



DocAve® 6 Content Manager

User Guide

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About Content Manager

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

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

Complementary Products

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

1. **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.
2. **DocAve Replicator** for SharePoint for copying SharePoint content within the same SharePoint farm or from one SharePoint farm to another.
3. **DocAve Report Center** for SharePoint to examine pain points in the SharePoint infrastructure and report on SharePoint user behavior and changes.
4. **DocAve Data Protection** for setting backup and recovery points prior to adjusting SharePoint governance policies in this product.

Submitting Documentation Feedback to AvePoint

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

Before You Begin

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

Configuration

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

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

Required Permissions

To install and use Content Manager 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 on the permissions, you can simply add the DocAve Agent Account to the local Administrators group to apply all of the required permissions.
2. SharePoint Permissions: These permissions must be manually configured prior to using DocAve 6 Content Manager; they are not automatically configured.
 - User is a member of the Farm Administrators group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.
 - Full Control to all zones of all Web applications via User Policy for Web Applications
 - Full Control to all of the service applications
 - For SharePoint 2013, in Policy for Web application, make sure that the DocAve Agent Account has the **Account operates as System** permission.
***Note:** The user used to deploy the Apps for SharePoint cannot have the **Account operates as System** permission.
 - User Profile Service Application permission:
 - For SharePoint 2010
 - Use Personal Features
 - Create Personal Site
 - Use Social Features

- For SharePoint 2013
 - Create Personal Site (required for personal storage, newsfeed, and followed content)
 - Follow People and Edit Profile
 - Use Tags and Notes
 - Managed Metadata Service: Term Store Administrator
 - Search Service: Full Control
 - Business Data Connectivity Service: Full Control
3. SQL Permissions: These permissions must be manually configured prior to using DocAve 6 Content Manager; they are not automatically configured.
- Database Role of db_owner for all the databases related with SharePoint, including Content Databases, Config Database, Nintex Workflow Database, and Central Admin Database.

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

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

Local System Permissions

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

- IIS WPG (for IIS 6.0) or IIS IUSRS (for IIS 7.0)
- Performance monitor users
- DocAve Users (this group is created by DocAve automatically with the following permissions):
 - Full Control to the Registry of *HKEY_LOCAL_MACHINE\SOFTWARE\AvePoint\DocAve6*
 - Full Control to the Registry of *HKEY_LOCAL_MACHINE\System\CurrentControlSet\Services\Eventlog*
 - Full Control to the Communication Certificate
 - Permission of Log on as a batch job (navigate to: *Control Panel > Administrative Tools > Local Security Policy > Security Settings > Local Policies > User Rights Assignment*)
 - Full Control Permission for DocAve Agent installation directory

Licensing and Permissions for SharePoint Online Agent

To install and use Content Manager properly, ensure that the Agent Account has the proper Local System Permissions. DocAve automatically configures the Local System Permissions during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations on the permissions, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.

Getting Started

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

Launching Content Manager

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

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

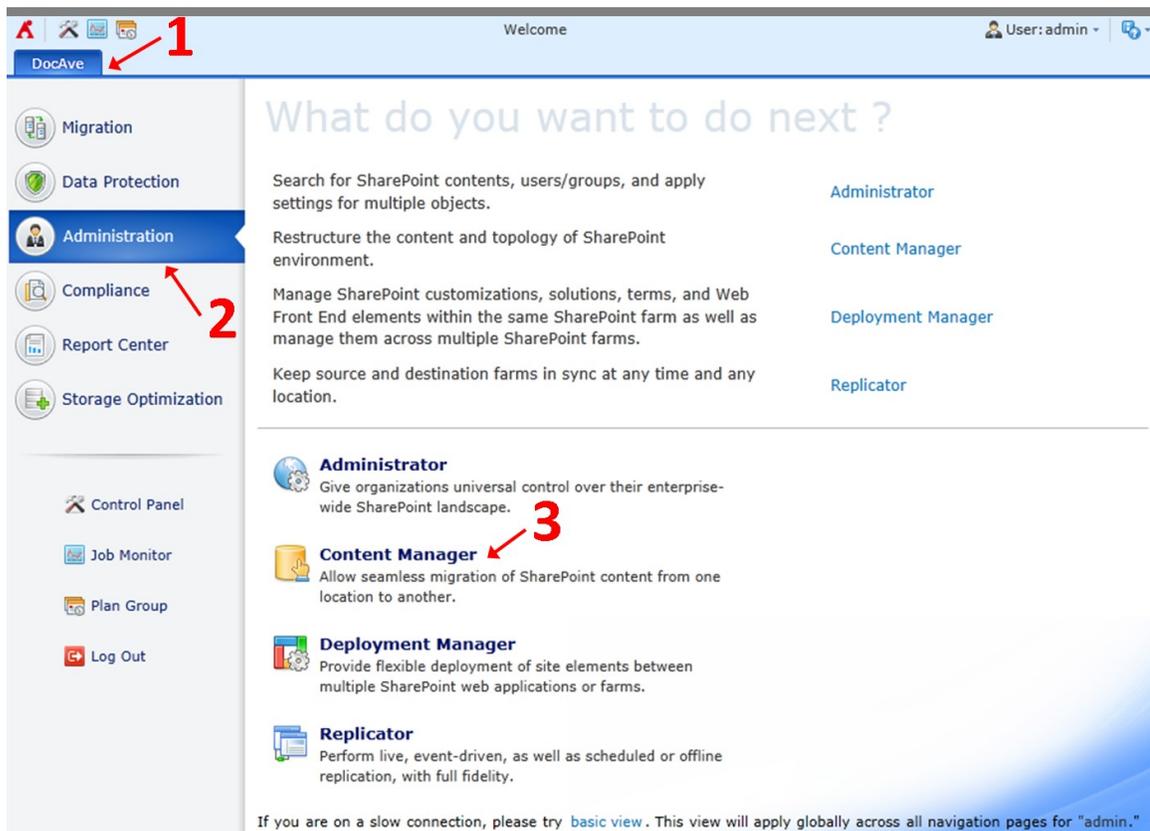


Figure 1: DocAve module launch window.

Content Manager Interface

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

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

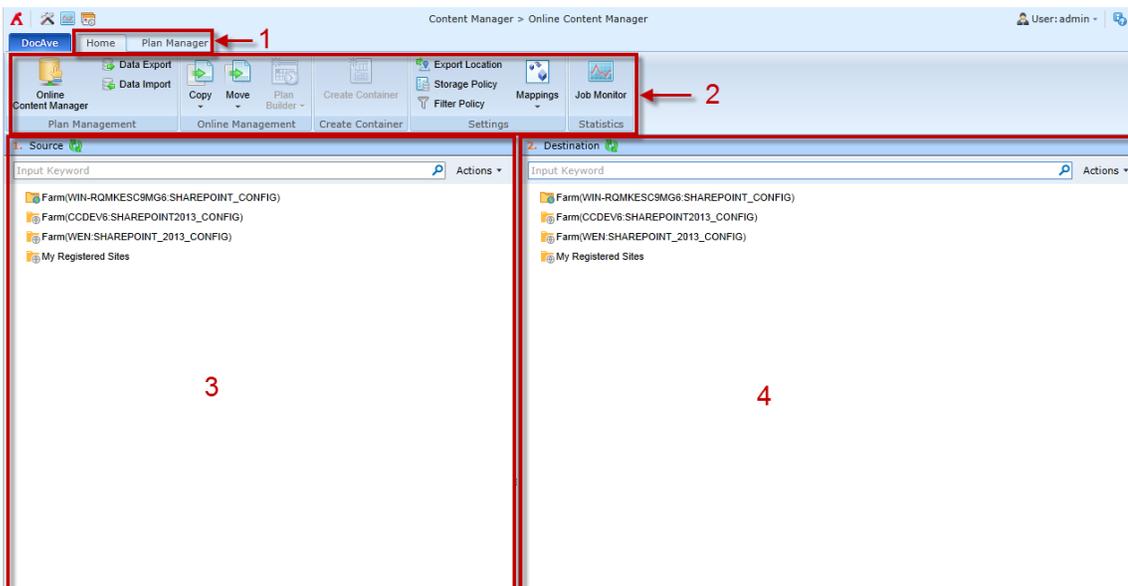


Figure 2: Content Manager Interface.

Basic Content Management Functions

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

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

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

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

Copying Content

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

Configuring Default Copy Settings

The Default Copy Settings feature allows you to customize a template for your copy settings. These settings will be applied to any new copy jobs you create. You will be able to edit these settings before running the copy job.

To configure default copy settings, click **Copy** on the ribbon, and then select **Default Copy Settings** from the drop-down list. Then, make your settings selections in the following fields:

1. **Action** – Select **Attach** to transfer the source node as a child node underneath the destination node, or select **Merge** to add the content, securities, and configurations of the source node to the destination node.

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

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

3. **Configuration** – Choose whether or not to migrate configuration to the destination:
 - Select the **Copy configuration** checkbox to copy the properties, descriptions, titles, settings, and features from the source node to the destination node. If you want to keep the look and feel of the source site including the quick launch, top link bar, tree view, site theme, and master page, and then select the **Keep look and feel** checkbox.
 - Leave the **Copy configuration** checkbox deselected if you don't want to migrate configuration to the destination. Then, choose from the following options:
 - Select **Copy the item-dependent columns and content types** to maintain item integrity. Then, select a conflict resolution method for these items' columns and content types from the drop-down list:
 - **Do not copy the columns and content types, or the corresponding items** – Ignores the conflicting columns, content types, and the corresponding items, and do nothing on the source and destination node.
 - **Overwrite the columns and content types** – Overwrites the destination columns and content types with the source node.
 - **Append the columns and content types to destination** – Keeps the destination columns and content types when there is a conflict. In addition, copy the source columns and content types to the destination node with a numerical suffix added (for example, ColumnName_1, ColumnName_2, etc.).
 - Select **Do not copy the item-dependent columns or content types**. Report the items if the corresponding column or content type is not found in destination. The corresponding items are not copied to the destination. The job report will show items if the corresponding column or content type is not found in the destination node.
4. **Security** – Select the **Copy security** checkbox if you want to copy the user and/or group permissions from the source node to the destination node, including SharePoint permission level and permission inheritance of SharePoint objects. Additionally, select the **Exclude user/group without permission** checkbox if you want to exclude users and/or groups that have no permissions to the destination.

***Note:** A user/group without permission refers to a user/group that exists in the source node, but does not have any permission. You cannot view this kind of user/group in the **People and Groups > SiteName Members** page of a site, but you can view it in the **People and Groups > All People** page. To go to the **People and Groups > All People** page, modify **MembershipGroupId=8**

in the URL of the **People and Groups > SiteName Members** page to **MembershipGroupId=0**, then you are brought to the **People and Groups > All People** page.

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

***Note:** This function will only take effect when the source node level is equal to or higher than the site collection level because users are saved in the top-level site.
7. **Workflow** – Select the **Include workflow definition** checkbox to copy the definition of existing workflows for the selected content from the source node to the destination node, and/or select the **Include workflow instance** to copy the state, history, and tasks of existing workflows for the selected content from the source node to the destination node. By default, the **Include completed instance** checkbox is selected to copy the completed instance from the source node to the destination node. You can select the **Include running instance** checkbox if you want to copy the currently running instance in the source node to the destination node, and then select one of the following radio buttons:
 - **Cancel workflows** – Cancel the copied or moved running workflow in the destination node after the Content Manager jobs.
 - **Restart workflows** – Restart the copied or moved running workflow in the destination node after the Content Manager jobs.
8. **Managed Metadata Service Setting** – Select the **Copy Managed Metadata Service** checkbox if you want to copy the related managed metadata services from the source node to the destination node, and then select one of the following radio buttons:
 - **Term** – Copy terms that are used in the source, their parent terms, the term sets where the used terms reside, and the names of the groups where the used terms reside to the destination.
 - **Term set** – Copy the whole term sets where the used terms reside in the source (regardless of whether or not the terms in the term sets are used by the source node or not) to the destination.
 - **Managed Metadata Service** – Copy the whole Managed Metadata Services that are related to the source node to the destination.

***Note:** Copying the Managed metadata Service will automatically activate the service in the destination, if the service in destination is not activated.
9. **Preserve the Null Column Values** – Select **Yes** to preserve the null values of item columns (such as newly created columns), or select **No** to replace null values with default values in the destination node.

