# AvePoint RevIM 3.2.1

## User Guide

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# What's New in This Guide

- AvePoint RevIM supports SharePoint 2016.
- Support using an existing column of the **Managed Metadata** type in SharePoint for classification when Configuring Global Settings.
- Support classifying existing SharePoint documents using the default business classification term when Classifying Documents in **Global Settings**, and Classifying Documents in **Custom Settings**.
- Added the **Move and declare documents as SharePoint records** option when Creating Rules to support moving source documents to a destination library and declaring the moved documents as SharePoint records.
- Support Creating Term Groups in AvePoint RevIM.
- Support Importing Term Groups from SharePoint 2013/2016 Managed Metadata Services to AvePoint RevIM via a CSV file.
- Support choosing the SharePoint Managed Metadata Services to which the business classification term group will be synchronised when Configuring Term Settings of the business term group.
- Support updating the column values of **Home Location** and **Box** of a physical file based on its actual storage location after Moving Physical Files to a new folder.
- Added the Appendix G: Configuring the AgentCommonStorageEnv.cfg File section.

# About AvePoint RevIM

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

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

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

# Overview of the Basic Operations in AvePoint RevIM

You can create rules and business classification terms in AvePoint RevIM, and then synchronise business classification terms to the SharePoint Managed Metadata Services or the term store in the SharePoint admin center. By creating and synchronising location terms, folders with the same structure and names as location terms will be created in SharePoint libraries to hold physical items. You can run a DocAve Archiver job to manage content in SharePoint, and then view job details in DocAve Archiver Job Monitor. To gain a comprehensive understanding of the SharePoint content and rules in AvePoint RevIM, you can view and download a job report in **Report Center**.

To manage SharePoint content, follow the steps below:

1. Create rules to define actions for data. Using the rules, for data that meets the rule settings criteria, you can decide to archive the data and store it in a storage policy before removing and destroying the data from SharePoint, keep the data in SharePoint and archive it, or move the data to a destination library and declare the moved data that exists in SharePoint as a record.

   If you enable the Enable Manual Approval feature in rule settings, the content that meets the rule settings criteria needs to be reviewed in DocAve Governance Automation before the archive. Only the approved objects will be archived.

   For more information, refer to Rule Management.

2. Create business classification terms in AvePoint RevIM or import terms from SharePoint, associate rules with the business classification terms, and then synchronise business classification terms to SharePoint Managed Metadata Services or the term store in the SharePoint admin center. For more information, refer to Term Management.
3. Create location terms, and synchronise location terms to SharePoint Managed Metadata Services or the term store in the SharePoint admin center. After the sysnchronisation, folders with the same structure and names as location terms will be created in all physical libraries to hold physical items. For more information, refer to Location Management.
4. By creating a column of the **Managed Metadata** type in SharePoint, and selecting a business classification term as the default column value, you can classify documents in SharePoint by using the business classification terms. By selecting a business classification term, you can classify container level objects with the IDs of the business classification terms. As such, rules associated with the business classification term will be applied to the documents and container level objects. For more information, refer to SharePoint Settings.
5. Select the **Mark the Physical Library** checkbox when configuring custom settings for container level objects, and then box types and location terms created in AvePoint RevIM will be synchronised to SharePoint physical libraries as values of **Box Type** and **Home Location** columns. You can manage physical items in the SharePoint physical libraries.
6. Select a SharePoint node where you want to manage SharePoint content, and then run a DocAve Archiver job to check whether or not the content in the node and the physical files in the SharePoint physical libraries meet the applied rules. Rule actions will be executed on

SharePoint content that meets the rule settings criteria configured on the **Rule Management** page. For more information, refer to Disposal Activity Management.

7. You can view job details, generate reports, and gain a comprehensive understanding of the records and rules in your environment:

    - Navigate to **MENU** > **Job Monitor**. Select a job and view the job details. For more information, refer to Job Monitor.
    - Navigate to report center. Generate reports of Content due for Disposal Report, Term Usage Report, Rule Usage Report, AvePoint RevIM Auditor Report, Creation and Destruction Report, and Available Space Report. For more information, refer to Report Center.

# Submitting Documentation Feedback to AvePoint

AvePoint encourages customers to provide feedback regarding our product documentation. You can Submit Your Feedback on our website.

# Logging into AvePoint RevIM

Refer to the following steps to log into AvePoint RevIM.

1. Open the following URL in the same format in an internet browser: *Https://<Hostname>:Port*.

   **<Hostname>** is the hostname of the machine where AvePoint RevIM has been installed.

2. The AvePoint RevIM login page appears. AvePoint RevIM provides two login methods:

   - **Local System** – Only the built-in admin account can be used to log into AvePoint RevIM using this method.
   - **AD Integration** – Select this method to log into AvePoint RevIM as an Active Directory (AD) user. Select the domain to which the user belongs from the **Domain** drop-down list, and then enter your username and password in the corresponding fields.

   ***Note**: With the **Remember my user ID** checkbox selected, your username will be automatically entered the next time you log into AvePoint RevIM.

3. Click **Login**.

# Business Classification Management

Business Classification Management allows you to create business classification terms, import business classification terms from SharePoint Managed Metadata Services, associate business classification terms with rules, and synchronise business classification terms from AvePoint RevIM to SharePoint Managed Metadata Services or the term store in the SharePoint admin center.

## Term Management

In this section, you can create, edit, delete, search, synchronise, and manage settings of business classification terms.

### Creating Term Groups

After you finish installing AvePoint RevIM, there will be a built-in **Groups** node. You can create multiple business classification term groups under this node.

Refer to the following steps to create a business classification term group:

1. Click **Term Management** in the **Business Classification Management** tab. The **Term Management** page appears.
2. Click the down arrow ( ) button next to **Groups**, and select **Create Group.**
3. A text box appears below.
4. Enter a name for the business classification term group in the text box, and press **Enter** on your keyboard.

### Importing Term Groups

You can also import a term group together with a term set and terms from a SharePoint Managed Metadata Service to AvePoint RevIM via a CSV file.

***Note**: AvePoint RevIM does not support importing a term group together with a term set and terms from SharePoint Online to AvePoint RevIM.

Before importing a term group together with a term set and terms to AvePoint RevIM via a CSV file, you need to export the term group together with the term set and terms from SharePoint Managed Metadata Service to a CSV file using Windows PowerShell. For more information, refer to Appendix F: Exporting Terms Using Windows PowerShell.

To import the term group together with a term set and terms from the CSV file to AvePoint RevIM, complete the steps below:

1. Click **Term Management** in the **Business Classification Management** tab. The **Term Management** page appears.

2. Click the **Import** button on the left pane of the **Term Management** page.
3. Select the CSV file where the exported term group together with the term set and terms exist, and click **Open** to import the file.
4. A Term Import job starts immediately, and access **Job Monitor** to view the job details.

If the Term Import job finishes successfully, the imported term group together with the term set and terms will be displayed under the **Groups** node in AvePoint RevIM.

***Note**: The imported terms can only be used to classify the documents and container level objects within the site collection that are associated with the SharePoint Managed Metadata Service where the imported terms exist. To use these imported terms to classify the documents and container level objects outside of the site collection, click **Synchronise** on the left pane of the **Term Management** page to synchronise the imported term group together with the term set and terms to SharePoint Managed Metadata Services or the term store in the SharePoint admin center. For more information on the synchronisation, refer to Term Synchronisation.

## Creating Terms

After you finish installing AvePoint RevIM, there will be a built-in business classification term group named **TermGroup** and a built-in term set named **TermSet**. You can create nested terms under the built-in business classification term set. You can also create nested terms under the imported business classification term sets.

Refer to the following steps to create a business classification term:

1. Click **Term Management** in the **Business Classification Management** tab. The **Term Management** page appears.
2. Select the business classification term set or a term under which you want to create a new business classification term.
3. Click the down arrow ( ) of the business classification term set or term, and select **Create Term**. A text box appears below.
4. Enter a name for the business classification term in the text box, and press **Enter** on your keyboard. This new business classification term will be listed under the business classification term set or term.

## Searching Terms

After creating or importing business classification term groups/term sets/terms, you can search a specific business classification term group/term set/term. Enter the keywords in the **Search** text box, and click the Search ( ) button on the left pane of the **Term Management** page to search for the corresponding business classification term group/term set/term.

## Configuring Term Settings

You can configure business classification term settings including associated Managed Metadata Services, associated rules, and retirement setting.

To configure settings for a business classification term group/term set/term, click the business classification term group/term set/term from the **Terms** panel. The settings of this business classification term group/term set/term appear on the right pane of the **Term Management** page. The following settings are configurable:

- **Break Inheritance** – Click the **Break Inheritance** link in the **This term inherits the settings from its parent term. To change the settings of this term, click Break Inheritance.** message to break inheritance of a business classification term from its parent node.

  ***Note**: By default, the newly created business classification term will inherit the settings from their parent node. If you want to configure settings for a business classification term, make sure the business classification term has broken the inheritance from its parent node and it is active.

- **Inherit Settings** – Click the **Inherit Settings** link in the **This term has unique settings. To inherit settings from the parent, click Inherit Settings.** message to inherit settings for a business classification term that has broken the inheritance from its parent node.
- **Description** – Enter an optional description in the **Description** text box.
- Managed Metadata Service – Choose SharePoint Managed Metadata Services or the term store in the SharePoint admin center to which the business classification term group will be synchronised.

  **All Managed Metadata Services** – Synchronise the business classification term group to all SharePoint Managed Metadata Services or the term store in the SharePoint admin center that are connected to all registered SharePoint site collections.

  **Specific Managed Metadata Services** – Synchronise the business classification term group to the specific SharePoint Managed Metadata Services the term store in the SharePoint admin center that are associated with the configured site collections:

  i. Enter a site collection URL, and click **Add**. The site collection URL is displayed in the **Site Collection URL** column, and the SharePoint Managed Metadata Service or the term store in the SharePoint admin center that is connected to the site collection is displayed in the **Managed Metadata Service** column.

  ii. Repeat the step above to add more site collection URLs.

  iii. You can also click **Delete** in the **Action** column of a site collection to delete the site collection from the table.

- **Rule** – Manage rules that are associated with the business classification term. The following actions are available:

- **Add Rule** – Select an object level, and click **Add Rule** above the **Rule** table. A new rule is listed in the **Rule** table. Click the rule name of this new rule, and select the rule that you want to associate with the selected term. All rules created in **Rule Management** will be listed and selectable.

  When more than one rule is added, you can change the rule order. To change the rule order, click the down arrow displayed in the **Order** column, and select a new order for this rule.

  ***Note**: Only the orders of the rules in the same object level can be changed.

- View Rule – After a rule is added, you can click **View** next to the rule to view the rule details.
- Remove Rule – After a rule is no longer useful, you can click **Remove** next to a rule to remove the rule from the **Rule** table.

- **Retirement Setting** – To configure the retirement setting for a business classification term, deselect the **No retirement date** checkbox, and configure the retirement setting:

  ***Note**: By default, the **No retirement date** checkbox is selected for a new business classification term, which means the business classification term will never retire.

  ***Note**: If a business classification term is retired, no actions will be triggered on the items that are using this business classification term in SharePoint.

  - **Take effect from** – Select this option and select a date to specify when the business classification term will become active.
  - **Retire after** – Select this option and select a date to specify when the business classification term will retire.
  - **Active...Retire…** – Select this option and select a start date and an end date to define the time range during which the business classification term will be active.

After configuring settings of the business classification term group/term set/term, click **Save** to save the configurations, or click **Cancel** to exit without saving.

***Note**: After configuring settings of a business classification term group/term set/term, click **Synchronise** on the left pane of the **Term Management** page to synchronise the updated business classification term group/term set/term to SharePoint Managed Metadata Services or the term store in the SharePoint admin center. For more information on the synchronisation, refer to Term Synchronisation.

## Synchronising Terms to SharePoint

After creating business classification terms and importing business classification terms from SharePoint Managed Metadata Services, you can synchronise them to SharePoint Managed Metadata Services or the term store in the SharePoint admin center by clicking **Synchronise** on the left pane of the **Term**

**Management** page. You will be directed to the **Term Synchronisation** page. For more information on the synchronisation, refer to Term Synchronisation.

## Renaming, Retiring, and Deleting Terms

Once business classification terms are created, you can rename, retire, and delete them.

***Note**: The built-in business classification term group and term set cannot be retired or deleted.

Select a business classification term group, a term set, or a term from the **Terms** panel, and click the down arrow ( ) button next to the business classification term. You can:

- Rename – Select **Rename Group**/**Rename Term Set**/**Rename Term** from the drop-down list, enter a new name in the text box, and press **Enter** on the keyboard.

  Alternatively, you can double-click the business classification term group, term set, or term that you want to rename to make the name editable.

- Retire – Select **Retire Term** from the drop-down list, and click **OK** in the pop-up confirmation window.

  ***Note**: When a business classification term is retired, you can only perform the **Delete** action on the business classification term.

- Delete – Select **Delete Group**/**Delete Term** from the drop-down list, and click **OK** in the pop-up confirmation window.

# Term Synchronisation

For SharePoint 2013/2016, the business classification term tree in AvePoint RevIM including the business classification term group, term set, and terms will be synchronised to the SharePoint Managed Metadata Services that are connected to all registered SharePoint 2013/2016 site collections.

For SharePoint Online, the business classification term tree will be synchronised to the term store in the SharePoint admin center.

