

May 2007

DocAve™ 4.1 Content Manager User Guide

Additional user guides available at <http://www.avepoint.com/support>



Copyright

2001-2007 AvePoint, Inc. All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior written consent of AvePoint, 3 Second Street, Suite 202, Jersey City, NJ 07311

Trademarks

AvePoint DocAve™, AvePoint logo, and AvePoint, Inc. are trademarks of AvePoint, Inc. Microsoft, MS-DOS, Internet Explorer, SharePoint Portal Server 2003, Windows SharePoint Services, Windows SQL server, and Windows are either registered trademarks or trademarks of Microsoft Corporation. Adobe Acrobat and Acrobat Reader are trademarks of Adobe Systems, Inc. All other trademarks are property of their respective owners.

Changes

The material in this document is for information only and is subject to change without notice. While reasonable efforts have been made in the preparation of this document to assure its accuracy, AvePoint assumes no liability resulting from errors or omissions in this document or from the use of the information contained herein.

AvePoint reserves the right to make changes in the product design without reservation and without notification to its users.

AvePoint
3 Second Street, Suite 202
Jersey City, NJ 07311

For Technical Support, visit <http://www.avepoint.com/support>

For Products and Services Information, visit <http://www.avepoint.com/products>

For Sales Contact Information, visit <http://www.avepoint.com/about-us/contact-us/>

Table of Contents

1 Revision History	5
2 Overview.....	6
3 Installation	7
4 Content Manager 2.0.....	8
4.1 Layout, Features, and Options	8
4.1.1 Plan Name and Email Notification.....	9
4.1.2 Source and Destination.....	9
4.1.3 Schedule A / B.....	9
4.1.4 Full / Incremental	9
4.1.5 Restore Options (Not Overwrite, Overwrite, Append).....	9
4.1.6 Description	10
4.1.7 Keep ID	10
4.2 Usage	11
4.2.1 Single Farm	11
4.2.1.1 Source Agent.....	12
4.2.1.2 Destination Agent	12
4.2.1.3 Selecting the File Preview Button	13
4.2.1.4 Finalizing the Copy	15
4.2.2 Cross Farm	16
4.2.3 Keep ID Feature	17
4.2.3.1 What is “KeepID”	18
4.2.3.2 How to use “KeepID”	18
5 Supported and Pending Functionalities.....	20
6 Uninstall	22

Table of Figures

Figure 1: DocAve 4.1 Content Manager Main Screen.....	6
Figure 2: DocAve Agent Configuration Tool - Install.....	7
Figure 3: Content Manager 2.0 Layout, Features, and Options.....	8
Figure 4: Single Farm Copy	11
Figure 5: Drilling Down Source and Destination	12
Figure 6: SharePoint API Pain Point.....	13
Figure 7: Selecting the File Preview Button	14
Figure 8: Previewing the Files within the Selected Document.....	14
Figure 9: File Copied to Destination Location – Single Farm.....	15
Figure 10: Cross Farm Copy	16
Figure 11: Selecting the Cross Farm Agent	17
Figure 12: File Copied to Destination Location – Cross Farm.....	17
Figure 13: Create a Blank Site http://avepoint-i6poz1:40000/sites/site4	18
Figure 14: A Content Manager Job with “KeepID”	19
Figure 15: DocAve Agent Configuration Tool - Uninstall	22

1 Revision History

This revision history summarizes the changes made in each published version of this document.

Document No.	Publication Date	Description of Revisions
DocAve™ 4.1 Content Manager User Guide	January 29, 2007	Creation of DocAve 4.1™ Content Manager User Guide.

2 Overview

Content Manager 2.0, a module of DocAve 4.1, allows the seamless migration of content from one location to another within Microsoft SharePoint 2007. This migration can be performed within the same SharePoint farm, or from one SharePoint farm to a different farm. Content Manager is a powerful tool that is complementary to DocAve's other 3 Level Backup and Restoration Products (Item, Site, and Sub-site) and is considered a real-time, live copy because no backup is needed. Content Manager allows the administrator to restructure the content and topology of his/her SharePoint environment easily and accurately.

This guide will provide an understanding on the features and usage of Content Manager 2.0 for DocAve 4.1.