10. **Data Compression** – Select the **Compression** checkbox if you want to compress the data when it is copied. If you choose to compress the data, use the slider to select the compression rate. Fastest compression rate results in a larger data set. Best compression rate results in a smaller, better quality data set, but the compression takes more time to perform.
***Note:** Smaller data sets take longer to backup and recover.
11. **Data Encryption** – Select the **Encryption** checkbox if you want to encrypt the data. Then select the default security profile or a previously configured security profile from the drop-down list to protect your backup data using the security keys generated by the specified encryption method, or click **New Security Profile** to create a new one. For details on creating a security profile, refer to the [DocAve 6 Control Panel Reference Guide](#).
***Note:** Encrypted data takes longer to backup and recover.
12. **Column Mapping** – Maps source columns to destination columns. The destination column name will be replaced by the configured source column name, and you can add value mapping. According to column type, the source column and the destination column can be the same or different. The column can also be changed to Managed Metadata or Lookup. Select a column mapping you previously created from the drop-down list, or click **New Column Mapping** from the drop-down list. For information on creating a column mapping, see the [DocAve 6 Control Panel Reference Guide](#).
***Note:** If you select the column type **Change to Lookup** while setting up your column mapping, make sure that the **Lookup** column can only be associated with the list or list column that exists in the destination.
13. **Content Type Mapping** – Maps source content types to the specified content types in the destination, or change the content type name to another one, according to the condition that you set up. Select a content type mapping you previously created from the drop-down list, or click **New Content Type Mapping** from the drop-down list. For information on creating a content type mapping, see the [DocAve 6 Control Panel Reference Guide](#).
***Note:** Make sure that the source content type and the destination content type are the same.
14. **Template Mapping** – Replaces site and list templates. By inputting or selecting a template ID, the source template is changed to the destination template. Select a template mapping you previously created from the drop-down list, or click **New Template Mapping** from the drop-down list. For information on creating a template mapping, see the [DocAve 6 Control Panel Reference Guide](#).
15. **User Mapping** – Maps a source user to a target user. If the same user has a different username in Domain A than in Domain B, or if you want to copy an individual user’s content, permissions, and metadata in Domain A to another user in Domain B, the user’s permissions and metadata will not be lost when content is moved. Select a user mapping you previously created from the drop-down list, or click **New User Mapping** from the drop-down list. For information on creating a user mapping, see the [DocAve 6 Control Panel Reference Guide](#).
16. **Domain Mapping** – Maps a source domain to a destination domain. The destination domain name will be replaced by the configured source domain name, and the user in the source domain will be mapped to the destination user with the same login name. Select a domain

mapping you previously created from the drop-down list, or click **New Domain Mapping** from the drop-down list. For information on creating a domain mapping, see the [DocAve 6 Control Panel Reference Guide](#).

17. **Language Mapping** – Choose if you want to display destination node in a different language than source node after the plan has been executed. Select a language mapping you previously created from the drop-down list, or click **New Language Mapping** from the drop-down list. For information on creating a language mapping, see the [DocAve 6 Control Panel Reference Guide](#).

18. **Backup Environment Before Running Plan** – Select the **Backup the destination environment** checkbox if you want to create a copy of the destination node prior to performing the copy (allows you to undo the copy). If you choose to back up the destination environment before performing a copy, you must designate a storage policy. Select the **Backup the destination environment** checkbox and the **Storage policy** drop-down list appears. Select a previously configured storage policy from the drop-down list or click **New Storage Policy** to create a new one.

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

19. **Conflict Resolution** – Choose **Skip**, **Merge**, or **Replace** from the **Container level conflict resolution** drop-down list. Select the **Check lower objects** checkbox if you want to configure content level conflict resolution, then choose **Skip**, **Overwrite**, **Overwrite by Last Modified Time**, or **Append** from the **Content level conflict resolution** drop-down list. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A – Conflict Resolution](#).

20. **Notification** – Choose the type of notification report and designate which DocAve user will receive an e-mail notification report. Select a notification profile you previously created from the drop-down list. Click **View** beside the drop-down list to view details of the notification profile, or click **New Notification Profile** from the drop-down list. For information on creating a notification profile, see the [DocAve 6 Control Panel Reference Guide](#).

21. Click **OK** to save these configurations and return to the **Home** tab of Content Manager, or click **Cancel** to return to the **Home** tab of Content Manager without saving any of your changes.

Performing a Simple Copy

To perform a simple copy in Content Manager, select the node you want to copy from in the **Source** pane, and select the node you want to copy to in the **Destination** pane.

***Note:** Make sure that the source node and the destination node are in the same version of SharePoint. If the site within SharePoint 2013 is a SharePoint 2010 mode site, it can only be copied to the same mode site.

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

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

- **View** – Click **View** on the ribbon if you want to review your default copy settings.
- **Edit** – Click **Edit** on the ribbon to make changes to the copy settings. You will be brought to the Edit Copy Settings page. To configure the settings, refer to the [Configuring Copy Settings](#) section of this guide.
- **Preview** – Click **Preview** on the ribbon to see what the data tree of the destination node will look like after the copy job is run. The source node is marked by a prompt message: **From Source**.
***Note:** This function supports Web application, site collection, and site level objects.
- **Run Now** – Click **Run Now** on the ribbon to execute the copy job. Your copy job will begin immediately, and you will be brought back to the **Home** tab of Content Manager.
- **Cancel** – Click **Cancel** on the ribbon to close the **Copy** tab without running the copy job.

Configuring Copy Settings

On the Edit Copy Settings page, you can configure the following settings:

1. **Action** – Select **Attach** to transfer the source node as a child node underneath the destination node, or select **Merge** to add the content, securities, and configurations of the source node to the destination node. Click **Show Preview** to see what the data tree of the destination node will look like after the job is executed. Click **Hide Preview** to hide the data tree.
2. **Filter Policy** – Select a filter policy you previously created from the drop-down list, or click **New Filter Policy** from the drop-down list. Filter policies allow you to select specific objects or data within each SharePoint level from Web application down to the item level. For information on creating a filter policy, see the [DocAve 6 Control Panel Reference Guide](#).
***Note:** When using the filter policy in SharePoint Online, the **Created By** rule is not supported. Exceptions will be recorded in the job report.
3. **Configuration** – Choose whether or not to migrate configuration to the destination:
 - Select the **Copy configuration** checkbox to copy the properties, descriptions, titles, settings, and features from the source node to the destination node. If you want to keep the look and feel of the source site including the quick launch, top link bar, tree view, site theme, and master page, and then select the **Keep look and feel** checkbox.
***Note:** This function will only take effect if the source node is a site, the destination node is a top-level site or a site collection, and if you chose **Merge** as the action in step 1.

- Leave the **Copy configuration** checkbox deselected if you don't want to migrate configuration to the destination. Then, choose from the following options:
 - Select **Copy the item-dependent columns and content types** to maintain item integrity. Then, select a conflict resolution method for these items' columns and content types from the drop-down list:
 - **Do not copy the columns and content types, or the corresponding items** – Ignores the conflicting columns, content types, and the corresponding items, and do nothing on the source and destination node.
 - **Overwrite the columns and content types** – Overwrites the destination columns and content types with the source node.
 - **Append the columns and content types to destination** – Keeps the destination columns and content types when there is a conflict. In addition, copy the source columns and content types to the destination node with a numerical suffix added (for example, ColumnName_1, ColumnName_2, etc.).
 - Select **Do not copy the item-dependent columns or content types**. Report the items if the corresponding column or content type is not found in destination. The corresponding items are not copied to the destination. The job report will show items if the corresponding column or content type is not found in the destination node.
4. **Security** – Select the **Copy security** checkbox if you want to copy the user and/or group permissions from the source node to the destination node, including SharePoint permission level and permission inheritance of SharePoint objects. Additionally, select the **Exclude user/group without permission** checkbox if you want to exclude users and/or groups that have no permissions to the destination.

***Note:** The user/group without permission refers to the user/group that exists in the source node, but does not have any permission. You cannot view this kind of user/group in the **People and Groups > SiteName Members** page of a site, but you can view it in the **People and Groups > All People** page. To go to the **People and Groups > All People** page, modify **MembershipGroupId=8** in the URL of the **People and Groups > SiteName Members** page to **MembershipGroupId=0**. You will be brought to the **People and Groups > All People** page.
 5. **Content** – Select the **Copy content** checkbox if you want to copy content in libraries, folders, and items from the source node to the destination node. Additionally, select the **Include list attachment** if you want to also copy attached content in lists from the source node to the destination node.
 6. **User Profile** – Select the **Copy user profile** checkbox if you want to copy user profiles from the source node to the destination node.

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

7. **Workflow** – Select the **Include workflow definition** checkbox to copy the definition of existing workflows for the selected content from the source node to the destination node, and/or select the **Include workflow instance** to copy the state, history, and tasks of existing workflows for the selected content from the source node to the destination node. By default, the **Include completed instance** checkbox is selected to copy the completed instance from the source node to the destination node. You can select **Include running instance** checkbox if you want to copy the currently running instance in the source node to the destination node, and then select one of the following radio buttons:
 - **Cancel workflows** – Cancel the copied or moved running workflow in the destination node after the Content Manager jobs.
 - **Restart workflows** – Restart the copied or moved running workflow in the destination node after the Content Manger jobs.
8. **Managed Metadata Service Setting** – Select the **Copy Managed Metadata Service** checkbox if you want to copy the related managed metadata services from the source node to the destination node, and then select one of the following radio buttons:
 - **Term** – Copy terms that are used in the source, their parent terms, the term sets where the used terms reside, and the names of the groups where the used terms reside to the destination.
 - **Term set** – Copy the whole term sets where the used terms reside in the source (regardless of whether or not the terms in the term sets are used by the source node or not) to the destination.
 - **Managed Metadata Service** – Copy the whole Managed Metadata Services that are related to the source node to the destination.
 - ***Note:** Copying the Managed metadata Service will automatically activate the service in the destination, if the service in destination is not activated.
9. **Preserve the Null Column Values** – Select **Yes** to preserve the null values of item columns (such as newly created columns), or select **No** to replace null values with default values in the destination node.
10. **Data Compression** – Select the **Compression** checkbox if you want to compress the data when it is copied. If you choose to compress the data, use the slider to select the compression rate. Fastest compression rate results in a larger data set. Best compression rate results in a smaller, better quality data set, but the compression takes more time to perform.
 - ***Note:** Smaller data sets take longer to backup and recover.
11. **Data Encryption** – Select the **Encryption** checkbox if you want to encrypt the data. Then select the default security profile or a previously configured security profile from the drop-down list to protect your backup data using the security keys generated by the specified encryption method, or click **New Security Profile** to create a new one. For details on creating a security profile, refer to the [DocAve 6 Control Panel Reference Guide](#).
 - ***Note:** Encrypted data takes longer to backup and recover.

12. **Column Mapping** – Maps source columns to destination columns. The destination column name will be replaced by the configured source column name, and you can add value mapping. According to column type, the source column and the destination column can be the same or different. The column can also be changed to Managed Metadata or Lookup. Select a column mapping you previously created from the drop-down list, or click **New Column Mapping** from the drop-down list. For information on creating a column mapping, see the [DocAve 6 Control Panel Reference Guide](#).

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

***Note:** Make sure that the source content type and the destination content type are the same.
14. **Template Mapping** – Replaces site and list templates. By inputting or selecting a template ID, the source template is changed to the destination template. Select a template mapping you previously created from the drop-down list, or click **New Template Mapping** from the drop-down list. For information on creating a template mapping, see the [DocAve 6 Control Panel Reference Guide](#).
15. **User Mapping** – Maps a source user to a target user. If the same user has a different username in Domain A than in Domain B, or if you want to copy an individual user’s content, permissions, and metadata in Domain A to another user in Domain B, the user’s permissions and metadata will not be lost when content is moved. Select a user mapping you previously created from the drop-down list, or click **New User Mapping** from the drop-down list. For information on creating a user mapping, see the [DocAve 6 Control Panel Reference Guide](#).
16. **Domain Mapping** – Maps a source domain to a destination domain. The destination domain name will be replaced by the configured source domain name, and the user in the source domain will be mapped to the destination user with the same login name. Select a domain mapping you previously created from the drop-down list, or click **New Domain Mapping** from the drop-down list. For information on creating a domain mapping, see the [DocAve 6 Control Panel Reference Guide](#).
17. **Language Mapping** – Choose if you want to display destination node in a different language than source node after the plan has been executed. Select a language mapping you previously created from the drop-down list, or click **New Language Mapping** from the drop-down list. For information on creating a language mapping, see the [DocAve 6 Control Panel Reference Guide](#).
18. **Backup Environment Before Running Plan** – Select the **Backup the destination environment** checkbox if you want to create a copy of the destination node prior to performing the copy (allows you to undo the copy). If you choose to back up the destination environment before performing a copy, you must designate a storage policy. Select a previously configured storage policy or click **New Storage Policy** to create a new one.

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

19. **Conflict Resolution** – Choose **Skip**, **Merge**, or **Replace** from the **Container level conflict resolution** drop-down list. Select the **Check lower objects** checkbox if you want to configure content level conflict resolution, then choose **Skip**, **Overwrite**, **Overwrite by Last Modified Time**, or **Append** from the **Content level conflict resolution** drop-down list. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A – Conflict Resolution](#).
20. **Notification** –Choose the type of notification report and designate which DocAve user will receive an e-mail notification report. Select a notification profile you previously created from the drop-down list. Click **View** beside the drop-down list to view details of the notification profile, or click **New Notification Profile** from the drop-down list. For information on creating a notification profile, see the [DocAve 6 Control Panel Reference Guide](#).

Moving Content

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

Configuring Default Move Settings

The Default Move Settings feature allows you to customize a template for your move settings. These settings will be applied to any new move jobs you create. You will be able to edit these settings before running the copy job.

To configure default move settings, click **Move** on the ribbon, and then select **Default Move Settings** from the drop-down list. Then, make your settings selections in the following fields

1. **Action** – Select **Attach** to transfer the source node as a child node underneath the destination node, or select **Merge** to add the content, securities, and configurations of the source node to the destination node.
2. **Filter Policy** – Select a filter policy you previously created from the drop-down list, or click **New Filter Policy** from the drop-down list. Filter policies allow you to select specific objects or data within each SharePoint level from Web application down to the item level. For information on creating a filter policy, see the [DocAve 6 Control Panel Reference Guide](#).

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

3. **Configuration** – Choose whether or not to migrate configuration to the destination:
 - Select the **Move configuration** checkbox to move the properties, descriptions, titles, settings, and features from the source node to the destination node. If you want to keep the look and feel of the source site including the quick launch, top link bar, tree view, site theme, and master page, and then select the **Keep look and feel** checkbox.