There are several scenarios for synchronising the business classification term group, term set, and terms to the SharePoint Managed Metadata Services or term store:

- If there is no business classification term group/term set/term with the same name as that of AvePoint RevIM in the SharePoint Managed Metadata Service or term store, a new business classification term group/term set/terms will be created in the SharePoint Managed Metadata Service or term store together with its settings and status.
- If a business classification term group/term set/term with the same name as that of AvePoint RevIM already exists in the SharePoint Managed Metadata Service or term store, there are two scenarios:

- If the existing business classification term group/term set/or terms in the SharePoint Managed Metadata Service or term store is created by AvePoint RevIM, then the name and description of the business classification term group/term set/term settings will be synchronised, and the status of the term set or term will be synchronised.
- If the existing business classification term group/term set/or terms in the SharePoint Managed Metadata Services or term store is not created by AvePoint RevIM, there are two scenarios:
  - If a business classification term group or term set with the same name already exists in the SharePoint Managed Metadata Service or term store, the Term Synchronisation job will fail.
  - If a business classification term with the same name already exists in the SharePoint Managed Metadata Service or term store, only the business classification term will be skipped in the synchronisation.

You can select to synchronise all business classification terms once or periodically by configuring a schedule for the Term Synchronisation job.

A Term Synchronisation job also synchronises all term-related operations including creation, deletion, name change, retirement, and term settings that were performed since the last synchronisation job.

Refer to the following steps to configure a schedule for the Term Synchronisation job:

1. Click **Term Synchronisation** in the **Business Classification Management** tab. The **Term Synchronisation** page appears.
2. Select an option to determine whether or not to synchronise the business classification terms to SharePoint Managed Metadata Services or term store based on a configured schedule.
   - **No Schedule** – Select this option to synchronise the business classification terms without a schedule.
   - **Configure a schedule** – Select this option to configure a customised schedule, and synchronise business classification terms by schedule.
     - **Start time** – Select the date and time for synchronising business classification terms to SharePoint Managed Metadata Services or term store.

       Click the calendar ( ) button in the **Start Time** field. Click a date on the calendar or click **Today** to navigate to the current day; select the time and a time zone form the drop-down lists, and then click **OK** to save the date and time.
     - **Interval** – Specify an interval for recurring synchronisations.
     - **No end date** – The synchronisation will be run repeatedly until you stop it manually.

- **End after __occurrences** – The synchronisation will stop after the defined occurrences that you enter in this field.
- **End by __**– The synchronisation will stop at the exact date and time that you select.

3. Click **Save** to save the settings. A prompt appears informing you that the settings are successfully saved. Business classification terms will be synchronised based on your schedule settings. After a Term Synchronisation job completes, you can navigate to **MENU** > **Job Monitor** to view the job details or download the job report to check the business classification term's synchronisation status.

   Click **Save and Synchronise Now** to save the configurations and synchronise the business classification terms immediately. A prompt appears informing you that the synchronisation job has started, and you can navigate to **MENU** > **Job Monitor** to view detailed information of the job.

   Click **Cancel** to cancel the configurations. The **Home** page appears.

# SharePoint Settings

In this section, you can configure **Global Settings**, **Custom Settings**, and **Inherit Global Settings** of a SharePoint node.

By creating a column of the **Managed Metadata** type and selecting a business classification term as the default value, you can classify documents in SharePoint by using the business classification terms. By selecting a business classification term, you can classify container level objects with the IDs of the business classification terms.

***Note**: Container level objects include: lists, libraries, sites, and site collections.

***Note**: Before configuring SharePoint Settings, make sure all business classification terms have been synchronised to SharePoint Managed Metadata Services or the term store in the SharePoint admin center. For more information on the synchronisation, refer to Term Synchronisation.

## Configuring Global Settings

Global Settings allows you to classify documents using business classification terms and classify container level objects with business classification term IDs.

***Note**: Global Settings are supported on SharePoint Sites groups.

### Classifying Documents

In this section, you can create a column of the **Managed Metadata** type and then select a business classification term as the default value to apply rules associated with the selected business classification term to documents.

Refer to the following steps to configure global settings:

1. Select one or more SharePoint Sites groups from the tree and click **Global Settings**, or click the settings link next to a SharePoint Sites group to configure global settings. The **Global Settings** page appears.

   ***Note**: To run the Global Settings job successfully, at least one site collection must exist in each of the selected SharePoint Sites groups.

2. Click **Document Level** on the **Global Settings** page.
3. Select one of the following options to specify if you want to use an existing column or create a new column whose default value will be used to classify documents:

   - **Use an existing column** – Select this option to use an existing column of the **Managed Metadata** type for classification. Enter a column name in the **Column Name** text box.

     ***Note**: Before using this feature, make sure you have created at least one column of the **Managed Metadata** type in SharePoint. The column value terms can be found in AvePoint RevIM.

     ***Note**: With this option selected, you cannot configure custom settings for the site collections, sites, lists, and libraries within the selected SharePoint Sites group.

   - **Create a new column** – Select this option to create a new column of the **Managed Metadata** type for classification.

     i. **Column Name** – Enter a column name in the text box. A column of the **Managed Metadata** type with the same name will be created in all lists and libraries of the site collections in the selected SharePoint Sites group.

        ***Note**: All columns of the **Managed Metadata** type created by AvePoint RevIM share the same column ID and internal name as **RevIMBCS**. This enables documents to move across different site collections smoothly while keeping the original column and business classification term value created by AvePoint RevIM.

     ii. **Description** – Enter an optional description in the text box.

     iii. Expand a business classification term group, and select a business classification term as the default value for the column. When uploading documents to SharePoint, the selected business classification term will be automatically chosen as the column value, you can also modify the column value by selecting any business classification term under the business classification term set.

        ***Note**: The built-in business classification term group and term set cannot be selected as the default value for the column.

Use the Search feature to simplify your search for a business classification term. Enter keywords in the Search text box above the business classification term group, and then click the Search ( ) button to search for the corresponding business classification term.

iv. **Apply to the existing documents** – Select this option to classify documents that already exist in SharePoint. After the column of the **Managed Metadata** type is created in the library, the business classification term configured above will be assigned as the column value to the existing documents in the library for classification.

***Note**: If **Create major and minor (draft) versions** is enabled in the library settings, and the current version of an existing document is a major version, a minor version will be created after the Global Settings job finishes. If **Require content approval for submitted items** is enabled in the library settings, the approval status of existing documents will be updated to **Draft** after the Global Settings job finishes.

4. Click **Save** to close the **Global Settings** window and run the Global Settings job. Access **Job Monitor** to view job details and download the job report.

### Classifying Container Level Objects

After classifying documents, you can classify container level objects. By selecting a business classification term, an AvePoint RevIM property will be added to all container level objects within the selected SharePoint node, and the ID of the selected business classification term will be the property value. As such, rules associated with the selected business classification term will be applied to the container level objects.

Refer to the following steps to classify container level objects:

1. Click **Container Level** on the **Global Settings** page.
2. Enter an optional description in the **Description** text box.
3. Expand a business classification term group, and select a business classification term.

   ***Note**: The built-in business classification term group and term set cannot be selected.

   Use the Search feature to simplify your search for a business classification term. Enter keywords in the Search text box above the business classification term group, and then click the Search ( ) button to search for the corresponding business classification term.

4. Click **Save** to close the **Global Settings** window and run the Global Settings job. Access **Job Monitor** to view job details and download the job report.

## Configuring Custom Settings

You can use Custom Settings to narrow down the business classification term scope that can be used when classifying documents and container level objects.

***Note**: Custom Settings are supported on site collection, site, list, and library levels.

## Classifying Documents

Before configuring custom settings, you must configure the global settings first.

Custom Settings allows you to customise the column settings configured in Global Settings except for the column name.

Refer to the following steps to configure custom settings:

1. Select one or multiple SharePoint nodes from the tree and click **Custom Settings**, or click the settings link next to the selected SharePoint node to configure custom settings. The **Custom Settings** page appears.
2. Click **Document Level** on the **Custom Settings** page.
3. Expand the business classification term group, and select a business classification term for the column configured in Global Settings.
4. **Apply to the existing documents** – Select this option to classify documents that already exist in SharePoint. After the column of the **Managed Metadata** type is created in the library, the business classification term configured above will be assigned as the column value to the existing documents in the library for classification.

   ***Note**: If **Create major and minor (draft) versions** is enabled in the library settings, and the current version of an existing document is a major version, a minor version will be created after saving the global settings or custom settings. If **Require content approval for submitted items** is enabled in the library settings, the approval status of existing documents will be updated to **Draft** after saving the global settings or custom settings.

5. Select the (optional) **Specify Default Value** checkbox to specify a business classification term as the default value for the column. The default value text box below becomes editable.
   a. Click ( ) next to the text box. The **Specify Default Value** pop-up window appears.
   b. The business classification term selected in step **3** will be displayed. Expand the business classification term, and select a business classification term as the default value of the column configured in Global Settings.
   c. Click **Select >>**. The selected business classification term appears in the text box.
   d. Click **Save** to save the configurations.
6. Click **Save** to close the **Custom Settings** window and run the Custom Settings job. Access **Job Monitor** to view job details and download the job report.

## Classifying Container Level Objects

After classifying documents, you can classify container level objects. By selecting a business classification term, an AvePoint RevIM property will be added to all container level objects within the selected SharePoint node, and the ID of the selected business classification term will be the property value. Thus, rules associated with the selected business classification term will be applied to the container level objects.

You can also choose whether or not to mark the physical library within the selected node when configuring custom settings.

Refer to the following steps to classifying container level objects:

1. Click **Container Level** on the **Custom Settings** page.
2. Choose whether or not to mark the physical library. With the **Mark the Physical Library where physical items will be held** checkbox selected, the physical library node will be grayed out on the SharePoint tree of Report Center after the Custom Settings job finishes.

   ***Note**: If a physical library exists in the selected node, make sure the **Mark the Physical Library** checkbox is selected. Otherwise, no box types and location terms created in AvePoint RevIM will be synchronised to the SharePoint physical library as values of **Box Type** and **Home Location** columns.

3. Select the **Enable the Classification** checkbox.
4. Expand the business classification term group, and select a business classification term.

   Use the Search feature to simplify your search for a business classification term. Enter keywords in the Search text box above the business classification term group, and then click the Search ( ) button to search for the corresponding business classification term.

5. Click **Save** to close the **Custom Settings** window and run the Custom Settings job. Access **Job Monitor** to view job details and download the job report.

## Configuring Inheritance of Global Settings

For SharePoint nodes that have custom settings configured, you can inherit the Global Settings of the SharePoint Sites group again.

Refer to the following steps to inherit global settings:

1. Select one or multiple SharePoint nodes from the tree.

   ***Note**: Inherit Global Settings are configurable only when one or more of the selected nodes have custom settings configured.

2. Click **Inherit Global Settings** to run the Inherit Global Settings job. Access **Job Monitor** to view job details and download the job report.

## Applying SharePoint Settings to Newly Added SharePoint Nodes

After applying global settings to a SharePoint Sites group, or custom settings to a SharePoint site collection, site, list, and library, AvePoint RevIM supports applying the configured settings to the site collections, sites, lists, and libraries that are newly added to the selected SharePoint node.

You can select to apply settings once or periodically by configuring a schedule for the SharePoint Settings Schedule job.

Refer to the following steps to configure a schedule:

1. Click **Schedule** on the **SharePoint Settings** page. The **Schedule** pop-up window appears.
2. Select an option to determine whether or not to apply the configured SharePoint settings to newly added SharePoint nodes based on a configured schedule.
    - **No Schedule** – Select this option to apply the configured SharePoint settings without a schedule.
    - **Configure a schedule** – Select this option to configure a customised schedule, and apply the configured SharePoint settings by schedule.
        - **Start time** – Select the date and time for applying the configured SharePoint settings to newly added SharePoint nodes.

          Click the calendar ( ) button in the **Start Time** field. Click a date on the calendar or click **Today** to navigate to the current day; select the time and a time zone from the drop-down lists, and then click **OK** to save the date and time.
        - **Interval** – Specify an interval for rerunning the SharePoint Settings Schedule job.
        - **No end date** – The SharePoint Settings Schedule job will be run repeatedly until you stop it manually.
        - **End after __occurrences** – The SharePoint Settings Schedule job will stop running after the defined occurrences that you enter in this field.
        - **End by __**– The SharePoint Settings Schedule job will stop at the exact date and time that you select.
3. Click **Save** to save the settings. The configured SharePoint settings will be applied to the newly added site collections, sites, lists, and libraries based on your schedule settings. After a SharePoint Settings Schedule job completes, you can navigate to **MENU** > **Job Monitor** to view the job details or download the job report.

# Business Rule Management

Business Rule Management allows you to define business rules and actions for data disposal and retention.

## Rule Management

All rules created in AvePoint RevIM are displayed on the **Rule Management** page. Rule details include: **Rule Name**, **Description**, **Object Level**, and **Last Modified Time**.

You can use Rule Management to create, edit, and delete rules.

On the **Rule Management** page, you can sort rules by the last modified time in ascending or descending order, and define how many rules can be displayed in each page of the rule table.

- **Last Modified Time** – Click the down arrow ( ) button next to the column, and then select a sort order.
- **Show rows** – Define how many rules can be displayed in each page of the table. Select a number from the **Show rows** drop-down list. The available numbers are **5**, **10**, and **15**.

### Creating Rules

Refer to the following steps to create a rule:

***Note**: Before creating a rule, ensure that a storage policy has been configured in Control Panel for storing the backup data.

1. Click **Rule Management** in the **Business Rule Management** tab. The **Rule Management** page appears.
2. Click **Create** above the rule table. You are redirected to the **Create** page.
3. **Define records management rule** – Select an existing rule from the drop-down list or create a new one:
   - **Copy from an existing rule** – Select this option to reuse an existing rule. Select a created rule from the drop-down list, the rule settings of this existing rule are displayed. You can modify rule settings to create a new rule based on the existing rule. Enter a rule **Name** for the new rule.
   - **Create a new rule** – Select this option to create a new rule. Enter a rule **Name** and an optional **Description** in the corresponding text boxes.
4. **Define object level** – Select the type of content for this rule from the drop-down list.

