



DocAve® 6 Archiver

User Guide

Service Pack 3

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About DocAve Archiver

DocAve Archiver is the industry's first truly seamless, business-rule aware, granular archiving solution for Microsoft SharePoint with full text index, federated search, tiered storage management, and backup and recovery support.

With SharePoint data volumes increasing rapidly, companies need a solution to attenuate data growth, manage long-term retention, and save money by leveraging a tiered storage system. Archiver helps your company save thousands just in license fees, and end-users can seamlessly search and view the archived content from SharePoint.

***Note:** DocAve Archiver does not support SharePoint Online.

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 Archiver:

- 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 Content Manager for SharePoint for restructuring or moving SharePoint content.
- 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.
- DocAve Replicator to perform live or event-driven replication, as well as scheduled or offline replication. Synchronization and management of all content, configurations, and securities is performed with full fidelity.

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 following sections for system and farm requirements that must be in place prior to installing and using DocAve Archiver.

Configuration

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

Agents

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

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

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

Required Permissions

To install and use Archiver properly, ensure that the Agent account has the following permissions.

1. 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 within your organization on the permissions that can be applied, you can simply add the DocAve Agent Account to the local Administrators group to apply all the required permissions.

***Note:** The Local Administrator permission is required to deploy any Archiver solution.

2. SharePoint Permissions: These permissions must be manually configured prior to using DocAve 6 Archiver; they are not automatically configured:
 - User is a member of the Farm Administrators group. Since Archiver works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.
 - Full Control to all zones of all Web applications via User Policy for Web Applications
 - User Profile Service Application permissions for SharePoint 2010:

- Use Personal Features
 - Create Personal Site
 - Use Social Features
 - User Profile Service Application permissions 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
 - Business Data Connectivity Service – Full Control
 - Search Service – Full Control
3. SQL Permissions: These permissions must be manually configured prior to using DocAve 6 Archiver; they are not automatically configured:
- Database Role of db_owner for all the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, and Central Administration Content Database
 - Database Role of dbcreator and Security Admin to SQL Server (this permission is only required when you choose to create the Archiver Database using the Windows Authentication method, because the Agent Account will be used to create the Archiver Database)
- *Note:** If you choose to use SQL Authentication when creating the Archiver Database, make sure the user specified also has dbcreator and Security Admin database roles to SQL Server.

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 (the group is created by DocAve automatically; it has 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\eventLog6
 - Full Control to the Communication Certificate

- Permission of **Log on as a batch job** (it can be found within Control Panel > Administrative Tools > Local Security Policy > Security Settings > Local Policies > User Rights Assignment)
- Full Control permission for DocAve Agent installation directory

Getting Started

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

Launching Archiver

To launch Archiver and access its functionality, click the **DocAve** tab to display all modules for DocAve 6, and complete the following steps:

1. Log into DocAve. If you are already in the software, click the **DocAve** tab. The **DocAve** tab displays all modules on the left side of the window.
2. Click **Storage Optimization** to view the Storage Optimization modules.
3. Click **Archiver** to launch this module.

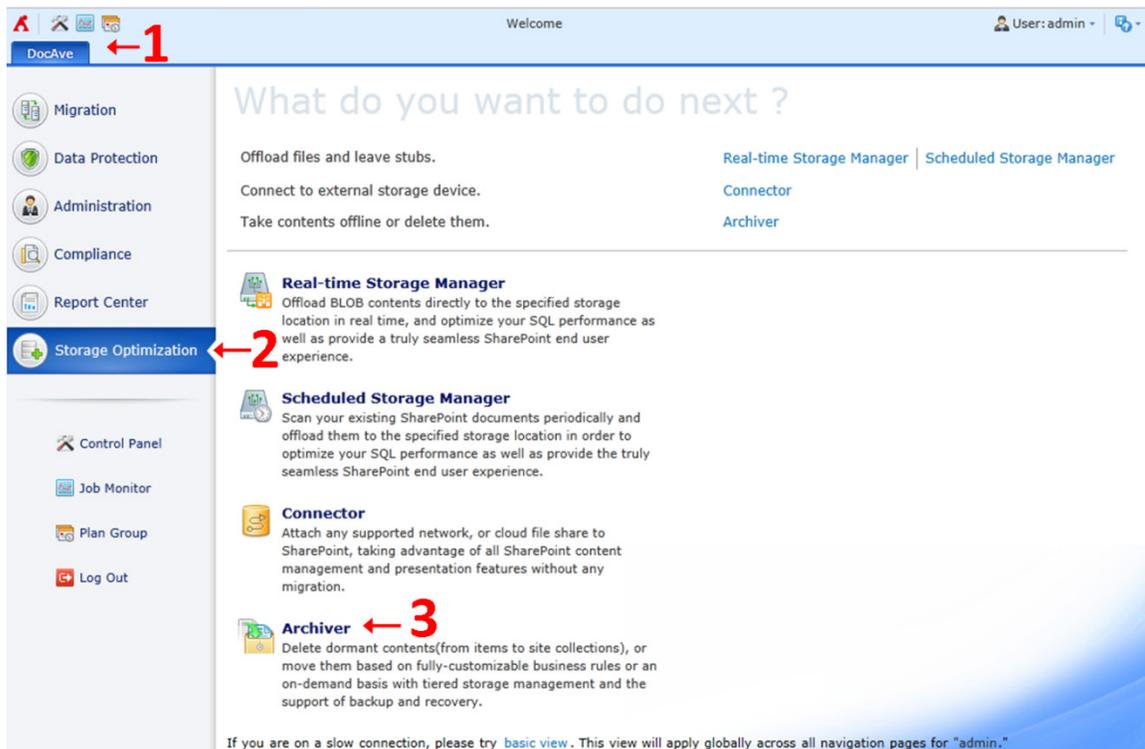


Figure 1: DocAve module launch window.

User Interface Overview

After clicking **Archiver**, the Storage Optimization suite user interface launches with the **Archiver** tab active. This tab displays your farm environment and allows for quick access to a list of Archiver features.

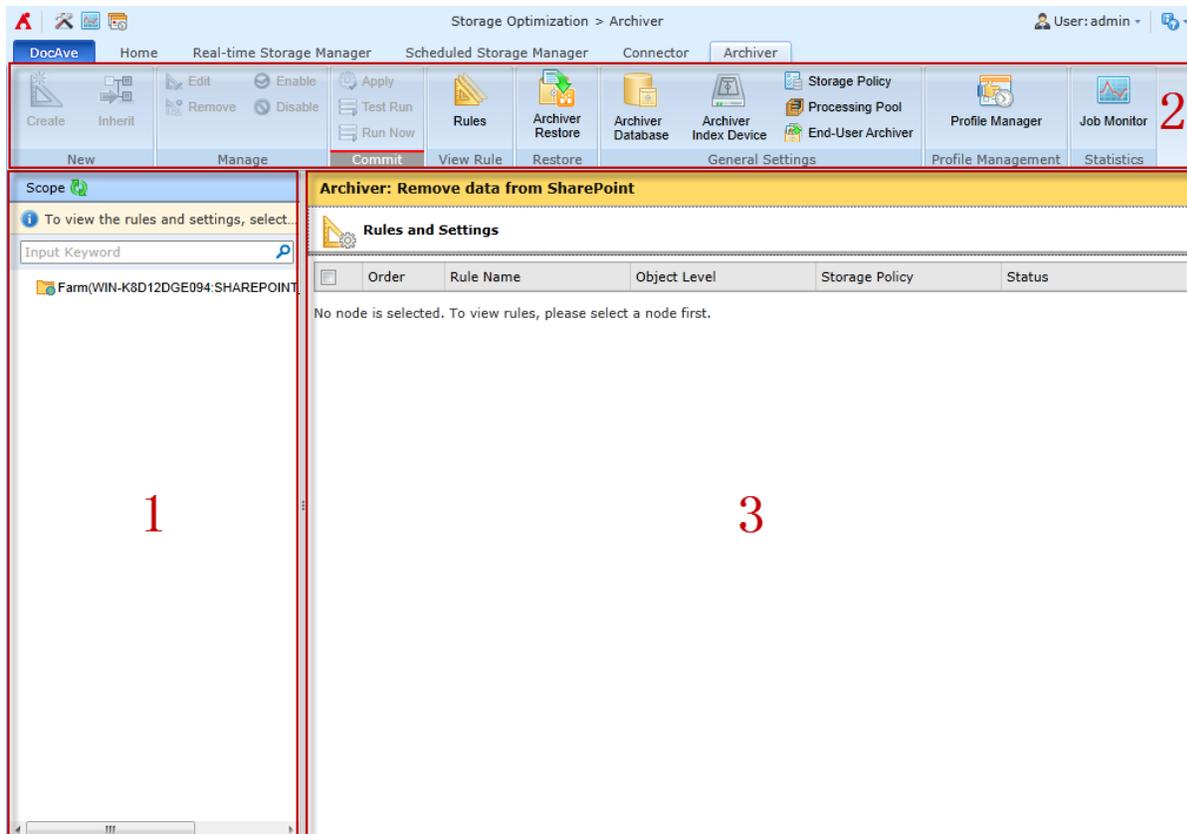


Figure 2: Archiver User Interface.

1. The **SharePoint tree (Scope panel)** displays all content within your farms. Use this panel to select the content that you want to perform actions on. Selecting content often reveals new tabs and functionality on the ribbon.
2. The **ribbon** shows the available actions and wizards for the selected nodes. This content is dynamic; it will often change depending on what is selected in the SharePoint tree.
3. The **workspace** shows all form-based content that is used during the configuration of actions performed in DocAve products.

Selecting Farms and Nodes

To select farms and nodes, complete the following steps:

1. From the **Scope** panel on the left, click the farm that contains the relevant SharePoint content.
2. Select the relevant content that you want to perform further operations on by clicking the radio buttons to the left of the content.

3. Selecting content enables you to perform the procedures described throughout this guide.

If newly-created SharePoint objects are not displayed on the tree, right-click the corresponding node, and click **Refresh** to refresh the tree.

Pre-Archiver Job Configurations

The sections below detail the configurations to make prior to setting up an Archiver job. Configuring Archiver involves performing the following steps in the order given:

1. [Configuring Devices and Setting up Storage Policies](#)
2. [Configuring the Archiver Database](#)
3. [Configuring the Archiver Index Device](#)
4. [Configuring the Processing Pool](#)

***Note:** Step 4 is optional but recommended. Archiver comes with a default processing pool configuration, but these settings should be modified according to your requirements.

Configuring Devices and Setting up Storage Policies

In order to perform an Archiver job, it is necessary to first configure at least one logical device and at least one storage policy. Archiver can write to any Net Share, FTP, TSM, EMC Centera, Cloud Storage, Dell DX Storage, Caringo Storage, and HDS Hitachi Content Platform device.

DocAve has the ability to treat multiple Net Share physical storage devices as a single logical unit (known as a Logical Device) when saving archived data. This is especially useful for very large archive plans, as many small drives can be combined. Storage Policies define which logical devices, Media Service, and retention rule to use for each Archiver job.

For instructions on defining logical devices and setting up storage policies, refer to the [DocAve 6 Control Panel Reference Guide](#).

Configuring the Archiver Database

After setting up the storage policy, configure an Archiver Database. An Archiver database stores a table of scan results that is used by DocAve Archiver and the optional Governance Automation product. The Archiver Database can be configured on any SQL server on the farm.

The Governance Automation product (using approval functionality inherent to Governance Automation) uses the table of scan results to determine which of the scanned content will be archived. The scan results or “records” that are written to the Archiver database are marked as **Approved**. The Governance Automation product reads the scan results before the Archiver job starts and, using the manual approval process, determines which objects to archive. When the Archiver job finishes, the applicable data is archived and the corresponding records are marked as **Archived** in the Archiver Database.

To configure an Archiver database, complete the following steps:

1. Navigate to: **Archiver** tab > **General Settings** group > **Archiver Database**. The **Archiver Database** tab appears.
2. Select the SharePoint farm that will be using the Archiver database.
3. On the **Archiver Database** tab > **Manage** group, click **Configure** to configure the database for the selected SharePoint farm.
4. After being redirected to the configuration page, configure the **Database Server** and **Database Name** in the **Configure Archiver Database** area.
 - **Database Server** – Enter the hostname or IP address of the selected database server.
 - **Database Name** – Enter the Archiver database’s name.
5. In the **Authentication** area, **Windows authentication** is selected by default. If desired, select **SQL authentication** to use SQL authentication instead, and then specify the **Account** and **Password** used to connect to the specified SQL Server. If desired, select the **Failover Database Server** checkbox, and then enter a disaster recovery database server.
1. Click **Advanced** to expand the advanced configuration. Use the **Connection String** feature to create and configure Archiver databases using command lines. Select the **Manually Input Connection String** checkbox to use the **Connection String** method to create and connect the Archiver Database using Windows authentication or SQL authentication.

***Note:** If you select **Manually Input Connection String**, the Authentication area is grayed out and unavailable.

To create an Archiver database using Windows authentication, enter the following information:

- **Server** – Enter the name of a SQL Server instance. The value must be either the server’s name on the network, an IP address, or the name of a Configuration Manager alias. To connect to the default instance on the local server, refer to the following examples:
 - **Server=.**;
 - **Server= IP Address**;
 - **Server=localhost**;
 - **Server=localDatabase\instancename**;
- **Database** – Enter the database name. If a database is not specified, the default database defined for the login is used. To connect to the database, refer to the following example: **Database=Database’s name**.
- **Trusted_Connection** – Select the **true** value to use Windows Authentication Mode for login validation.
- **DataSource** – Enter the instance’s name, the Hostname, or the IP address of a SQL Server. If this field is not specified, a connection is made to the default instance on the local computer.

- **Failover Partner** – Enter the name of the failover server used for database mirroring.
- **Initial Catalog** – Enter the Archiver database’s name.
- **Integrated Security** – Select the **true** value to accept the value “SSPI” for Windows Authentication.

To create an Archiver database using SQL authentication, input the following information:

***Note:** Each instruction’s key and value must be connected with “=”. The instructions are separated using “;”.

- **Server** – Enter the name of a SQL Server instance. The value must be either the server’s name on the network, an IP address, or the name of a Configuration Manager alias. To connect to the default instance on the local server, refer to the following examples:
 - **Server=.**;
 - **Server=IP Address;**
 - **Server=localhost;**
 - **Server= localDatabase\instancename;**
- **Database** – Enter the database name. If a database is not specified, the default database defined for the login is used. To connect to the database, refer to the following example: **Database=Database’s name.**
- **Trusted_Connection** – Select the **False** value to not use Windows Authentication Mode for login validation. You can specify the credentials that will be used to connect to the database.
- **User ID** – Enter the login name.
- **Password** – Enter the password.
- **DataSource** – Enter the instance’s name, the Hostname, or the IP address of a SQL server. If not specified, a connection is made to the default instance on the local computer.
- **Failover Partner** – Enter the name of the failover server used for database mirroring.
- **Initial Catalog** – Enter the Archiver database’s name.