***Note:** This function will only take effect if the source node is a site, the destination node is a top-level site or a site collection, and if you chose **Merge** as the action in step 1.

- Leave the **Move configuration** checkbox deselected if you don't want to migrate configuration to the destination. Then, choose from the following options:
 - Select **Move the item-dependent columns and content types** to maintain item integrity. Then, select a conflict resolution method for these items' columns and content types from the drop-down list:
 - **Do not move the columns and content types, or the corresponding items** – Ignores the conflicting columns, content types, and the corresponding items, and do nothing on the source and destination node.
 - **Overwrite the columns and content types** – Overwrites the destination columns and content types with the source node.
 - **Append the columns and content types to destination** – Keeps the destination columns and content types when there is a conflict. In addition, copy the source columns and content types to the destination node with a numerical suffix added (for example, ColumnName_1, ColumnName_2, etc.).
 - Select **Do not move the item-dependent columns or content types**. Report the items if the corresponding column or content type is not found in destination. The corresponding items are not moved to the destination. DocAve will report the items if the corresponding column or content type is not found in the destination node.
- 4. **Security** – Select the **Move security** checkbox to move the user and/or group permissions from the source node to the destination node, including SharePoint permission level and permission inheritance of SharePoint objects. Select the **Exclude user/group without permission** checkbox to not copy users and/or groups that have no permissions to the destination. The user/group without permission refers to the user/group that exists in the source node, but does not have any permission. You cannot view this kind of user/group in the **People and Groups > SiteName Members** page of a site, but you can view it in the **People and Groups > All People** page. To go to the **People and Groups > All People** page, modify **MembershipGroupId=8** in the URL of the **People and Groups > SiteName Members** page to **MembershipGroupId=0**. You will be brought to the **People and Groups > All People** page.
- 5. **Content** – Select the **Move content** checkbox to move content in libraries, folders, and items from the source node to the destination node. Additionally, select the **Include list attachment** to also move attached content in lists from the source node to the destination node.
- 6. **User Profile** – Select the **Move user profile** checkbox to move user profiles from the source node to the destination node.

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

7. **Workflow** – Select the **Include workflow definition** checkbox to move the definition of existing workflows for the selected content from the source node to the destination node, and/or select the **Include workflow instance** to move the state, history, and tasks of existing workflows for the selected content from the source node to the destination node. By default, the **Include completed instance** checkbox is selected to copy the completed instance from the source node to the destination node. You can select **Include running instance** checkbox if you want to copy the currently running instance in the source node to the destination node, and then select one of the following radio buttons:
 - **Cancel workflows** – Cancel the copied or moved running workflow in the destination node after the Content Manager jobs.
 - **Restart workflows** – Restart the copied or moved running workflow in the destination node after the Content Manger jobs.
8. **Managed Metadata Service Setting** – Select the **Copy Managed Metadata Service** checkbox if you want to copy the related managed metadata services from the source node to the destination node, and then select one of the following radio buttons:
 - **Term** – Copy terms that are used in the source, their parent terms, the term sets where the used terms reside, and the names of the groups where the used terms reside to the destination.
 - **Term set** – Copy the whole term sets where the used terms reside in the source (regardless of whether or not the terms in the term sets are used by the source node or not) to the destination.
 - **Managed Metadata Service** – Copy the whole Managed Metadata Services that are related to the source node to the destination.
 - ***Note:** Copying the Managed metadata Service will automatically activate the service in the destination, if the service in destination is not activated.
9. **Preserve the Null Column Values** – Select **Yes** to preserve the null values of item columns (such as newly created columns), or select **No** to replace null values with default values in the destination node.
10. **Data Compression** – Select the **Compression** checkbox if you want to compress the data when it is moved. If you choose to compress the data, use the slider to select the compression rate. Fastest compression rate results in a larger data set. Best compression rate results in a smaller, better quality data set, but the compression takes more time to perform.
 - ***Note:** Smaller data sets take longer to backup and recover.
11. **Data Encryption** – Select the **Encryption** checkbox to encrypt the data. Then select the default security profile or a previously configured security profile from the drop-down list to protect your backup data using the security keys generated by the specified encryption method, or click **New Security Profile** to create a new one. For details on creating a security profile, refer to the [DocAve 6 Control Panel Reference Guide](#).
 - ***Note:** Encrypted data takes longer to backup and recover.

12. **Column Mapping** – Maps source columns to destination columns. The destination column name will be replaced by the configured source column name, and you can add value mapping. According to column type, the source column and the destination column can be the same or different. The column can also be changed to Managed Metadata or Lookup. Select a column mapping you previously created from the drop-down list, or click **New Column Mapping** from the drop-down list. For information on creating a column mapping, see the [DocAve 6 Control Panel Reference Guide](#).

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

***Note:** Make sure that the source content type and the destination content type are the same.
14. **Template Mapping** – Replaces site and list templates. By inputting or selecting a template ID, the source template is changed to the destination template. Select a template mapping you previously created from the drop-down list, or click **New Template Mapping** from the drop-down list. For information on creating a template mapping, see the [DocAve 6 Control Panel Reference Guide](#).
15. **User Mapping** – Maps a source user to a target user. If the same user has a different username in Domain A than in Domain B, or if you want to move an individual user’s content, permissions, and metadata in Domain A to another user in Domain B, the user’s permissions and metadata will not be lost when content is moved. Select a user mapping you previously created from the drop-down list, or click **New User Mapping** from the drop-down list. For information on creating a user mapping, see the [DocAve 6 Control Panel Reference Guide](#).
16. **Domain Mapping** – Maps a source domain to a destination domain. The destination domain name will be replaced by the configured source domain name, and the user in the source domain will be mapped to the destination user which has the same login name. Select a domain mapping you previously created from the drop-down list, or click **New Domain Mapping** from the drop-down list. For information on creating a domain mapping, see the [DocAve 6 Control Panel Reference Guide](#).
17. **Language Mapping** – Choose if you want to display destination node in a different language than source node after the plan has been executed. Select a language mapping you previously created from the drop-down list, or click **New Language Mapping** from the drop-down list. For information on creating a language mapping, see the [DocAve 6 Control Panel Reference Guide](#).
18. **Source Documents/Items Deleted Method** – Select **Manually** to delete the source content once the move job is complete. To delete it manually, select the move job in Job Monitor, then click **Delete** on the ribbon and select **Delete Content** from the drop-down list. Select **Automatically** to have DocAve delete the source content once the move job is complete.

19. **Delete Source Checked Out Documents** – Select **Yes** to have DocAve delete the checked out documents on the source node when source content is deleted. By default, **No** is selected.
20. **Backup Environment Before Running Plan** – Select the **Backup the source environment** checkbox if you want to create a copy of the source node prior to performing the move (allows you to undo the move). If you choose to back up the source and/or destination environment before performing a copy, you must designate a storage policy. Select a previously configured storage policy or click **New Storage Policy** to create a new one.

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

***Note:** The source node is deleted as the second step in a move job. If Backup the source environment is not selected, you will not be able to restore the source node to its state prior to the Move job.
21. **Conflict Resolution** – Choose **Skip**, **Merge** or **Replace** from the **Container level conflict resolution** drop-down list. Select the **Check lower objects** checkbox to configure content level conflict resolution, then choose **Skip**, **Overwrite**, **Overwrite by Last Modified Time**, or **Append** from the **Content level conflict resolution** drop-down list. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A](#).
22. **Notification** – Choose the type of notification report and designate which DocAve user will receive an e-mail notification report. Select a notification profile you previously created from the drop-down list. Click **View** beside the drop-down list to view details of the notification profile, or click **New Notification Profile** from the drop-down list. For information on creating a notification profile, see the [DocAve 6 Control Panel Reference Guide](#).
23. Click **OK** to save these configurations and return to the **Home** tab of Content Manager, or click **Cancel** to return to the **Home** tab of Content Manager without saving any of your changes.

Performing a Simple Move

To perform a simple move in Content Manager, select the node you want to move from in the **Source** pane, and select the node you want to move to in the **Destination** pane.

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

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

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

- **View** – Click **View** on the ribbon to review your move settings.

- **Edit** – Click **Edit** on the ribbon to make changes to the move settings. You will be brought to the Edit Move Settings page. To configure the settings in Edit Move Settings, refer to the [Configuring Move Settings](#) section of this guide.
- **Preview** – Click **Preview** on the ribbon to see what the data tree of the destination node will look like after the move job is run. The source node is marked by a prompt message: **From Source**.

***Note:** The preview function supports Web application, site collection, and site level objects.
- **Run Now** – Click **Run Now** on the ribbon to execute the move job. Your move job will begin immediately, and you will be brought back to the **Home** tab of Content Manager.
- Click **Cancel** on the ribbon to close the Move tab without running the Move job.

Configuring Move Settings

In **Edit Move Settings** page, you can configure the following settings:

1. **Action** – Select **Attach** to transfer the source node as a child node underneath the destination node, or select **Merge** to add the content, securities, and configurations of the source node to the destination node. Click **Show Preview** to see what the data tree of the destination node will look like after the job is executed. Click **Hide Preview** to hide the data tree.
2. **Filter Policy** – Select a filter policy you previously created from the drop-down list, or click **New Filter Policy** from the drop-down list. Filter policies allow you to select a specified objects or data within each SharePoint level from Web application down to the item level. For information on creating a filter policy, see the [DocAve 6 Control Panel Reference Guide](#).

***Note:** When using the filter policy in SharePoint Online, the **Created By** rule is not supported. Exceptions will be recorded in the job report.
3. **Configuration** – Choose whether or not to migrate configuration to the destination:
 - Select the **Move configuration** checkbox to copy the properties, descriptions, titles, settings, and features from the source node to the destination node. If you want to keep the look and feel of the source site including the quick launch, top link bar, tree view, site theme, and master page, then select the **Keep look and feel** checkbox.

***Note:** This function will only take effect if the source node is a site, the destination node is a top-level site or a site collection, and if you chose **Merge** as the action in step 1.
 - Leave the **Move configuration** checkbox deselected if you don't want to migrate configuration to the destination. Then, choose from the following options:
 - Select Move the item-dependent columns and content types to maintain item integrity. Then, select a conflict resolution method for these items' columns and content types from the drop-down list:
 - **Do not move the columns and content types, or the corresponding items** – Ignores the conflicting columns, content types, and the

corresponding items, and do nothing on the source and destination node.

- **Overwrite the columns and content types** – Overwrites the destination columns and content types with the source node.
 - **Append the columns and content types to destination** – Keeps the destination columns and content types when there is a conflict. In addition, copy the source columns and content types to the destination node with a numerical suffix added (for example, ColumnName_1, ColumnName_2, etc.).
 - Select **Do not move the item-dependent columns or content types**. Report the items if the corresponding column or content type is not found in destination. The corresponding items are not copied to the destination. The job report will show items if the corresponding column or content type is not found in the destination node.
4. **Security** – Select the **Move security** checkbox if you want to move the user and/or group permissions from the source node to the destination node, including SharePoint permission level and permission inheritance of SharePoint objects. Additionally, select the **Exclude user/group without permission** checkbox if you want to exclude users and/or groups that have no permissions to the destination. The user/group without permission refers to the user/group that exists in the source node, but does not have any permission. You cannot view this kind of user/group in the **People and Groups > SiteName Members** page of a site, but you can view it in the **People and Groups > All People** page. To go to the **People and Groups > All People** page, modify **MembershipGroupId=8** in the URL of the **People and Groups > SiteName Members** page to **MembershipGroupId=0**. You will be brought to the **People and Groups > All People** page.
 5. **Content** – Select the **Move content** checkbox if you want to move content in libraries, folders, and items from the source node to the destination node. Additionally, select the **Include list attachment** if you want to also move attached content in lists from the source node to the destination node.
 6. **User Profile** – Select the **Move user profile** checkbox if you want to move user profiles from the source node to the destination node.

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

7. **Workflow** – Select the **Include workflow definition** checkbox to move the definition of existing workflows for the selected content from the source node to the destination node, and/or select the **Include workflow instance** to move the state, history, and tasks of existing workflows for the selected content from the source node to the destination node. By default, the **Include completed instance** checkbox is selected to copy the completed instance from the source node to the destination node. You can select the **Include running instance** checkbox if you want to copy the currently running instance in the source node to the destination node, and then select one of the following radio buttons:
 - **Cancel the workflow** – Cancel the copied or moved running workflow in the destination node after the Content Manager jobs.
 - **Restart the workflow** – Restart the copied or moved running workflow in the destination node after the Content Manager jobs.
8. **Managed Metadata Service Setting** – Select the **Copy Managed Metadata Service** checkbox if you want to copy the related managed metadata services from the source node to the destination node, and then select one of the following radio buttons:
 - **Term** – Copy terms that are used in the source, their parent terms, the term sets where the used terms reside, and the names of the groups where the used terms reside to the destination.
 - **Term set** – Copy the whole term sets where the used terms reside in the source (regardless of whether or not the terms in the term sets are used by the source node or not) to the destination.
 - **Managed Metadata Service** – Copy the whole Managed Metadata Services that are related to the source node to the destination.
 - ***Note:** Copying the Managed metadata Service will automatically activate the service in the destination, if the service in destination is not activated.
9. **Preserve the Null Column Values** – Select **Yes** to preserve the null values of item columns (such as newly created columns), or select **No** to replace null values with default values in the destination node.
10. **Data Compression** – Select the **Compression** checkbox if you want to compress the data when it is moved. If you choose to compress the data, use the slider to select the compression rate. Fastest compression rate results in a larger data set. Best compression rate results in a smaller, better quality data set, but the compression takes more time to perform.
 - ***Note:** Smaller data sets take longer to backup and recover.
11. **Data Encryption** – Select the **Encryption** checkbox if you want to encrypt the data. Then select the default security profile or a previously configured security profile from the drop-down list to protect your backup data using the security keys generated by the specified encryption method, or click **New Security Profile** to create a new one. For details on creating a security profile, refer to the [DocAve 6 Control Panel Reference Guide](#).
 - ***Note:** Encrypted data takes longer to backup and recover.