   ***Note**: The **Folder** object level rules can be used to manage physical files in SharePoint physical libraries. If you want to use a **Folder** object level rule to tag lifecycle status of physical files with

**Pending Disposal**, refer to Appendix C: Tagging Physical Files with Pending Disposal Lifecycle Status for more information.

5. **Define rule criteria** – Configure the criteria for the selected type of content. Refer to Appendix B: Criteria Filter Conditions for more information.

   ***Note**: Multiple criteria can be added to the criteria area. However, to create a rule successfully, at least one criterion is required.

   ***Note**: When creating a **Folder** object level rule to manage physical files in SharePoint physical libraries, you need to configure the rule criteria based on the physical files' information instead of the folder's information.

   - Click **Add**, and then configure the rule criterion to specify what SharePoint content will be monitored by this rule.
     - Rule – Select a rule from the drop-down list.
     - Condition – Select a condition from the drop-down list.
     - Value – Enter a value for the rule.
   - To delete a rule criterion, click the Remove ( ) button next to the criterion.
   - If more than one criterion is added, click the link in the message above the rule criteria area to define the logical relationship among the rule criterion (**All** is the default logical relationship).
     - **All** – Rule actions will be executed on the content that meets all rule criteria.
     - **Any** – Rule actions will be executed on the content that meets any one of the rule criteria.

6. **What would you like to do with the SharePoint data?** – Select one option to manage the SharePoint data.

   - **Remove content from SharePoint and destroy** – Select this option to archive data that meets the criteria configured above and store it in a storage policy. The corresponding data in SharePoint will be deleted.
     - **Leave a stub in SharePoint for each record following disposal** – Select this checkbox to dispose the document in the selected node and leave a stub in the same location. Two columns will also be created for the stub: A **Person and group** column named **Original Author** and a **Date and time** column named **Original Created Time**. Click the stub, you are redirected to the page displaying the message: **This document has been disposed, please contact your RMO officer for more details.**

       ***Note**: This function only supports the **Document** object level.

       ***Note**: The stub page is stored in **Style Library**, and the message is customisable. To customise the message, find the stub page in **Style Library**,

and download the stub page. Customise the message in the ** This document has been disposed, **

** please contact your RM Officer for more details. ** node, and upload the stub page to SharePoint.

- **Archive and retain content in SharePoint** – Select this option to archive the data that meets the criteria configured above and store it in a storage location. The corresponding data will not be deleted from SharePoint after the archive/backup.

  ***Note**: This function only supports the **Document**, **Item**, and **Folder** object levels.

  Once you select this option, you can also select the following options for further configurations:

  - **Declare each document/item as a SharePoint record** – Select this checkbox to declare the data or stub that meets the rule as a read-only record in SharePoint.

    ***Note**: This function only supports the **Document** and **Item** object levels.

  - **Tag each document/item with:** – Select this checkbox to back up the data and store it according to the storage policy configured in the Control Panel, and then add one or multiple columns to indicate the archiving status of the data.

    - **Archived (Yes/No column)** – Indicates whether or not the data is archived successfully. If the data is archived successfully, the value will be displayed as **Yes**.
    - **Archived By** – The name of the user who registers the site collection.
    - **Archived Time** – The time when the data was archived.
    - **Custom Metadata:** – A customised column. Select the column type and then enter the name and value for this column. If the data is archived successfully, the customised column and its value will be displayed.

- **Move and declare documents as SharePoint records** – Select this option to move the source documents to the selected destination library and declare the moved documents as SharePoint records.

  ***Note**: This function only supports the **Document** object level.

  i. Enter the full URL in the text box to specify the destination library.

  ii. Enter an account with its password that has permission to access the entered library.

  iii. Click **Validation Test** to test the validation of the user account and library's URL.

  ***Note**: Only the library whose template is **Document Library** or **Record Library** can be selected as the destination library.

***Note**: For SharePoint 2013/2016, the source node and the selected destination library must be in the same farm.

7. **Enable manual approval** – Select this checkbox to enable this function. If you choose to enable this function, the content that meets the criteria configured above needs to be reviewed before the archive. Only the approved objects will be archived.

   ***Note**: This function is selectable only when you choose the **Remove content from SharePoint and destroy** option above.

   ***Note**: The Enable Manual Approval feature is integrated with DocAve Governance Automation. If you use **Enable manual approval**, all objects that meet the applied rule must be manually reviewed in DocAve Governance Automation. The rule's action will then be executed on the approved objects when you manually run a DocAve Archiver job with the same settings (including the rule settings and the node where the rule is applied).

   For detailed information on the DocAve Governance Automation manual approval process, refer to Appendix A: Configuring DocAve Governance Automation for the Manual Approval Process.

8. **Export the SharePoint content before archiving?** – Select this checkbox to export a snapshot of the contents before archiving. If you choose to enable this function, select one of the following export formats from the drop-down list.

   - **Autonomy Integration** means the exported content can be managed in the Autonomy platform.
   - **Concordance Load File** means the exported content can be imported to the Concordance platform for management.
   - **EDRM XML** means the exported content can be managed by EDRM (Electronic Discovery Reference Model).
   - **VEO File** means the exported content meets the Victorian Electronic Records Strategy (VERS) Standard (PROS 99/007).

     ***Note**: To use this export type, configuration files can be configured prior to using the job to customise the metadata of the VEO files. For more information on configuring the configuration files, refer to **Configuration Files for Exporting Content into VEO Files** in the DocAve 6 Archiver Reference Guide.

9. Click **Save** to save this new rule, or click **Cancel** to exit without saving the configurations.

## Editing Rules

Once rules are created, all rule settings can be edited except for the rule name. **Rule Name** is a fixed setting and cannot be changed.

Refer to the following steps to edit an existing rule:

1. Click **Rule Management** in the **Business Rule Management** tab. The **Rule Management** page appears.
2. Select a rule and click **Edit** above the rule table. You are redirected to the **Edit** page.
3. You can edit the settings of this rule. For more information, refer to Creating Rules.

## Deleting Rules

When a rule is no longer useful, you can delete it. Deleting unnecessary rules enables you to simplify rules management.

Refer to the following steps to delete rules:

1. Click **Rule Management** in the **Business Rule Management** tab. The **Rule Management** page appears.
2. Select one or more of the rules from the rule table by selecting the checkboxes to the left of the rules.
3. Click **Delete** above the rule table. A confirmation window appears. Click **OK** to delete the selected rules, or click **Cancel** to exit without deleting the selected rules.

# Disposal Activity Management

Disposal Activity Management is used to run DocAve Archiver jobs to manage SharePoint content.

Before running a DocAve Archiver job, you must create rules, associate rules with business classification terms that have already been synchronised to SharePoint, and then apply your applicable configurations to a SharePoint node.

To run a job, complete the following steps:

1. Expand **My Registered Sites**.
2. Select a SharePoint node from the **Scope** panel.
3. Click **Run Now** to run the DocAve Archiver job immediately. Running jobs can be observed in the DocAve Archiver Job Monitor.

# Report Center

Report Center allows you to configure and view reports, and gain a comprehensive understanding of the content and rules in your environment.

In this section, you can manage profiles, generate reports, and view reports.

## Content Due for Disposal Report

The Content Due for Disposal Report is used to report SharePoint content that will be disposed at a specified time.

### Creating a Content Due for Disposal Report Profile

By configuring a time and selecting a SharePoint node in a profile, the SharePoint content that meets the rules within the selected SharePoint node at the specified time will be reported.

To create a profile, complete the following steps:

1. Click **Create** above the profile table. You are redirected to the **Create** page.
2. Configure the following settings:
    - **Profile Name** – Enter the profile name, followed by an optional **Description**.
    - **SharePoint content that meets business rules at the selected time will be collected in the report** – Configure a time to determine at which time the SharePoint content that meets the rules will be reported:
        i. Click the calendar ( ) button.
        ii. Click a date in the calendar, and select a time zone form the drop-down lists.
        iii. Click **OK** to save the date and time.
    - **Select the record type to report on** – Select the type of record that will be reported.
        - With **Physical Records** selected, all physical files that meet the rules within the physical library will be reported.
        - With **Electronic Records** selected, you need to select a SharePoint node. SharePoint content that meets the rules within the SharePoint node selected in the reporting scope field will be reported.
    - **Reporting Scope** – Select one or multiple SharePoint nodes to define the scope where SharePoint content that meets the rules will be reported.

      ***Note**: The physical library node is grayed out if you have selected the **Mark the physical library where physical items will be held** checkbox when configuring custom settings.

***Note**: If a physical library exists in the selected SharePoint node, the physical library will be skipped when searching content.

- Use the Search feature to search for a SharePoint node. You can enter the keywords here, and then click the Search ( ) button to search for the corresponding SharePoint node.

  ***Note**: You can only search for the SharePoint nodes whose names are displayed in the expanded tree.

- Expand the SharePoint tree, and then select a SharePoint node.

3. Click **Save** to save the profile. You are redirected to the **Content Due for Disposal Report** page.

   When the profile is created, you can click the profile name to view the profile details.

# Term Usage Report

The Term Usage Report is used to display the quantity and location of the SharePoint content that has been classified using a specified business classification term within a SharePoint node.

## Creating a Term Usage Report Profile

In this section, you can create a term usage report profile. First, select the SharePoint nodes to report on, and then select the business classification terms for which you want to see the usage. The content that uses the selected business classification terms within the selected SharePoint nodes will be reported in the term usage report.

To create a profile, complete the following steps:

1. Click **Create** above the profile table. You are redirected to the **Create** page.
2. Configure the following settings:
   - **Profile Name** – Enter the profile name, followed by an optional **Description**.
   - **Select the term type to report on** – Select the type of business classification term whose usage will be reported.

     ***Note**: **Orphaned Terms** are the business classification terms that have been deleted or deactivated in SharePoint or AvePoint RevIM. By selecting **Orphaned Terms**, content that has been classified using orphaned business classification terms will be reported.

   - **Term Selection** – Select one or more business classification term set or terms to specify the reporting business classification terms.
     - Use the Search feature to simplify your search for a business classification term. Enter keywords in the text box, and then click the Search ( ) button to search for the corresponding business classification term.

***Note**: You can only search for the business classification terms whose names are displayed in the expanded tree.

- Expand the business classification term tree, and then select the business classification terms.

- **Select the record type to report on** – Select the type of record that will be reported.
  - With **Physical Records** selected, all physical files that have been classified used the selected business classification term within the physical library will be reported.
  - With **Electronic Records** selected, you need to select a SharePoint node, and SharePoint content that has been classified within the specified SharePoint node selected in the **Reporting Scope** field using the selected business classification term will be reported.
- **Reporting Scope** – Select one or multiple SharePoint nodes to specify the reporting scope.

  ***Note**: The physical library node is grayed out if you have select the **Mark the physical library where physical items will be held** checkbox when configuring custom settings.

  ***Note**: If a physical library exists in the selected SharePoint node, the physical library will be skipped when searching business classification terms.

  - Use the Search feature to search for a SharePoint site collection, site, or list. You can enter the keywords here, and then click the Search ( ) button to search for a specific site or list within the unfolded nodes.
  - Expand the SharePoint tree, and then select the SharePoint node.

3. Click **Save** to save the profile. You are redirected to the **Term Usage Report** page.

   When the profile is created, click the profile name to view the profile details.

## Rule Usage Report

The Rule Usage Report helps users understand how many business classification terms are associated with a rule. You can perform the following actions:

- View Rule Usage – To view usage of a rule, select a rule from the **Rule Selection** drop-down list, and then click **Search**. The details of the selected rule are displayed in the **Rule Details** pane, and the business classification terms associated with the selected rule are listed in the term details table. Details about the business classification terms are: **Term Name**, **Term Full Path**, and **Term Status**.
- Search Term – To search for a business classification term associated with the selected rule above, enter keywords in the **Search Term** text box, and click the Search ( ) button to perform the search.

- **Export Report** – You can export a rule usage report to view the rule details and the details of the business classification terms associated with the selected rule.

  Select a rule from the **Rule Selection** drop-down list, click **Search** to show the rule usage report, and then click **Export Report** to export the rule usage report. The rule usage report, including rule details and business classification term details, is exported.

## AvePoint RevIM Auditor Report

The AvePoint RevIM Auditor Report is used to display detailed information of activities including operation records and export records performed within AvePoint RevIM within a specified time range. The detailed information is displayed in the format of diagrams and tables.

You can perform the following actions in the AvePoint RevIM Auditor Report:

- **Diagram** – To customise an activity diagram, click **Diagram**, and complete the following steps:

  - Bar chart – Click the bar chart view ( ) button. All activities performed within AvePoint RevIM will be displayed in a bar chart.
  - Line chart – Click the line chart view ( ) button. All activities performed within AvePoint RevIM will be displayed in a line chart.

  You can customise the activity diagram by the vertical axis for the bar chart view and the horizontal axis for the line chart view. The available types of information include: **Time**, **User**, **Module**, **Action**, and **Status**.

  You can also customise the activity diagram by time range. Select a provided time range or customise a time range. Activities that occurred within the specified time range will be displayed in the diagram. To customise a time range, click **Custom**, select a **start date** and **end date**, and click **OK**.

- **Details** – Display the detailed activities performed in the time range specified for the diagram. To customise an activity table, click **Details**, and complete the following steps:

  **Manage Columns** – Filter the columns that will be displayed in the activity table. Click **Manage Columns**, select or clear the checkboxes next to the column names, and click **OK**. The selected column names will be displayed in the activity table.

  The column names are: **Time**, **User**, **Module**, **Section**, **Action**, **Object Name**, **New Value**, **Original Value**, and **Status**.

Click **Export Report** to export all operation records performed within AvePoint RevIM.

# Creation and Destruction Report

The Creation and Destruction Report is used to display items including documents and physical files that have been created and/or destroyed within a specified time range.