6. Click **OK** to apply the configuration.

Configuring the Archiver Index Device

In order to set an Archiver rule on a given node, the node must have an Archiver index device configured for it. An Archiver index device stores the index of data archived during an Archiver job. This index is needed in order to restore archived data from a file system to SharePoint. It is recommended that you back up the Archiver index device frequently to ensure availability of content should a catastrophic database failure occur.

The size of the index is related to the complexity of the data being indexed. Normally, the Archiver index does not increase in size very quickly. As archive content is pruned, so is the related data in the index.

While there are no particular recommendations as to where to configure an index device, it may be most convenient to do so at the farm level.

To configure an Archiver index device, complete the following steps:

1. Navigate to: **Archiver** tab > **General Settings** group > **Archiver Index Device**. The **Archiver Index Device** tab appears.
2. Click the root farm node and expand the tree structure. From the **Object** column, select where to apply the Archiver index device. All the farms that have DocAve Agents installed and the Archiver module enabled are listed.

***Note:** When selecting the farm node, the Archiver index device is only applied to all existing Web applications and site collections in that farm. The Archiver index device is not configured for newly-created Web application or site collections. If you do not configure an Archiver index device for a newly-added Web application or site collection, then the newly-added node inherits its upper-level node's index device.

3. To configure the Archiver index device for the selected objects, there are two conditions to consider:
 - To configure the index device for the selected nodes and their sub-nodes, click **Configure** in the **Manage** group.
 - To configure the index device for a selected node only, click **Configure** to the right of the selected node.

***Note:** When creating a new Archiver rule on a selected node, DocAve verifies that an index device has been configured for the node. If it has not, DocAve checks the index device configuration of the selected node's parent node, and so on. If DocAve finds an Archiver index device available from an upper level node, this index device is used in the corresponding rule and all later rules (if any) configured on the selected node. If there are no Archiver index devices configured on any upper-level nodes, you must manually configure an index device for the selected node in order to create an Archiver rule on that node.

- Specify one **Logical Device** from the drop-down menu for the selected objects in the **Archiver Index Device** area.
- To generate a full text index during an Archiver job, optionally select the **Enable full text index** checkbox in the **Full Text Index** area. Then, select one pre-defined full text index profile from the displayed drop-down list. For more detailed information on creating an index profile, refer to the **Index Manager** section of the [Control Panel Reference Guide](#).

See the screenshot below for a list of the file types that support full text index.



Figure 3: File types that support full text index.

- Click **OK** to apply the settings.

Configuring the Processing Pool

The Processing Pool feature allows you to control the maximum number of archive jobs that can be run simultaneously. Normally, an archive job is fairly resource-intensive, so running multiple archive jobs simultaneously may affect the performance of the server. To avoid this condition, configure the Processing Pool feature.

Archive jobs that are added into the processing pool become threads. The number of jobs you allow in the processing pool is the maximum number of archive jobs that can be run simultaneously. The remaining archive jobs are placed in a queue.

Each SharePoint farm has one default processing pool: **Default_Farm(Farm Name)**. The number of threads set in this pool is **5**.

To create a new processing pool for a selected farm, complete the following steps:

- Navigate to: **Archiver** tab > **Processing Pool** in the **General Settings** group.
- Click **Create** in **Manage** group on the **Processing Pool** tab. The **Create Processing Pool** tab appears.
- Processing Pool Name** – Enter a processing pool **Name** and an optional **Description**.
- Farm** – Select the **Farm** from the drop-down list.
- Agent Group** – Select an **Agent group** from the drop-down list. The agents in the selected agent group are used by this processing pool to perform the Archiver jobs. For more information about creating agent groups, refer to the [DocAve 6 Control Panel Reference Guide](#).

6. **Maximum Number of Jobs** – Specify the **Maximum number of jobs** that can run simultaneously during Archiver jobs. For example, if you enter **8** in this text box, as many as eight Archiver jobs can be run at the same time.

To view detailed information on an existing processing pool, complete the following steps:

1. Navigate to: **Archiver** tab > **Processing Pool** in the **General Settings** group.
2. Select a pool from the processing pool page.
3. Click **View Details** in the **Manage** group on the **Processing Pool** tab.

To edit an existing processing pool, complete the following steps:

1. Navigate to: **Archiver** tab > **Processing Pool** in the **General Settings** group.
2. Select a pool from the processing pool page.
3. Click **Edit** in the **Manage** group on the **Processing Pool** tab.

To delete existing processing pools, complete the following steps:

1. Navigate to: **Archiver** tab > **Processing Pool** in the **General Settings** group.
2. Select one or more pools from the processing pool page.
3. Click **Delete** in the **Manage** group on the **Processing Pool** tab.

Configuring Archiver Jobs

To run an Archiver job, a node must have one or more Archiver rules applied to it, as well as configured settings. Archiver rules and settings define which content in the selected node gets archived and where the content is saved, processing pool information, notification settings, and job schedule.

Archiver jobs can be configured via two methods:

1. Create an Archiver profile and apply it to a selected node. An Archiver profile integrates rules and settings configurations into one saved profile. If you've created an Archiver profile, you can apply the profile to one or more nodes without having to re-apply the same rules and settings repeatedly. This method should be used if multiple nodes in your farm require the same configurations and/or archiving criteria.
2. Configure rules on a selected node, manually configure the settings for that node, and then apply both the rules and the settings to the node. This method should be used on nodes that require uncommon configurations or criteria—that is, configurations or criteria that are not likely to be re-used elsewhere in the farm.

Regardless of the method you choose, you will need to create, save, and apply at least one Archiver rule in order to run a job. See the information below for instructions on creating and configuring profiles and rules.

Creating an Archiver Profile Using Profile Manager

The Profile Manager is used to configure an Archiver profile, integrating rules and settings configurations into one saved profile. This feature allows you to instantly apply the same set of rules and settings to multiple nodes without having to repeatedly configure the same settings for each node.

To create and configure an Archiver profile, complete the following steps:

1. From within Archiver, click **Profile Manager** in the **Profile Management** group on the ribbon. The **Profile Manager** tab appears.
2. Click **Create** in the **Manager** group on the ribbon. The **General Settings** configuration page appears in the **Create Profile** tab.
3. Configure the following settings:
 - **Name** – Enter the profile **Name**, followed by an optional **Description**.
 - **Farm** – Select the farm from the drop-down list to create the profile on the selected SharePoint farm.
 - **Category** – Enter an optional category name (for example, DocAve) for this profile to be easily recognized by users.
4. When finished, click **Next** in the **Commit** group or on the bottom-right corner of the page. The **Rules** page appears.

5. Click **Create** in the **Rule Management** group to create an Archiver rule. For detailed information on creating Archiver rules, refer to [Creating and Configuring Archiver Rules](#).
***Note:** Multiple rules can be created and included in a profile.
6. When finished, click **Next** in the **Commit** group or on the bottom-right corner of the page. The **Settings** page appears.
7. Configure the settings for the profile. For detailed information on configuring settings, refer to [Configuring Settings](#).
8. When finished, click **Next** in the **Commit** group or on the bottom-right corner of the page. The **Overview** page appears.
9. The settings configured above are displayed in the **Overview** page. To make changes to the configured rules or settings, click **Edit** in the row next to the particular page you want to edit.
10. When satisfied with the configurations, click **Finish** in the **Commit** group or on the bottom-right corner of the page. The **Profile Manager** pane appears.
11. The created profile is displayed in the **Profile Manager** pane. To view, edit, or delete an existing profile, select the checkbox to the left of the profile name and click **View Details**, **Edit**, or **Delete** in the **Manage** group. Click **Close** to leave this page and return to the **Archiver** tab.
12. For instructions on applying the created profile and running a job, refer to [Applying a Profile to a Selected Node and Running a Job](#).

Creating and Configuring Archiver Rules

An Archiver rule defines the criteria, object level, storage policy, and data management configurations for the selected node. To create Archiver rules, complete the following steps:

1. Select a node from the **Scope** panel.
2. Access the **Create Rule** interface by either of the following methods:
 - Click **Create** in the **New** group of the **Archiver** tab. The **Archiver Rule** pop-up window appears.
 - In the **Configure Rules and Settings** pane, select **Create my own rules and settings**. If no rules are defined for the selected node, a message appears above the **Configure Rules and Settings** pane instructing you to click **Create**. The **Archiver Rule** pop-up window appears.
3. **How would you like to archive the SharePoint content?** – Select one of the following radio buttons:
 - **Reuse an existing rule** – Select an existing rule from the drop-down list.
***Note:** The existing rule cannot be modified from this screen.

- **Copy from an existing rule** – Select an existing rule to copy from the drop-down list. Use this selection to modify the settings of an existing rule and save the modification as a new one with a different rule name.
 - **Create a new rule** – Enter a **Name** for the new rule, and optionally, enter a **Description**.
4. **What type of content would you like to archive?** – Specify the **Object level** for this Archiver rule from the drop-down list. The level you specify cannot be higher than the selected node level.
- *Note:** You can only select an object level that at an equivalent or lower level than the node you selected in the **Scope** panel. Only one object level can be selected for each rule.
5. **How would you like to define the content to be archived?** – Configure the criteria for the selected object level. Refer to [Appendix A – Criteria Filter Conditions](#) for more information.
- *Note:** Multiple criteria can be added into the **Criteria** fields; however, to create a rule successfully, at least one criteria row is required.
- When finished setting the criteria, click **Add** to add the new filter condition. You change the logical relationship between the filter rules by clicking the **And** links after the rules (**And** is the default logical relationship).
 - **And** – The content that meets all the rules is archived.
 - **Or** – The content that meets any one of the rules is archived.
 - Under **Basic Filter Conditions**, view the Archiver rules logical relationship. For example, if the logical relationship is **((1 And 2) Or 3)**, the contents that meet both the filter rule 1 and filter rule 2, or meet the filter rule 3 are archived.
6. **Where would you like to store the archived data?** – Select one of the previously-configured storage policies for the archived data from the drop-down list, or select **New Storage Policy** to create a new one.
7. **Would you like to export the SharePoint data before archiving?** – Click **Yes** to enable this function for the Archiver rule on the selected nodes. If enabling this function, the contents on the selected nodes that meet the specified Archiver rule will be exported to the specified file system location before performing an Archiver job.
- **Export type selection** – Select an export type from the drop-down list. **Autonomy Integration** means the content can be managed in the Autonomy platform. **Concordance** means the content exported by Vault can be imported to the Concordance platform for management.
 - **Select an export location** – Select an **Export Location** from the drop-down list where you want to store the exported data. You can also choose to create a new one by clicking on the **New Export Location**.
8. **What would you like to do with the SharePoint Data** – Select one option to control the SharePoint data which will be archived or backed up.
- **Archive and remove data from SharePoint** – Select **Archive and remove data from SharePoint** to archive the data that are specified on the selected nodes and store them

in a specified file system location. Then, the corresponding data in SharePoint will be deleted.

- **Archive and keep data in SharePoint** – Select **Archive and keep data in SharePoint** and then specify how to deal with the data in SharePoint using the following options.
 - **Tag each file with:** – Select **Tag each file with:** to back up the data that are specified on the selected nodes and then add one or multiple columns to indicate the status of these data.
 - **Archived (Yes/No column)** – Create the corresponding column for the archived data. If the data is archived successfully, the value will be displayed as **Yes**.
 - **Archived By** – Create the corresponding column for the archived data. The column value is displayed as the account name of the user who archived this data.
 - **Archived Time** – Create the corresponding column for the archived data. The column value is displayed as the backed up time of this data.
 - **Custom Metadata:** – Create the column that is customized by users. Select the column type and then enter the name and value for this column. If the data is archived successfully, the customized column and its related value will be displayed.
 - **Leave a stub in SharePoint for each file (uses Storage Manager)** – Select **Leave a stub in SharePoint for each file (uses Storage Manager)** to extend the data that are specified on the selected nodes and leave the stubs in SharePoint.
 - **Logical device** – Select an existing logical device from the drop-down list to store the data that are extended from SharePoint. If there is no logical device that is previously configured, click **New Logical Device** to create a new logical device.

***Note:** Make sure the BLOB providers and stub databases have been configured for the selected scope in Storage Manager.
 - **Declare each file as a SharePoint record** – Select **Declare each file as a SharePoint record** to declare the data or stubs that exist in SharePoint as record.
- 9. **Data Compression** – If you want to enable data compression, select the **Compression** checkbox, choose a compression level using the slider, and then select whether to leverage 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 cause slower job times.
- 10. **Data Encryption** – If you want to enable data encryption, select the **Encryption** checkbox, and configure the following options:

***Note:** Encrypting data causes slower archive times.

- Choose whether you want to leverage DocAve Media Server (**Media Service**) resources or SharePoint Server (**SharePoint Agent**) resources for compression.
 - Choose a security profile from the **Security profile** drop-down list, or select **New Security Profile** to create a new one. For more information on creating a security profile, refer to the [DocAve 6 Control Panel Reference Guide](#).
11. Click **OK** to save the configurations and create this new rule successfully, or click **Cancel** to cancel without saving any of your configurations.
 12. After clicking **OK**, the Archiver rule is created and displayed in the **Rules and Settings** pane. Here you can view the general information (**Order, Rule Name, Object Level, Storage Policy, and Status**) of the rule. For more detailed information, click a rule and observe the **Details** pane.
 13. For instructions on applying the created rule and running a job, refer to [Applying Rules to a Selected Node and Running a Job](#).

Configuring Settings

In addition to rules, selected nodes must also have settings configured in the **Rules and Settings** pane.

***Note:** If you have configured and applied an Archiver profile to the selected node by using the **Reuse an existing profile** option, then the settings will not be editable, as they now reference the settings defined in the profile.

To configure Archiver job settings, complete the following steps under **Settings**:

1. **Processing Pool** – Specify a processing pool for the Archiver rule, or click **New Processing Pool** to create a new pool. Refer to [Configuring the Processing Pool](#) for more information.
2. **Workflow** – Define how you want to manage the workflows in the SharePoint objects to be archived by optionally selecting one or both of the checkboxes:
 - **Include workflow definition** – Archives only the definition of existing source workflows.
 - **Include workflow instance** – Archives the definition and history of existing source workflows.
3. **Notification** – Select how to be notified of executed Archiver jobs. Select the desired notification profile from the drop-down list. For instructions on setting up a notification profile, refer to the [DocAve 6 Control Panel Reference Guide](#).
4. **Schedule** – Select one of the following scheduling options:
 - **No Schedule** – Select this option to run the Archiver job immediately.
 - **Configure the schedule myself** – Select this option to configure a customized schedule, and run the Archiver job by schedule. Fill in the parameters according to your desired schedule. After configuring the schedule for the Archiver job, click **Calendar View** to view the scheduled search by day, week, or month.

Applying Configurations and Running Archiver Jobs

Created rules or a created profile must be applied to the selected node in order to run an Archiver job. Refer to the information below to apply your applicable configuration to a selected node and run an Archiver job.