12. **Column Mapping** – Maps source columns to destination columns. The destination column name will be replaced by the configured source column name, and you can add value mapping. According to column type, the source column and the destination column can be the same or different. The column can also be changed to Managed Metadata or Lookup. Select a column mapping you previously created from the drop-down list, or click **New Column Mapping** from the drop-down list. For information on creating a column mapping, see the [DocAve 6 Control Panel Reference Guide](#).

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

***Note:** Make sure that the source content type and the destination content type are the same.
14. **Template Mapping** – Replaces site and list templates. By inputting or selecting a template ID, the source template is changed to the destination template. Select a template mapping you previously created from the drop-down list, or click **New Template Mapping** from the drop-down list. For information on creating a template mapping, see the [DocAve 6 Control Panel Reference Guide](#).
15. **User Mapping** – Maps a source user to a target user. If the same user has a different username in Domain A than in Domain B, or if you want to move an individual user’s content, permissions, and metadata in Domain A to another user in Domain B, the user’s permissions and metadata will not be lost when content is moved. Select a user mapping you previously created from the drop-down list, or click **New User Mapping** from the drop-down list. For information on creating a user mapping, see the [DocAve 6 Control Panel Reference Guide](#).
16. **Domain Mapping** – Maps a source domain to a destination domain. The destination domain name will be replaced by the configured source domain name, and the user in the source domain will be mapped to the destination user which has the same login name. Select a domain mapping you previously created from the drop-down list, or click **New Domain Mapping** from the drop-down list. For information on creating a domain mapping, see the [DocAve 6 Control Panel Reference Guide](#).
17. **Language Mapping** – Choose if you want to display destination node in a different language than source node after the plan has been executed. Select a language mapping you previously created from the drop-down list, or click **New Language Mapping** from the drop-down list. For information on creating a language mapping, see the [DocAve 6 Control Panel Reference Guide](#).
18. **Source Documents/Items Deleted Method** – Select **Manually** to delete the source content once the move job is complete. To delete it manually, select the move job in Job Monitor, then click **Delete** on the ribbon and select **Delete Content** from the drop-down list. Select **Automatically** to have DocAve delete the source content once the move job is complete.

19. **Delete Source Checked Out Documents** – Select **Yes** to have DocAve delete the checked out documents on the source node when source content is deleted. By default, **No** is selected.
20. **Backup Environment Before Running Plan** – Select the **Backup the destination environment** checkbox if you want to create a copy of the destination node prior to performing the move (allows you to undo the move). If you choose to back up the destination environment before performing a copy, you must designate a storage policy. Select a previously configured storage policy or click **New Storage Policy** to create a new one.

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

***Note:** The source node is deleted as the second step in a move job. If **Backup the source environment** is not selected, you will not be able to restore the source node to its state prior to the move job.
21. **Conflict Resolution** – Choose **Skip**, **Merge**, or **Replace** from the **Container level conflict resolution** drop-down list. Select the **Check lower objects** checkbox if you want to configure content level conflict resolution, then choose **Skip**, **Overwrite**, **Overwrite by Last Modified Time**, or **Append** from the **Content level conflict resolution** drop-down list. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A – Conflict Resolution](#).
22. **Notification** – Choose the type of notification report and designate which DocAve user will receive an e-mail notification report. Select a notification profile you previously created from the drop-down list. Click **View** beside the drop-down list to view details of the notification profile, or click **New Notification Profile** from the drop-down list. For information on creating a notification profile, see the [DocAve 6 Control Panel Reference Guide](#).

Creating Containers

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

***Note:** Create Container can only be used to create sites, lists, and folders in the SharePoint Online environments.

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

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

***Note:** When creating a folder, no settings need to be configured, and clicking **Create Container** at the folder level will create a folder immediately.

Creating a Site Collection

Configure these settings on the Create Site Collection page:

1. **Title and Description** – Enter the **Title** of the new site collection, and a **Description** for future reference.
2. **Web Site Address** – Displays the URL of the site collection you are about to create.
3. **Template Selection** – Select the desired language from the **Select a language** drop-down list, and then select a site template for this new site collection. Click on a tab to access the templates listed in that category, or click on the **Custom** tab and select **<Select Template Later ...>** to not choose a template upon creation.
4. **Primary Site Collection Administrator** – Enter the **Username** of the primary administrator for this site collection.
5. **Secondary Site Collection Administrator** – Enter the **Username** of the secondary administrator for this site collection.
6. **Quota Template** – Select the storage quota template to apply to this site collection.
7. **Content Database** – Select the content database for this site collection.
8. Click **OK** to create the new site collection, or click **Cancel** to close the Create Container interface.

Creating a Site

Configure these settings on the Create Site page:

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

Creating a List/Library

Configure these settings in the Create List page:

1. **Object Type** – Choose whether you want to create a **List** or a **Library**.
2. **Category** – Select the type for the new list or library from the drop-down list.
3. **Navigation**– Select **Yes** or **No** to determine whether or not to display this list or library on the Quick Launch.
4. Click **OK** to create the new list or library, or click **Cancel** to close the Create Container interface.

Building Plans

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

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

Building Plans Using Wizard Mode

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

***Note:** Make sure that the source node and the destination node are in the same version of SharePoint. If the site within SharePoint 2013 is a SharePoint 2010 mode site, it can only be copied or moved to the same mode site.

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

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

node will look like after the job is executed, click **Show Preview**. The source node is marked by a prompt message: **From Source**.

When you have finished configuring the method for this plan, click **Next**.

3. **Data Selection** – Configure the **following** settings:

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

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

- b. **Configuration** – Choose whether or not to migrate configuration to the destination:

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

***Note:** This function will only take effect if the source node is a site, the destination node is a top-level site or a site collection, and if you chose **Merge** as the action in step 1.

- o Leave the **Copy/Move configuration** checkbox deselected if you don't want to migrate configuration to the destination. For more information on how to configure the Configuration section, refer to [Configuring the Configuration Section](#).

- c. **Security** – Select the **Copy/Move security** checkbox to copy/move the user and/or group permissions from the source node to the destination node, including SharePoint permission level and permission inheritance of SharePoint objects. Select the **Exclude user/group without permission** checkbox to not copy or move users and/or groups that have no permissions to the destination. The user/group without permission refers to the user/group that exists in the source node, but does not have any permission. You cannot view this kind of user/group in the **People and Groups > SiteName Members** page of a site, but you can view it in the **People and Groups > All People** page. To go to the **People and Groups > All People** page, modify **MembershipGroupId=8** in the URL of the **People and Groups > SiteName Members** page to **MembershipGroupId=0**. You will be brought to the **People and Groups > All People** page.

- d. **Content** – Select the **Copy/Move content** checkbox to copy/move content in libraries, folders and items from the source node to the destination node. Select the **Include list**

attachment to also copy/move attached content in lists from the source node to the destination node.

- e. **User Profile** – Select the **Copy/Move user profile** checkbox if you want to move user profiles from the source node to the destination node.

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

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

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

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

- **Term** – Copy terms that are used in the source, their parent terms, the term sets where the used terms reside, and the names of the groups where the used terms reside to the destination.
- **Term set** – Copy the whole term sets where the used terms reside in the source (regardless of whether or not the terms in the term sets are used by the source node or not) to the destination.
- **Managed Metadata Service** – Copy the whole Managed Metadata Services that are related to the source node to the destination.

***Note:** Copying the Managed metadata Service will automatically activate the service in the destination, if the service in destination is not activated.

When you have finished configuring the data selection settings, click **Next**.

- 4. **Schedule** – Configure a schedule for this plan:
 - If you selected **Copy** in the **Method** section, choose one of the following options:
 - Select **No Schedule** to manually execute this plan.

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

When you have finished configuring the schedule, click **Next**.

5. **Advanced** – Configure the following advanced settings:
 - a. **Preserve the Null Column Values** – Select **Yes** to preserve the null values of item columns (such as newly created columns), or select **No** to replace null values with default values in the destination node.
 - b. **Data Compression** – Select the **Compression** checkbox if you want to compress the data when it is copied. If you choose to compress the data, use the slider to select the compression rate. Fastest compression rate results in a larger data set. Best compression rate results in a smaller, better quality data set, but the compression takes more time to perform.

***Note:** Smaller data sets take longer to backup and recover.
 - c. **Data Encryption** – Select the **Encryption** checkbox if you want to encrypt the data. Then select the default security profile or a previously configured security profile from the drop-down list to protect your backup data using the security keys generated by the specified encryption method, or click **New Security Profile** to create a new one. For details on creating a security profile, refer to the [DocAve 6 Control Panel Reference Guide](#).

***Note:** Encrypted data takes longer to backup and recover.
 - d. **Column Mapping** – Maps source columns to destination columns. The destination column name will be replaced by the configured source column name, and you can add

value mapping. According to column type, the source column and the destination column can be the same or different. The column can also be changed to Managed Metadata or Lookup. Select a column mapping you previously created from the drop-down list, or click **New Column Mapping** from the drop-down list. For information on creating a column mapping, see the [DocAve 6 Control Panel Reference Guide](#).

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

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

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

- f. **Template Mapping** – Replaces site and list templates. By inputting or selecting a template ID, the source template is changed to the destination template. Select a template mapping you previously created from the drop-down list, or click **New Template Mapping** from the drop-down list. For information on creating a template mapping, see the [DocAve 6 Control Panel Reference Guide](#).
- g. **User Mapping** – Replaces an existing source node username with an existing destination node username or a default username in the destination, or add a place holder account to keep user metadata even if the user no longer exists. Select a user mapping you previously created from the drop-down list, or click **New User Mapping** from the drop-down list. For information on creating a user mapping, see the [DocAve 6 Control Panel Reference Guide](#).
- h. **Domain Mapping** – Maps a source domain to a destination domain. The destination domain name will be replaced by the configured source domain name, and the user in the source domain will be mapped to the destination user which has the same login name. Select a domain mapping you previously created from the drop-down list, or click **New Domain Mapping** from the drop-down list. For information on creating a domain mapping, see the [DocAve 6 Control Panel Reference Guide](#).
- i. **Language Mapping** – Choose if you want to display destination node in a different language than source node after the plan has been executed. Select a language mapping you previously created from the drop-down list, or click **New Language Mapping** from the drop-down list. For information on creating a language mapping, see the [DocAve 6 Control Panel Reference Guide](#).

- j. **Backup Environment Before Running Plan** – Choose from the following configurations:
 - o Select the **Backup the source environment** checkbox (for move jobs only) to create a copy of the source node prior to performing the move.
 - o Select the **Backup the destination environment** checkbox to create a copy of the destination node prior to performing the copy (allows you to undo the copy). If you choose to back up the destination environment before performing a copy, you must designate a storage policy. Select a previously configured storage policy or click **New Storage Policy** to create a new one.

***Note:** Content Manager only supports the Backup type storage policy. For more information on storage policies, see the [DocAve 6 Control Panel Reference Guide](#).
- k. **Conflict Resolution** – Choose **Skip**, **Merge**, or **Replace** from the **Container level conflict resolution** drop-down list. Select the **Check lower objects** checkbox if you want to configure content level conflict resolution, then choose **Skip**, **Overwrite**, **Overwrite by Last Modified Time**, or **Append** from the **Content level conflict resolution** drop-down list. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A – Conflict Resolution](#).
- l. **Notification** – Choose the type of notification report and designate which DocAve user will receive an e-mail notification report. Select a notification profile you previously created from the drop-down list. Click **View** beside the drop-down list to view details of the notification profile, or click **New Notification Profile** from the drop-down list. For information on creating a notification profile, see the [DocAve 6 Control Panel Reference Guide](#).
- m. **Associated Plan Group** – Adds the plan to one or more plan groups to manage multiple plans with common settings. Select a plan group you previously created from the drop-down list, or click **New Plan Group** from the drop-down list to create a new one. For information on creating a plan group, see the [DocAve 6 Control Panel Reference Guide](#).

When you have finished configuring the advanced settings, click **Next**.

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

Configuring the Configuration Section

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

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

Building Plans Using Form Mode

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

***Note:** Make sure that the source node and the destination node are in the same version of SharePoint. If the site within SharePoint 2013 is a SharePoint 2010 mode site, it can only be copied or moved to the same mode site.

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

1. **Plan Name** – Enter the new **Plan Name**, then enter a **Description** for future reference. Click **Next**.
2. **Method** – Select **Copy** or **Move** for the type of job you want Content Manager to run when this plan is executed. If you select **Move**, you may also configure the following settings:
 - **Source Documents/Items Deleted Method** – Select **Manually** to delete the source content yourself once the copy/move job is complete (select the copy/move job in Job Monitor, then click **Delete** on the ribbon and select **Delete Content** from the drop-down list), or select **Automatically** to have DocAve delete the source content once the copy/move job is complete.