***Note**: For a creation and destruction report where all documents that have been destroyed are collected, **Object Level**, **Action Time**, and **Term Name** columns' values that are displayed on the **Creation and Destruction Report > Show Report** page are retrieved from the DocAve Archiver database. Before creating a creation and destruction report, make sure you have configured the **AgentCommonStorageEnv.cfg** file to retrieve values of the **Object Level** and **Term Name** columns. For more information, refer to Appendix G: Configuring the AgentCommonStorageEnv.cfg File.

***Note**: AvePoint RevIM is integrated with DocAve. To use AvePoint RevIM functions properly, make sure the version of the integrated DocAve is DocAve 6 SP8 CU2 and above. If the integrated DocAve is DocAve 6 SP9, you do not need to modify the configuration file above.

## Creating a Creation and Destruction Report Profile

By configuring a time range and selecting an action type in a profile, physical files that are created or destroyed in all physical libraries within the specified time range will be reported. By selecting a SharePoint node, documents that are created or destroyed within the specified SharePoint node at a specified time range will be reported.

To create a profile, complete the following steps:

1. Click **Create** above the profile table. You are redirected to the **Create** page.
2. Configure the following settings:
    - **Profile Name** – Enter the profile name, followed by an optional **Description**.
    - **Select an action type** – Choose items that will be reported.
        - Select **Created** to report created items.
        - Select **Destroyed** to report destroyed items.
        - Select both **Created** and **Destroyed** to report both created and destroyed items.
    - **Define a time range** – Select a time range to determine at which time items that are created and/or destroyed will be reported. To customise a time range:
        i. Select the **custom** option.
        ii. Click the calendar ( ) button.
        iii. Select a start and an end date, and click **OK** to save the changes.
    - **Select the record type to report on** – Select the type of record that will be reported.

- With **Physical Records** selected, all physical files that are created and/or destroyed based on the selection above within the physical library will be reported.
- With **Electronic Records** selected, documents that are created and/or destroyed based on the selection above within the SharePoint node selected in the reporting scope field will be reported.

- **Reporting Scope** – Select one or multiple SharePoint nodes to define the scope where documents that are created and/or destroyed will be reported.

  ***Note**: The physical library node is grayed out if you have select the **Mark the physical library where physical items will be held** checkbox when configuring custom settings.

  ***Note**: If a physical library exists in the selected SharePoint node, the physical library will be skipped when searching documents.

  - Use the Search feature to search for a SharePoint node. You can enter the keywords here, and then click the Search ( ) button to search for the corresponding SharePoint node.

    ***Note**: You can only search for the SharePoint nodes whose names are displayed in the expanded tree.

  - Expand the SharePoint tree, and then select a SharePoint node.

3. Click **Save** to save the profile. You are redirected to the **Creation and Destruction Report** page.

   When the profile is created, you can click the profile name to view the profile details.

# Available Space Report

The Available Space Report is used to calculate the available space of a location and report all box types in the location and the number of boxes in each type.

A location's available space equals the location's total space minus the space of boxes that exist in the location.

## Creating an Available Space Report Profile

In this section, you can create an available space report profile.

To create a profile, complete the following steps:

1. Click **Create** above the profile table. You are redirected to the **Create** page.
2. Configure the following settings:
   - **Profile Name** – Enter the profile name, followed by an optional **Description**.

- **Select a location to report on** – Select a location term whose available space will be reported.

  Use the Search feature to simplify your search for a location term. Enter keywords in the text box, and then click the Search ( ) button to search for the corresponding location term.

  ***Note**: You can only search for the location terms whose names are displayed in the expanded tree.

3. Click **Save** to save the profile. You are redirected to the **Available Space Report** page.

   When the profile is created, click the profile name to view the profile details.

# Managing Profiles in Report Center

For the following report types, after creating profiles, you can edit and delete profiles. You can also generate and view reports.

- Content Due for Disposal Report
- Term Usage Report
- Creation and Destruction Report
- Available Space Report

## Editing a Profile

Once profiles are created, all profile settings can be edited.

To edit a profile, select the profile, click **Edit** above the profile table, and then edit the settings of this profile on the **Edit** page.

## Deleting Profiles

When a profile is no longer useful, you can delete this profile from the profile table. Deleting unnecessary profiles enables you to simplify profiles management.

To delete a profile, complete the following steps:

1. Select one or more profiles, and click **Delete** above the profile table. A confirmation window appears.
2. Select or clear the **Deleted Related Jobs and Reports** checkbox to define whether or not to simultaneously delete the related jobs and reports.

If the checkbox is deselected, the jobs that ran before using this profile will not be deleted. You can still find the deleted profile and view the reports that have been generated before using this profile on the **Show Report** page.

3. Click **OK** to delete the profiles, or click **Cancel** to exit without deleting the selected profiles.

## Generating Reports

To generate a report, complete the following steps:

1. Select a profile from the profile table.
2. Click **Generate Report** above the profile table to start the job. Access **Job Monitor** to view job details.

## Viewing Reports

The **Show Report** function allows you to view and export reports after running a generating report job.

To show a report, complete the following steps:

1. Select a profile from the profile table.
2. Click **Show Report** above the profile table. You are redirected to the **Show Report** page.

   Alternatively, click **MENU** in the upper-right corner, and click **Job Monitor** to launch Job Monitor. On the **Job Monitor** page, select a generating report job, and click **Show Report**. You are redirected to the **Show Report** page.

For more information on showing reports, refer to Job Monitor.

# Physical Item Management

The Physical Item Management function allows you to manage physical items including boxes, files, and records in SharePoint physical libraries and generate reports in AvePoint RevIM.

## Location Management

In this section, you can create, edit, delete, search, synchronise, and configure the total space for location terms.

### Creating Location Terms

After installing AvePoint RevIM, there will be a built-in location term set named **LocationSet** and a built-in location term named **Holding Box**. You can create nested location terms under the built-in location term set.

Refer to the following steps to create a location term:

1. Click **Location Management** in the **Physical Item Management** tab. The **Location Management** page appears.
2. Select the built-in location term set or a location term under which you want to create a new location term.
3. Click the down arrow ( ) of the built-in location term set or location term, and select **Create Term**. A text box appears below.
4. Enter a name for the location term in the text box, and press **Enter** on your keyboard. This new location term will be listed under the built-in location term set.

After finishing creating a location term, you can define a total space for it:

1. Click a location term from the location terms panel. The settings of this location term appear on the right pane of the **Location Management** page.
2. Enter a positive number in the **Total Space** text box.
3. Click **Save** to save the space setting.

After creating location terms, you can search a specific location term. Enter the keywords in the **Search** text box, and click the Search ( ) button on the left pane of the **Location Management** page to search for the corresponding location term.

### Synchronising Location Terms to SharePoint

After creating location terms, you can synchronise them to SharePoint Managed Metadata Services or the term store in the SharePoint admin center by clicking **Synchronise** on the left pane of the **Location Management** page. You will be redirected to the **Location Synchronisation** page. For more information on the synchronisation, refer to Location Synchronisation.

## Renaming and Deleting Location Terms

Once location terms are created, you can rename or delete location terms. Deleting unnecessary location terms enables you to simplify location term management.

Select the built-in location term set, or any location term on the left pane of the **Location Management** page, and click the down arrow ( ) button of it. You can:

- Rename – Select **Rename Term Set**/**Rename Term** from the drop-down list, enter a new name in the text box, and press **Enter** on the keyboard.

  Alternatively, you can double-click the built-in location term set, or any location term except for **Holding Box** that you want to rename to make the name editable.

- Delete – Click **Delete Term** from the drop-down list, and click **OK** in the pop-up confirmation window.

  ***Note**: The built-in location term set cannot be deleted.

# Location Synchronisation

Location term set together with terms under it in AvePoint RevIM can be synchronised to SharePoint Managed Metadata Services or the term store in the SharePoint admin center. Folders with the same structure and names as location terms will be created in SharePoint physical libraries to hold physical boxes, files, and records.

- For SharePoint 2013/2016, the location terms will be synchronised to the SharePoint Managed Metadata Services that are connected to all registered SharePoint 2013/2016 site collections.
- For SharePoint Online, the location terms will be synchronised to the term store in the SharePoint admin center.

You can select to synchronise all location terms once or periodically by configuring a schedule for the Location Term Synchronisation job. After the synchronisation, the location term set together with terms under it will be displayed under the business classification term group that has been synchronised to the SharePoint Managed Metadata Services or term store in the SharePoint admin center.

A Location Term Synchronisation job also synchronises all term-related operations including creation, deletion, name change, and total space change that were performed since the last synchronisation job.

Refer to the following steps to configure a schedule for the Location Term Synchronisation job:

1. Click **Location Synchronisation** in the **Physical Item Management** tab. The **Location Synchronisation** page appears.
2. Select an option to determine whether or not to synchronise the location terms to SharePoint Managed Metadata Services or term store based on a configured schedule.
   - **No Schedule** – Select this option to synchronise the location terms without a schedule.

- **Configure a schedule** – Select this option to configure a customised schedule, and synchronise location terms by schedule.
    - **Start time** – Select the date and time for synchronising location terms to SharePoint Managed Metadata Services or term store.

      Click the calendar ( ) button in the **Start Time** field. Click a date on the calendar, select a time and a time zone from the drop-down lists, and then click **OK** to save the date and time.
    - **Interval** – Specify an interval for recurring synchronisations.
    - **No end date** – The synchronisation will be run repeatedly until you stop it manually.
    - **End after __occurrences** – The synchronisation will stop after the defined occurrences that you enter in this field.
    - **End by __**– The synchronisation will stop at the exact date and time that you select.

3. Click **Save** to save the settings. A prompt appears informing you that the settings are successfully saved. Location terms will be synchronised based on your schedule settings. After a Location Term Synchronisation job completes, you can navigate to **MENU** > **Job Monitor** to view the job details or download the job report to check the synchronisation status.

   Click **Save and Synchronise Now** to save the configurations and synchronise the location terms immediately. A prompt appears informing you that the synchronisation job has started, and you can navigate to **MENU** > **Job Monitor** to view detailed information of the job.

   Click **Cancel** to cancel the configurations. The **Home** page appears.

# File Location Update

The storage location where a physical file should be stored can be reflected by the column values of **Home Location** and **Box** of this physical file in the SharePoint physical library.

File Location Update is used to check if a physical file's actual storage location matches its **Home Location** and **Box** column values, and move the physical file to the correct location if its actual storage location does not match the column values.

***Note**: A physical file cannot be moved to the correct location if the folder with the same structure and name as the location term that appears in the **Home Location** column does not exist in SharePoint physical libraries. However, if the folder with the same structure and name as the box that appears in the **Box** column does not exist in SharePoint physical libraries, a box with the same structure and name will be automatically created after a File Location Update job completes, and the physical file can be moved to the folder.

1. Click **File Location Update** in the **Physical Item Management** tab. The **File Location Update** page appears.
2. Select an option to determine whether or not to update the physical file's storage location based on a configured schedule.
    - **No Schedule** – Select this option to update the physical file's storage location without a schedule.
    - **Configure a schedule** – Select this option to configure a customised schedule, and update the physical file's storage location by schedule.
        - **Start time** – Select the date and time for the update.

          Click the calendar ( ) button in the **Start Time** field. Click a date on the calendar, select a time and a time zone from the drop-down lists, and then click **OK** to save the date and time.
        - **Interval** – Specify an interval for recurring the update.
        - **No end date** – The File Location Update job will be run repeatedly until you stop it manually.
        - **End after __occurrences** – The File Location Update job will stop after the defined occurrences that you enter in this field.
        - **End by __**– The File Location Update job will stop at the exact date and time that you select.
3. Click **Save** to save the settings. A prompt appears informing you that the settings are successfully saved. A physical file's storage location will be updated based on your schedule settings. After a File Location Update job completes, you can navigate to **MENU** > **Job Monitor** to view the job details or download the job report.

   Click **Save and Update Now** to save the configurations and update the physical file's storage location immediately. A prompt appears informing you that the File Location Update job has started, and you can navigate to **MENU** > **Job Monitor** to view detailed information of the job.

   Click **Cancel** to cancel the configurations. The **Home** page appears.

# Box Management

In this section, you can create box types and define sizes for different box types. Boxes created in SharePoint physical libraries have a **Choice** type of column named **Box Type**, which uses the box type created in AvePoint RevIM as its value. The box size will be used by the system when calculating the available space of a location.

To access the **Box Management** page, click **Box Management** in the **Physical Item Management** tab.

- **Create** – Create a new box type and define its capacity. Click **Create**, enter the box type, size, and an optional description in the text boxes, and click **Save**.

- **Edit** – Make changes to a box type. Click **Edit** to the right of the row. After editing the box type, size, and description, click **Save** to save the changes.
- **Delete** – Delete a box type.
- **Set as Default** – Set this box type as the default value of the **Box Type** column in SharePoint.

## Physical Item Import

Physical Item Import allows users to import existing physical items including physical files and records to a SharePoint physical library via a CSV file.

1. Click **Physical Item Import** in the **Physical Item Management** tab. The **Physical Item Import** page appears.
2. Choose a physical library where the imported physical items will be held.
3. Click **Download Template**. A **physicaltemplate.csv** file is downloaded to the download location of your default browser.
4. Configure physical items that you want to import in the CSV file.

   ***Note**: If a physical file you entered in the template does not exist in the SharePoint physical library, a physical file with the same name will be created.

   ***Note**: Make sure the following required columns in the CSV file are configured before importing the CSV file.

   - **PhysicalFileName** – Enter the name of the physical file.
   - **PhysicalRecordName** – Enter the name of the physical record.

     ***Note**: This field is required only when you import physical records.

   - **Home Location** – Enter the location term in the format of *term group/term set/term*. The physical file will be held under the folder that shares the same name and structure with the entered location term.
   - **Box** – Enter the name of the physical box where the physical file will be held.
   - **Business Classification** – Enter the business classification term that will be used to classify the physical file in the format of *term group/term set/term*.
5. Click **Import**. Select the **physicaltemplate.csv** file, and click **Open**.