Applying a Profile to a Selected Node and Running a Job

To apply a created profile to a selected node and run the job, complete the following steps:

1. Select a node from the **Scope** panel.
2. In the **Configure Rules and Settings** pane on the right, select one of the following options to apply a profile to the node selected in the farm tree.
 - *Note:** Any modified rules are also applied to rules in the selected profile; however, modified settings do not affect the original settings configured in the selected profile.
 - To create new rules and settings based on an existing profile, select **Create new rules and settings based on an existing profile** and select a profile from the drop-down list. The rules and settings configured for the selected profile are displayed in the **Rules and Settings** workspace and can be edited as needed. If you have not created a profile, click the **New Profile** link in the drop-down list to create a new profile. For more information, refer to [Creating an Archiver Profile Using Profile Manager](#).
 - To reuse an existing profile, select **Reuse an existing profile** and select a profile from the drop-down list.
 - *Note:** The existing profile cannot be modified from this screen.
3. Click **Apply** in the **Commit** group to apply the selected profile. The selected profile is applied to the selected node, and all nodes below the selected node inherit the profile rules and settings. For more information on inheritance, see [Applying or Stopping Inheritance](#).
4. From the **Commit** pane, click **Run Now** to run the job immediately. Running jobs can be observed in Job Monitor.
 - *Note:** Alternatively, click **Apply and Run Now** to both apply the profile and run the job with one click.

Applying Rules to a Selected Node and Running a Job

To apply a rule to a selected node and then run an Archiver job, complete the following steps:

1. Select a node from the **Scope** panel. All rules created for that particular node display below the **Configure Rules and Settings** section of the **Rules and Settings** workspace.

2. If desired, create more Archiver rules or specify which rule will run first by changing the number in the **Order** field. Ensure a rule is checked first by changing its **order**. To re-order rules, modify the value in the **Order** column.
3. Click **Apply** in the **Commit** group to apply all configured rules and corresponding settings. The configured rules and settings are applied to the selected node and all nodes below it. For more information on inheritance, see [Applying or Stopping Inheritance](#).
4. Click **Run Now** to run the applied rules and settings immediately (the running jobs can be checked in the Job Monitor), or click **Apply and Run Now** to both apply the rule and run the job immediately.

If you are not sure whether the created rule will run successfully, click **Apply and Test Run** to both apply the rule and run a test job immediately. Performing an Archiver Test Run job can verify whether the created rule and settings will be successfully applied and run during the Archiver job. The test run will also identify which data can be archived.

Archiver Job Running Status

To view Archiver jobs that are running, click **Job Monitor** in the **Statistics** group. During the job process, the first three tasks listed below are run, one by one, during the Archiver job. If **Generate Full Text Index** was selected during the Archiver index device configuration, then fourth task is performed as well.

1. **Scan** – The first task searches the content for data that matches the corresponding Archiver rule. If there is no matching object, the next two tasks are not run. Scan jobs are not performed for end-user archiving jobs because the user directly selects the content to be archived from SharePoint. For more information, refer to [End-User Archiving](#).
2. **Archive** – The second task archives the data that was located in the first task according to the storage policy and other configured settings. If no data has been archived in this task, then the Merge Index task described below is not performed.
3. **Merge Index** – The last task is the Merge Index task. Site collections have a major index, and the minor index generated by each Archiver job must be merged into the major index. The major index increases in size as the archived data size increases. As such, the index may become large in size. In the event that the merge index job status reads **Failed/Finished with Exception**, the generated minor indexes can be re-merged to the major index by clicking **Start** in Job Monitor and starting the corresponding merge index job again.
4. **Archiver Full Text Index** – If the **Generate Full Text Index** option was selected in the **Archiver Index Device** configuration page and the Archiver index device was applied to the selected node in the farm tree, and then the Archiver job run on this node will generate a full text index of the archived content.

Managing Archiver Rules

Once created and applied, Archiver rules can be edited, removed, disabled, and deleted. In addition, inheritance can be applied or stopped. Review the following sections for information on managing Archiver rules.

Applying or Stopping Inheritance

After setting up and applying an Archiver rule on a selected node, its sub-nodes automatically inherit the rule that is applied to their parent node. The **Stop Inheriting** option logically separates the rule in the lower level node from the upper level node; this rule is useful, for example, to ensure that often-used data in a particular list is not archived accidentally.

To create a new rule or edit an existing rule that is applied to the current node or lower level nodes, you must break the inheritance first. To break this inheritance, click **Stop Inheriting** in the **New** group on the ribbon.

To manually apply an Archiver rule inheritance to a node, complete the following steps:

1. Select the node that will inherit the parent node's Archiver rule.
2. Click **Inherit** in the **New** group on the ribbon to inherit the rule. This button changes to **Stop Inheriting**.

Helpful Notes for Applying Inheritance

Review the following notes to help you apply inheritance when managing Archiver rules:

- By default, an Archiver rule configured for a higher level is inherited by lower-level nodes.
 - You cannot create a new rule on a node if it inherits Archiver rules from a higher-level node.
 - An inherited Archiver rule cannot be edited or removed and can only be viewed.
 - Choosing to inherit rules from higher-level nodes again after already breaking inheritance, removes all the rules that are added after breaking the inheritance from the following nodes:
 - The node that inherits the higher-level rules again.
 - The nodes that inherit rules from the node above it.
- *Note:** The newly-added rules in the selected levels are not deleted; they still exist in the Archiver Rule list for re-application, if necessary.
- If multiple rules are created in an Archiver profile, then only the rules whose object level is lower than or equal to the selected node level can be applied.

- If the object level of a rule inherited from a higher-level node is higher than the level of the currently-selected node, then the rules in this profile cannot be applied to the selected node and cannot be run.

Helpful Notes for Stopping Inheritance

Review the following notes to help you stop inheritance when managing Archiver rules:

- When breaking a rule's inheritance at a selected level, the inheritance is only broken at this level; the rule's lower level inheritance is not broken.
- After the rule's inheritance is broken, you can apply new rules and edit the corresponding rule settings at the lower level.
- If you break rule inheritance on a node and then disable the inherited rule, this rule can still be used by an upper level.
- If you break rule inheritance on a node and then edit the inherited rule, the changes will affect all the SharePoint objects that use this rule.
- If after breaking a rule's inheritance on a selected node you run an Archiver job at a higher level, there are two conditions:
 - If the **Object Level** of a higher level's Archiver rule is higher than the level of the selected node, the lower-level node is included in the scope of the Archiver job.
 - If the **Object Level** of a higher level's Archiver rule is lower than or equal to the level of the selected node, the lower-level node is not included in the Archiver job.

Editing or Removing Archiver Rules

Existing Archiver rules can be edited or removed from nodes. See the information below.

Editing Existing Archiver Rules

Certain created Archiver rule settings can be modified using the **Edit** feature. The description, object level, criteria, storage policy, data compression, and data encryption settings can all be edited. The **Rule Name** is a fixed setting and cannot be changed using the **Edit** feature.

To edit an existing Archiver rule, complete the following steps:

1. Select the node in the **Scope** panel that contains the rule or rules you would like to edit.
2. Select a rule from the **Rules and Settings** workspace by selecting the checkbox to the left of the rule.
3. Click **Edit** in the **Manage** group on the ribbon.
4. The **Archiver Rule** page appears; you can view associated objects for this rule. See [Creating and Configuring Archiver Rules](#) for more information.

Removing Existing Rules from Nodes

When a created rule is no longer useful for the nodes in the farm tree, you can remove this rule from the node. Use the **Remove** feature to simplify rules management and remove unnecessary rules from the nodes.

To remove an existing Archiver rule, complete the following steps:

1. Select the node in the **Scope** panel that contains the rule or rules you would like to remove.
2. Select one or more rules from the **Rules and Settings** workspace by selecting the checkboxes to the left of the rule.
3. Click **Remove** in the **Manage** group on the ribbon.
4. The rule or rules are removed from the selected node and sub-nodes on the tree.

***Note:** Removed rules still exist in the Archiver Rule list for re-application, if necessary.

***Note:** If a current node inherits a rule from an upper-level node, you must first stop inheriting at this node before performing a **Create**, an **Edit**, or a **Remove**.

Enabling and Disabling Rules

Once rules are created and applied to a node, they can be enabled (to be included in a run) and disabled (to be omitted from a run) as desired. Disabling is useful, for example, when some of the rules do not need to be run in a particular job, but will be required in subsequent jobs. As opposed to deleting the rule, which removes it from the Archiver Rule list entirely, disabling the rule omits it from that particular run but saves it in the Archiver Rule list for future use.

Review the following two sections for information on disabling and enabling rules.

Disabling an Existing Rule

After creating and applying the rule, the **Status** of rule in the **Rules and Settings** pane reads **Enabled** by default. In some situations, it may be desired to disable a rule for a particular job.

To disable an enabled Archiver rule, complete the following steps:

1. Select the node in the **Scope** panel that contains the rule or rules you would like to disable.
2. Select a rule or rules from the **Rules and Settings** workspace by selecting the checkboxes to the left of the rule.
3. Click **Disable** from the **Manage** group on the ribbon to disable the selected rules. The rule status changes to **Disabled** in the **Status** column.

Enabling a Disabled Rule

To enable an existing disabled Archiver rule, complete the following steps:

1. Select the node in the **Scope** panel that contains the rule or rules you would like to enable.
2. Select a rule or rules from the **Rules and Settings** workspace by selecting the checkboxes to the left of the rule.
3. Click **Enable** in the **Manage** group on the ribbon to enable the selected rules. The rule status changes to **Enabled** in the **Status** column.

Using Rule Viewer

Use the Rule Viewer to search for and manage created Archiver rules. The basic operations described below are:

- Viewing and searching for rules using a Rule Based view
- Viewing and searching for rules using a Scope Based view
- Viewing the details of the rules which are created on the specified node using View Details
- Deleting rules that are useless to the whole farm tree
- Removing rules from the selected scopes

To launch the Rule Viewer, click **Rules** in the **View Rule** group on the ribbon. The **Archiver Rules tab** appears. See the following sections for information on using the Rule Viewer.

Rule Based Viewing

The **Rule Based** table view initially displays all rules sorted alphabetically in the first (**Rule Name**) column and includes three other columns: **Scope** (the scope that the specified rule is applied to), **Profile Name** (the name of the profile that the specified rule belongs to), and **Module** (the module that the rule belongs to).

***Note:** Only the **Module** column can be deselected from the column list by clicking the  icon, deselecting **Module**, and clicking **OK**. You can also hover the mouse over the **Module** column and click the  icon to hide this column from the current view.

When in **Rule Based** view, you can perform the following functions:

- **Search all pages** – Enter a keyword and click  to search for the related rules from the first page to the last page.
- **Search current page** – Enter a keyword and click  to search for the related rules in the page you select.

***Note:** Keywords are not case sensitive, and the search accepts partial word input. However, use of wildcards is not supported.

- **Show rows** –The number of the rules that are displayed on each page is **15** by default. You can reset the number from the drop-down list. Once the number of rules exceeds the number that can be included in a single page, they will be displayed in the next page. You can enter a specific **Number** to directly go to the corresponding page, or click < or > to page forwards or page backwards.

Deleting Rules

Delete a created rule when it no longer has a use for any node within the entire farm tree. Deleting a rule permanently removes the rule from the Archive Rules list.

To delete an Archiver rule in the **Rule Based** view, complete the following steps:

1. Click the **Archiver** tab.
2. Click **Rules** in the **View Rule** group on the ribbon. The Archiver Rules tab opens.
3. Click **Rule Based** in the **View** group.
4. Select the rules you want to delete in the table by selecting the checkboxes to the left of the rules.
5. Click **Delete** in the **Manage** group to delete the selected rules. The rule is permanently deleted from the Archiver Rules list.

***Note:** Since the delete operation cannot be undone, make sure that the rules you are deleting are no longer needed.

Scope Based Viewing

The **Scope Based** table view initially displays all rule-related URLs sorted alphabetically in the first column (**Scope**) and includes the **Node Level** (the level of the node that the specified rule is applied to), **Rule Name** (the name of the rule), and **Profile Name** (the name of the profile that the specified rule belongs to) columns as well. The **Rule Name** column lists every rule applied to the scope in the same row.

Note that the **Rule Name** column can be deselected from the column list by clicking the  icon, deselecting **Rule Name**, and clicking **OK**.

The **Scope Based** view offers the following functionality:

- **Search all pages** – Enter a keyword and click  to search for the related rules from the first page to the last page.
- **Search current page** – Enter a keyword and click  to search for the related rules in the page you select.

- **Show rows** – The number of the rules that are displayed on each page is **15** by default. You can reset the number from the drop-down list. Once the number of rules exceeds the number that can be included in a single page, they will be displayed in the next page. You can enter a specific **Number** to directly go to the corresponding page or click < or > icon to page forwards or page backwards.

Viewing Details of the Created Rules

This function allows you to view detailed information on Archiver rules that are created on the selected node.

To view Archiver rules that have been created in DocAve, follow the steps below.

1. Click the **Archiver** tab.
2. In the **View Rule** group, click **Rules**.
3. In the **Archiver Rules** page, select one existing rule from the **Rule Based/Scope based** table and click **View Details** in **Manage** group.
4. In the **View Details** page, detailed information on the created Archiver rule will be displayed.

Removing Rules

To remove a Storage Manager rule in the **Scope Based** view, complete the following steps:

1. Click the **Archiver** tab.
2. In the **View Rule** group on the ribbon, click **Rules**.
3. In the pop-up window, click **Scope Based** in the **View** group.
4. Select a scopes where you want to remove the rules in the table by selecting the checkboxes to the left of the scopes.
5. Click **Remove** in the **Manage** group to remove all the rules from the selected scopes.

For more information, refer to [Removing Existing Rules from Nodes](#).

Restoring Archived Data

Any data archived using DocAve's Archiver can be restored down to the item/item version level. Restore the archived data by clicking **Archiver Restore** in the **Restore** group.

DocAve provides two data restore modes:

- **General Mode** – The General Mode supports a restore of data down to the item/item version level. Integrated with the Advanced Search function, General Mode restores the specified archived data regardless of whether or not a full text index was generated during an archive job. In this mode, the following two Archiver restores are provided:
 - **In place restore** – Restores the archived data to its original location.
 - **Restore to file system** – Used for out-of-place restoring of contents directly to the file system.
- **Full Text Index Mode** – The Full Text Index Mode restore performs a **Restore to file system** job on archived data that contains a generated full text index. The full text index allows a user to search the actual document content for specified criteria, allowing for a more granular approach to a restore. The available scope is site collection level or above.

General Mode

The steps for selecting the content to restore are identical for both **In place restore** and **Restore to file system**. Complete the following steps, and then proceed to the section relevant to the type of restore you are performing.

1. Click **Archiver Restore** in the **Restore** group. The **Archiver Restore** tab appears. By default, **General Mode** is selected in the **View** group on the ribbon.
2. **Data Selection** – Select the archived data from the tree structure that you want to restore.

***Note:** To search for specific objects or data within each SharePoint level, use the **Advanced Search** feature. For more information, refer to [Using Advanced Search](#).