- **Delete Source Checked Out Documents** – By default, **No** is selected. Select **Yes** if you want to have DocAve delete the checked out documents on the source node when source content is deleted.
3. **Action** – Select **Attach** to transfer the source node as a child node underneath the destination node, or select **Merge** to add the content, securities, and configurations of the source node to the destination node. To see what the data tree of the destination node will look like after the job is executed, click **Show Preview**.
 4. **Backup Environment Before Running Plan** – Configure the following configurations:
 - Select the **Backup the source environment** checkbox (for move jobs only) to create a copy of the source node prior to performing the move.
 - Select the **Backup the destination environment** checkbox to create a copy of the destination node prior to performing the copy (allows you to undo the copy). If you choose to back up the destination environment before performing a copy, you must designate a storage policy. Select a previously configured storage policy or click **New Storage Policy** to create a new one.

***Note:** Content Manager only supports the Backup type storage policy. For more information on storage policies, see the [DocAve 6 Control Panel Reference Guide](#).
 5. **Schedule** – Configure a schedule for this plan:
 - If you selected **Copy** in the **Method** section, choose one of the following options:
 - Select **No Schedule** to manually execute this plan.
 - Select **Start Time** if you want to have this plan be executed at a specified time. Select the date and time you want this plan to be executed. If applicable, you may change the time zone by clicking on the hyperlink to select a different time zone.
 - If you selected **Move** in the **Method** section, choose one of the following options:
 - Select **No Schedule** to manually execute this plan.
 - Select **Configure the schedule myself** to specify the frequency to run this recurring schedule. Configure the following settings:
 - **Start time** – Specify the time when this plan is executed.
 - **Interval** – Specify the interval for this plan.
 - **No end date** – The **Move** jobs will run on a configured schedule until you manually end it.
 - **End after __ occurrences** – The **Move** jobs will stop running after the number of times you specify here.
 - **End by __** – The **Move** jobs will end on the date and time you specify here.

6. Click **Advanced** to configure more options.
7. **Filter Policy** – Select a filter policy you previously created from the drop-down list, or click **New Filter Policy** from the drop-down list. Filter policies allow you to select specific objects or data within each SharePoint level from web application down to the item level. For information on creating a Filter Policy, see the [DocAve 6 Control Panel Reference Guide](#).

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

8. **Configuration** – Choose whether or not to migrate configuration to the destination:
 - Select the **Copy/Move configuration** checkbox to copy/move the properties, descriptions, titles, settings, and features from the source node to the destination node. If you want to keep the look and feel of the source site including the quick launch, top link bar, tree view, site theme, and master page, then select the **Keep look and feel** checkbox.

***Note:** This function will only take effect if the source node is a site, the destination node is a top-level site or a site collection, and if you chose **Merge** as the action in step 1.
 - Leave the **Copy/Move configuration** checkbox deselected if you don't want to migrate configuration to the destination. Then, choose from the following options:
 - Select **Copy/Move the item-dependent columns and content types to maintain item integrity**. Then, select a conflict resolution method for these items' columns and content types from the drop-down list:
 - **Do not copy/move the columns and content types, or the corresponding items** – Ignores the conflicting columns, content types, and the corresponding items, and do nothing on the source and destination node.
 - **Overwrite the columns and content types** – Overwrites the destination columns and content types with the source node.
 - **Append the columns and content types to destination** – Keeps the destination columns and content types when there is a conflict. In addition, copy the source columns and content types to the destination node with a numerical suffix added (for example, ColumnName_1, ColumnName_2, etc.).
 - Select **Do not copy/move the item-dependent columns or content types**. The corresponding items are not copied/moved to the destination. The job report will show items if the corresponding column or content type is not found in the destination node.
9. **Security** – Select the **Copy/Move security** checkbox to copy/move the user and/or group permissions from the source node to the destination node, including SharePoint permission level and permission inheritance of SharePoint objects. Select the **Exclude user/group without permission** checkbox to not copy or move users and/or groups that have no permissions to the destination. The user/group without permission refers to the user/group that exists in the source node, but does not have any permission. You cannot view this kind of user/group in the

People and Groups > SiteName Members page of a site, but you can view it in the **People and Groups > All People** page. To go to the **People and Groups > All People** page, modify **MembershipGroupId=8** in the URL of the **People and Groups > SiteName Members** page to **MembershipGroupId=0**. You will be brought to the **People and Groups > All People** page.

10. **Content** – Select the **Copy/Move content** checkbox to copy/move content in libraries, folders and items from the source node to the destination node. Select the **Include list attachment** to also copy/move attached content in lists from the source node to the destination node.

11. **User Profile** – Select the **Copy/Move user profile** checkbox if you want to move user profiles from the source node to the destination node.

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

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

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

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

- **Term** – Copy terms that are used in the source, their parent terms, the term sets where the used terms reside, and the names of the groups where the used terms reside to the destination.
- **Term set** – Copy the whole term sets where the used terms reside in the source (regardless of whether or not the terms in the term sets are used by the source node or not) to the destination.
- **Managed Metadata Service** – Copy the whole Managed Metadata Services that are related to the source node to the destination.

***Note:** Copying the Managed metadata Service will automatically activate the service in the destination, if the service in destination is not activated.

14. **Preserve the Null Column Values** – Select **Yes** to preserve the null values of item columns (such as newly created columns), or select **No** to replace null values with default values in the destination node.

15. **Data Compression** – Select the **Compression** checkbox if you want to compress the data when it is copied. If you choose to compress the data, use the slider to select the compression rate. Fastest compression rate results in a larger data set. Best compression rate results in a smaller, better quality data set, but the compression takes more time to perform.
***Note:** Smaller data sets take longer to backup and recover.
16. **Data Encryption** – Select the **Encryption** checkbox if you want to encrypt the data. Then select the default security profile or a previously configured security profile from the drop-down **list** to protect your backup data using the security keys generated by the specified encryption method, or click **New Security Profile** to create a new one. For details on creating a security profile, refer to the [DocAve 6 Control Panel Reference Guide](#).
***Note:** Encrypted data takes longer to backup and recover.
17. **Column Mapping** – Maps source columns to destination columns. The destination column name will be replaced by the configured source column name, and you can add value mapping. According to column type, the source column and the destination column can be the same or different. The column can also be changed to Managed Metadata or Lookup. Select a column mapping you previously created from the drop-down list, or click **New Column Mapping** from the drop-down list. For information on creating a column mapping, see the [DocAve 6 Control Panel Reference Guide](#).
***Note:** If you select the column type **Change to Lookup** while setting up your column mapping, make sure that the **Lookup** column can only be associated with the list or list column that exists in the destination.
18. **Content Type Mapping** – Replaces source content types with destination content types according to the condition that you set up. Select a content type mapping you previously created from the drop-down list, or click **New Content Type Mapping** from the drop-down list. For information on creating a content type mapping, see the [DocAve 6 Control Panel Reference Guide](#).
***Note:** Make sure that the source content type and the destination content type are the same.
19. **Template Mapping** – Replaces site and list templates. By inputting or selecting a template ID, the source template is changed to the destination template. Select a template mapping you previously created from the drop-down list, or click **New Template Mapping** from the drop-down list. For information on creating a template mapping, see the [DocAve 6 Control Panel Reference Guide](#).
20. **User Mapping** – Maps a source user to a target user. If the same user has a different username in Domain A than in Domain B, or if you want to copy or move an individual user's content, permissions, and metadata in Domain A to another user in Domain B, the user's permissions and metadata will not be lost when content is moved. Select a user mapping you previously created from the drop-down list, or click **New User Mapping** from the drop-down list. For information on creating a user mapping, see the [DocAve 6 Control Panel Reference Guide](#).
21. **Domain Mapping** – Maps a source domain to a destination domain. The destination domain name will be replaced by the configured source domain name, and the user in the source domain will be mapped to the destination user which has the same login name. Select a domain

mapping you previously created from the drop-down list, or click **New Domain Mapping** from the drop-down list. For information on creating a domain mapping, see the [DocAve 6 Control Panel Reference Guide](#).

22. **Language Mapping** – Choose if you want to display destination node in a different language than source node after the plan has been executed. Select a language mapping you previously created from the drop-down list, or click **New Language Mapping** from the drop-down list. For information on creating a language mapping, see the [DocAve 6 Control Panel Reference Guide](#).
23. **Conflict Resolution** – Choose **Skip**, **Merge**, or **Replace** from the **Container level conflict resolution** drop-down list. Select the **Check lower objects** checkbox if you want to configure content level conflict resolution, then choose **Skip**, **Overwrite**, **Overwrite by Last Modified Time**, or **Append** from the **Content level conflict resolution** drop-down list. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A – Conflict Resolution](#).
24. **Notification** – Choose the type of notification report and designate which DocAve user will receive an e-mail notification report. Select a notification profile you previously created from the drop-down list. Click **View** beside the drop-down list to view details of the notification profile, or click **New Notification Profile** from the drop-down list. For information on creating a notification profile, see the [DocAve 6 Control Panel Reference Guide](#).
25. **Associated Plan Group** – Add the plan to one or more plan groups to manage multiple plans with common settings. Select a plan group you previously created from the drop-down list, or click **New Plan Group** from the drop-down list to create a new one. For information on creating a plan group, see the [DocAve 6 Control Panel Reference Guide](#).
26. Click **OK** on the ribbon, and then select **OK** from the drop-down list to save the plan. To save the plan and execute it right away, click **OK** on the ribbon, and then select **OK and Run Now** from the drop-down list.
27. At any time, click **Cancel** on the ribbon to abandon the new plan's configuration and return to the **Home** tab of Content Manager.

Managing Plans

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

In Plan Manager, you will see a list of all of your previously created plans. You can customize how these plans are displayed in a number of different ways:

- **Search** – Filters the plans displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the viewing pane, type in the keyword for the plan you want to display. You can select to **Search all pages** or **Search current page**.
***Note:** The search function is not case sensitive.
- **Manage columns** (±) – Manage which columns are displayed in the list so that only the information you want to see will be shown. Select the manage columns button (±), and

then check the checkbox next to the column name to have that column shown in the list.

- **Hide the column** (☒) – Hover over a column heading and then select the hide the column button (☒) to hide the column.
- **Filter the column** (🔍) – Filter which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Hover over a column heading in a column you want to filter, and then select the filter the column button (🔍). Check the checkbox next to the item name to have that item shown in the list.

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

- **View Details** – Click **View Details** on the ribbon, right-click at the plan name, and then select **View Details** from the drop-down menu, or select **View Details** from the plan name's drop-down list to see the Plan Details page of the selected plan. Here you can also click **Edit** on the ribbon to make changes to the plan's settings. You will be brought to the Edit Plan page where you can change the source and destination nodes for this plan in the **Preview** tab, or click the **Settings** tab to edit the plan's settings in the Edit Plan interface. Configure the settings in Edit Plan as you would when [Building Plans Using Form Mode](#). Click **Save** on the ribbon, and then select **Save** from the drop-down list to save the plan. To save the plan and execute it right away, click **Save** on the ribbon, then select **Save and Run Now** from the drop-down list. To save a changed plan as a new one, click **Save As** on the ribbon. At any time, click **Cancel** on the ribbon to return to the Plan Manager without saving any of your changes.
- **Edit** – Click **Edit** on the ribbon, right-click at the plan name and then select **Edit** from the drop-down menu, or select **Edit** from the plan name's drop-down list to make changes to the selected plan's settings. You will be brought to the Edit Plan page where you can change the source and destination nodes for this plan in the **Preview** tab, or click the **Settings** tab to edit the plan's settings in the Edit Plan interface. Configure the settings in Edit Plan as you would when [Building Plans Using Form Mode](#). Click **Save** on the ribbon, and then select **Save** from the drop-down list to save the plan. To save the plan and execute it right away, click **Save** on the ribbon, then select **Save and Run Now** from the drop-down list. To save a changed plan as a new one, click **Save As** on the ribbon. At any time, click **Cancel** on the ribbon to return to the Plan Manager without saving any of your changes.
- **Delete** – Click **Delete** on the ribbon, right-click at the plan name and then select **Delete** from the drop-down menu, or select **Delete** from the plan name's drop-down list to delete the selected plan. A warning message will appear to confirm the deletion. Click **OK** to delete the selected plan, or click **Cancel** to return to Plan Manager without deleting the selected plan.
- **Test Run** – Click **Test Run** on the ribbon to simulate the execution of the selected plan. You can see the results of the test run in Job Monitor. For more information, see the [DocAve 6 Job Monitor Reference Guide](#).

- **Run Now** – Click **Run Now** on the ribbon to execute the plan immediately. You can see the review details about the plan’s execution in Job Monitor. For more information, see the [DocAve 6 Job Monitor Reference Guide](#).