A Physical Item Import job starts. After a Physical Item Import job completes, physical files and records will be imported to the selected SharePoint physical library. Navigate to **MENU** > **Job Monitor** to view the job details or download the job report.

# Managing SharePoint Physical Libraries

SharePoint physical libraries are used to hold items including physical boxes, files, and records. End Users can create various requests to obtain the physical items that they need, which can trigger corresponding workflows, and Records Management Officers (RM Officers) can review and process the requests to provide the corresponding physical items to End Users.

## Familiarizing Yourself with the AvePoint RevIM Site Collection or Site Interface

The landing page of an AvePoint RevIM site collection or site in SharePoint provides you with essential information about your requests and tasks. Click **Records Repository**, **Tasks**, or **Requests** in the top link bar to navigate to that particular page.

Refer to the following information to gain a brief understanding about the site contents of the AvePoint RevIM site collection or site:

- **Records Repository** – The SharePoint physical library that is automatically created after a new site collection or site is created by using the End User Solution.
    - For End Users, you can create and submit various requests.
    - For RM Officers, you can review and process various requests created or submitted by End Users. You can also create various requests and physical boxes.

  There are three views on the **Records Repository** page: **Boxes**, **Files**, and **Files for Disposal**. Each view presents different columns and you can switch among these views.

- **Tasks** – For RM Officers, all tasks that need your review and process are displayed in this list. A task will be created for each RM Officer when a request is created or submitted to the RMO Group.
  ***Note**: For New Physical Record requests, no tasks will be created.
- **Requests** – All created and submitted requests are displayed in this list, including completed requests and in progress requests. To view request details, click the request title link to access the corresponding request information page.

## What Are the AvePoint RevIM Roles

When managing SharePoint physical libraries, each user has a specified role, which allows them to perform certain actions. AvePoint RevIM uses the following role types:

- **End Users** – End Users can create and submit requests, and view requests you created and submitted.

- **RM Officers** – RM Officers are approvers who can also create requests, but are primarily responsible for reviewing and processing requests.

# What Can I Do as an End User

As an End User, you can create and submit the following requests to obtain what you need from the physical library:

- Create New Physical File Request
- Create New Physical Record Request
- Submit File Loan Request
- Submit Box Loan Request

## Creating a New Physical File Request

If you need a physical file but the physical file does not exist in the physical library, you can create a new physical file request.

To create a new physical file request, complete the steps below:

1. On the **Records Repository** page, click **Request a New Physical File** in the **Manage** group of the **FILES** tab. The **New File Request** page appears.
2. On the **New File Request** page, complete detailed information about the physical file that you need:
   - **Object Name** – Enter the name of the physical file.
   - **Business Classification** – Select a business classification term to associate the physical file with the business classification term.

     ***Note**: This is the column you created when configuring global settings to classify physical files, and we use **Business Classification** as an example. If you customise the column name when configuring global settings, the customised column name will be displayed here instead.

     i. Click the select term ( ) button.

     ii. Select a business classification term as the value of the **Business Classification** column, and click **Select >>**.

     iii. Click **OK**. The selected business classification term appears in the text box.
   - **Request Description** – Enter a brief description for your new physical file request.
3. Click **Save** to save the request. The new physical file request is routed to the RM Officers. All RM Officers in the RMO Group will receive an e-mail notification.

After any RM Officer completes your request, the physical file is available to you. An e-mail notification will be sent to you.

## Submitting a Physical File Loan Request

If you need a physical file that already exists in the physical library, you can submit a physical file loan request.

To submit a physical file loan request, complete the steps below:

1. On the **Records Repository** page, locate and select the physical file that you want to loan.
2. Click **Submit a File Loan Request** in the **Manage** group of the **FILES** tab. The **File Loan Request** page appears.
3. Enter a brief description for your physical file loan request.
4. Click **Save** to submit this request to the RM Officers. All RM Officers in the RMO Group will receive an e-mail notification.

After any RM Officer approves your request, the physical file is available to you. An e-mail notification will be sent to you.

## Creating a New Physical Record Request

If you need a physical record but the physical record does not exist in the physical library, you can create a new physical record request.

***Note**: The new physical record request will not be routed to the RM Officers. After you save the request, a physical record will be automatically created by the system.

To create a new physical record request, complete the steps below:

1. On the **Records Repository** page, locate and select a physical file where the physical record that you need will be held.
2. Click **Request a New Physical Record** in the **Manage** group of the **FILES** tab. The **New Record Request** page appears.
3. On the **New Record Request** page, complete the detailed information about the physical record that you need:
    - **Object Name** – Enter the name of the physical record.
    - **Request Description** – Enter a brief description for your new physical record request.
4. Click **Save** to save the request.

## Submitting a Box Loan Request

If you need to loan many physical files, and these physical files exist in one physical box, you can submit a physical box loan request to loan the physical files as a whole.

***Note**: A physical box is allowed to be loaned when all physical files in it are available, or just some of all physical files in it are available.

To submit a physical box loan request, complete the steps below:

1. On the **Records Repository** page, locate and select the physical box that you want to loan.
2. Click **Submit a Box Loan Request** in the **Manage** group of the **FILES** tab. The **Box Loan Request** page appears.
3. Enter a brief description for your physical box loan request.
4. Click **Save** to submit this request to the RM Officers. All RM Officers in the RMO Group will receive an e-mail notification.

After any RM Officer approves your request, the physical box is available to you. An e-mail notification will be sent to you.

# What Can I Do as a Records Management Officer

RM Officers are users that are primarily responsible for reviewing and processing requests. By doing so, RM Officers can provide End Users with what they need from the physical library.

RM Officers can also create and submit requests, like an End User. For more information on creating and submitting requests, refer to Creating a New Physical File Request, Submitting a Physical File Loan Request, Creating a New Physical Record Request, and Submitting a Box Loan Request.

## Processing a New Physical File Request

When a new physical file request is created and you are one of the RMO Group members, an e-mail notification will be sent to you.

To access your request, click **the Requests list** link in the e-mail notification. You are redirected to the **Incomplete Requests** tab of the **Requests** page.

To process your request, complete the steps below:

1. Click the title of the request to view request detailed information.
2. Click the **In Progress** link in the **Process New File Request** column.
3. Click the **New File Request Task** link to open the task that has been assigned to you.
4. Click **Complete** to complete the task. By default, the newly created physical file is held in the **Holding Box** folder with the **Loaned** value appears in the **Availability** column. The name of the End User who creates the new physical file request will be displayed in the **Currently Held By** column. The physical file is only available to the End User who creates the new physical file request.

An e-mail notification will be sent to the End User who creates the new physical file request to notify them about the creation of the new physical file.

## Processing the Returned Physical File

After the End User returns the physical file, you need to modify the physical file again to update its properties and make the physical file available to other End Users.

1. On the **Records Repository** page, locate and select the physical file in the **Holding Box** folder.
2. Click **Edit Properties** in the **Manage** group of the **FILES** tab. The properties of the physical file is editable.
    - **Name** – Modify the name of the physical file.
    - **Lifecycle Status** – Modify the lifecycle status. The following four types of lifecycle statuses are available:
        - **Open** – For newly created physical files, **Open** is automatically configured by the system as the lifecycle status.
        - **Closed** – For physical files that can be closed, RM Officers can manually modify the lifecycle status to **Closed**.
        - **Pending Disposal** – For physical files that meet rule settings, the **Pending Disposal** status will be automatically configured by the system as the lifecycle status after a DocAve Archiver job where the rule is added completes.
        - **Destroyed** – For physical files with the **Pending Disposal** lifecycle status, **Disposed** is automatically configured by the system as the lifecycle status after RM Officers destroy the physical files and perform the **Mark as Disposed** operation.
    - **Home Location** – Configure a location term to associate the location term with the physical file. The physical file will be held under the folder that shares the same name and structure with the selected location term.
        i. Click the select term ( ) button.
        ii. Select a location term as value of the **Home Location** column, and click **Select >>**.
        iii. Click **OK**. The selected location term appears in the text box.
    - **Box** – Enter the name of the physical box where the physical file will be held.
    - **Business Classification** – Modify the business classification term that has been associated with the physical file.

      ***Note**: This is the column you created when configuring global settings to classify physical files, and we use **Business Classification** as an example. If you customise the column name when configuring global settings, the customised column name will be displayed here instead.

i. Click the select term ( ) button.

ii. Select a business classification term as value of the **Business Classification** column, and click **Select >>**.

iii. Click **OK**. The selected business classification term appears in the text box.

- **Date Opened** – Click the calendar ( ) button, and select a date when the physical file is created.
- **Date Closed** – Click the calendar ( ) button, and select a date when the physical file is closed.
- **Availability** – Modify the availability of the physical file.
  - **Available** – The physical file is available to all End Users.
  - **Loaned** – The physical file has already been loaned to an End User, and cannot be loaned again until the End User returns the physical file.
  - **Missing** – The physical file is missing, and cannot be loaned to End Users.

3. Click **Save** to save the changes.
4. Locate the physical file in the **Holding Box** folder, and click the **In Progress** link in the **Process File Hold** column.
5. Click the **File Hold Task** link to open the task.
6. Click **Complete** to complete the task. The availability status of the physical file changes to **Available**. The name of the End User who creates the new physical file request will disappear in the **Currently Held By** column.

## Creating a New Physical Box

RMO Officers can create physical boxes to hold physical files.

To create a new physical box, complete the steps below:

1. On the **Records Repository** page, click **Files** > **New Document** > **Physical Box**. The **New Folder** page appears.
2. On the **New Folder** page, complete the detailed information about the physical box that you want to create:
   - **Name** – Enter the name of the physical box.
   - **Availability** – Select the availability of the physical box. By default, the availability of the new physical box is **Available**.
   - **Home Location** – Select a location term to associate the physical box with the location term. The physical box will be created under the folder that shares the same name and structure with the selected location term.

i. Click the select term ( ) button.

ii. Select a location term as value of the **Home Location** column, and click **Select >>**.

iii. Click **OK**. The selected location term appears in the text box.

- **Box Type** – Select the box type. All box types created in AvePoint RevIM are available to be selected.

3. Click **Save** to save the changes.

## Moving Physical Files

RM Officers can move a physical file from the **Holding Box** folder or any other folders to a defined folder. To move a physical file to a defined folder, complete the steps below:

1. On the **Records Repository** page, select the physical file in the **Holding Box** folder or any other folders where you want to move the physical file.
2. Click **Move Files** in the **Manage** group of the **FILES** tab.
3. In the pop-up window, select a folder where the physical file will be moved, and click **OK**.
4. Click **OK** in the pop-up confirmation window.

   ***Note**: Do not use the browser's back or refresh buttons until a prompt appears saying **File has been moved**. Otherwise, your current configurations will not be saved.

After a physical file is moved to a new folder, the column values of **Home Location** and **Box** of this physical file will be automatically updated based on its actual storage location.

## Processing a Physical File Loan Request

When a physical file loan request is submitted and you are one of the RMO Group members, an e-mail notification will be sent to you.

To access your request, click **the Requests list** link in the e-mail notification. You are redirected to the **Incomplete Requests** tab of the **Requests** page.

To process your request, complete the steps below:

1. Click the title of the request to view request detailed information.
2. Click the **File Loan Request Task** link in the **Process File Loan Request** column to open the task that has been assigned to you.
3. Select one of the options below to process the request, and then enter any comments that you want to send to the End User in the **Comments** text box.

   - **Approve** – The physical file loan request is approved. The physical file is only available to the End User who submits the request. The name of the End User who creates the

physical file loan request will be displayed in the **Currently Held By** column. Other End Users can not submit a loan request for the physical file again until the End User returns the physical file.

- **Reject** – The physical file loan request is rejected. Then End User can submit a physical file loan request again.
- **Missing** – The physical file loan request is rejected. The physical file is declared as missing.
- **Cancel** – The physical file loan request is canceled by you. The request is awaiting to be processed by other RM Officers.

### Processing the Returned Physical File

After the End User returns the physical file, you need to modify the physical file again to make the physical file available to all other End Users.

1. On the **Records Repository** page, locate the physical file in the folder, and click the **In Progress** link in the **Process File Hold** column.
2. Click the **File Hold Task** link to open the task.
3. Click **Complete** to complete the task. The availability status of the physical file changes to **Available**. The name of the End User who creates the physical file loan request will disappear in the **Currently Held By** column.

## Processing a Box Loan Request

When a physical box loan request is submitted and you are one of the RMO Group members, an e-mail notification will be sent to you.

To access your request, click **the Requests list** link in the e-mail notification. You are redirected to the **Incomplete Requests** tab of the **Requests** page.

To process your request, complete the steps below:

1. Click the title of the request to view request detailed information.
2. Click the **In Progress** link in the **Process Box Loan Request** column to open the task that has been assigned to you.
3. Click the **Box Loan Request Task** link to open the task.
4. Select one of the option below to process the request, and then enter any comments that you want to send to the End User in the **Comments** text box.
    - **Approve** – The physical box loan request is approved. The physical box is only available to the End User who submits the request. The name of the End User who creates the physical box loan request will be displayed in the **Currently Held By** column. Other End Users can not submit a loan request for the physical box again until the End User returns the physical box.

- **Reject** – The physical box loan request is rejected. The End User can submit a physical box loan request again.
- **Cancel** – The physical box loan request is canceled by you. The request is awaiting to be processed by other RM Officers.

### Processing the Returned Physical Box

After the End User returns all physical files that they have loaned in the physical box, or just return some physical files in the physical box, you need to modify the physical box again to make the physical box available to all other End Users.

1. On the **Records Repository** page, select **Boxes** from the **Current View** drop-down menu to switch to the **Boxes** view.
2. Locate the physical box that has been returned, and click the **In Progress** link in the **Process Box Hold** column.
3. Click the **Box Hold Task** link to open the task.
4. Click the **Task details** link to process the task. All physical files that have been loaned are displayed.
5. Select the physical files that have been returned by the End User, and click **Return Box**. The availability status of the physical box changes to **Available**. The name of the End User who creates the physical box loan request will disappear in the **Currently Held By** column. The availability status of the physical files that have been returned together with the physical box changes to **Available**.