- In the **Archiver Data** pane, expand the tree and select the desired node. Regardless of the object level you selected when creating the Archiver rule, it is possible to restore data down to the item/item version level.
- When selecting certain nodes, the **Security** and **Property** checkboxes appear and are selected by default.
 - **Security** – Restores the security settings of the SharePoint objects.
 - **Property** – Restores the property settings of the SharePoint objects.

For more information about security and property settings, refer to the following table:

Type	SharePoint Object	SharePoint Object Attributes That Belong to the Respective Type
Security	Site collection	Users and groups of the site collection
	Site	Mappings of the users and their permissions, permission levels, groups, users
	List	Mappings of the users and their permissions, users, groups
	Folder/item/file	Mappings of the users and their permissions, users, groups
Property	Site collection	Basic information used to create the site collection, site collection, site features information
	Site	Basic information used to create the site, other site, site columns, site content types, navigation, and site features information; triggers for the users' actions in the site
	List	Basic information used to create the list; other list, list columns, and list content types information; triggers for the users' actions in the list, alerts
	Folder/item/file	Properties of the folder/item/file, alerts

- Select the data to be restored. See the table below for more information:

Restore Level	Step
Restoring only a site collection	<ol style="list-style-type: none"> 1. Navigate to the site collection and expand its data tree. 2. Select the checkbox next to the site collection to select the entire site collection.
Restoring a site	<ol style="list-style-type: none"> 1. Navigate to the site. 2. Select the checkbox next to the site to select the site and its content.
Restoring a list/library	<ol style="list-style-type: none"> 1. Navigate to the list/library. 2. Select the checkbox next to the list/library to select the list/library and its content.
Restoring a file/item	<ol style="list-style-type: none"> 1. Navigate to the root folder of the library/list that contains the file/ item. 2. Click the items icon. 3. Select the checkbox next to the file/item

3. After selecting the content to restore, click **Next**. The **Restore Type** pane appears.

- [Click here](#) for further instructions if you want to perform an **In place restore**.
- [Click here](#) for further instructions if you want to perform a **Restore to file system**.

Performing an In Place Restore

In place restore jobs restore archived data to its original location. To perform an in place restore, complete the following steps:

1. After selecting the content to restore, select a **Restore Type**.
 - **Restore Type** – Select the location where to restore the archive data. In this case, select **In place restore** to restore data to the original SharePoint location.
 - **Agent Group** – Select an agent group from the drop-down list to execute the restore job. For more information on agent groups, refer to the [DocAve 6 Control Panel Reference Guide](#).
2. Click **Next**. The **Restore Settings** pane appears.
3. Set the restore settings by configuring the following settings:
 - **Conflict Resolution** – If the SharePoint object name in the archived data is the same as the name of an existing object in the location you are restoring to, this is considered a “conflict.” Select one of the following options for resolving conflicts:
 - **Overwrite** – Copies the archived item/document to the original location by overwriting the original item with the same ID or the document with the same name.
 - **Not Overwrite** – Keeps the original item/document as it is and does not restore the archived item/document.
 - **Workflow** – Optionally select one or both of the following checkboxes to define how SharePoint workflows are recovered.
 - **Include workflow definition** – Restores the definition of the source workflows to SharePoint.
 - **Include workflow instance** – Restores the state, history, and tasks for each item.
 - **Notification** – Configure e-mail notification settings. Select the desired notification profile from the drop-down list. For instructions on setting up a notification profile, refer to the [DocAve 6 Control Panel Reference Guide](#).
 - **Schedule** – Select when to restore the content to SharePoint.
 - **Restore once the wizard finished** – Run the plan immediately after finishing using the wizard.
 - **Start time** – Configure a schedule yourself and choose a start time. Click the link below the start time to switch the time zone to your desired one.
4. When finished, click **Next**. The **Overview** page appears.
5. **Overview** – Review and edit plan selections. Click **Edit** beside the row you want to edit to open the corresponding settings page.

6. Confirm all the configurations and click **Finish**.

Performing a Restore to File System

Restore to file system jobs restores the archived data directly to the file system. To perform a restore to file system job, complete the following steps:

1. After selecting the content to restore, configure the following settings:
 - **Restore Type** – Select the location where to restore the archive data. In this case, select **Restore to file system** to restore data to your desired location.
 - **In Concordance format** – Select this checkbox to use the third party software Concordance to view the metadata of the data to be restored. This function also allows the user to view metadata for the full text index generated during an archive job.

Upon completion of a restore to file system job, the selected archived data is restored to the specified location. In this same directory are the following three files, which enable you to view metadata by using Concordance:

- **MetaData.dat** – This file records the restored data’s metadata.
 - **CommonCreateConcordanceDB.cpl** – After importing the **MetaData.dat** file into Concordance, use this Concordance file to view the restored data’s metadata.
 - **CommonCreateHyperlinks.cpl** – After importing the **MetaData.dat** file into Concordance, use this file to view and open a hyperlink to the restored data.
- **Destination** – Specify the location where you want to restore the archived data. Enter a **UNC path**, **Username**, and **Password**. Click the **Validation Test** button to validate the entered configuration.

Click **Next**. The **Restore Settings** pane appears.

2. Set the **Restore Settings**.
 - **Conflict Resolution** – If the SharePoint object name in the archived data is the same as the name of an existing object in the location you are restoring to, this is considered a “conflict.” Select one of the following options for resolving conflicts:
 - **Overwrite** – Copies the archived item/document to the selected location by overwriting the item with the same ID or the document with the same name in the specified location.
 - **Not Overwrite** – Keeps the item/document in the specified location as it is and does not restore the archived item/document.

- **Workflow** – Optionally select one or both of the following checkboxes to define how SharePoint workflows are recovered:
 - **Include workflow definition** – Restores the definition of the source workflows to SharePoint.
 - **Include workflow instance** – Restores the state, history, and tasks for each item.
- **Notification** – Configure e-mail notification settings. Select the desired notification profile from the drop-down list. For instructions on setting up a notification profile, refer to the [DocAve 6 Control Panel Reference Guide](#).
- **Schedule Settings** – Select when to restore the content to SharePoint.
 - **Restore once the wizard finished** – Run the plan immediately after finishing using the wizard.
 - **Start time** – Configure a schedule yourself and choose a start time. Click the link below the start time to switch the time zone to your desired one.

When finished, click **Next**. The **Overview** screen appears.

3. **Overview** – Review and edit plan selections. Click **Edit** beside the row you want to edit to open the corresponding settings page.

Confirm all the configurations and click **Finish**.

Using Advanced Search

Advanced search provides a quick method of selecting specific objects or data within each SharePoint level (from the Web application down to the item level) for restoration in General Mode. To use advanced search, complete the following steps:

1. From the **Archiver Restore** page (see [Restoring Archived Data](#)), select the node you want to search and click **Advanced Search** from the **Advanced** group on the ribbon.
2. In the **Advanced Search** page, the SharePoint levels equal to or lower than what you selected in the Archiver restore tree are listed in the **Level** drop-down list. The value is not case sensitive and supports wildcards. Click **Add a Filter Level Group** to add a filter group, and then select one level from the corresponding drop-down list.
3. Click **Add a Criterion** to add a new filter rule in the filter group at the selected level. Change the rule settings in the **Rule**, **Condition**, and **Value** columns. Change logical relationship between the filter rules by clicking the logic icon after the rule. There are two logic options: **And** and **Or**.
 - **And** – Searches for content that meets all the rules.
 - **Or** – Searches for content that meets any one of the rules.

Under **Basic Filter Conditions**, view the filter rules' logical relationship. For example, if the logical relationship is **((1 And 2) Or 3)**, the contents that meet both the filter rule 1 and filter rule 2, or that meet the filter rule 3, are included in the search result.

4. Click **Search** to execute the search operation. The search result is displayed under the tab **Search Result (1)**.

Full Text Index Mode

The steps for selecting the content to restore are identical to the restore to file system function. The Full Text Index Mode enriches the search function by enabling the user to search not only by filter level criterion, but also by file content. The Full Text Index Mode restore supports the following levels: document, document version, item, item version, and attachment.

***Note:** To correctly search for content using Full Text Index Mode, it is recommended that you install the iFilter plug-in that is related to the corresponding file format on the server where the Media Service for full text index is installed before generating the full text index.

To use Full Text Index Mode, complete the followings steps:

1. Click **Archiver Restore** in the **Restore** group. The **Archiver Restore** tab appears. Switch the mode by clicking **Full Text Index Mode** in the **View** group on the ribbon.
2. **Data Selection** – Expand the farm tree and select the node on which the **Archiver Full Text Index** job has been performed.
3. Set the **Filter Level Group** and **Criterion**, or enter specific content in the **Search** textbox, to search for the archived data that you want to restore. You can enter the keywords and characters here. These characters are not case-sensitive. To specify the files that you want to search for, enter the criteria name and the value connected with =. Then, click **Search** to search for the corresponding files.

***Note:** Insert a forward slash (\) before characters such as + - && | ! () { } [] ^ " ~ * ?. If this is not done, then the archived data will not be searched properly.

***Note:** When the archived data which are specified on the selected node are not found after the search finishes, the corresponding index profiles will be listed in the pop-up window when clicking **View Details**. The detailed information will be displayed.

4. Click **Next**. The **Restore Type** pane appears.
 - **Restore Type** – Select the location where to restore the archive data.
***Note:** Full Text Index Mode only supports the **Restore to file system** restore type that generates Concordance format files after restoring the archived data.
 - **Destination** – Specify the location where you want to restore the archived data. Enter a **UNC path, Username, and Password**. Click **Validation Test** to validate the entered configuration.
5. Click **Next**. The **Restore Settings** pane appears.
 - **Workflow** – Optionally select one or both of the following checkboxes to define how SharePoint workflows are recovered.

- **Include workflow definition** – Restores the definition of the source workflows to SharePoint.
 - **Include workflow instance** – Restores the state, history, and tasks for each item.
 - **Notification** – Configure e-mail notification settings. Select the desired notification profile from the drop-down list. For instructions on setting up a notification profile, refer to the [DocAve 6 Control Panel Reference Guide](#).
 - **Schedule Settings** – Select when to restore the content to the specified location in the file system.
 - **Restore once the wizard finished** – Runs the plan immediately after finishing using the wizard.
 - **Start time** – Configure a schedule yourself and choose a start time. Click the link below the start time to switch the time zone to your desired one.
6. Click **Next** when you are finished. The **Overview** screen appears.
 7. Review and edit plan selections. Click **Edit** beside the row you want to edit to open the corresponding settings page.
 8. Confirm all the configurations and click **Finish**.

Checking a Job Status

Archiver contains a Job Monitor button where users can view the status of the running jobs. This module is useful for monitoring jobs or troubleshooting for errors.

Refer to the [DocAve 6 Job Monitor Reference Guide](#) for more information.

Archiver Tools

Some tools are provided with the Archiver module.

- **Manager Tool Dell DX Client** – Use the **ManagerToolDELLDXClient** tool to display and update the **retention time**, **compression type**, and the **date of deferred compression** of DocAve Archiver data that is saved on a Dell DX Storage server.
- **Manager Tool HCP Client** – This tool is used to display and update the properties (**Retention time**, **Hold**, **Shred**, and **Index**) of DocAve Archiver data that is saved on an HDS Hitachi Content Platform server.

For more information, refer to [DocAve 6 Supplementary Tools User Guide](#).

End-User Archiving

The End-User Archiving feature allows end-users who have the required permissions to archive SharePoint content manually at the site collection, site, library, list, folder, document, and item levels. After an end-user initiates an Archiver job, the job process and detailed information can be viewed in Job Monitor. Once content is archived, users have the ability to search through archived content and restore content, if desired.

Job records are also generated in Job Monitor during end-user archiving jobs. If you are using end-user archiving frequently, it is highly recommended that you configure a job pruning policy to ensure databases do not become overloaded with job data. For instructions on defining job pruning policies, refer to the [DocAve 6 Control Panel Reference Guide](#).

***Note:** In order to search archived data in the **Archiver Tools** page in SharePoint, a full text index must be generated during an end-user archiving job.

The following sections contain further information on activating the feature and performing end-user archiving.

End-User Archiving Permissions

Refer to the following table for the detailed information about the archiving permissions to different object level.

Object Level	Required Permission	Description
Site collection	Site Collection Administrator	Only the Site Collection Administrator can access the page.
Site	Full Control of the site	AddAndCustomizePages
		AddDelPrivateWebParts
		AddListItems
		ApplyStyleSheets
		ApplyThemeAndBorder
		ApproveItems
		BrowseDirectories
		BrowseUserInfo
		CancelCheckout
		CreateAlerts
		CreateGroups
		DeleteListItems
		DeleteVersions
		EditListItems
		EditMyUserInfo
		EnumeratePermissions
ManageAlerts		
ManageLists		

Object Level	Required Permission	Description
		ManagePermissions
		ManagePersonalViews
		ManageSubwebs
		ManageWeb
		Open
		OpenItems
		UpdatePersonalWebParts
		UseClientIntegration
		UseRemoteAPIs
		ViewFormPages
		ViewListItems
		ViewPages
		ViewVersions
		ViewUsageData
Library/list	Designer permission	DeleteVersions
		ManageLists
		CancelCheckout
		OpenItems
		EditListItems
		ViewListItems
		AddListItems
		DeleteListItems
		ApproveItems
		ViewVersions
		CreateAlerts
		ViewFormPages
Folder/item/document	Contribute permission	AddListItems
		EditListItems
		ViewListItems
		DeleteListItems

Installing and Using End-User Archiver

To install and use the End-User Archiver feature, complete the following steps:

1. Configure the Archiver index device on the desired node.
2. Configure the Archiver Database.
3. Navigate to: **DocAve v6 > Control Panel > Solution Manager**. The Solution Manager window appears.
4. Select the SharePoint farm from the **Farm** drop-down list.
5. Select **SP2010EndUserArchiver.wsp** or **SP2013EndUserArchiver.wsp** from the solution list (according to the SharePoint farm you currently use), and click **Install** in the **Actions** group to

install this solution. After the solution is installed, click **Deploy** in the **Actions** group to deploy the solution to the SharePoint farm.

6. Once the solution is installed and deployed, navigate to: **Archiver** tab > **General Settings** group > **End-User Archiver**. The **End-User Archiver** page appears.
 7. On the **End-User Archiving** tab, expand the farm tree in the **Scope** pane and select the node where you want to perform the **End-User Archiver**. Click **Configure** in the End-User Archiver Settings group to configure the **End-User Archiver Rule**.
 - **Where would you like to store the archived data?** – Select a storage policy from the drop-down list. For detailed information on configuring a storage policy, refer to the **Storage Policy** section of the [DocAve 6 Control Panel Reference Guide](#).
 - **What would you like to do with the SharePoint data?** – Select one of the following options:
 - **Archive and remove data from SharePoint** – Select **Archive and remove data from SharePoint** to archive the data that are specified on the selected nodes and store them in a specified file system location. Then, the corresponding data in SharePoint will be deleted.
 - **Archive and keep data in SharePoint** – Archives the applicable data on the selected nodes and stores them in the selected file system location. Data is not deleted from SharePoint after the archive/backup. Select from the following options:
 - **Tag each file with** – Backs up applicable data on the selected nodes and then adds one or multiple columns to each file to indicate the status of the data.
 - **Leave a stub in SharePoint for each file (uses Storage Manager)** – Extends the applicable data on the selected nodes and leave their stubs in SharePoint.
- For detailed information, refer to the [Creating and Configuring Archiver Rules](#) section of this guide.
- **Permission Requirements** – Specify a permission mode for the end users who have the corresponding permissions to archive the contents in SharePoint. Refer to the following information for details about the three permission modes:
 - **Users with standard permissions** – Select the **Users with standard permissions** mode to specify the end users who have the required permission to perform an End-User Archiver job for the corresponding object level. For details about the required permissions for archiving, refer to the [End-User Archiving Permissions](#) section.

