed. Review your selections and click **Install** to start the hotfix installation.
9. In the **Installation Progress** step, click **Next** after the installation finishes.
10. In the **Installation Complete** step, click **Finish** to exit the AvePoint Update Manager tool.

***Note:** To upgrade AvePoint RevIM successfully, clear the browsing history of the browser that you use to open AvePoint RevIM after you apply the hotfix.

Using the AvePoint Update Manager Tool to Uninstall Hotfixes

The AvePoint Update Manager tool can be used to uninstall hotfixes that have been installed on AvePoint RevIM 3.2.1.

Complete the steps below to uninstall a hotfix:

1. Download the **AvePoint_RevIM_3_SP2_CU1.zip** file to the server where AvePoint RevIM is installed. Contact an AvePoint representative for the link to this ZIP file.
***Note:** Make sure the **Net.TCP Port Sharing Service** is running on the server.
2. Extract the **AvePoint_RevIM_3_SP2_CU1.zip** file.
3. In the extracted folder, right-click the **RunUpgrade.bat** file and then select **Run as administrator** to start the AvePoint Update Manager tool. The **Requirement Pre-Scan** page appears, and the **Requirement Pre-Scan** starts automatically.
***Note:** If either of the two requirements has a status of **Failed**, update your environment and then click **Retry Scan** to scan your environment again.
4. After the status of all requirements is **Passed**, click **Continue**.
5. Click the **Rollback** tile or the **Rollback** tab.
6. In the **Patch Selection** step, select the checkbox next to the hotfix that you are about to uninstall and then click **Next**.
7. In the **Service Selection** step, select the checkbox next to AvePoint RevIM where you want to uninstall the hotfix and then click **Next**.
8. In the **Overview** step, the selected hotfix and the AvePoint RevIM website are displayed. Review your selections and click **Uninstall** to start the hotfix uninstallation.
9. In the **Uninstallation Progress** step, click **Next** after the uninstallation finishes.
10. In the **Uninstallation Complete** step, click **Finish** to exit the AvePoint Update Manager tool.

***Note:** To uninstall the hotfix completely, clear the browsing history of the browser that you use to open AvePoint RevIM after you uninstall the hotfix.

Uninstalling AvePoint RevIM

To uninstall AvePoint RevIM, complete the following steps:

1. Go to the server from which you want to uninstall AvePoint RevIM.
2. Access the uninstallation wizard using a method provided in [Using the AvePoint RevIM Uninstallation Wizard](#).
3. In the **AvePoint RevIM Uninstallation Wizard** page, click **Uninstall**.
4. Click **Next**.
5. Click **Finish** to complete the uninstallation.

***Note:** Once the uninstallation is in progress, it cannot be cancelled.

Using the AvePoint RevIM Uninstallation Wizard

You can use any of the four methods below to access the AvePoint RevIM Uninstallation Wizard after AvePoint RevIM has been installed. To complete the operations successfully, the Uninstallation Wizard must be run by a local administrator.

- Open the Start Menu in Windows on the machine where AvePoint RevIM is installed and navigate to **All Programs > AvePoint RevIM > Uninstall**. Click **Uninstall**.
- Navigate to **Control Panel > Uninstall a Programme > AvePoint RevIM**. Double-click AvePoint RevIM.
- Double-click the **Setup.exe** file in the extracted folder of the AvePoint RevIM installation package and run it.
- Run the AvePoint RevIM Uninstallation Wizard of by running the application file directly in the installation directory on machine where AvePoint RevIM is installed.

To run the AvePoint RevIM Uninstallation Wizard, go to the **Uninstall** folder in the `.../AvePoint/RevIM/` directory on the machine and run the **AvePointRevIMUninstallation.exe** file.

Appendix A: Updating DocAve Connection Information

Rule and global storage information configured in AvePoint RevIM are stored in the Control database of DocAve. If the DocAve Manager changes, you need to update the DocAve connection information in order for AvePoint RevIM to function.

If the DocAve Manager whose hostname or IP address of the machine where DocAve Manager is installed changes, but still uses its original Control database, you need to reconfigure DocAve connection information with information on the new DocAve Manager. For more information on configuring DocAve connection information, refer to [Configuring DocAve Connection](#).

If this is a new DocAve Manager, after you reconfigure DocAve connection information with information on the new DocAve Manager, you also need to perform the following:

1. Reconfigure global storage settings. The global storage settings are synchronised from DocAve, so you need to configure global storage settings again. For more information on configuring global storage settings, refer to [Configuring Global Storage Settings](#).
2. Reassociate business classification terms with rules. All business classification terms that have been ever associated with rules need to be configured again. For more information on associating business classification terms with rules, refer to the **Configuring Term Settings** section in the [AvePoint RevIM User Guide](#).

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