   For physical files that have not been returned together with the physical box, you need to process the physical files again in the same way of processing the returned physical files when the End User returns them. For details on processing a physical file loan request, refer to Processing the Returned Physical File.

## Processing Pending Disposal Physical Files

When lifecycle status of a physical file is **Pending Disposal**, you can mark the physical file as destroyed after you already destroy the physical file.

1. On the **Records Repository** page, select **Files for Disposal** from the **Current View** drop-down menu to switch to the **Files for Disposal** view. All physical files in the physical library that are waiting to be destroyed are displayed.
2. Locate the physical files that you want to dispose, and click **Mark as Destroyed**. The lifecycle status of the physical file changes to **Destroyed**. The destroyed time will be automatically created and displayed in the **Destroyed Time** column of the physical file.

# Job Monitor

Job Monitor allows you to view the status and details of jobs, download reports, and view reports.

## Launching Job Monitor

To launch Job Monitor and access its functionality, follow the instructions below:

1. Log into AvePoint RevIM. If you are already in the software, click **MENU** in the upper-right corner.
2. Click **Job Monitor** to launch Job Monitor.

## Understanding Job Monitor

Job Monitor provides you with a number of ways to customise the way your jobs are displayed so that you can more efficiently manage them.

1. Sort Columns – Allows you to change the sort order for the following columns: **Job ID**, **Job Type**, **Progress**, **Status**, **Start Time**, **Finish Time**, and **Job Run By**.

   To sort a column, click the sort ( ) button in the column heading, and then select ascending or descending.

2. Filter Columns – Allows you to filter jobs according to their types or status, and determine which kinds of jobs will be displayed. First, click the sort ( ) button next to the **Job Type** and **Status** column, and then select the checkbox next to the job type or status.

   You can also use the Search feature to search the jobs that you want to filter. Enter a search criterion in the **Search** text box. The system will search for the jobs with the entered criteria and provide the matching values as suggestions. Select options from the suggestions listed.

3. **Manage Columns** – Allows you to manage which columns will be displayed in the job table so that only information you want to see is displayed. Click **Manage Columns**, select the checkboxes next to the column names, and click **OK**. The selected columns will be displayed in the Job Monitor table.

   ***Note**: You cannot clear the checkbox next to the **Job ID** column.

4. Search Jobs – Allows you to search jobs based on their IDs. You can enter a keyword or phrase to define the search result.

## Operations in Job Monitor

**Job Monitor** provides you with a number of tools that allow you to perform actions on jobs that you are currently running or have run in the past.

You can perform the following actions in Job Monitor:

- **View Details** – Allows you to view the details of a job. Select a job by selecting the corresponding checkbox, and click **View Details**. The **View Details** tab appears with the job report displayed in the viewing pane with the **Summary** tab selected. The **Summary** tab displays general information about the job. For more in-depth information, click the corresponding **Details** tab in the viewing pane. Click **Close** to go back to the **Job Monitor** page.
- **Delete** – Allows you to delete job information. Select one or more jobs by selecting the corresponding checkboxes, and click **Delete**. A confirmation window will appear to confirm that you are sure you want to proceed with the deletion. Click **OK** to delete the selected jobs.
- **Refresh** – Allows you to refresh the **Job Monitor** page. Click **Refresh**. The **Job Monitor** page is refreshed.
- **Download Report** – Allows you to download the job reports of the selected jobs. Select the corresponding checkboxes next to the jobs you want to download, and click **Download Report**.
- **Show Report** – Allows you to view a report. After showing a report, click **Export Report** to export a report of the selected job.

## Showing Reports

The **Show Report** page displays the details of reports that are generated in **Content Due for Disposal Report**, **Term Usage Report**, **Creation and Destruction Report**, and **Available Space Report**.

On the **Show Report** page, you can complete the following steps to customise the report details that you want to view and export:

1. **Profile Name** – All profiles created in the Content Due for Disposal Report or Term Usage Report are listed here. Select a profile from the **Profile Name** drop-down list.
2. **Report Generation Time** – All start times of the report generating jobs from the selected profile will be listed here. By default, the latest job's start time will be displayed in the Report Generation Time text box. Select a report generation time from the **Report Generation Time** drop-down list to specify which job from the profile you want to view.
3. **Manage Columns** – All columns that can be displayed in the report table are listed here. To manage the columns that will be displayed in the report details table, click **Manage Columns**, select or clear the checkboxes next to the column names, and click **OK**. The selected columns will be displayed in the table.
4. **Search** – Enter the keywords in the **Search** text box, and click the Search ( ) button to search for the corresponding report records. The search criteria include: **Title/Name** and **Term Name**.
5. **Action** – Choose the items that will be reported.

   ***Note**: The **Action** field appears only when a creation and destruction report job is selected.

6. **Export Report** – After finishing configuring the Show Report settings, you can also click **Export Report** to export the current report.

# AvePoint RevIM Web API

AvePoint RevIM Web API is a .NET Framework API set to manipulate AvePoint RevIM, and customers can use AvePoint RevIM Web API to integrate AvePoint RevIM with other programmes such as DocAve Governance Automation.

AvePoint RevIM Web API can be used to:

- Register SharePoint site collections in the DocAve Control Panel and configure custom settings for the registered site collections.
- Marking the physical library where physical items will be held.

## Sample

This section provides some samples about how to use AvePoint RevIM Web API.

### Registering SharePoint Site Collections and Configuring Custom Settings

The following is an example for registering SharePoint site collections and configure custom settings for the registered site collections using AvePoint RevIM Web API:

```
System.Net.ServicePointManager.ServerCertificateValidationCallback = delegate(object
sender, X509Certificate certificate, X509Chain chain, SslPolicyErrors sslPolicyErrors)
{ return true; };
```

// Configure the URL of AvePoint RevIM Web API. Replace the value of the **Host** parameter with the hostname or IP address of the machine where AvePoint RevIM is installed, and replace the value of the **Port** parameter with the port number of the AvePoint RevIM Web site.

```
 Private string applyClassificationController = "https://" + Host + ":" + Port +
"/api/ApplyClassification/Post";
```

// Configure the user's security token used to operate AvePoint RevIM Web API. Make sure the user account can log onto AvePoint RevIM.

```
    Token = this.GetToken();
    HttpWebRequest GetMyTasksReq = WebRequest.Create(applyClassificationController) as
HttpWebRequest;
    GetMyTasksReq.Method = "Post";
    GetMyTasksReq.Headers.Add("Accept-Language", "en-US,en;q=0.8");
    GetMyTasksReq.Headers.Add("Authorization", "Token " + this.Token.Trim('\"'));
    GetMyTasksReq.Accept = "application/json";
    GetMyTasksReq.ContentType = "application/x-www-form-urlencoded";
    GetMyTasksReq.Timeout = 500000;
GetMyTasksReq.ReadWriteTimeout = 500000;
Dictionary<string, string> requestBody = new Dictionary<string, string>();
```

// Configure a SharePoint Sites group to which the site collection will be registered. Replace the value of the **GroupName** parameter with the SharePoint Sites group. Make sure global settings have been configured on the SharePoint Sites group.

```
     requestBody.Add("GroupName", this.GroupName);
```

// Configure the URL of the site collection that you want to register. AvePoint RevIM Web API only supports registering SharePoint site collections.

```
    requestBody.Add("SiteCollectionUrl", this.SiteCollectionUrl);
```

// Confiugre a default term to classify documents or container level objects.

```
requestBody.Add("DefaultTermPath", this.DefaultTermPath);
```

// Configure a term scope where terms can be used to classify documents or container level objects.

```
requestBody.Add("RootTermPath", this.RootTermPath);
```

// Configure the DocAve Agent account that is used to register the site collection.

```
requestBody.Add("UserName", "");
string bodyContent = string.Empty;
if (requestBody != null && requestBody.Count > 0)
{
     int i = 0;
     foreach (string key in requestBody.Keys)
     {
          if (i == 0)
          {
               bodyContent = key + "=" + requestBody[key];
               i++;
           }
            else
            {
                 bodyContent = bodyContent + "&" + key + "=" + requestBody[key];
            }
     }
}
byte[] body = Encoding.Default.GetBytes(bodyContent);
GetMyTasksReq.ContentType = "application/x-www-form-urlencoded";
Stream stream = GetMyTasksReq.GetRequestStream();
stream.Write(body, 0, body.Length);
HttpWebResponse response = (HttpWebResponse)GetMyTasksReq.GetResponse();
var jsonString = new StreamReader(response.GetResponseStream()).ReadToEnd();
Console.WriteLine(jsonString);
```

## Marking the Physical Library

The following is an example for marking the physical library where physical items will be held using AvePoint RevIM Web API:

```
System.Net.ServicePointManager.ServerCertificateValidationCallback = delegate(object
sender, X509Certificate certificate, X509Chain chain, SslPolicyErrors sslPolicyErrors)
{ return true; };
```

// Configure the URL of AvePoint RevIM Web API. Replace the value of the **Host** parameter with the hostname or IP address of the machine where AvePoint RevIM is installed, and replace the value of the **Port** parameter with the port number of the AvePoint RevIM Web site.

```
private string registerPhysicalLocationController=  "https://" + Host + ":" + Port +
"/api/RegisterPhysicalLocation/Post";
```

// Configure the user's security token used to operate AvePoint RevIM Web API. Make sure the user account can log onto AvePoint RevIM.

```
    Token = this.GetToken();
HttpWebRequest GetMyTasksReq = WebRequest.Create(registerPhysicalLocationController)
as HttpWebRequest;
    GetMyTasksReq.Method = "Post";
    GetMyTasksReq.Headers.Add("Accept-Language", "en-US,en;q=0.8");
    GetMyTasksReq.Headers.Add("Authorization", "Token " + this.Token.Trim('\"'));
    GetMyTasksReq.Accept = "application/json";
    GetMyTasksReq.ContentType = "application/x-www-form-urlencoded";
    GetMyTasksReq.Timeout = 500000;
    GetMyTasksReq.ReadWriteTimeout = 500000;
    Dictionary<string, string> requestBody = new Dictionary<string, string>();
```

// Configure the URL of the site collection where the physical library exist. Make sure the site collection has been registered to a SharePoint Sites group, and global settings have been configured on the SharePoint Sites group.

```
requestBody.Add("SiteCollectionUrl", this.RecordSite);
```

// Configure the URL of the site where the physical library exist, or configure the physical library URL.

```
requestBody.Add("Url", this.RecordUrl);

    string bodyContent = string.Empty;
    if (requestBody != null && requestBody.Count > 0)
    {
         int i = 0;
         foreach (string key in requestBody.Keys)
         {
              if (i == 0)
              {
                   bodyContent = key + "=" + requestBody[key];
                   i++;
               }
               else
               {
                    bodyContent = bodyContent + "&" + key + "=" + requestBody[key];
                }
        }
    }
     byte[] body = Encoding.Default.GetBytes(bodyContent);
     GetMyTasksReq.ContentType = "application/x-www-form-urlencoded";
     Stream stream = GetMyTasksReq.GetRequestStream();
     stream.Write(body, 0, body.Length);
     HttpWebResponse response = (HttpWebResponse)GetMyTasksReq.GetResponse();
     var jsonString = new StreamReader(response.GetResponseStream()).ReadToEnd();
```

## Getting Security Token

To use AvePoint RevIM Web API, log into AvePoint RevIM first and then get security token.

The following is an example for getting a security token using AvePoint RevIM Web API:

```
System.Net.ServicePointManager.ServerCertificateValidationCallback = delegate(object
sender, X509Certificate certificate, X509Chain chain, SslPolicyErrors sslPolicyErrors)
{ return true; };
    HttpWebRequest GetMyTasksReq = WebRequest.Create(AdminTokenController) as
HttpWebRequest;
    GetMyTasksReq.Method = "Post";
    GetMyTasksReq.Headers.Add("Accept-Language", "en-US,en;q=0.8");
    Dictionary<string, string> requestBody = new Dictionary<string, string>();
```

// Configure the username of the user account used to log onto AvePoint RevIM. AvePoint RevIM Web API only supports the “Local System” login method. The username and password of the default admin account is “admin” “admin”.

```
    requestBody.Add("userName", "Admin");
```

// Configure the password of the user account.

```
    requestBody.Add("password", "***");
    string bodyContent = string.Empty;
    if (requestBody != null && requestBody.Count > 0)
    {
         int i = 0;
         foreach (string key in requestBody.Keys)
         {
```

```
            if (i == 0)
            {
                 bodyContent = key + "=" + requestBody[key];
                 i++;
             }
             else
             {
                  bodyContent = bodyContent + "&" + key + "=" + requestBody[key];
              }
           }
    }
    byte[] body = Encoding.Default.GetBytes(bodyContent);
    GetMyTasksReq.ContentType = "application/x-www-form-urlencoded";
    Stream stream = GetMyTasksReq.GetRequestStream();
    stream.Write(body, 0, body.Length);
    HttpWebResponse response = (HttpWebResponse)GetMyTasksReq.GetResponse();
    Token = new StreamReader(response.GetResponseStream()).ReadToEnd();
```

# Integrating with DocAve Governance Automation

AvePoint RevIM Web API integrates with the Custom Service of DocAve Governance Automation.

You can refer to the detailed information in Sample to prepare the PowerShell script file and then use the Custom Service of DocAve Governance Automation to perform actions by executing the PowerShell script file.

For more information on executing the desired actions through a PowerShell script file, refer to the **Custom Service** section in the DocAve Governance Automation Administrator User Guide.