Using Data Import and Data Export

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

Exporting Content

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

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

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

6. **Content** – Select the **Export content** checkbox to export content in libraries, folders, and items from the source node to the destination node. Select the **Include list attachment** to also export attached content in lists from the source node to the destination node.
7. **Workflow** – Select the **Include workflow definition** checkbox to export the definition of existing workflows for the selected content from the source node to the destination node. Select the **Include workflow instance** checkbox to also export the state, history, and tasks of existing workflows for the selected content from the source node to the destination node. By default, the **Include completed instance** checkbox is selected to copy the completed instance from the source node to the destination node. You can select **Include running instance** checkbox if you want to copy the currently running instance in the source node to the destination node, and then select one of the following radio buttons:
 - **Cancel workflows** – Cancel the copied or moved running workflow in the destination node after the Content Manager jobs.
 - **Restart workflows** – Restart the copied or moved running workflow in the destination node after the Content Manger jobs.
8. **Managed Metadata Service Setting** – Select the **Copy Managed Metadata Service** checkbox if you want to copy the related managed metadata services from the source node to the destination node, and then select one of the following radio buttons:
 - **Term** – Copy terms that are used in the source, their parent terms, the term sets where the used terms reside, and the names of the groups where the used terms reside to the destination.
 - **Term set** – Copy the whole term sets where the used terms reside in the source (regardless of whether or not the terms in the term sets are used by the source node or not) to the destination.
 - **Managed Metadata Service** – Copy the whole Managed Metadata Services that are related to the source node to the destination.
 - ***Note:** Copying the Managed metadata Service will automatically activate the service in the destination, if the service in destination is not activated.
9. **Data Compression** – Select the **Compression** checkbox to compress the data when it is exported. If you choose to compress the data, use the slider to select the compression rate. Faster compression rates result in larger data sets. Best compression rates result in smaller, better quality data sets, but the compression takes more time to perform.
 - ***Note:** Smaller data sets take longer to backup and recover.
10. **Data Encryption** – Select the **Encryption** checkbox to encrypt the data. Then select the Default Security Profile or a previously configured security profile from the drop-down list to protect your backup data using the security keys generated by the specified encryption method. Or click **New Security Profile** to create a new one. For details on creating a security profile, refer to the [DocAve 6 Control Panel Reference Guide](#). Note that encrypted data takes longer to backup and recover.

11. **Generate Metadata File** – Select the **Generate Metadata File** checkbox to generate Microsoft Excel files with metadata for each library or list. The metadata files are stored in the export location **you** configured. You can edit the metadata file to add, edit, or delete the metadata of items in batch.
12. **Notification** – Choose the type of notification report and designate which DocAve user will receive an e-mail notification report. Select a notification profile you previously created from the drop-down list. Click **View** beside the drop-down list to view details of the notification profile or click **New Notification Profile** from the drop-down list. For information on creating a notification profile, see the [DocAve 6 Control Panel Reference Guide](#).
13. **Associated Plan Group** – Add the plan to one or more plan groups to manage multiple plans with **common** settings. Select a plan group you previously created from the drop-down list or click **New Plan Group** from the drop-down list to create a new one. For information on creating a plan group, see the [DocAve 6 Control Panel Reference Guide](#).
14. Click **OK** to save the export plan. To save the export plan and execute it right away, click **OK**, and then select **OK and Run Now**.
15. Click **Cancel** at any time to abandon the new export plan’s configuration and return to the **Home** tab of Content Manager.

Importing Content

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

1. **Plan Name** – Enter the new **Plan Name**, then enter a **Description** for future reference.
2. **Browse** – In the **Browse** tab, click on the export location to expand its data tree. Select the exported content. Click the **Details** tab to see what content are included.
3. **Action** – Select **Attach** to transfer the source node as a child node underneath the destination node, or select **Merge** to add the content, securities, and configurations of the source node to the destination node. To see what the data tree of the destination node will look like after the job is executed, click **Show Preview**.
4. **Schedule** – Configure a schedule for this plan by choosing one of the following options:
 - Select **No Schedule** to manually execute this plan.
 - Select **Start Time** if you want to have this plan be executed at a specified time. Select the date and time you want this plan to be executed. If applicable, you may change the time zone by clicking on the hyperlink to select a different time zone.
5. Click **Advanced** to configure further options.
6. **Conflict Resolution** – Choose **Skip**, **Merge**, or **Replace** from the **Container level conflict resolution** drop-down list. Select the **Check lower objects** checkbox if you want to configure content **level** conflict resolution, then choose **Skip**, **Overwrite**, **Overwrite by Last Modified Time**, or **Append** from the **Content level conflict resolution** drop-down list. For detailed information

on how Content Manager resolves conflicts based on these configurations, see [Appendix A – Conflict Resolution](#).

7. **Configuration** – If you want to import the properties, descriptions, titles, settings, and features from the source node to the destination node, select the **Import configuration** checkbox. If you do not want to import the configurations, leave the checkbox deselected, and configure the following options:
 - Select the **Import the item-dependent columns and content types to maintain item integrity** radio button to import the item dependent columns and content types to destination and choose one of the following options from the **Conflict resolution for dependent items** drop-down list:
 - **Do not copy/move the columns and content types, or the corresponding items** – Ignores the conflicting columns, content types, and the corresponding items and do nothing on the source and destination node.
 - **Overwrite the columns and content types** – Overwrites the destination columns and content types with that of the source node.
 - **Append the columns and content types to destination** – Keeps the destination columns and content types when there is a conflict. In addition, copy the source columns and content types to the destination node with a numerical suffix added (for example, ColumnName1, ColumnName2, etc.).
 - Select the **Do not Import the item-dependent columns or content types** radio button to not import item dependent columns or content types to destination. The corresponding items will not be imported to the destination. DocAve will report the items if the corresponding column or content type is not found in the destination node.
8. **Security** – Select the **Import security** checkbox to import the user and/or group permissions from the source node to the destination node, including SharePoint permission level and permission inheritance of SharePoint objects. Select the **Exclude user/group without permission** checkbox to not import users and/or groups that have no permissions to the destination. The user/group without permission refers to the user/group that exists in the source node, but does not have any permission. You cannot view this kind of user/group in the **People and Groups > SiteName Members** page of a site, but you can view it in the **People and Groups > All People** page. To go to the **People and Groups > All People** page, modify **MembershipGroupId=8** in the URL of the **People and Groups > SiteName Members** page to **MembershipGroupId=0**. You will be brought to the **People and Groups > All People** page.
9. **Workflow** – Select the **Include workflow definition** checkbox to import the definition of existing workflows for the selected content from the source node to the destination node. Select the **Include workflow instance** checkbox to also import the state, history, and tasks of existing workflows for the selected content from the source node to the destination node. By default, the **Include completed instance** checkbox is selected to copy the completed instance from the source node to the destination node. You can select **Include running instance** checkbox if you want to copy the currently running instance in the source node to the destination node, and then select one of the following radio buttons:
 - **Cancel workflows** – Cancel the copied or moved running workflow in the destination node after the Content Manager jobs.

- **Restart workflows** – Restart the copied or moved running workflow in the destination node after the Content Manger jobs.
10. **Managed Metadata Service Setting** – Select the **Copy Managed Metadata Service** checkbox if you want to copy the related managed metadata services from the source node to the destination node, and then select one of the following radio buttons:
 - **Term** – Copy terms that are used in the source, their parent terms, the term sets where the used terms reside, and the names of the groups where the used terms reside to the destination.
 - **Term set** – Copy the whole term sets where the used terms reside in the source (regardless of whether or not the terms in the term sets are used by the source node or not) to the destination.
 - **Managed Metadata Service** – Copy the whole Managed Metadata Services that are related to the source node to the destination.

***Note:** Copying the Managed metadata Service will automatically activate the service in the destination, if the service in destination is not activated.
 11. **Preserve the Null Column Values** – Select **Yes** to preserve the null values of item columns (such as newly created columns), or select **No** to replace null values with default values in the destination node.
 12. **Column Mapping** – Maps source columns to destination columns by using a customized column mapping or an existing metadata file which is generated in Export Location. Choose **Use Column Mapping** and select a column mapping you previously created from the drop-down list, or click **New Column Mapping** from the drop-down list. For information on creating a column mapping, see the [DocAve 6 Control Panel Reference Guide](#). To apply an existing metadata file in the Export Location to this import job, choose **Use existing metadata file**.

***Note:** If you choose to change a column to a **Lookup** column, make sure that the **Lookup** column can only be associated with the list or list column that exists in the destination.
 13. **Content Type Mapping** – Maps source content types to specified content types in destination, or change the content type name to another one, according to the condition that you set up. Select a content type mapping you previously created from the drop-down list, or click **New Content Type Mapping** from the drop-down list. For information on creating a content type mapping, see the [DocAve 6 Control Panel Reference Guide](#).

***Note:** Make sure that the source content type and the destination content type are the same.
 14. **Template Mapping** – Replaces site templates and list templates. By inputting or selecting a template ID, the source template is changed to the destination template. Select a template mapping you previously created from the drop-down list, or click **New Template Mapping** from the drop-down list. For information on creating a template mapping, see the [DocAve 6 Control Panel Reference Guide](#).
 15. **User Mapping** – Maps a source user to a target user. If the same user has a different username in Domain A than in Domain B, or if you want to move an individual user's content, permissions, and metadata in Domain A to another user in Domain B, the user's permissions and metadata

will not be lost when the content is moved. Select a user mapping you previously created from the drop-down list, or click **New User Mapping** from the drop-down list. For information on creating a user mapping, see the [DocAve 6 Control Panel Reference Guide](#).

16. **Domain Mapping** – Maps a source domain to a destination domain. The destination domain name will be replaced by the configured source domain name, and the user in the source domain will be mapped to the destination user which has the same login name. Select a domain mapping you previously created from the drop-down list, or click **New Domain Mapping** from the drop-down list. For information on creating a domain mapping, see the [DocAve 6 Control Panel Reference Guide](#).
17. **Language Mapping** – Choose if you want to display the destination node in a different language than source node after the plan has been executed. Select a language mapping you previously created from the drop-down list, or click **New Language Mapping** from the drop-down list. For information on creating a language mapping, see the [DocAve 6 Control Panel Reference Guide](#).
18. **Backup Environment Before Running Plan** – Select the **Backup the destination environment** checkbox to create a copy of the destination node prior to performing the copy (allows you to undo the copy). If you choose to back up the destination environment before performing a copy, you must designate a storage policy. Select a previously configured storage policy or click **New Storage Policy** to create a new one.

***Note:** Content Manager only supports the Backup type storage policy. For more information on storage policies, see the [DocAve 6 Control Panel Reference Guide](#).
19. **Notification** – Choose the type of notification report and designate which DocAve user will receive an e-mail notification report. Select a notification profile you previously created from the drop-down list. Click **View** beside the drop-down list to view details of the notification profile or click **New Notification Profile** from the drop-down list. For more information on creating a notification profile, see the [DocAve 6 Control Panel Reference Guide](#).
20. **Associated Plan Group** – Add the plan to one or more plan groups to manage multiple plans with common settings. Select a plan group you previously created from the drop-down list or click **New Plan Group** from the drop-down list to create a new one. For information on creating a plan group, see the [DocAve 6 Control Panel Reference Guide](#).
21. Click **OK** to save the export plan. To save the export plan and execute it right away, click **OK**, and then select **OK and Run Now**.
22. Click **Cancel** at any time to abandon the new plan's configuration and return to the **Home** tab of Content Manager.

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

Editing Metadata File

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

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

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

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

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

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

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

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

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

Advanced Settings

For advanced users, Content Manager offers these additional settings that can be configured and saved to apply to Content Manager plans:

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

While these settings can be accessed in Content Manager, they are configured in the Control Panel. For more detailed information about these settings, see the [DocAve 6 Control Panel Reference Guide](#).

Content Manager for SharePoint Online

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

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

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

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

***Note:** Content Manager for SharePoint Online only supports the Create Container function for site and list level in a SharePoint Online destination node.

***Note:** For Office 365 SharePoint Online site collections, the publishing feature must be activated at both the source and the destination. If publishing is not activated, errors may result (such as page duplication or inability to open pages).

***Note:** If given the corresponding permissions, Tenant Group users can view and modify a DocAve plan, profile, or job created by the other users that are also in this group. For detailed information on Tenant Group users, see the [DocAve 6 Control Panel Reference Guide](#).

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

***Note:** Content Manager for SharePoint Online does not support to copy or move the Apps for SharePoint.

DocAve Content Manager Use Case

The following use case demonstrates the use of features described in this guide in a real-world situation. This use case is intended to give the user a sense of when to use certain features of Content Manager, and how Content Manager works with other DocAve products to create a better user experience overall.

Restructuring SharePoint Environments

Bob is the head of an IT department for a medium-sized company that uses Microsoft SharePoint as their main collaboration platform. Over time, the organization has grown, and new verticals and departments have been created to accommodate the additional business activities. With the growth, new sites and pages were created on SharePoint to allow these departments to have their own space for structuring content, projects, and workflows. Bob knew that while ad hoc sites and pages were sufficient solutions when the departments were first added, their SharePoint environment would become disorganized over time, making content hard to find. As this problem became more apparent, Bob met with the company's management to plan out how to restructure their SharePoint environment to make it more efficient to use. Once Bob had planned out the new structure for their SharePoint environment, he launched DocAve Content Manager to create plans for moving and copying site collections, sites, pages, lists, libraries, and items. When creating these plans, Bob also made sure to configure the schedule so that the jobs ran after business hours so he could minimize disruption to daily business processes without having to work overnight. Once the restructuring was complete, Bob performed admin searches using DocAve Administrator for SharePoint to make sure all of the permissions for the new environment were correct.

Appendix A – Conflict Resolution

Container Level Conflict Resolution

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

Content Level Conflict Resolution

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

Appendix B – Supported Online and Offline Non-SharePoint Settings

Supported Online Settings

The following table identifies the supported settings for copy and move jobs between non-SharePoint Online environments.