- **Site collection administrators** – Select the **Site collection administrators** mode to specify the end users who have the site collection administrator permission to perform an End-User Archiver job for the corresponding object level.
- **Users in the specified SharePoint groups** – Select the **Users in the specified SharePoint groups** mode to specify the end users in the specified SharePoint groups who have the permission to perform an End-User Archiver job for the corresponding object level.

***Note:** The specified SharePoint groups must have at least the standard permissions required for archiving SharePoint objects.
- **Workflow** – Select how you want to manage the workflows in the SharePoint objects to be archived.
 - **Include workflow definition** – Archives only the definition of existing source workflows.
 - **Include workflow instance** – Archives definition and history of existing source workflows.
- **Data Compression** – Select an optional **Data Compression** setting. Select the **Compression** checkbox to enable data compression, and then choose a compression level using the slider. A low compression level results in a faster compression rate but a larger data set, while a high compression level results in a slower compression rate but a smaller, better quality data set.

***Note:** Small data sets cause slower job times. Select whether to leverage DocAve Media Server (**Media Service**) resources or SharePoint Server (**SharePoint Agent**) resources for compression.
- **Data Encryption** – Select the **Encryption** checkbox (optional) to enable data encryption. Note that encrypting data causes slower archive times. Select whether to leverage DocAve Media Server (**Media Service**) resources or SharePoint Server (**SharePoint Agent**) resources for compression. Then, choose a security profile from the **Security Profile** drop-down list. You can also click the **New Security Profile** link to create a new security profile. For more information on creating a security profile, refer to the [DocAve 6 Control Panel Reference Guide](#).
- **Tagging Archived Data** – Track archived content for search. You can add multiple criteria to specify multiple tracking policies for the archived data you want to track.
 - **List URL** – Enter the complete list URL address in the blank area to track the archived data in this list.
 - **Column Name** – Enter the column name in the blank area to track the metadata in this column.
 - **Display Name** – Enter the display name of the column specified in **Column Name** to track the metadata in that column. In this field, you can enter any name for this tag; the name will display when the content is archived.

- **Permissions Required for End-User Archiver Restore** – Specify a permission mode for the end users who have the corresponding permissions to restore the archived contents back to SharePoint. Refer to the following details about the three permission modes:
 - **Site collection administrators** – Select the **Site collection administrators** mode to specify the end users who have the site collection administrator permission to perform an End-User Archiver restore job for the corresponding object level.
 - **Users in the specified SharePoint groups** – Select the **Users in the specified SharePoint groups** mode to specify the end users in the specified SharePoint groups who have the required permission to perform an End-User Archiver restore job for the corresponding object level.

***Note:** The users in the specified SharePoint groups have the permission to perform End-User Archiver restore jobs for the entire site collection, including the object levels that have broken inheritance from the site collection.
 - **Users with the specified permissions** – Select the users who have the specified permissions mode and select the exact permissions listed in the **Select Permissions** window. The end users who have the specified permissions in the **Select Permissions** window can perform an End-User Archiver restore job for the corresponding object level.
8. After finishing the configuration, click **Apply** to apply the configuration to the selected node.
 9. Click **Activate** in the **End-User Archiver Settings** group to activate the **End-User Archiver** feature on the selected nodes.

The status of the **End-User Archiver** feature, the storage policy used by the corresponding scope, and the Archiver index device used by the corresponding scope can be viewed in the **Scope** pane. Hovering over the specified scope, you can click **Activate** to activate the **End-User Archiver** feature and click **Configure** to configure the Archiver rule being used.

10. With this feature activated, the user can go to the SharePoint site that contains the activated feature and perform **End-User Archiver** on the selected data.

Use End-User Archiver in a SharePoint 2010 environment to archive a:

- Site collection, navigate to: **Site Actions > Site Settings > Site Collection Administration > Archive this site collection.**
- Site, navigate to: **Site Actions > Site Settings > Site Administration > Archive this Site.**
- Library, navigate to: **Library Tools > Library > Library Settings > Archive this list.**
- List, navigate to: **List Tools > List > List Settings > Archive this list.**
- Folder/file/item, right-click on the object and select **Archive** from the drop-down menu. If archiving multiple files or items, select the checkboxes of the corresponding item and click **Archive** in the **Manage** group on the ribbon to archive these selected objects.

Use End-User Archiver in a SharePoint 2013 environment to archive a:

- Site collection, navigate to: **Settings Icon** ⚙ > **Site settings** > **Site Collection Administration** > **Archive this site collection**.
- Site, navigate to: **Settings Icon** ⚙ > **Site Settings** > **Site Administration** > **Archive this Site**.
- Library, navigate to: **LIBRARY** > **Library Settings** > **Archive this list**.
- List, navigate to: **LIST** > **List Settings** > **Archive this list**.
- Folder/file/item, right-click on the object and select **Archive** from the drop-down menu. If archiving multiple files or items, select the checkboxes of the corresponding item and click **Archive** in the **Manage** group on the ribbon to archive these selected objects.

Searching Archived Content

For a user to search archived content, a full index must be generated during an Archiver job. Refer to [Configuring the Archiver Index Device](#) for instructions on enabling this feature.

After an Archiver job completes:

- On a SharePoint 2010 farm, the archived site or site collection data can be viewed by accessing the SharePoint site and navigating to: **Site Actions** > **Site Settings** > **Site Administration** > **View archived content of this site** (for a site) or **Site Actions** > **Site Settings** > **Site Collection Administration** > **View archived content of this site collection** (for a site collection).
- On a SharePoint 2013 farm, the archived site or site collection data can be viewed by accessing the SharePoint site and navigating to: **Settings Icon** ⚙ > **Site settings** > **Site Administration** > **View archived content of this site** (for a site) or **Settings Icon** ⚙ > **Site settings** > **Site Collection Administration** > **View archived content of this site collection** (for a site collection).

In the **Archiver Tools** page, the libraries/lists that contain archived content are displayed in the pane. A selected library/list can be restored back to its original location in SharePoint. You can also click the list to view the details of the archived contents and specify which archived data to restore, as well as view the properties or download the archived data to the specified local path.

Additionally, use the **Search** function in the **Archiver Tools** page to search the archived data. Click **Search** in the ribbon to access the search page.

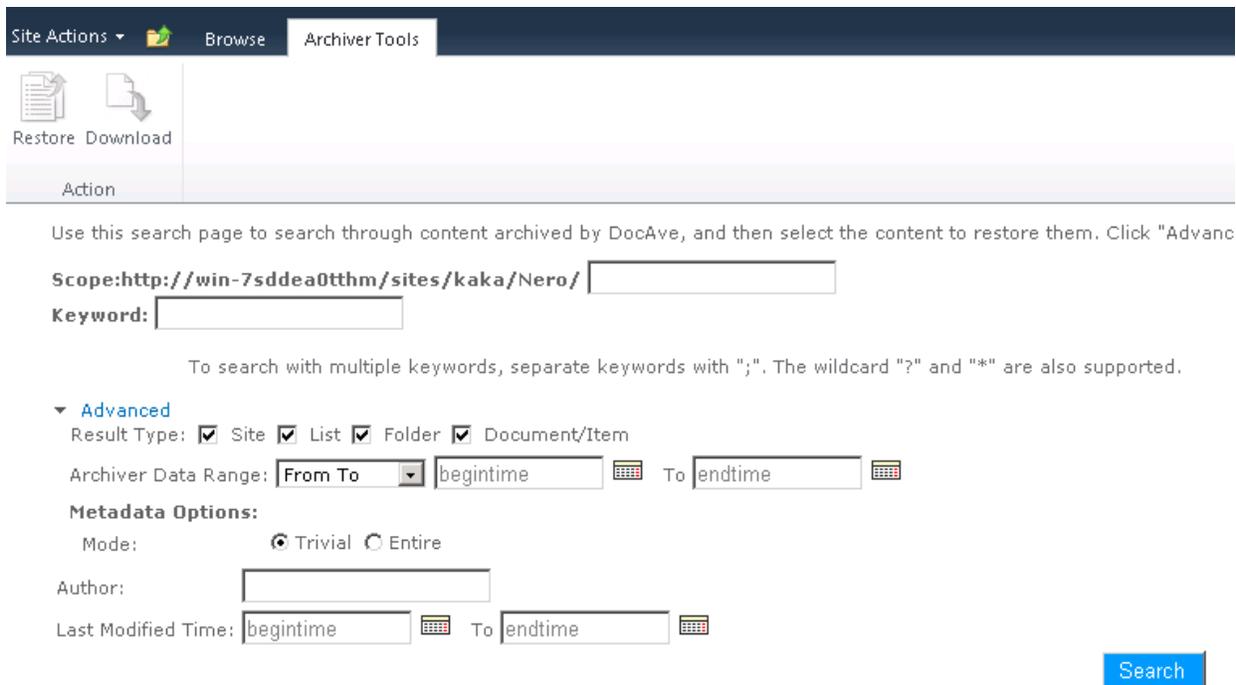


Figure 4: Archiver Tools interface (SharePoint 2010).

Installing and Using the Error Page Solution

When a file is archived from SharePoint, it cannot be accessed through its original URL. When the **Error Page for DocAve Archived Data** feature is enabled, DocAve will inform a user that the data cannot be accessed because it has been archived from SharePoint.

To activate the error page solution, complete the following steps:

1. Navigate to: **DocAve v6 > Control Panel > Solution Manager**. The Solution Manager window appears.
2. Select the SharePoint farm from the **Farm** drop-down list. Then, select the **SP2010ErrorPageforArchivedData.wsp** or **SP2013ErrorPageforArchivedData.wsp** according to the SharePoint farm you currently use, and click **Install** to install this solution.
3. After the solution installs, click **Deploy** to deploy the solution to the SharePoint farm.
4. Navigate to: **DocAve v6 > Storage Optimization > Archiver**. The Archiver page appears.
5. Click **End-User Archiver** in the **General Settings** group on the ribbon. The **End-User Archiver** tab appears. To activate this feature on the corresponding web application, expand the farm tree and select the Web applications on which you want to apply the feature. Then, click **Activate** to activate this feature and apply it on the selected web application.

Using Archiver to Reduce Storage Costs and SharePoint SQL Server Density

Quickly-growing amounts of fixed or stale SharePoint content contributes to rising storage costs, increasing SharePoint's total cost of ownership (TCO). In addition to elevating storage costs, growing amounts of data decrease the overall quality of content available and increase the load on the system, thereby affecting overall performance.

In this use case, SharePoint Administrator Joe is facing the aforementioned issues. His organization is facing rising storage costs due to excessive content in SQL Server. Knowing the capabilities of the DocAve Platform, Joe deploys Archiver onto his organization's farm.

First, Joe selects the Web application for which he will create and apply a rule. The selected Web application contains the organization's documents that do not need to adhere to compliance policies. Joe wants to archive content that has not been modified in six months or more. He considers these documents to be inactive, and because they are taking up valuable space on SQL Server, he wants to archive them in less expensive storage. Joe creates the following rule and schedule:

<input type="checkbox"/>	Order	Rule Name	Object Level	Storage Policy	Status
<input type="checkbox"/>	1	Archive Old Documents	Document	Archive 6 mos1	Enabled
Details:					
Criteria:					
1.Document, Modified Time, Older Than, 6Month(s)					
Criteria Filters: (1)					
Storage Policy: Archive 6 mos1					
Compression: None					
Encryption: None					

Figure 5: Details about the created rules and settings.

Start time: 2012-03-01 17:00
Eastern Time (US & Canada)

Interval: 7 Day(s) Calendar View

No end date

End after [] occurrence(s)

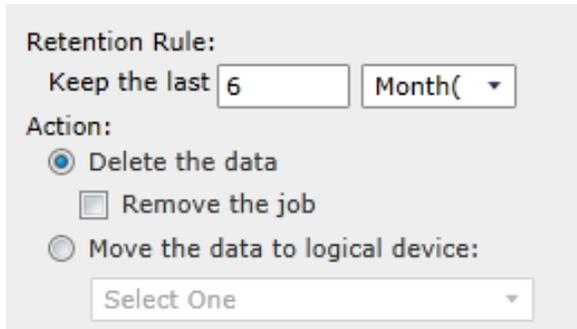
End by 2012-02-28 14:52
Eastern Time (US & Canada)

Figure 6: Details about the schedule configured in an Archiver rule.

With these settings, all documents that have not been modified within 6 months will be archived in Net Share storage (specified in the storage policy). Archiver is set to run on a recurring schedule, occurring weekly during off-business hours to ensure that SharePoint performance is not affected by the job. It is

important to note that in addition to archiving specific content, Joe can also archive entire site collections, sites, and lists/libraries. Many organizations run projects using team sites. When a project comes to an end, Joe can use Archiver to archive the team sites and accompanying content, ensuring that the irrelevant content does not take up space in SQL.

Within the storage policy, Joe selects the appropriate logical device, enables the **Retention Rule**, and selects **Archive type** as the storage policy type. For the **Retention Rule**, Joe decides to delete the data from storage if it is older than six months, as shown below.



The screenshot shows a configuration window for a Retention Rule. It includes a section for 'Retention Rule' with a 'Keep the last' input field containing the number '6' and a dropdown menu set to 'Month()'. Below this is an 'Action:' section with three radio button options: 'Delete the data' (which is selected), 'Remove the job', and 'Move the data to logical device:'. Under the third option is a dropdown menu with the text 'Select One'.

Figure 7: Details about the retention policy configured in an Archiver rule.

Using DocAve Archiver, Joe reduced SharePoint storage costs by automatically offloading SharePoint content that would ordinarily reside in expensive SQL Server storage to less expensive hierarchical storage systems. Because Archiver does not leave data stubs in SharePoint, the Archiver jobs reduced the density of data on SQL Server, thereby improving system performance (especially when running content searches).

***Note:** If you are changing a retention rule that has already been applied to a node, the new retention rule does not apply to the data that has already been archived. The data that has already been archived will be pruned according to the original retention rule.

Using Archiver to Manage Compliance Content

Along with managing storage costs, organizations must find ways to efficiently store records in compliance with retention or records management policies.