# Appendix A: Configuring DocAve Governance Automation for the Manual Approval Process

With the **Enable manual approval** checkbox selected in the applied rule of a node, all objects within the node that meet the rule settings must be manually reviewed in DocAve Governance Automation. The rule's action will only be executed on the approved objects after you manually run a DocAve Archiver job with the same settings.

To review the objects, download the approval report, configure the approval settings for the exported objects offline, and then submit the approval settings to update the approval status of the objects.

Refer to the following steps to perform the review:

1. Create a site collection policy.

   ***Note**: Only site collections that are created by DocAve Governance Automation can use the Enable Manual Approval feature. To use this feature on site collections that are not created by DocAve Governance Automation, you must import these site collections into DocAve Governance Automation. For more information about importing existing site collections into DocAve Governance Automation, refer to the **Importing Existing Site Collections and Sites** section in the DocAve Governance Automation Administrator User Guide.

   ***Note**: To enable manual approval for content in the site collections associated with this policy, make sure the site collection policy is configured as follows:

   - Select the **Enable site collection content archival using DocAve Archiver** checkbox in the **DocAve Configuration** step.
   - Select the **Manual Archive Using RevIM** profile.
   - Select an approval process.

   For more information about managing site collection policies, refer to the **Creating or Editing Site Collection Policies** section in the DocAve Governance Automation Administrator User Guide.

2. Select the site collection policy when configuring a Create Site Collection service. For more information about configuring a Create Site Collection service, refer to the **Create Site Collection Service** section in the DocAve Governance Automation Administrator User Guide.
3. Submit a service request using this Create Site Collection service, and a new site collection will be created after the Create Site Collection service request is approved. For more information about submitting a service request, refer to the **Start a Request** section in the DocAve Governance Automation Administrator User Guide.
4. Register the site collection in DocAve after it is created. For more information about registering SharePoint sites in the DocAve Control Panel, refer to the DocAve Control Panel Reference Guide.

5. Use the default DocAve Governance Automation Timer Service, or configure a customised timer service to run the synchronization and scans job on a schedule. When a scheduled synchronization and scans job starts, a manual archive task (which contains a report of the content that meets the rule) will be automatically generated and assigned to the assignee designated in the approval process in Step **1**. An e-mail notification will also be sent to the assignee.

   ***Note**: Make sure the **Enable archive site collection content scan job** checkbox is selected so that the archive site collection content scan job can check if there is content in the site collections that needs to be archived.

   For more information about configuring the timer service, refer to the **Configuring the Timer Service** section in the DocAve Governance Automation Administrator User Guide.

6. Process the manual archive task in **My Tasks** on the **Monitoring and Reporting** page. The default status for the task is **Waiting for Approval**.
7. Click the task title to view the detailed information of the task in the **View Details** window.
8. Click **Review** in the **View Details** window to automatically download the report of the content that meets the AvePoint RevIM rule.

   Alternatively, click **here** in the **If necessary, click here to download the report again**. message to manually download the report.

9. Find and open the report.
10. In the report, find the **Action** column, and then edit the approval status for each object.
    - **Approve** – Enter **Approve** as the approval status of an object. The object will be archived after you manually run a DocAve Archiver job with the same settings. The default approval status is **Approve**.
    - **Reject** – Enter **Reject** as the approval status of an object. The object will not be archived after you manually run another DocAve Archiver job with the same settings.
11. Click **Save** to save changes to the report and close it.
12. In the **View Details** window, click **Browse**, and then select the modified report to upload.
13. After the report is uploaded, click **Finish** to close the **View Details** window and return to the **My Task** page.
14. Select the task, and click **Submit** on the ribbon to submit the task. In the pop-up window, enter an optional comment. Click **OK** to save the comment, or click **Cancel** to return to the **My Tasks** page without saving the comment.
15. After you manually run a DocAve Archiver job on the same node with the same settings including the rule settings and the node where the rule is applied, the rule's action will then be executed on the approved objects.

# Appendix B: Criteria Filter Conditions

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

## Site Collection Object Level

Refer to the following information about criteria filter conditions at the site collection level:

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

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

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

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

- **Does Not Equal** – Enter the complete site collection title. This selection archives all site collections except for the one that matches the entered title. Wildcards are unavailable.

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

- **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all site collections whose custom property does not match the entered text.
- **Equals** – Enter the complete site collection property text. This selection archives the site collection whose property name matches the entered text. Wildcards are unavailable.
- **Does Not Equal** – Enter the complete site collection property text. This selection archives all site collections except for those whose property name matches the entered text. Wildcards are unavailable.

- **Custom Property (Number)** – Enter the property name that is customized by users, followed by an Arabic number.
  - **>=** – Archive the site collections whose Custom Number Property value is equal to or greater than the entered number.
  - **<=** – Archive all site collections whose Custom Number Property value is equal to or less than the entered number.
  - **=** – Archive the site collections whose Custom Number Property value is equal to the entered number.
- **Custom Property (Yes/No)** – Enter the property name that is customized by users and select **Yes** or **No**.
  - **Yes** – If selected, archives the site collections whose Custom Yes/No Property value is **Yes**.
  - **No** – If selected, archives the site collections whose Custom Yes/No Property value is **No**.
- **Custom Property (Date and Time)** – Enter the property name that is customized by users and set the Date and Time.
  - **From … To** – Archive the site collections whose Custom Date/Time Property is within the selected Date/Time period.
  - **Before** – Archive the site collections whose Custom Date/Time Property is earlier than the selected Date/Time period.
  - **Older Than** – Archive the site collections whose Custom Date/Time Property is older than the current date for the number of Days/Weeks/Months/Years.

## Site Object Level

Refer to the following information about criteria filter conditions at the site level:

- **URL** – Enter the URL of a site.

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

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

- **Title** – Enter the title of a site.
  - **Contains** – Wildcards cannot be used in this field; all objects that contain the entered Title will be archived.
  - **Does not Contain** – You can enter part of the site title here. This selection archives all sites that do not contain the entered title. Wildcards are unavailable.
  - **Matches** – Wildcards such as "*" and "?" are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
  - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all sites that do not match the entered title.
  - **Equals** – Enter the site title. This selection archives the site that matches the entered title. Wildcards are unavailable.
  - **Does Not Equal** – Enter the complete site title. This selection archives all sites except for the one that matches the entered title. Wildcards are unavailable.
- **Modified Time** – Set a date range for the modified site.
  - **From … To** – Archive all sites that are modified between the two dates selected.
  - **Before** – Archive all sites modified before the date selected.
  - **Older Than** – Archive all sites with a modification date that is older than the **Days**, **Weeks**, **Months**, or **Years** selected from the drop-down list.
- **Created Time** – Set a date range for the created site.
  - **From … To** – Archive all sites that were created between the two dates selected.
  - **Before** –Archive all sites that were created before the date selected.

- **Older Than** – Archive all sites with a creation date that is older than the **Days**, **Weeks**, **Months**, or **Years** selected from the drop-down list.

- **Custom Property (Text)** – Enter the property name that is customized by users, followed by the text content.
  - **Matches** – Wildcards such as "*" and "?" are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
  - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all sites whose custom property does not match the entered text.
  - **Contains** – Wildcards cannot be used in this field; all objects that contain the entered Custom Property Text will be archived.
  - **Does not Contain** – You can enter part of the site property text here. This selection archives all sites whose property name does not contain the entered text. Wildcards are unavailable.
  - **Equals** – Enter the complete site property text. This selection archives the site whose property name matches the entered text. Wildcards are unavailable.
  - **Does Not Equal** – Enter the complete site property text. This selection archives all sites except for those whose property name matches the entered text. Wildcards are unavailable.
- **Custom Property (Number)** – Enter the property name that is customized by users, followed by an Arabic number.
  - **>=** – Archive the sites whose Custom Number Property value is equal to or greater than the entered number.
  - **<=** – Archive all sites whose Custom Number Property value is equal to or less than the entered number.
  - **=** – Archive the sites whose Custom Number Property value is equal to the entered number.
- **Custom Property (Yes/No)** – Enter the property name that is customized by users and select **Yes** or **No**.
  - **Yes** – If selected, archives the sites whose Custom Yes/No Property value is **Yes**.
  - **No** – If selected, archives the sites whose Custom Yes/No Property value is **No**.
- **Custom Property (Date and Time)** – Enter the property name that is customized by users and set the Date and Time.
  - **From … To** – Archive the sites whose Custom Date/Time Property is within the selected Date/Time period.
  - **Before** – Archive the sites whose Custom Date/Time Property is earlier than the selected Date/Time period.

- **Older Than** – Archive the sites whose Custom Date/Time Property is older than the current date for the number of Days/Weeks/Months/Years.

## List/Library Object Level

Refer to the following information about criteria filter conditions at the list or library level:

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

- **Does not Contain** – You can enter part of the list/library property text here. This selection archives all lists/libraries whose property name does not contain the entered text. Wildcards are unavailable.
- **Matches** – Wildcards such as "*" and "?" are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
- **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all lists/libraries whose custom property does not match the entered text.
- **Equals** – Enter the complete list/library property text. This selection archives the list/library whose property name matches the entered text. Wildcards are unavailable.
- **Does Not Equal** – Enter the complete list/library property text. This selection archives all lists/libraries except for those whose property name matches the entered text. Wildcards are unavailable.

- **Custom Property (Number)** – Enter the property name that is customized by users, followed by an Arabic number.
  - **>=** – Archive the lists/libraries whose Custom Number Property value is equal to or greater than the entered number.
  - **<=** – Archive all lists/libraries whose Custom Number Property value is equal to or less than the entered number.
  - **=** – Archive the lists/libraries whose Custom Number Property value is equal to the entered number.
- **Custom Property (Yes/No)** – Enter the property name that is customized by users and select **Yes** or **No**.
  - **Yes** – If selected, archives the lists/libraries whose Custom Yes/No Property value is **Yes**.
  - **No** – If selected, archives the lists/libraries whose Custom Yes/No Property value is **No**.
- **Custom Property (Date and Time)** – Enter the property name that is customized by users and set the Date and Time.
  - **From … To** – Archive the lists/libraries whose Custom Date/Time Property is within the selected Date/Time period.
  - **Before** – Archive the lists/libraries whose Custom Date/Time Property is earlier than the selected Date/Time period.
  - **Older Than** – Archive the lists/libraries whose Custom Date/Time Property is older than the current date for the number of Days/Weeks/Months/Years.

## Folder Object Level

Refer to the following information about criteria filter conditions at the folder level:

***Note**: When a **Folder** object level rule is used manage physical files in SharePoint physical libraries, the rule criteria condition needs to be configured based on the physical files' information instead of the folders' information.

- **Name** – Enter the name of the folder.
  - **Contains** – Wildcards cannot be used in this field; all objects that contain the entered name will be archived.
  - **Does not Contain** – You can enter part of the folder name here. This selection archives all folders that do not contain the entered name. Wildcards are unavailable.
  - **Matches** – Wildcards such as "*" and "?" are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
  - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all folders that do not match the entered name.
  - **Equals** – Enter the complete folder name. This selection archives the folder that matches the entered name. Wildcards are unavailable.
  - **Does Not Equal** – Enter the complete folder name. This selection archives all folders except for those that match the entered name. Wildcards are unavailable.
- **Modified Time** – Set a date range for the modified folders.
  - **From … To** – Archive all folders that are modified between the two dates selected.
  - **Before** – Archive all folders modified before the date selected.
  - **Older Than** – Archive all folders with a modification date that is older than the **Days**, **Weeks**, **Months**, or **Years** selected from the drop-down list.
- **Created Time** – Set a date range for the created folders.
  - **From … To** – Archive all folders that were created between the two dates selected.
  - **Before** – Archive all folders that were created before the date selected.
  - **Older Than** – Archive all folders with a creation date that is older than the **Days**, **Weeks**, **Months**, or **Years** selected from the drop-down list.
- **Created By** – Enter the name of the user who created the folders.

- **Contains** – You can enter part of the creator's name here. This selection archives all folders whose creator's name contains the entered value. Wildcards are unavailable.
- **Equals** – Enter the creator's complete name. This selection archives the folders whose creator's name matches the entered value. Wildcards are unavailable.

- **Content Type** – Enter a name for the folder content type.
  - **Contains** – Wildcards cannot be used in this field; all objects that contain the entered content type name will be archived.
  - **Does not Contain** – You can enter part of the folder content name here. This selection archives all folders whose content type name do not contain the entered content type name. Wildcards are unavailable.
  - **Matches** – Wildcards such as "*" and "?" are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
  - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all folders whose content type name does not match the entered name.
  - **Equals** – Enter the complete content type name. This selection archives the folders whose content type name matches the entered name. Wildcards are unavailable.
  - **Does Not Equal** – Enter the complete content type name. This selection archives all folders whose content type name does not match the entered name. Wildcards are unavailable.
- **Column (Text)** – Enter the column name that is customized by users, followed by the text content.
  - **Contains** – Wildcards cannot be used in this field; all objects that contain the entered text column will be archived.
  - **Does not Contain** – This selection archives all folders whose text column does not contain the entered value. Wildcards are unavailable.
  - **Matches** – Wildcards such as "*" and "?" are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
  - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all folders containing text column whose value does not match the entered value.
  - **Equals** – Enter the complete text column value. This selection archives the folders whose text column value matches the entered value. Wildcards are unavailable.

    - **Does Not Equal** – Enter the complete text column value. This selection archives all folders whose text column value does not match the entered value. Wildcards are unavailable.

- **Column (Number)** – Enter the column name, followed by an Arabic number.
    - **>=** – Archive folders whose number column value is equal to or greater than the entered number.
    - **<=** – Archive folders whose number column value is equal to or less than the entered number.
    - **=** – Archive folders whose number column value is equal to the entered number.
- **Column (Yes/No)** – Enter the column name and set **Yes** or **No**.
    - **Yes** – If selected, archives the folders whose Yes/No column value is **Yes**.
    - **No** – If selected, archives the folders whose Yes/No column value is **No**.
- **Column (Date and Time)** – Enter the column name and set date and time.
    - **From … To** – Archive all folders whose Date and Time column value is between the two dates selected.
    - **Before** – Archive all folders Whose Date and Time column value is before the date selected.
    - **Older Than** – Archive all folders whose Date and Time column value is older than the **Days**, **Weeks**, **Months**, or **Years** selected from the drop-down list.