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

Supported Online Settings			
Action	Attach		
	Merge		
	Preview		
Filter Policy			
Select Source Components	Configuration	Copy/Move configuration	Keep look and feel
		Uncheck Copy/Move configuration	Do not copy/move the columns and content types, or the corresponding items
			Overwrite the columns and content types
		Copy/Move the item dependent columns and content types to maintain item integrity	Append the columns and content types to destination
	Do not copy/move the item dependent columns or content types. Report the items if the corresponding column or content type is not found in destination.		
	Security	Exclude user/group without permission	
	Content	Include list attachment	
User Profile			
Workflow	Include workflow definition		
	Include workflow instance	Include completed instance	
		Include running instance	Cancel workflows
		Restart workflows	
Managed Metadata Service Setting	Copy Managed Metadata Service		Term
			Term set
			Managed Metadata Service
Preserve the Null Column Values			
Data Compression			
Data Encryption			
Column Mapping			
Content Type Mapping			
Template Mapping			
Domain Mapping			

Supported Online Settings		
User Mapping		
Language Mapping		
Source Documents/Items Deleted Method (Move Only)	Manually	
	Automatically	
Delete Source Checked Out Documents (Move Only)		
Backup Environment Before Running Plan	Backup the source environment (Move Only)	
	Backup the destination environment	
Conflict Resolution	Container level conflict resolution	Skip
		Merge
		Replace
	Check lower objects	
	Content level conflict resolution	Skip
		Overwrite
Overwrite by Last Modified Time		
Append		
Notification		
Associated Plan Group		

Supported Offline Settings

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

Export Settings

Export Settings			
Filter Policy			
Select Source Components	Content	Include list attachment	
	User Profile		
Data Compression			
Data Encryption			
Workflow	Include workflow definition		
	Include workflow instance	Include completed instance	
		Include running instance	Cancel workflows
			Restart workflows
Generate Metadata File			
Notification			
Associated Plan Group			

Import Settings

Import Settings	
Action	Attach
	Merge

Import Settings				
	Preview			
Conflict Resolution	Container level conflict resolution	Skip		
		Merge		
		Replace		
	Check lower objects			
	Content level conflict resolution	Skip		
Overwrite				
Overwrite by Last Modified Time				
Append				
Select Source Components	Configuration			
	Security			
Workflow	Include workflow definition			
	Include workflow instance	Include completed instance		
		Include running instance	Cancel the workflow	
			Restart the workflow	
Managed Metadata Service Setting	Copy Managed Metadata Service	Term		
		Term set		
		Managed Metadata Service		
Preserve the Null Column Values				
Column Mapping				
Content Type Mapping				
Template Mapping				
Domain Mapping				
User Mapping				
Language Mapping				
Backup Environment Before Running Plan	Backup the destination environment			
Notification				
Associated Plan Group				

Appendix C – Supported and Unsupported SharePoint Online Settings for SharePoint 2010

The following table identifies the supported and unsupported SharePoint Online settings for SharePoint 2010 for copy and move jobs against with the settings of SharePoint on-premise. Note that options which only exist in Move have been marked as (Move Only).

Functionality Name			Support Status	
Action	Attach		Supported	
	Merge		Supported	
	Preview			
Source Documents/Items Deleted Method (Move Only)	Manually		Supported	
	Automatically		Supported	
Delete Source Checked Out Documents (Move Only)			Supported	
Filter Policy			Supported	
Select Source Components	Configuration	Copy/Move configuration	Keep look and feel	Supported
		Uncheck Copy/Move configuration	Do not copy/move the columns and content types, or the corresponding items	Supported
			Overwrite the columns and content types	Supported
		Copy/Move the item-dependent columns and content types to maintain item integrity	Append the columns and content types to destination	Supported
	Do not copy/move the item-dependent columns or content types. Report the items if the corresponding column or content type is not found in destination.		Supported	
	Security	Copy/Move security		Supported
		Exclude user/group without permission		Unsupported
	Content	Include list attachment		Supported
	User Profile			Unsupported
	Schedule	No schedule		Supported
Start time		Supported		
Configure the schedule myself (Move Only)		Start Time		Supported
		Interval: __ Days		Supported
		No end date		Supported
	End after __ occurrences		Supported	

Functionality Name			Support Status	
		End by	Supported	
Workflow	Include workflow definition		Unsupported	
	Include workflow instance	Include completed instance	Unsupported	
		Include running instance	Cancel workflows	Unsupported
			Restart workflows	Unsupported
Managed Metadata Service Setting	Copy Managed Metadata Service	Term	Unsupported	
		Term set	Unsupported	
		Managed Metadata Service	Unsupported	
Preserve the Null Column Values			Supported	
Data Compression			Supported	
Data Encryption			Supported	
Column Mapping			Supported	
Content Type Mapping			Supported	
Template Mapping			Supported	
User Mapping	Normal User Mapping		Supported	
	Add a default destination user		Supported	
	Add a place holder account to keep metadata even if the user no longer exists		Unsupported	
Domain Mapping			Supported	
Language Mapping			Supported	
Backup Environment Before Running Plan	Backup the source environment (Move Only)		Supported	
	Backup the destination environment		Supported	
Conflict Resolution	Container Level	Skip	Supported	
		Merge	Supported	
		Replace	Supported	
	Check lower objects		Supported	
	Content Level	Skip	Supported	
		Overwrite	Supported	
		Overwrite by Last Modified Time	Supported	
Append		Unsupported		
Notification			Supported	
Associated Plan Group			Supported	
Create Container			Supported (for site/list/folder)	
			Unsupported (for site collection)	

Appendix D – Supported and Unsupported SharePoint Online Settings for SharePoint 2013

The following table identifies the supported and unsupported SharePoint Online settings for SharePoint 2013 for copy and move jobs against with the settings of SharePoint on-premise.

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

Functionality Name				Support Status	
Action	Attach			Supported	
	Merge			Supported	
	Preview			Supported	
Source Documents/Items Deleted Method (Move Only)	Manually			Supported	
	Automatically			Supported	
Delete Source Checked Out Documents (Move Only)				Supported	
Filter Policy				Supported	
Select Source Components	Configuration	Copy/Move configuration	Keep look and feel	Supported	
		Uncheck Copy/Move configuration	Do not copy/move the columns and content types, or the corresponding items	Supported	
		Copy/Move the item-dependent columns and content types to maintain item integrity	Overwrite the columns and content types	Supported	
			Append the columns and content types to destination	Supported	
		Do not copy/move the item-dependent columns or content types. Report the items if the corresponding column or content type is not found in destination.	Supported		
	Security	Copy/Move security		Supported	
		Exclude user/group without permission		Supported	
	Content	Include list attachment		Supported	
	User Profile				Unsupported
	Schedule	No schedule			Supported
Start time			Supported		
Configure the schedule myself (Move Only)		Start time		Supported	
		Interval: __ Days		Supported	
	No end date		Supported		

Functionality Name			Support Status	
		End after __ occurrences	Supported	
		End by __	Supported	
Workflow	Include workflow definition		Unsupported	
	Include workflow instance	Include completed instance	Unsupported	
		Include running instance	Cancel workflows	Unsupported
			Restart workflows	Unsupported
Managed Metadata Service Setting	Copy Managed Metadata Service	Term	Supported	
		Term set	Supported	
		Managed Metadata Service	Supported	
Preserve the Null Column Values			Supported	
Data Compression			Supported	
Data Encryption			Supported	
Column Mapping			Supported	
Content Type Mapping			Supported	
Template Mapping			Supported	
User Mapping	Normal User Mapping		Supported	
	Add a default destination user		Supported	
	Add a place holder account to keep metadata even if the user no longer exists		Unsupported	
Domain Mapping			Supported	
Language Mapping			Supported	
Backup Environment Before Running Plan	Backup the source environment (Move Only)		Supported	
	Backup the destination environment		Supported	
	Rollback		Supported	
Conflict Resolution	Container Level	Skip	Supported	
		Merge	Supported	
		Replace	Supported	
	Check lower objects		Supported	
	Content Level	Skip	Supported	
		Overwrite	Supported	
		Overwrite by Last Modified Time	Supported	
Append		Unsupported		
Notification			Supported	
Associated Plan Group			Supported	
Create Container			Supported (for site/list/folder)	
			Unsupported (for site collection)	

Appendix E – Supported and Unsupported Elements for Content Manager

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

Source	Type	Status
Libraries	Document Library	Supported
	Form Library	Supported
	Wiki Page Library	Supported
	Picture Library	Supported
	Translation Management Library	Supported
	Data Connection Library	Supported
	Slide Library	Supported
	Report Library	Supported
	Asset Library	Supported
	DocAve Content Library	Supported
	DocAve Media Library	Supported
Communications List	Announcements	Supported
	Contacts	Supported
	Discussion Board	Supported
Tracking Lists	Links	Supported
	Calendar	Supported
	Tasks	Supported
	Project Tasks	Supported
	Issue Tracking	Supported
	Survey	Supported
Custom Lists	Custom List	Supported
	Custom List in Datasheet View	Supported
	Language and Translators	Supported
	KPI Lists (in SharePoint 2010)	Supported
	Status Lists (in SharePoint 2013)	Unsupported
	Import Spreadsheet	Supported
Web Pages	Basic Page	Supported
	Web Part Page	Supported
	sites and Workspaces	Supported
Workflow	SharePoint Built-in Workflow	Supported (SharePoint On-Premise 2010, SharePoint On-Premise 2013)
		Only support workflow definition for SharePoint Online 2013 with 2010 experience version

Source	Type	Status
	SharePoint Designer Workflow	Supported (SharePoint On-Premise 2010, SharePoint On-Premise 2013) Only support workflow definition for SharePoint Online 2013 with 2010 experience version
	Nintex Workflow	Supported (SharePoint On-Premise 2010, SharePoint On-Premise 2013) Unsupported for SharePoint Online
	Visual Studio Workflow	Unsupported
	Visio Workflow	Unsupported
	Azure Workflow	Unsupported
	RSS	
Alerts		Supported
Metadata	Single line of text	Supported
	Multiple lines of text	Supported
	Choice (menu to choose from)	Supported
	Number	Supported
	Currency	Supported
	Date and Time	Supported
	Look up	Supported
	Yes/No	Supported
	Person or Group	Supported
	Hyperlink or Picture	Supported
	Calculated	Supported
	Business Data	Supported
Managed Metadata	Supported	
Security & Properties	Version Settings	Supported
	Column Settings	Supported
	Permissions	Supported
Version Histories	Documents	Supported
	Lists	Supported
Apps for SharePoint	SharePoint-hosted Apps	Supported
	Provider-hosted Apps	Unsupported
	Auto-hosted Apps	Unsupported

Appendix F – Accessing Hot Key Mode

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

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

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

Home Page

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

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

Functionality Name and Hot Key	
Online Content Manager	L
Copy	C
Move	M
Data Export	O
Data Import	I
Create Container	N
Plan Builder	P
Export Location	E
Storage Policy	S
Filter Policy	F

Functionality Name and Hot Key			
Mappings	A	Column Mapping	CL
		Content Type Mapping	CT
		Template Mapping	T
		User Mapping	U
		Domain Mapping	D
		Language Mapping	L

Copy

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

Move

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

Plan Builder

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

Plan Manager Page

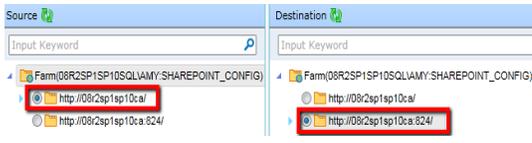
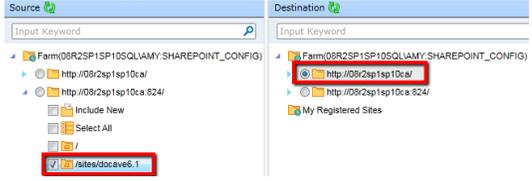
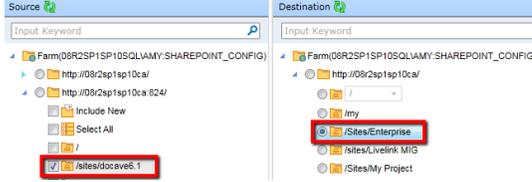
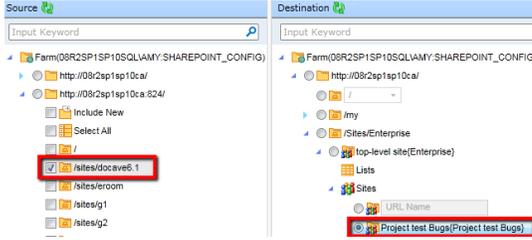
To access the **Plan Manager** page by using hot keys in the Content Manage interface, press the **Ctrl + Alt + Z** key combination to access the hot key mode, and then press **P** on the keyboard to jump to the **Plan Manager** page.