SharePoint Administrator Joe wants to manage content that must adhere to compliance policies. In this case, Joe wants to archive all compliance data on a particular site. This data is no longer being actively modified, but it must stay accessible in inexpensive storage for the next 3 years. Subsequent to that time frame, the data must be deleted immediately. To begin, Joe selects that Web application and creates the following rule:

<input type="checkbox"/>	Order	Rule Name	Object Level	Storage Policy	Status
<input type="checkbox"/>	1	Compliance Data	Document	Compliance Storage	Enabled
Details:					
Criteria:					
1.Document, Name, Contains, 21CFR					
Criteria Filters: (1)					
Storage Policy: Compliance Storage					
Compression: None					
Encryption: EncryptionAgent					

Figure 8: Create Archiver rule to manage Compliance content.

With these settings, all documents that contain 21CFR in the title will be archived in compliance storage. Joe is running this job once, so he does not set a schedule. From within Storage Policy, Joe sets the retention rule to delete the data after 36 months (three years).

Retention Rule:

Keep the last

Action:

Delete the data

Remove the job

Move the data to logical device:

Figure 9: Retention policy configured in an Archiver rule.

With this rule, Joe is using DocAve Archiver to reduce compliance risk by enabling consistent disposition of content in accordance with records management policies for content preservation, remediation, or retention.

Appendix A – Criteria Filter Conditions

The following appendix identifies the criteria filter conditions for each object level.

***Note:** Multiple criteria can be added into the **Criteria** row. But, to create a rule successfully, at least one criteria row is required.

***Note:** Before you set an Archiver rule with the criteria of **Custom Property**, the corresponding property must be added in the lists/libraries, sites or site collections in advance.

***Note:** If you select the **Last Accessed Time** rule in the **Criteria** field, make sure the node you select to use this criterion has run an Auditor Retrieve Data job.

For details about running an Auditor Retrieve Data job, refer to [Running an Auditor Retrieve Data Job](#).

Site Collection Object Level

1. **URL** – Enter the URL of a site collection.

***Note:** It is not case sensitive when entering the **URL/Title/Name** in each object level.

- **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
- **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the site collections that do not match the entered URL.
- **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered URL will be archived.
- **Does not Contain** – This selection archives all the site collections that do not contain the entered URL. Wildcards are unavailable.
- **Equals** – Enter the complete site collection URL. This selection archives the site collection that matches the entered URL. Wildcards are unavailable.
- **Does Not Equal** – Enter the complete site collection URL. This selection archives all the site collections except for the one that matches the entered URL. Wildcards are unavailable.

2. **Title** – Enter the title of a site collection.

- **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
- **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the site collections that do not match the entered title.

- **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered URL will be archived.
 - **Does not Contain** – You can enter part of the site collection title here. This selection archives all the site collections that do not contain the entered title. Wildcards are unavailable.
 - **Equals** – Enter the complete site collection title. This selection archives the site collection that matches the entered title. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete site collection title. This selection archives all the site collections except for the one that matches the entered title. Wildcards are unavailable.
3. **Modified Time** – Set a date range for the modified site collections.
- **From ... To** – Archives all of the site collections that are modified between the two dates selected.
 - **Before** – Archives all of the site collections modified before the date selected.
 - **Older Than** – Archives all of the site collections with a modification date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.
4. **Created Time** – Set a date range for the created site collections.
- **From ... To** – Archives all of the site collections that were created between the two dates selected.
 - **Before** – Archives all of the site collections that were created before the date selected.
 - **Older Than** – Archives all of the site collections with a creation date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.
5. **Primary Administrator** – Enter the name of the administrator.
- **Contains** – You can enter part of the administrator’s name here. This selection archives all the site collections whose primary administrator’s name contains the entered value. Wildcards are unavailable.
 - **Equals** – Enter the primary administrator’s complete name. This selection archives the site collection whose primary administrator’s name matches the entered value. Wildcards are unavailable.
6. **Site Collection Size Trigger** – Enter a data size value for the site collection. The units for this value can be selected as **KB, MB, or GB** from the drop-down list.
- **>=** – Archives all the site collections whose data size is equal to or exceeds the entered value.
7. **Custom Property (Text)** – Enter the property name that is customized by users, followed by the text content.
- **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.

- **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the site collections whose custom property does not match the entered text.
 - **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered URL will be archived.
 - **Does not Contain** – You can enter part of the site collection property text here. This selection archives all the site collections whose property name does not contain the entered text. Wildcards are unavailable.
 - **Equals** – Enter the complete site collection property text. This selection archives the site collection whose property name matches the entered text. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete site collection property text. This selection archives all the site collections except for those whose property name matches the entered text. Wildcards are unavailable.
8. **Custom Property (Number)** – Enter the property name that is customized by users, followed by an Arabic number.
- **>=** – Archive the site collections whose Custom Number Property value is equal to or greater than the entered number.
 - **<=** – Archive all of the site collections whose Custom Number Property value is equal to or less than the entered number.
 - **=** – Archive the site collections whose Custom Number Property value is equal to the entered number.
9. **Custom Property (Yes/No)** – Enter the property name that is customized by users and select **Yes** or **No**.
- **Yes** – If selected, archives the site collections whose Custom Yes/No Property value is **Yes**.
 - **No** – If selected, archives the site collections whose Custom Yes/No Property value is **No**.
10. **Custom Property (Date and Time)** – Enter the property name that is customized by users and set the Date and Time.
- **From ... To** – Archive the site collections whose Custom Date/Time Property is within the selected Date/Time period.
 - **Before** – Archive the site collections whose Custom Date/Time Property is earlier than the selected Date/Time period.
 - **Older Than** – Archive the site collections whose Custom Date/Time Property is older than the current date for the number of Days/Weeks/Months/Years.
11. **Last Accessed Time** – Set a date range for the last accessed time of the site collections.
- **From ... To** – Archives all of the site collections that were last accessed between the two dates selected.

- **Before** – Archives all of the site collections that were last accessed before the date selected.
- **Older Than** – Archives all of the site collections that are with a last accessing date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.

Site Object Level

1. **URL** – Enter the URL of a site.

***Note:** It is not case sensitive when entering the **URL/Title/Name** in each object level.

- **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
- **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the sites that do not match the entered URL.
- **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered URL will be archived.
- **Does not Contain** – You can enter part of the site URL here. This selection archives all the sites that do not contain the entered URL. Wildcards are unavailable.
- **Equals** – Enter the complete site URL. This selection archives the site that matches the entered URL. Wildcards are unavailable.
- **Does Not Equal** – Enter the complete site URL. This selection archives all the sites except for the one that matches the entered URL. Wildcards are unavailable.

2. **Title** – Enter the title of a site.

- **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
- **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the sites that do not match the entered title.
- **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered Title will be archived.
- **Does not Contain** – You can enter part of the site title here. This selection archives all the sites that do not contain the entered title. Wildcards are unavailable.
- **Equals** – Enter the complete site title. This selection archives the site that matches the entered title. Wildcards are unavailable.
- **Does Not Equal** – Enter the complete site title. This selection archives all the sites except for the one that matches the entered title. Wildcards are unavailable.

3. **Modified Time** – Set a date range for the modified site.

- **From ... To** – Archive all of the sites that are modified between the two dates selected.
 - **Before** –Archive all of the sites modified before the date selected.
 - **Older Than** – Archive all of the sites with a modification date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.
4. **Created Time** – Set a date range for the created site.
- **From ... To** – Archive all of the sites that were created between the two dates selected.
 - **Before** –Archive all of the sites that were created before the date selected.
 - **Older Than** – Archive all of the sites with a creation date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.
5. **Created By** – Enter the name of the user who created the site.
- **Contains** – You can enter part of the creator’s name here. This selection archives all the sites whose creator’s name contains the entered value. Wildcards are unavailable.
 - **Equals** – Enter the creator’s complete name. This selection archives the site whose creator’s name matches the entered value. Wildcards are unavailable.
- *Note:** The user name has two different forms (**Log on Name** and **Displayed Name**):
- **Log on Name** – If entering a log on name with **Equals**, enter the value as **Domain\Username**.
 - **Displayed Name** – If entering a displayed name with **Equals**, enter the username exactly how it displays in SharePoint.
6. **Custom Property (Text)** – Enter the property name that is customized by users, followed by the text content.
- **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
 - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the sites whose custom property does not match the entered text.
 - **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered Custom Property Text will be archived.
 - **Does not Contain** – You can enter part of the site property text here. This selection archives all the sites whose property name does not contain the entered text. Wildcards are unavailable.
 - **Equals** – Enter the complete site property text. This selection archives the site whose property name matches the entered text. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete site property text. This selection archives all the sites except for those whose property name matches the entered text. Wildcards are unavailable.

7. **Custom Property (Number)** – Enter the property name that is customized by users, followed by an Arabic number.
 - **>=** – Archive the sites whose Custom Number Property value is equal to or greater than the entered number.
 - **<=** – Archive all the sites whose Custom Number Property value is equal to or less than the entered number.
 - **=** – Archive the sites whose Custom Number Property value is equal to the entered number.
8. **Custom Property (Yes/No)** – Enter the property name that is customized by users and select **Yes** or **No**.
 - **Yes** – If selected, archives the sites whose Custom Yes/No Property value is **Yes**.
 - **No** – If selected, archives the sites whose Custom Yes/No Property value is **No**.
9. **Custom Property (Date and Time)** – Enter the property name that is customized by users and set the Date and Time.
 - **From ... To** – Archive the sites whose Custom Date/Time Property is within the selected Date/Time period.
 - **Before** – Archive the sites whose Custom Date/Time Property is earlier than the selected Date/Time period.
 - **Older Than** – Archive the sites whose Custom Date/Time Property is older than the current date for the number of Days/Weeks/Months/Years.
10. **Last Accessed Time** – Set a date range for the last accessed time of the sites.
 - **From ... To** – Archives all of the sites that were last accessed between the two dates selected.
 - **Before** – Archives all of the sites that were last accessed before the date selected.
 - **Older Than** – Archives all of the sites that have a last accessed date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.

List/Library Object Level

1. **Name** – Enter the name of a list/library.
 - **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
 - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the lists/libraries that do not match the entered name.
 - **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered Name will be archived.

- **Does not Contain** – You can enter part of the list/library name here. This selection archives all the lists/libraries that do not contain the entered name. Wildcards are unavailable.
 - **Equals** – Enter the complete list/library name. This selection archives the list/library that matches the entered name. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete list/library name. This selection archives all the lists/libraries except for those that match the entered name. Wildcards are unavailable.
2. **Modified Time** – Set a date range for the modified list/library.
- **From ... To** – Archive all of the lists/libraries that are modified between the two dates selected.
 - **Before** – Archive all of the lists/libraries modified before the date selected.
 - **Older Than** – Archive all of the lists/libraries with a modification date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.
3. **Created Time** – Set a date range for the created lists/libraries.
- **From ... To** – Archive all of the lists/libraries that were created between the two dates selected.
 - **Before** – Archive all of the lists/libraries that were created before the date selected.
 - **Older Than** – Archives all of the lists/libraries with a creation date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.
4. **Created By** – Enter the name of the user who created the list/library.
- **Contains** – You can enter part of the creator’s name here. This selection archives all the lists/libraries whose creator’s name contains the entered value. Wildcards are unavailable.
 - **Equals** – Enter the creator’s complete name. This selection archives the lists/libraries whose creator’s name matches the entered value. Wildcards are unavailable.
5. **Custom Property (Text)** – Enter the property name that is customized by users, followed by the text content.
- **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
 - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the lists/libraries whose custom property does not match the entered text.
 - **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered Custom Property Text will be archived.
 - **Does not Contain** – You can enter part of the list/library property text here. This selection archives all the lists/libraries whose property name does not contain the entered text. Wildcards are unavailable.

- **Equals** – Enter the complete list/library property text. This selection archives the list/library whose property name matches the entered text. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete list/library property text. This selection archives all the lists/libraries except for those whose property name matches the entered text. Wildcards are unavailable.
6. **Custom Property (Number)** – Enter the property name that is customized by users, followed by an Arabic number.
 - **>=** – Archive the lists/libraries whose Custom Number Property value is equal to or greater than the entered number.
 - **<=** – Archive all of the lists/libraries whose Custom Number Property value is equal to or less than the entered number.
 - **=** – Archive the lists/libraries whose Custom Number Property value is equal to the entered number.
 7. **Custom Property (Yes/No)** – Enter the property name that is customized by users and select **Yes** or **No**.
 - **Yes** – If selected, archives the lists/libraries whose Custom Yes/No Property value is **Yes**.
 - **No** – If selected, archives the lists/libraries whose Custom Yes/No Property value is **No**.
 8. **Custom Property (Date and Time)** – Enter the property name that is customized by users and set the Date and Time.
 - **From ... To** – Archive the lists/libraries whose Custom Date/Time Property is within the selected Date/Time period.
 - **Before** – Archive the lists/libraries whose Custom Date/Time Property is earlier than the selected Date/Time period.
 - **Older Than** – Archive the lists/libraries whose Custom Date/Time Property is older than the current date for the number of Days/Weeks/Months/Years.
 9. **Last Accessed Time** – Set a date range for the last accessed time of the lists/libraries.
 - **From ... To** – Archives all of the lists/libraries that were last accessed between the two dates selected.
 - **Before** – Archives all of the lists/libraries that were last accessed before the date selected.
 - **Older Than** – Archives all of the lists/libraries that have a last accessed date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.

Document Object Level

1. **Name** – Enter the name of the document.

- **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
 - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the documents that do not match the entered name.
 - **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered Name will be archived.
 - **Does not Contain** – You can enter part of the document name here. This selection archives all the documents that do not contain the entered name. Wildcards are unavailable.
 - **Equals** – Enter the complete document name. This selection archives the document that matches the entered name. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete document name. This selection archives all the documents except for those that match the entered name. Wildcards are unavailable.
2. **Document Size** – Enter a data size value for the document. The units for this value can be selected as **KB**, **MB** or **GB** from the drop-down list.
 - **>=** – Archive all of the documents whose size is equal to or greater than the entered size.
 - **<=** – Archive all of the documents whose size is equal to or less than the entered size.
 3. **Modified Time** – Set a date range for the modified documents.
 - **From ... To** – Archive all of the documents that are modified between the two dates selected.
 - **Before** – Archive all of the documents modified before the date selected.
 - **Older Than** – Archive all of the documents with a modification date that is older than the **Days**, **Weeks**, **Months**, or **Years** selected from the drop-down list.
 4. **Created Time** – Set a date range for the created documents.
 - **From ... To** – Archive all of the documents that were created between the two dates selected.
 - **Before** – Archive all of the documents that were created before the date selected.
 - **Older Than** – Archive all of the documents with a creation date that is older than the **Days**, **Weeks**, **Months**, or **Years** selected from the drop-down list.
 5. **Created By** – Enter the name of the user who created the document.
 - **Contains** – You can enter part of the creator’s name here. This selection archives all the documents whose creator’s name contains the entered value. Wildcards are unavailable.
 - **Equals** – Enter the creator’s complete name. This selection archives the documents whose creator’s name matches the entered value. Wildcards are unavailable.