## Item Object Level

Refer to the following information about criteria filter conditions at the item level:

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

    - **Does Not Equal** – Enter the complete item title. This selection archives all items except for those that match the entered title. Wildcards are unavailable.

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

- **Equals** – Enter the complete content type name. This selection archives the items whose content type name matches the entered name. Wildcards are unavailable.
- **Does Not Equal** – Enter the complete content type name. This selection archives all items whose content type name does not match the entered name. Wildcards are unavailable.

- **Column (Text)** – Enter the column name that is customized by users, followed by the text content.
  - **Contains** – Wildcards cannot be used in this field; all objects that contain the entered text column will be archived.
  - **Does not Contain** – This selection archives all items whose text column does not contain the entered value. Wildcards are unavailable.
  - **Matches** – Wildcards such as "*" and "?" are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
  - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all items containing text column whose value does not match the entered value.
  - **Equals** – Enter the complete text column value. This selection archives the items whose text column value matches the entered value. Wildcards are unavailable.
  - **Does Not Equal** – Enter the complete text column value. This selection archives all items whose text column value does not match the entered value. Wildcards are unavailable.
- **Column (Number)** – Enter the column name, followed by an Arabic number.
  - **>=** – Archive items whose number column value is equal to or greater than the entered number.
  - **<=** – Archive items whose number column value is equal to or less than the entered number.
  - **=** – Archive items whose number column value is equal to the entered number.
- **Column (Yes/No)** – Enter the column name and set **Yes** or **No**.
  - **Yes** – If selected, archives the items whose Yes/No column value is **Yes**.
  - **No** – If selected, archives the items whose Yes/No column value is **No**.
- **Column (Date and Time)** – Enter the column name and set date and time.
  - **From … To** – Archive all items whose Date and Time column value is between the two dates selected.
  - **Before** – Archive all items whose Date and Time column value is before the date selected.

    - **Older Than** – Archive all items whose Date and Time column value is older than the **Days**, **Weeks**, **Months**, or **Years** selected from the drop-down list.

- **Parent List Type ID** – Enter the list's ID number.
    - **Equals** – Enter the list's complete ID value. This selection archives the items in the specified list whose ID number matches the entered value. Wildcards are unavailable.
    - **Does Not Equal** – Enter the list's complete ID value. This selection archives all items in the specified list whose ID number does not match the entered value. Wildcards are unavailable.

## Document Object Level

Refer to the following information about criteria filter conditions at the document level:

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

- **Older Than** – Archive all documents with a modification date that is older than the **Days**, **Weeks**, **Months**, or **Years** selected from the drop-down list.

- **Created Time** – Set a date range for the created documents.
  - **From … To** – Archive all documents that were created between the two dates selected.
  - **Before** – Archive all documents that were created before the date selected.
  - **Older Than** – Archive all documents with a creation date that is older than the **Days**, **Weeks**, **Months**, or **Years** selected from the drop-down list.
- **Created By** – Enter the name of the user who created the document.
  - **Contains** – You can enter part of the creator's name here. This selection archives all documents whose creator's name contains the entered value. Wildcards are unavailable.
  - **Equals** – Enter the creator's complete name. This selection archives the documents whose creator's name matches the entered value. Wildcards are unavailable.
- **Modified By** – Enter the name of the user who latest modified the documents.
  - **Contains** – You can enter part of the modifier's name. This selection archives all documents whose modifier's name contains the entered value. Wildcards are unavailable.
  - **Equals** – Enter the modifier's complete name. This selection archives the documents whose modifier's name matches the entered value. Wildcards are unavailable.

    ***Note**: The user name has two different forms (**Log on Name** and **Displayed Name**):

    - **Log on Name** – If entering a log on name with **Equals**, enter the value as **Domain\Username**.
    - **Displayed Name** – If entering a displayed name with **Equals**, enter the username exactly how it displays in SharePoint.
- **Content Type** – Enter a name for the document content type.
  - **Contains** – Wildcards cannot be used in this field; all objects that contain the entered content type will be archived.
  - **Does not Contain** – You can enter part of the document content type name here. This selection archives all documents whose content type name does not contain the entered content type name. Wildcards are unavailable.
  - **Matches** – Wildcards such as "*" and "?" are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.

- **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all documents whose content type name does not match the entered content type name.
- **Equals** – Enter the complete content type name. This selection archives the documents whose content type name matches the entered name. Wildcards are unavailable.
- **Does Not Equal** – Enter the complete content type name. This selection archives all documents whose content type name does not match the entered name. Wildcards are unavailable.

- **Column (Text)** – Enter the customized column name, followed by the text content.
  - **Contains** – Wildcards cannot be used in this field; all objects that contain the entered text column will be archived.
  - **Does not Contain** – This selection archives all documents whose text column does not contain the entered value. Wildcards are unavailable.
  - **Matches** – Wildcards such as "*" and "?" are available when using **Matches**; it is the most flexible way of specifying the objects you would like to archive. The content that matches the entered text will be archived.
  - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all documents containing a text column whose value does not match the entered value.
  - **Equals** – Enter the complete text column value. This selection archives the documents whose text column value matches the entered value. Wildcards are unavailable.
  - **Does Not Equal** – Enter the complete text column value. This selection archives all documents whose text column value does not match the entered value. Wildcards are unavailable.
- **Column (Number)** – Enter the column name, followed by an Arabic number.
  - **>=** – Archive documents whose number column value is equal to or greater than the entered number.
  - **<=** – Archive documents whose number column value is equal to or less than the entered number.
  - **=** – Archive documents whose number column value is equal to the entered number.
- **Column (Yes/No)** – Enter the column name and set **Yes** or **No**.
  - **Yes** – If selected, archives the documents whose Yes/No column value is **Yes**.
  - **No** – If selected, archives the documents whose Yes/No column value is **No**.
- **Column (Date and Time)** – Enter the column name and set date and time.

- **From … To** – Archives all documents whose Date and Time column value is between the two dates selected.
- **Before** – Archives all documents whose Date and Time column value is before the date selected.
- **Older Than** – Archives the documents whose Date and Time column value is older than the **Days**, **Weeks**, **Months**, or **Years** selected from the drop-down list.

- **Parent List Type ID** – Enter the document's parent list's ID number.
  - **Equals** – Enter the document's parent list's ID value. This selection archives the documents in the specified list whose ID number matches the entered value. Wildcards are unavailable.
  - **Does Not Equal** – Enter the item's parent list's ID value. This selection archives all documents in the specified list whose ID number does not match the entered value. Wildcards are unavailable.

# Appendix C: Tagging Physical Files with Pending Disposal Lifecycle Status

To tag the lifecycle status of physical files in SharePoint physical libraries as **Pending Disposal**, you need to create a **Folder** object level rule, apply the rule to a SharePoint node where the physical libraries exist, and then run a DocAve Archiver job.

Refer to the steps below:

1. Click **Rule Management** in the **Business Rule Management** tab. The **Rule Management** page appears.
2. Click **Create** above the rule table. You are redirected to the **Create** page.
3. When configuring the **What would you like to do with the SharePoint data?** step, select the **Archive and retain content in SharePoint** option.
4. Select the **Tag each document/item with** checkbox, and then select the **Custom Metadata option**.
5. Select **Text** as the column type, enter **Lifecycle Status** as the column name, and then enter **Pending Disposal** as the column value.
6. Configuring other rules settings, and click **Save** to save the changes.
7. After creating the rule, you need to apply the rule to a SharePoint node where the physical libraries exist, and then run a DocAve Archiver job on the SharePoint node.

If physical files in the physical libraries are archived successfully, **Pending Disposal** will be tagged on these physical files as the value of the **Lifecycle Status** column.

For more information on creating rules and running DocAve Archiver jobs, refer to Creating Rules and Disposal Activity Management.

# Appendix D: Modifying the Web.config File to Regularly Clean up Log Files

After each AvePoint RevIM job completes, a log file with the name format of **RevIMScheduleJob.exe_JobId.log** will be provided for the job by AvePoint RevIM. Log files will be automatically cleared up per 7 days. You can also define how often log files will be cleaned up by modifying the **Web.config** file.

To modify how often log files will be cleaned up, complete the following steps:

1. Go to the machine with AvePoint RevIM installed and navigate to *…\RevIM\RevIMWeb\Config* directory to find the **Web.config** file.
2. Open the **Web.config** file with Notepad.
3. Find the **<add key="LogKeepDays" value="7" />** node. You can change the value to the desired number. The unit is day.

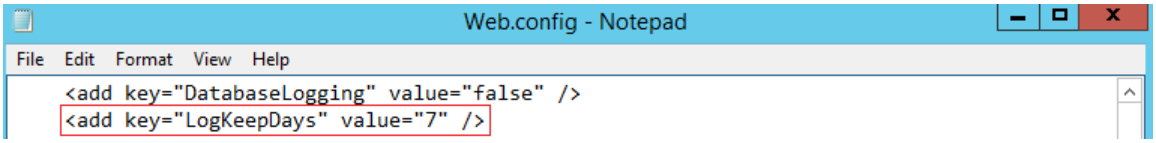


**Figure 1: The <add key="LogKeepDays" value="7" /> node in the Web.config file.**

4. Save changes to the file and close it.

# Appendix F: Exporting Terms Using Windows PowerShell

To export a term group together with a term set and terms from SharePoint Managed Metadata Service to a CSV file using Windows PowerShell, complete the following steps:

1. On the machine with AvePoint RevIM installed, navigate to *…RevIM\RevIMWeb\ExportSPTermScript* directory to find the **ExportSPTermtoCsv.ps1** file.
2. Copy the **ExportSPTermtoCsv.ps1** file to any one of the Web front-end servers or the Central Administration server of SharePoint where you want to export a term group together with a term set and terms.
3. On the SharePoint Web front-end server or Central Administration server where the copied **ExportSPTermtoCsv.ps1** file resides, locate **Windows PowerShell**.
4. Right-click **Windows PowerShell**, and then select **Run as administrator**. The **Administrator: Windows PowerShell** pop-up window appears.
5. In the pop-up window, enter the following commands:

   ***Note**: There is help information on how to use Windows PowerShell to export terms. To view the help information, enter `.\ExportSPTermtoCsv.ps1`, and then press **Enter** on the keyboard.

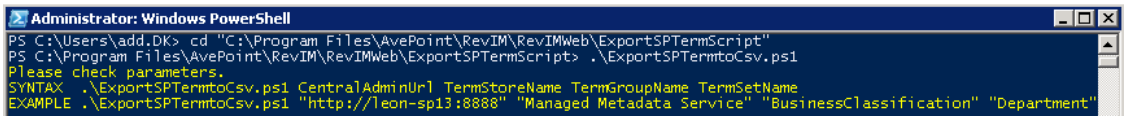


**Figure 2: Using Windows PowerShell.**

   a. Enter `cd "full path"`, and then press **Enter** on the keyboard. Replace **full path** with the full path of the **ExportSPTermtoCsv.ps1** file.

   b. Enter the following commands:

```
.\ExportSPTermtoCsv.ps1 "http://hostname:port" "Managed Metadata Service" "BusinessClassification" "Department"
```


**Figure 3: Entering commands.**

   - **"http://hostname:port"** – Replace **http://hostname:port** with the central admin URL of SharePoint 2013/2016 where you want to export terms.
   - **"Managed Metadata Service"** – Replace **Managed Metadata Service** with the name of the term store where the term group that you want to export exists.
   - **"BusinessClassification"** – Replace **BusinessClassification** with the name of the term group that you want to export.

- **"Department"** – Replace **Department** with the name of the term set that you want to export.

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

6. After Windows PowerShell completes the execution, a CSV file that stores the exported term group together with a term set and terms will be automatically generated in the same directory as the **ExportSPTermtoCsv.ps1** file with the name format of **Terms_Date_Time**.

   ***Note**: If terms failed to be exported, the reason why the terms failed to be exported will be recorded in the **log.txt** file in the same directory as the **ExportSPTermtoCsv.ps1** file.

# Appendix G: Configuring the AgentCommonStorageEnv.cfg File

For a creation and destruction report where all documents that have been destroyed are collected**,** **Object Level**, **Action Time**, and **Term Name** columns' values that are displayed on the **Creation and Destruction Report > Show Report** page are retrieved from the DocAve Archiver database. Before creating a creation and destruction report, you must configure the **AgentCommonStorageEnv.cfg** file to retrieve values of the **Object Level** and **Term Name** columns.

Refer to the steps below to configure the **AgentCommonStorageEnv.cfg** file:

1. Go to the machine where a DocAve Agent is installed and navigate to the *…\DocAve6\Agent\data\SP2013\Arch* directory to find the **AgentCommonStorageEnv.cfg** file.
2. Open the **AgentCommonStorageEnv.cfg** file with Notepad.
3. Find the **<DisplayColumns>** node.

   ***Note**: **<! - -<Column name=""/> - - >** is an example for your reference.

   ```
   <DisplayColumns>
                   <!--<Column name=""/>-->
   </DisplayColumns>
   ```

   **Figure 4: The <DisplayColumns> node.**

4. Add the following nodes:
   - **<Column name=""/>** – Configure this node to retrieve values of the **Term Name** column that is displayed on the **Creation and Destruction Report > Show Report** page. Enter the name of the column you configured in global settings as the parameter value.
   - **<Column name="Content Type"/>** – Use this node to retrieve values of the **Object Level** column that is displayed on the **Creation and Destruction Report > Show Report** page.
5. Save changes to the file and close it.

# Notices and Copyright Information



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