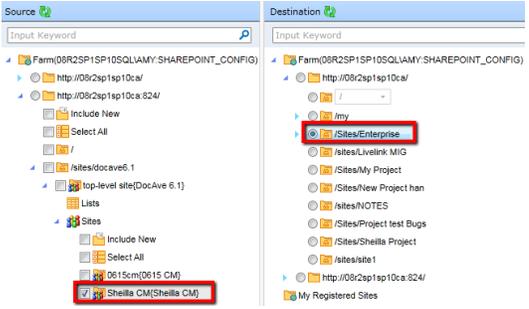
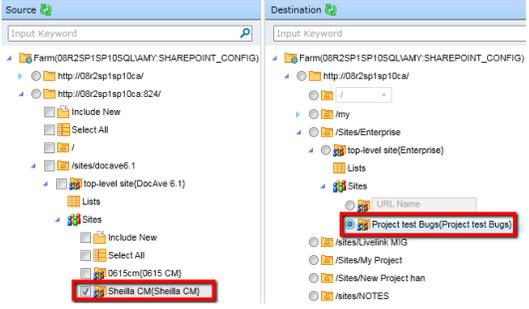
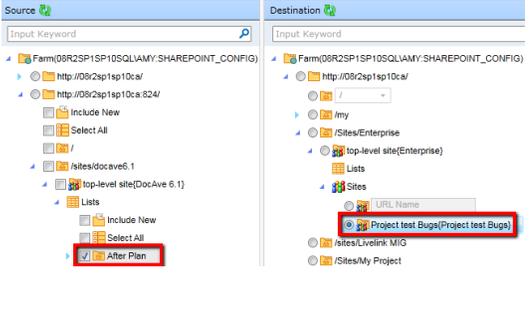
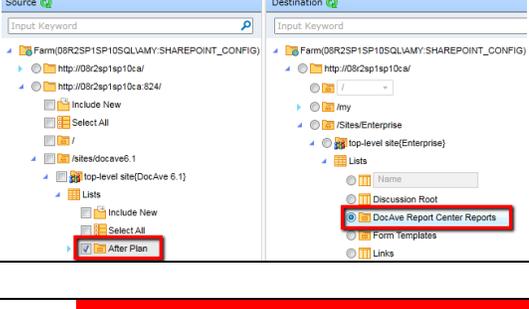
The following table provides a list of hot keys for the functionalities on the ribbon of the **Plan Manager** page. For example, continue pressing **V** to jump to the View Details interface.

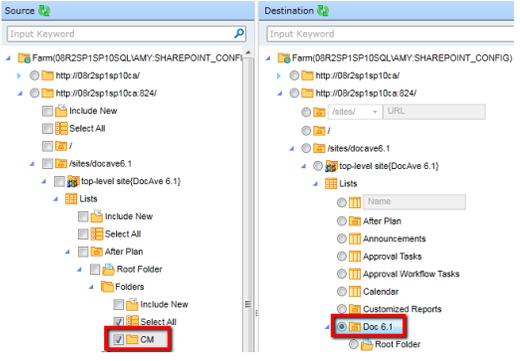
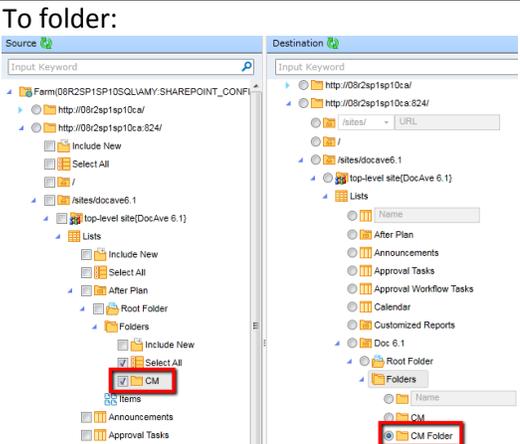
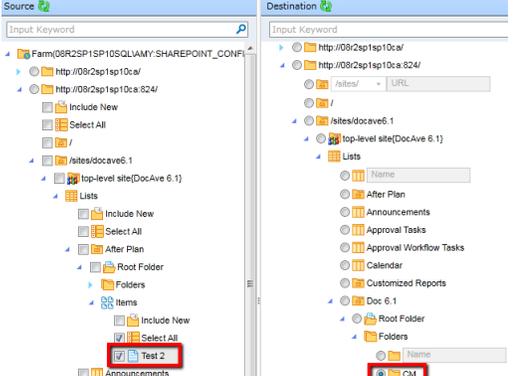
Functionality Name and Hot Key					
View Details	V	Source & Destination		D	
		Settings		T	
		Edit		E	
		Close		X	
Edit	E	Create Container		N	
		Save	S	Save and Run Now	R
				Save	S
		Save As		A	
		Cancel		C	
Delete		D			
Test Run		T			
Run Now		R			

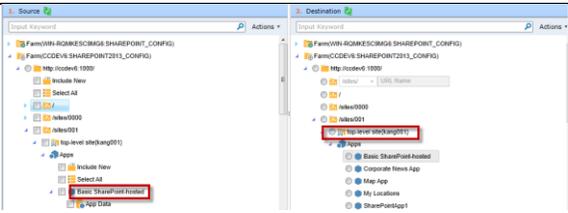
Appendix G – Content Manager Customization Support Table

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

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

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

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

Copy/Move To What to Copy/Move	Web Application	Site Collection	Site	List	Folder	Note	What to select when copying/moving
Apps		√	√			<p>To site collection: When copying or moving to the destination site collection, the Apps are attached to the top-level site of the destination site collection.</p> <p>To site: Attach</p>	
SharePoint Built-in Workflow	√	√	√	√		<p>If you want to copy or move the workflow, you must select the SharePoint objects that is associated with the workflow on the tree, and select the Include workflow definition/Include workflow instance.</p> <p>If the workflow in the source node is In Progress, by default the status in the destination node will be Canceled after being migrated. If you select the Restart the workflow radio button, the status in the destination node will still be In Progress after being migrated.</p> <p>Workflow Define how SharePoint workflows are migrated for the selected content. 'Definition' is the definition of existing source workflows. 'Instance' is the state, history, and tasks, for each item.</p>	<input checked="" type="checkbox"/> Include workflow definition <input checked="" type="checkbox"/> Include workflow instance
SharePoint designer workflow	√	√	√	√		<p>Reusable workflow template is unsupported. The workflow whose status is In Progress is unsupported Unsupported for SharePoint 2013</p>	
Nintex workflow	√	√	√	√		<p>Reusable workflow template is unsupported. Schedule in Nintex Workflow is unsupported. The workflow whose status is In Progress is unsupported. Unsupported for SharePoint 2013</p>	

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

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

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

Source Experience Version	Destination Experience Version	Supported Status
On-Premise SharePoint 2010	On-Premise SharePoint 2010	Supported
SharePoint 2010 Online	SharePoint 2010 Online	Supported
On-Premise SharePoint 2010	SharePoint 2010 Online	Supported
SharePoint 2010 Online	On-Premise SharePoint 2010	Supported
SharePoint 2013 Online 2010 Mode Site	SharePoint 2013 Online 2010 Mode Site	Supported
SharePoint 2013 Online 2010 Mode Site	SharePoint 2013 Online 2013 Mode Site	Partially supported
SharePoint 2013 Online 2013 Mode Site	SharePoint 2013 Online 2010 Mode Site	Unsupported
SharePoint 2013 Online 2010 Mode Site	SharePoint 2013 Online 2010 Mode Site	Supported
SharePoint 2013 Online 2010 Mode Site	On-Premise SharePoint 2013 2013 Mode Site	Partially supported
On-Premise SharePoint 2013 2013 Mode Site	SharePoint 2013 Online 2010 Mode Site	Unsupported
SharePoint 2013 Online 2013 Mode Site	SharePoint 2013 Online 2013 Mode Site	Supported
SharePoint 2013 Online 2013 Mode Site	On-Premise SharePoint 2013 2013 Mode Site	Supported
On-Premise SharePoint 2013 2013 Mode Site	SharePoint 2013 Online 2013 Mode Site	Supported
On-Premise SharePoint 2013 2010 Mode Site	SharePoint 2013 Online 2013 Mode Site	Partially supported
SharePoint 2013 Online 2013 Mode Site	On-Premise SharePoint 2013 2010 Mode Site	Unsupported
On-Premise SharePoint 2013 2010 Mode Site	On-Premise SharePoint 2013 2010 Mode Site	Supported
SharePoint 2013 Online 2013 Mode Site	On-Premise SharePoint 2013 2013 Mode Site	Supported
On-Premise SharePoint 2013 2013 Mode Site	SharePoint 2013 Online 2013 Mode Site	Supported

Source Experience Version	Destination Experience Version	Supported Status
On-Premise SharePoint 2013 2010 Mode Site	On-Premise SharePoint 2013 2013 Mode Site	Unsupported
On-Premise SharePoint 2013 2013 Mode Site	On-Premise SharePoint 2013 2010 Mode Site	Unsupported

Unsupported SharePoint Elements for Partially Supported Methods

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

Master Page

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

Site Template

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

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

IDID	Name	Title	Supported Status
0	GLOBAL#0	Global template	Supported
1	STS#0	Team Site	Supported
1	STS#1	Blank Site	Supported
1	STS#2	Document Workspace	Supported
2	MPS#0	Basic Meeting Workspace	Supported
2	MPS#1	Blank Meeting Workspace	Supported
2	MPS#2	Decision Meeting Workspace	Supported
2	MPS#3	Social Meeting Workspace	Supported
2	MPS#4	Multipage Meeting Workspace	Supported
3	CENTRALADMIN#0	Central Admin Site	Supported
4	WIKI#0	Wiki Site	Supported
9	BLOG#0	Blog	Supported
15	SGS#0	Group Work Site	Supported

IDID	Name	Title	Supported Status
16	TENANTADMIN#0	Tenant Admin Site	Supported
2764	ACCSRV#0	Access Services Site	Supported
N/A	ACCSRV#1	Assets Web Database	Unsupported
N/A	ACCSRV#3	Charitable Contributions Web Database	Unsupported
N/A	ACCSRV#4	Contacts Web Database	Unsupported
N/A	ACCSRV#5	Projects Web Database	Unsupported
N/A	ACCSRV#6	Issues Web Database	Unsupported
7	BDR#0	Document Center	Supported
14483	OFFILE#0	(obsolete) Records Center	Supported
14483	OFFILE#1	Records Center	Supported
40	OSRV#0	Shared Services Administration Site	Supported
3100	PPSMASite#0	PerformancePoint	Supported
3200	BICenterSite#0	Business Intelligence Center	Supported
20	SPS#0	SharePoint Portal Server Site	Supported
21	SPSPERS#0	SharePoint Portal Server Personal Space	Supported
22	SPSMSITE#0	Personalization Site	Supported
30	SPSTOC#0	Contents area Template	Supported
31	SPSTOPIC#0	Topic area template	Supported
32	SPSNEWS#0	News Site	Supported
39	CMSPUBLISHING#0	Publishing Site	Supported
53	BLANKINTERNET#0	Publishing Site	Supported
53	BLANKINTERNET#1	Press Releases Site	Supported
53	BLANKINTERNET#2	Publishing Site with Workflow	Supported
33	SPSNHOME#0	News Site	Supported
34	SPSSITES#0	Site Directory	Supported
36	SPSCOMMU#0	Community area template	Supported
38	SPSREPORTCENTER#0	Report Center	Supported
47	SPSPORTAL#0	Collaboration Portal	Supported
50	SRHCEN#0	Enterprise Search Center	Supported
51	PROFILES#0	Profiles	Supported
52	BLANKINTERNETCONTAINER#0	Publishing Portal	Supported
54	SPSMSITEHOST#0	My Site Host	Supported
56	ENTERWIKI#0	Enterprise Wiki	Supported
90	SRHCENTERLITE#0	Basic Search Center	Supported
90	SRHCENTERLITE#1	Basic Search Center	Supported
N/A	SRHCENTERFAST#0	FAST Search Center	Unsupported

List Template

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

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

Theme

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

Web Part

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

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

Type	Title	SharePoint 2010	SharePoint 2013
Business Data	Business Data Actions	Y	Y
	Business Data Connectivity Filter	Y	Y
	Business Data Item	Y	N
	Business Data Item Builder	Y	Y
	Business Data List	Y	Y
	Business Data Related List	Y	Y
	Chart Web Part	Y	N
	Excel Web Access	Y	Y
	Indicator Details	Y	Y
	Status List	Y	Y
	Visio Web Access	Y	Y
Content Rollup	Categories	Y	Y
	Content Query	Y	Y
	Relevant Documents	Y	Y
	RSS Viewer	Y	Y
	Site Aggregator	Y	Y
	Sites in Category	Y	Y
	Summary Links	Y	Y
	Table Of Contents	Y	Y
	Web Analytics Web Part	Y	N
	WSRP Viewer	Y	Y
	XML Viewer	Y	Y

Type	Title	SharePoint 2010	SharePoint 2013
Filters	Apply Filters Button	Y	Y
	Choice Filter	Y	Y
	Current User Filter	Y	Y
	Date Filter	Y	Y
	Page Filed Filter	Y	N
	Query String (URL) Filter	Y	Y
	SharePoint List Filter	Y	Y
	SQL Server Analysis Service Filter	Y	N
	Text Filter	Y	Y
Forms	HTML Form Web Part	Y	Y
	InfoPath Form Web Part	Y	Y
Media and Content	Content Editor	Y	Y
	Image Viewer	Y	Y
	Media Web Part	Y	Y
	Page Viewer	Y	Y
	Picture Library Slideshow Web Part	Y	Y
	Silverlight Web Part	Y	Y
Outlook Web App	My Calendar	Y	N
	My contacts	Y	N
	My Inbox	Y	N
	My Mail Folder	Y	N
	My Tasks	Y	N
Search	Advanced Search Box	Y	N
	Dual Chinese Search	Y	N
	Federated Results	Y	N
	People Refinement Panel	Y	N
	People Search Box	Y	N
	People Search Core Results	Y	N
	Refinement Panel	Y	N
	Related Queries	Y	N
	Search Action Links	Y	N
	Search Best Bets	Y	N
	Search Box	Y	Y
	Search Core Results	Y	N
	Search Paging	Y	N
	Search Statistics	Y	N
	Search Summary	Y	N
	Search Visual Best Bet	Y	N
Top Federated Results	Y	N	
Social Collaboration	Contact Details	Y	Y
	Note Board	Y	Y
	Organization Browser	Y	N
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Type	Title	SharePoint 2010	SharePoint 2013
	User Tasks	Y	Y

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