6. **Modified By** – Enter the **Name** of the user who latest modified the documents.
- **Contains** – You can enter part of the modifier’s name. This selection archives all the documents whose modifier’s name contains the entered value. Wildcards are unavailable.
 - **Equals** – Enter the modifier’s complete name. This selection archives the documents whose modifier’s name matches the entered value. Wildcards are unavailable.
- *Note:** The user name has two different forms (**Log on Name** and **Displayed Name**):
- **Log on Name** – If entering a log on name with **Equals**, enter the value as **Domain\Username**.
 - **Displayed Name** – If entering a displayed name with **Equals**, enter the username exactly how it displays in SharePoint.
7. **Content Type** – Enter a name for the document content type.
- **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
 - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the documents whose content type name does not match the entered content type name.
 - **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered content type will be archived.
 - **Does not Contain** – You can enter part of the document content type name here. This selection archives all the documents whose content type name does not contain the entered content type name. Wildcards are unavailable.
 - **Equals** – Enter the complete content type name. This selection archives the documents whose content type name matches the entered name. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete content type name. This selection archives all the documents whose content type name does not match the entered name. Wildcards are unavailable.
8. **Column (Text)** – Enter the column name that is customized by users, followed by the text content.
- **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
 - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the documents containing a text column whose value does not match the entered value.
 - **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered text column will be archived.

- **Does not Contain** – This selection archives all the documents whose text column does not contain the entered value. Wildcards are unavailable.
 - **Equals** – Enter the complete text column value. This selection archives the documents whose text column value matches the entered value. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete text column value. This selection archives all the documents whose text column value does not match the entered value. Wildcards are unavailable.
9. **Column (Number)** – Enter the column name, followed by an Arabic number.
- **>=** – Archive documents whose number column value is equal to or greater than the entered number.
 - **<=** – Archive documents whose number column value is equal to or less than the entered number.
 - **=** – Archive documents whose number column value is equal to the entered number.
10. **Column (Yes/No)** – Enter the column name and set **Yes** or **No**.
- **Yes** – If selected, archives the documents whose Yes/No column value is **Yes**.
 - **No** – If selected, archives the documents whose Yes/No column value is **No**.
11. **Column (Date and Time)** – Enter the column name and set date and time.
- **From ... To** – Archives all of the documents whose Date and Time column value is between the two dates selected.
 - **Before** – Archives all of the documents whose Date and Time column value is before the date selected.
 - **Older Than** – Archives all of the documents whose Date and Time column value is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.
12. **Parent List Type ID** – Enter the item's parent list's ID number.
- **Equals** – Enter the item's parent list's ID value. This selection archives the documents in the specified list whose ID number matches the entered value. Wildcards are unavailable.
 - **Does Not Equal** – Enter the item's parent list's ID value. This selection archives all the documents in the specified list whose ID number does not match the entered value. Wildcards are unavailable.
13. **Last Accessed Time** – Set a date range for the last accessed time of the documents in the SharePoint library or the documents that have been extended by the Real-Time/Scheduled Storage Manager.
- **From ... To** – Archives all of the documents that were last accessed between the two dates selected.
 - **Before** – Archives all of the documents that were last accessed before the date selected.

- **Older Than** –Archives all of the documents that have a last accessed date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.

Document Version Object Level

1. **Title** – Enter the **Title** of a document version.
 - **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
 - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the document versions whose title does not match the entered title.
 - **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered title will be archived.
 - **Does not Contain** – You can enter part of the document version title here. This selection archives all the document versions that do not contain the entered title. Wildcards are unavailable.
 - **Equals** – Enter the complete document version title. This selection archives the document version whose title matches the entered title. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete document version title. This selection archives all document versions except for those whose titles match the entered title. Wildcards are unavailable.
2. **Size** – Enter a data size value for the document version. The units for this value can be selected as **KB, MB or GB** from the drop-down list.
 - **>=** – Archives all of the document versions whose size is equal to or greater than the entered size.
 - **<=** – Archives all of the document versions whose size is equal to or less than the entered size.
3. **Modified Time** – Set a date range for the modified document versions.
 - **From ... To** – Archives all of the document versions which were modified between the two dates selected.
 - **Before** –Archives all of the document versions which were modified before the date selected.
 - **Older Than** – Archives all of the document versions whose modification date is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.
4. **Modified By** – Enter the name of the user who latest modified the document versions.
 - **Contains** – You can enter part of the modifier’s name here. This selection archives all the document versions whose modifier’s name contains the entered value. Wildcards are unavailable.

- **Equals** – Enter the modifier’s complete name. This selection archives the document versions whose modifier’s name matches the entered value. Wildcards are unavailable.
5. **Keep the Latest Version** – The number of document versions (**Major** and **Minor**) you set in the text box are left in SharePoint. The rest of the versions are archived.
 6. **Parent List Type ID** – Enter the list’s ID number.
 - **Equals** – Enter the list’s complete ID value. This selection archives the document versions in the specified list whose ID number matches the entered value. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete list’s ID value. This selection archives all the document versions in the specified list whose ID number does not match the entered value. Wildcards are unavailable.
 7. **Last Accessed Time** – Set a date range for the last accessed time of the document versions that have been extended by the Real-Time/Scheduled Storage Manager.
 - **From ... To** – Archives all of the document versions that have been extended by the Real-Time/Scheduled Storage Manager and were last accessed between the two dates selected.
 - **Before** – Archives all of the document versions that have been extended by the Real-Time/Scheduled Storage Manager and were last accessed before the date selected.
 - **Older Than** – Archives all of the document versions that have been extended by the Real-Time/Scheduled Storage Manager and are with a last accessing date that is older than the **Days**, **Weeks**, **Months**, or **Years** selected from the drop-down list.

Item Object Level

1. **Title** – Enter the title of the item.
 - **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
 - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the items whose title does not match the entered title.
 - **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered title will be archived.
 - **Does not Contain** – You can enter part of the item title here. This selection archives all the items that do not contain the entered title. Wildcards are unavailable.
 - **Equals** – Enter the complete item title. This selection archives the item whose title matches the entered title. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete item title. This selection archives all the items except for those that match the entered title. Wildcards are unavailable.
2. **Modified Time** – Set a date range for the modified items.

- **From ... To** – Archive all of the items that are modified between the two dates selected.
 - **Before** – Archive all of the items modified before the date selected.
 - **Older Than** – Archive all of the items with a modification date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.
3. **Created Time** – Set a date range for the created items.
- **From ... To** – Archive all of the items that were created between the two dates selected.
 - **Before** – Archive all of the items that were created before the date selected.
 - **Older Than** – Archive all of the items with a creation date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.
4. **Created By** – Enter the name of the user who created the items.
- **Contains** – You can enter part of the creator’s name here. This selection archives all the items whose creator’s name contains the entered value. Wildcards are unavailable.
 - **Equals** – Enter the creator’s complete name. This selection archives the items whose creator’s name matches the entered value. Wildcards are unavailable.
5. **Modified By** – Enter the **Name** of the user who latest modified the items.
- **Contains** – You can enter part of the modifier’s name here. This selection archives all the items whose modifier’s name contains the entered value. Wildcards are unavailable.
 - **Equals** – Enter the modifier’s complete name. This selection archives the items whose modifier’s name matches the entered value. Wildcards are unavailable.
6. **Content Type** – Enter a name for the item content type.
- **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
 - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the items whose content type name does not match the entered name.
 - **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered content type name will be archived.
 - **Does not Contain** – You can enter part of the item content name here. This selection archives all the items whose content type name do not contain the entered content type name. Wildcards are unavailable.
 - **Equals** – Enter the complete content type name. This selection archives the items whose content type name matches the entered name. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete content type name. This selection archives all the items whose content type name does not match the entered name. Wildcards are unavailable.
7. **Column (Text)** – Enter the column name that is customized by users, followed by the text content.

- **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
 - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the items containing text column whose value does not match the entered value.
 - **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered text column will be archived.
 - **Does not Contain** – This selection archives all the items whose text column does not contain the entered value. Wildcards are unavailable.
 - **Equals** – Enter the complete text column value. This selection archives the items whose text column value matches the entered value. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete text column value. This selection archives all the items whose text column value does not match the entered value. Wildcards are unavailable.
8. **Column (Number)** – Enter the column name, followed by an Arabic number.
- **>=** – Archive items whose number column value is equal to or greater than the entered number.
 - **<=** – Archive items whose number column value is equal to or less than the entered number.
 - **=** – Archive items whose number column value is equal to the entered number.
9. **Column (Yes/No)** – Enter the column name and set **Yes** or **No**.
- **Yes** – If selected, archives the items whose Yes/No column value is **Yes**.
 - **No** – If selected, archives the items whose Yes/No column value is **No**.
10. **Column (Date and Time)** – Enter the column name and set date and time.
- **From ... To** – Archive all of the items whose Date and Time column value is between the two dates selected.
 - **Before** – Archive all of the items whose Date and Time column value is before the date selected.
 - **Older Than** – Archive all of the items whose Date and Time column value is older than the **Days, Weeks, Months, or Years** selected from the drop-down list .
11. **Parent List Type ID** – Enter the list’s ID number.
- **Equals** – Enter the list’s complete ID value. This selection archives the items in the specified list whose ID number matches the entered value. Wildcards are unavailable.
 - **Does Not Equal** – Enter the list’s complete ID value. This selection archives all the items in the specified list whose ID number does not match the entered value. Wildcards are unavailable.

12. **Last Accessed Time** – Set a date range for the last accessed time of the items in the SharePoint list or the items that have been extended by the Real-Time/Scheduled Storage Manager.

- **From ... To** – Archives all of the items in the SharePoint list or the items that have been extended by the Real-Time/Scheduled Storage Manager and were last accessed between the two dates selected.
- **Before** – Archives all of the items in the SharePoint list or the items that have been extended by the Real-Time/Scheduled Storage Manager and were last accessed before the date selected.
- **Older Than** – Archives all of the items that have a last accessed date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.

Item Version Object Level

1. **Title** – Enter the **Title** of the item version.

- **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
- **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the item versions whose title does not match the entered title.
- **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered title will be archived.
- **Does not Contain** – You can enter part of the item version title here. This selection archives all the item versions that do not contain the entered title. Wildcards are unavailable.
- **Equals** – Enter the complete item version title. This selection archives the item version whose title matches the entered title. Wildcards are unavailable.
- **Does Not Equal** – Enter the complete item version title. This selection archives all the item versions except for those whose titles that match the entered title. Wildcards are unavailable.

2. **Modified Time** – Set a date range for the modified item versions.

- **From ... To** – Archive all of the item versions that were modified between the two dates selected.
- **Before** – Archive all of the item versions that were modified before the date selected.
- **Older Than** – Archive all of the item versions whose modification date is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.

3. **Modified By** – Enter the name of the user who latest modified the item versions.

- **Contains** – You can enter part of the modifier’s name here. This selection archives all the item versions whose modifier’s name contains the entered value. Wildcards are unavailable.

- **Equals** – Enter the modifier’s complete name. This selection archives the item versions whose modifier’s name matches the entered value. Wildcards are unavailable.
4. **Keep the Latest Version** – The number of item versions (**Major** and **Minor**) you set in the text box are left in SharePoint. The rest of the versions are archived.
 5. **Parent List Type ID** – Enter the list’s ID number.
 - **Equals** – Enter the list’s complete ID value. This selection archives the item versions in the specified list whose ID number matches the entered value. Wildcards are unavailable.
 - **Does Not Equal** – Enter the list’s complete ID value. This selection archives all the item versions in the specified list whose ID number does not match the entered value. Wildcards are unavailable.

Attachment Object Level

1. **Name** – Enter the name of the attachment.
 - **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
 - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the attachments that do not match the entered name.
 - **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered name will be archived.
 - **Does not Contain** – You can enter part of the attachment name here. This selection archives all the attachments that do not contain the entered name. Wildcards are unavailable.
 - **Equals** – Enter the complete attachment name. This selection archives the attachment that matches the entered name. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete attachment name. This selection archives all the attachments except for those that match the entered name. Wildcards are unavailable.
2. **Size** – Enter a data size value for the attachment. The units for this value can be selected as **KB**, **MB** or **GB** from the drop-down list.
 - **>=** – Archive all of the attachments whose size is equal to or greater than the entered size.
 - **<=** – Archive all of the attachments whose size is equal to or less than the entered size.
3. **Created Time** – Set a date range for the created attachments.
 - **From ... To** – Archive all of the attachments that were created between the two dates selected.
 - **Before** – Archive all of the attachments that were created before the date selected.

- **Older Than** – Archive all of the attachments with a creation date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.
4. **Created By** – Enter the name of the user who created the attachment.
 - **Contains** – You can enter part of the creator’s name here. This selection archives all the attachments whose creator’s name contains the entered value. Wildcards are unavailable.
 - **Equals** – Enter the creator’s complete name. This selection archives the attachments whose creator’s name matches the entered value. Wildcards are unavailable.
 5. **Column (Text)** – Enter the column name, followed by the text content.
 - **Matches** – Wildcards such as “*” and “?” are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
 - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the attachments whose text column does not match the entered value.
 - **Contains** – Wildcards cannot be used in this field; all the objects that contain the entered text column will be archived.
 - **Does not Contain** – This selection archives all the attachments whose text column does not contain the entered column name text. Wildcards are unavailable.
 - **Equals** – Enter the complete text column value. This selection archives the attachments whose text column value matches the entered value. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete text column value. This selection archives all the attachments whose text column value does not match the entered value. Wildcards are unavailable.
 6. **Column (Number)** – Enter the column name, followed by an Arabic number.
 - **>=** – Archive attachments whose Number column value is equal to or greater than the entered number.
 - **<=** – Archive attachments whose Number column value is equal to or less than the entered number.
 - **=** – Archive attachments whose Number column value is equal to the entered number.
 7. **Column (Yes/No)** – Enter the column name and set **Yes** or **No**.
 - **Yes** – If selected, archives the attachments whose Yes/No column value is **Yes**.
 - **No** – If selected, archives the attachments whose Yes/No column value is **No**.
 8. **Column (Date and Time)** – Enter the column name and set date and time.
 - **From ... To** – Archive all of the attachments whose Date and Time column value is between the two dates selected.
 - **Before** – Archive all of the attachments whose Date and Time column value is before the date selected.

- **Older Than** – Archive all of the attachments whose Date and Time column value is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.
9. **Parent List Type ID** – Enter the list’s ID number.
- **Equals** – Enter the list’s complete ID value. This selection archives the attachments in the specified list whose ID number matches the entered value. Wildcards are unavailable.
 - **Does Not Equal** – Enter the list’s complete ID value. This selection archives all the attachments in the specified list whose ID number does not match the entered value. Wildcards are unavailable.
10. **Last Accessed Time** – Set a date range for the last accessed time of the attachments.
- **From ... To** – Archive all of the attachments that were last accessed between the two dates selected.
 - **Before** – Archive all of the attachments that were last accessed before the date selected.
 - **Older Than** – Archive all of the attachments that have a last accessed date that is older than the **Days, Weeks, Months, or Years** selected from the drop-down list.

Running an Auditor Retrieve Data Job

To run an Auditor Retrieve Data job and implement the Last Accessed Time rule on the selected node, complete the following steps:

1. Navigate to the desired SharePoint site collection and enable the audit functions for the events that occurred in this site collection.
2. Navigate to **DocAve 6 > Report Center > Settings > Auditor Controller** and create an auditing plan for the selected node.
3. Before saving this plan, select the **Retrieve data** checkbox in the **Type** field and then select the **Track object last accessed time** checkbox in the **Advanced Rules** field.

***Note:** By default, only the data retrieved in the Auditor jobs run within a week from the current time can be used by the last accessed time rule. To change the time period, refer to the [Appendix E – Advanced Settings in Configuration Files](#) section of this guide.

Appendix B – Supported and Unsupported Web Parts

The following table lists the supported and unsupported Web parts in Archiver.

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

	Web Part	Support Status
	My Mail Folder	Supported
	My Tasks	Supported
Search	Advanced Search Box	Supported
	Dual Chinese Search	Supported
	Federated Results	Supported
	People Refinement Panel	Supported
	People Search Box	Supported
	People Search Core Results	Supported
	Refinement Panel	Supported
	Related Queries	Supported
	Search Action Links	Supported
	Search Best Bets	Supported
	Search Box	Supported
	Search Core Results	Supported
	Search Paging	Supported
	Search Statistics	Supported
	Search Summary	Supported
Search Visual Best Bet	Supported	
Top Federated Results	Supported	
Social Collaboration	Contact Details	Supported
	Note Board	Supported
	Organization Browser	Supported
	Site Users	Supported
	Tag Cloud	Supported
	User Tasks	Supported

Appendix C – Accessing Hot Key Mode

DocAve supports hot key mode, which allows you to perform actions quickly using only your keyboard. To access hot key mode from the Archiver interface, press **Ctrl + Alt + Z** (simultaneously) on the keyboard.

The following table provides a list of hot keys for the Archiver tab. To return to the top level after accessing a lower-level interface, press **Ctrl + Alt + Z** (simultaneously) on the keyboard to return to the top level. For example, continuing to press **H** to return to the **Storage Optimization** home page.

Operation Interface	Hot Key
Storage Optimization Home Page	H
Archiver Plan Manager	A
DocAve Home Page	1
DocAve Online Community	2
Control Panel	3
Job Monitor	4
Plan Group	5
Account Information	9
Help and About	0

Accessing the Archiver Page Using Hot Keys

To access Archiver using hot keys, first access the **Storage Optimization** home page. Then, press **Ctrl + Alt + Z** on the keyboard to access the hot key mode, and press **A** on the keyboard to enter the **Home** page. The following table provides a list of hot keys mapped to the Archiver ribbon functions.

Functionality Name and Hot Key	
Inherit	I
Stop Inheriting	S
Create	C
Edit	E
Remove	M
Enable	L
Disable	Q
Apply	A
Apply and Test Run	S
Apply and Run Now	W
Run Now	R
Rules	U
Archiver Restore	V
Archiver Database	B
Archiver Index Device	H
Storage Policy	T

Functionality Name and Hot Key	
Processing Pool	P
End-User Archiving	G
Profile Manager	X
Job Monitor	J

Archiver Index Device

Functionality Name and Hot Key	
Archiver Index Device Page	A
Configure	C
	OK
	Cancel
Close	X

Archiver Database

Functionality Name and Hot Key	
Archiver Database Page	D
Configure	C
	OK
	Cancel
Close	X

Processing Pool

Functionality Name and Hot Key	
Processing Pool Page	P
Create	N
	OK
	Cancel
View Details	V
Edit	E
	OK
	Cancel
Delete	D
Close	X

End-User Archiving

Functionality Name and Hot Key	
End-User Archiving Page	G
Deactivate	D
Activate	A
Configure	C
	Apply
	Cancel
Archiver Index Device	I
	Configure
	Close
Deactivate	E
Activate	F

Functionality Name and Hot Key	
Close	X

Profile Manager

Functionality Name and Hot Key							
Profile Manager Page	M						
Create Profile Page	N						
Create	N	Create	M	OK	O		
				Cancel	C		
		Edit	E	OK	O		
				Cancel	C		
		Remove		R			
		Enable		P			
		Disable		Q			
		Back		B			
		Next		N			
		Finish		F			
Cancel		C					
View Details	V	Edit	E	Create	M	OK	O
						Cancel	C
				Edit	E	OK	O
						Cancel	C
				Remove		R	
				Enable		P	
		Disable		Q			
		OK		O			
		Cancel		C			
		Cancel		C			
Edit	E	Create	M	OK	O		
				Cancel	C		
		Edit	E	Continue	T	OK	O
				Cancel	C	Cancel	C
		Remove		R			
		Enable		P			
		Disable		Q			
		OK		O			
Cancel		C					
Delete		D					
Close		C					

Plan Builder

Functionality Name and Hot Key					
Create	C	OK		O	
		Cancel		C	
Edit	E	Continue	T	OK	O
		Cancel		Cancel	C
		Cancel		C	

Rules

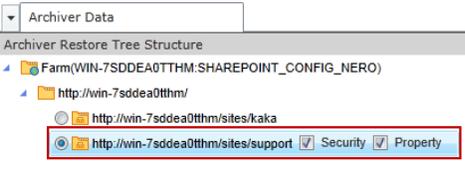
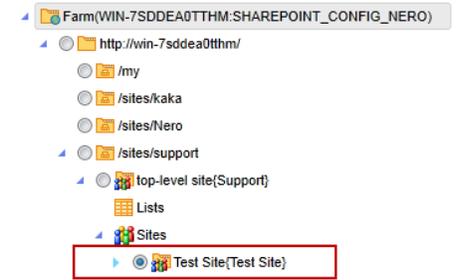
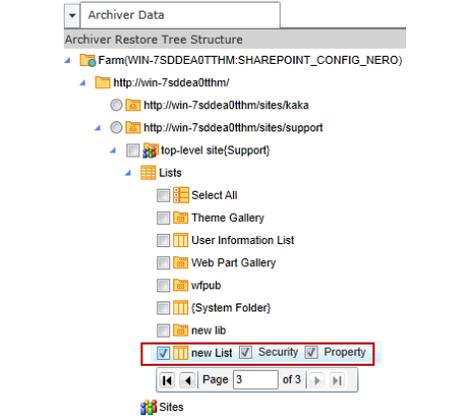
Functionality Name and Hot Key			
Archiver Rules Page		A	
Rule Based		R	
Scope Based		S	
View Details	V	Cancel	C
Delete/Remove		D	
Close		X	

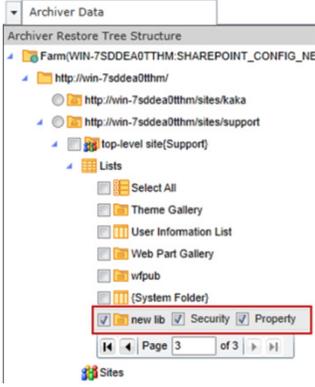
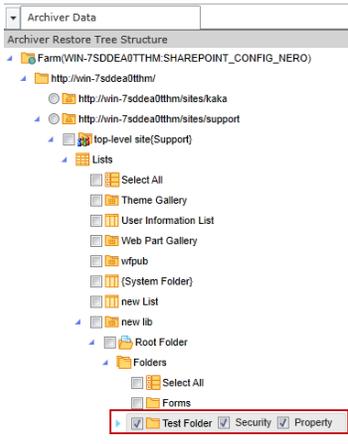
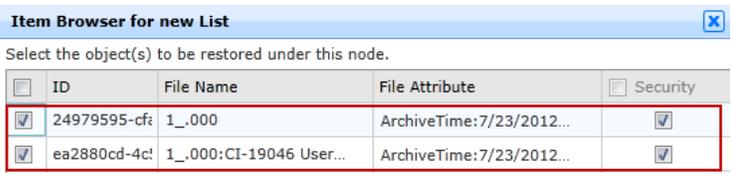
Archiver Restore

Functionality Name and Hot Key	
Archiver Restore Page	U
General Mode	G
Full Text Index Mode	T
Advanced Search	S
Back	B
Next	N
Finish	F
Cancel	C

Appendix D – Customization Support Table

A ✓ means that the restore is supported at this level, and a blank cell means that the restore is not supported at this level.

Restore Level/ What To Restore	Restore at ...						Notes	What to Select When Restoring
	Site Collection Level	Site Level	List Level	Document/Item Level	Document/Item Version Level	Attachment Level		
Site collection	✓	✓	✓	✓	✓	✓		 <p>The screenshot shows a tree structure under 'Archiver Data'. The path is: Farm(WIN-7SDDEA0TTHM:SHAREPOINT_CONFIG_NERO) > http://win-7sddea0tthm/ > http://win-7sddea0tthm/sites/kaka > http://win-7sddea0tthm/sites/support. The 'http://win-7sddea0tthm/sites/support' node is selected and highlighted with a red box. Checkmarks for 'Security' and 'Property' are visible next to the selected node.</p>
Site		✓	✓	✓	✓	✓		 <p>The screenshot shows a tree structure under 'Archiver Data'. The path is: Farm(WIN-7SDDEA0TTHM:SHAREPOINT_CONFIG_NERO) > http://win-7sddea0tthm/ > /sites/support > top-level site(Support) > Test Site[Test Site]. The 'Test Site[Test Site]' node is selected and highlighted with a red box.</p>
Lists			✓	✓	✓	✓		 <p>The screenshot shows a tree structure under 'Archiver Data'. The path is: Farm(WIN-7SDDEA0TTHM:SHAREPOINT_CONFIG_NERO) > http://win-7sddea0tthm/ > http://win-7sddea0tthm/sites/support > top-level site(Support) > Lists > new List. The 'new List' node is selected and highlighted with a red box. Checkmarks for 'Security' and 'Property' are visible next to the selected node. A pagination bar at the bottom indicates 'Page 3 of 3'.</p>

Restore Level/ What To Restore	Restore at ...						Notes	What to Select When Restoring
	Site Collection Level	Site Level	List Level	Document/Item Level	Document/Item Version Level	Attachment Level		
Libraries			√	√	√	√		
Folders				√	√	√		
Items, Documents, and Attachments				√	√	√		
Content Types		√	√	√			The content types can be restored together with the site/list/library.	N/A

Restore Level/ What To Restore	Restore at ...						Notes	What to Select When Restoring
	Site Collection Level	Site Level	List Level	Document/Item Level	Document/Item Version Level	Attachment Level		
SharePoint Designer Customizations	√	√	√	√	√		The customizations can be restored together with the selected contents.	N/A
Web Parts	√	√	√	√	√			N/A
Users	√	√	√					N/A
SharePoint Workflows		√	√	√	√		<p>To restore the workflow at the item level, select the SharePoint object that is associated with the workflow on the tree, and select the checkbox in front of Include workflow definition/Include workflow instance.</p> <p>SharePoint Designer workflows are supported.</p> <p>Nintex 2010 Workflow is supported and the Nintex 2010 Workflow must be installed on the destination.</p>	<p>Workflow Define how SharePoint workflows are backed up for the selected content. 'Definition' is the definition of existing source workflows. 'Instance' is the state, history, and tasks, for each item.</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f0f0f0;"> <input checked="" type="checkbox"/> Include workflow definition <input checked="" type="checkbox"/> Include workflow instance </div>
Lists and items with Managed Metadata	√	√	√	√	√	√	<p>To restore an item with metadata term sets, ensure Managed Metadata Service is started on destination.</p> <p>To restore term sets, use item level and ensure that Managed Metadata Service is started on destination.</p>	N/A

Supported and Unsupported Workflow in SharePoint 2010 and SharePoint 2013

Refer to the following table for details about the supported and not supported workflows in SharePoint 2010 and SharePoint 2013.

SharePoint Workflow	SharePoint 2010		SharePoint 2013	
	Supported	Unsupported	Supported	Unsupported
SharePoint Built-in Workflow	√		√	
SharePoint Designer Workflow	√			√
Nintex Workflow	√			√
Visual Studio Workflow	√			√
Visio Workflow		√		√
Azure Workflow		√		√

Appendix E – Advanced Settings in Configuration Files

Specify whether to restore custom properties in the SharePoint property bag and choose the last accessed time rule by configuring the **AgentCommonWrapperConfig.config** file. Modify the time period for the auditor job by configuring **AgentCommonStorageEnv.cfg** file. For detailed information, refer to the following sections.

AgentCommonWrapperConfig.config

Configure the **AgentCommonWrapperConfig.config** file to specify whether to restore custom properties in the SharePoint property bag.

Access a machine that has a DocAve Agent installed on it. Open the ... \AvePoint\DocAve6\Agent\bin directory to find the **AgentCommonWrapperConfig.config** file.

Restoring Specified Web Properties

Open the **AgentCommonWrapperConfig.config** file and find the **WrapperCommon** node. Within this node, find the **<RestoredAllWebProperties>False</RestoredAllWebProperties>** node and the **<SpecialWebPropertyNames></SpecialWebPropertyNames>** node. These two nodes are added to the configuration file automatically when you first run an Archiving or Restore job.

- If you do not want to restore the custom properties in the property bag, use the default **False** value. When using the **False** value, you can also add specific custom properties in the **SpecialWebPropertyNames** node. The custom properties you specify will be restored. Use a semicolon to separate custom properties. Note that the built-in properties in the property bag are all restored.
- If you want to restore all properties, including the custom and built-in properties, change **False** to **True**. When using the **True** value, you can add specific properties in the **SpecialWebPropertyNames** node. The properties you specify will not be restored.

Choosing the Last Accessed Time Rule

Open the **AgentCommonWrapperConfig.config** file and find the **WrapperCommon** node. Within this node, find the **<UseStubAccessTimeRule>False</UseStubAccessTimeRule>** node.

- **False** – The default value is **false**, which means the time used by this rule is the last accessed time of the selected documents/attachments/lists/libraries/sites/site collections that retrieved by Auditor Data Retrieve jobs; the time of the document versions used by this rule is the last accessed time of the corresponding Storage Manager stubs in SharePoint.
- **True** – The time of documents/attachments used by this rule will be changed to the last accessed time of the corresponding Storage Manager stubs in SharePoint.

AgentCommonStorageEnv.cfg

Configure the **AgentCommonStorageEnv.cfg** file to modify the time period. Only the Auditor Retrieve Data job run within the specified time period, can the Archiver job that configured the last accessed time rule run successfully. Or the Archiver job will be Finished with Exception, and no data in the selected node will be archived. Refer to the following steps to modify the time period:

1. Access a machine that has a DocAve Agent installed on it.
2. Open the ...*AvePoint\DocAve6\Agent\data\SP2010\Arch* directory to find the **AgentCommonStorageEnv.cfg** file.
2. Open the **AgentCommonStorageEnv.cfg** file and find the **Archive** node.
3. Within this node, find the **Daysbetween= "7"** parameter.
4. Change the value to a desired one. The time unit is **Day**.
5. Save changes to this file and close it.

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