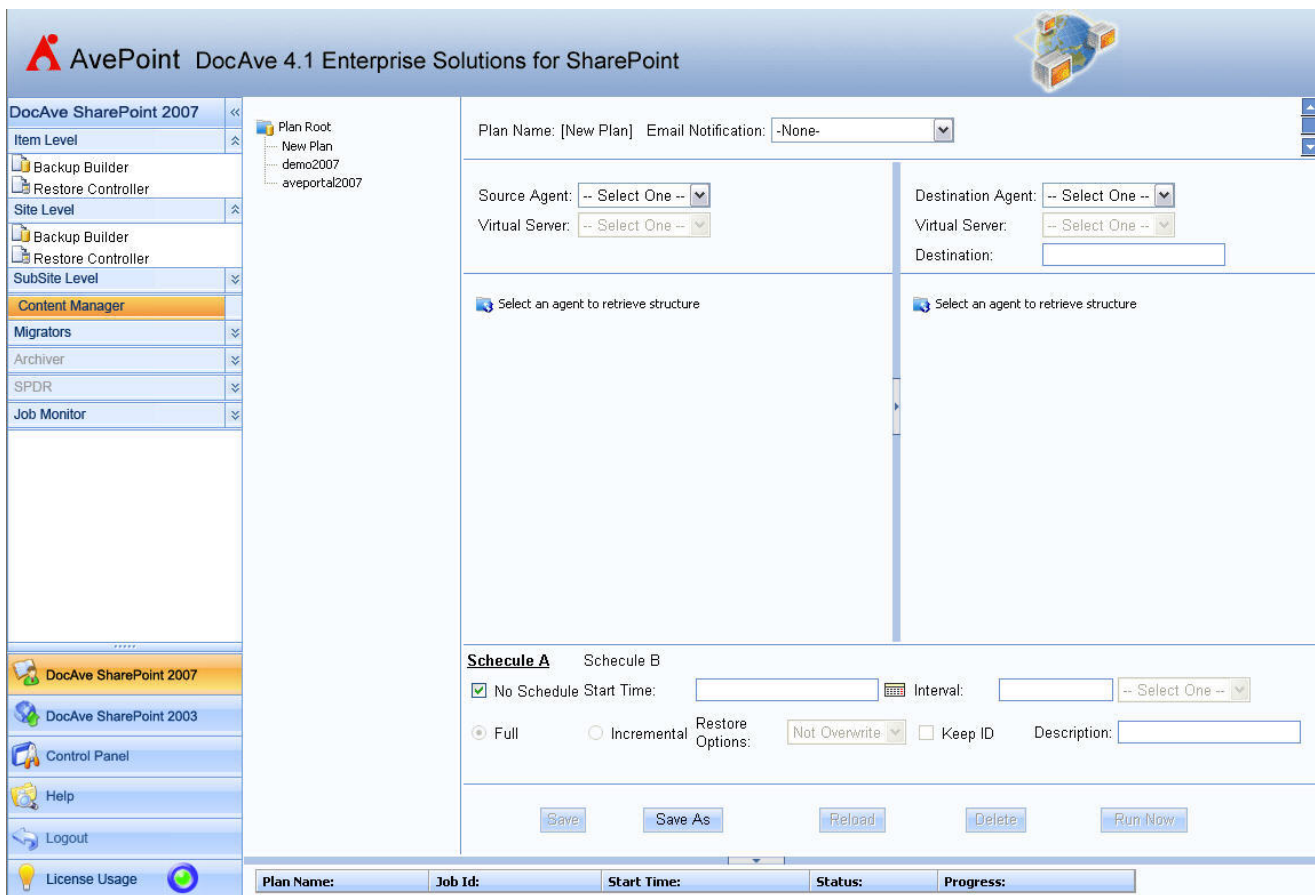


Figure 1: DocAve 4.1 Content Manager Main Screen

3 Installation

Before using Content Manager, make sure that it is installed and enabled from within the DocAve Agent Configuration Tool. In the Agent Configuration, make sure that the option “Content Manager for Sharepoint 2007” is checked for each agent.

To properly use Content Manager, a DocAve Agent should be installed on each front-end web server. This is required in order to perform cross farm migrations.

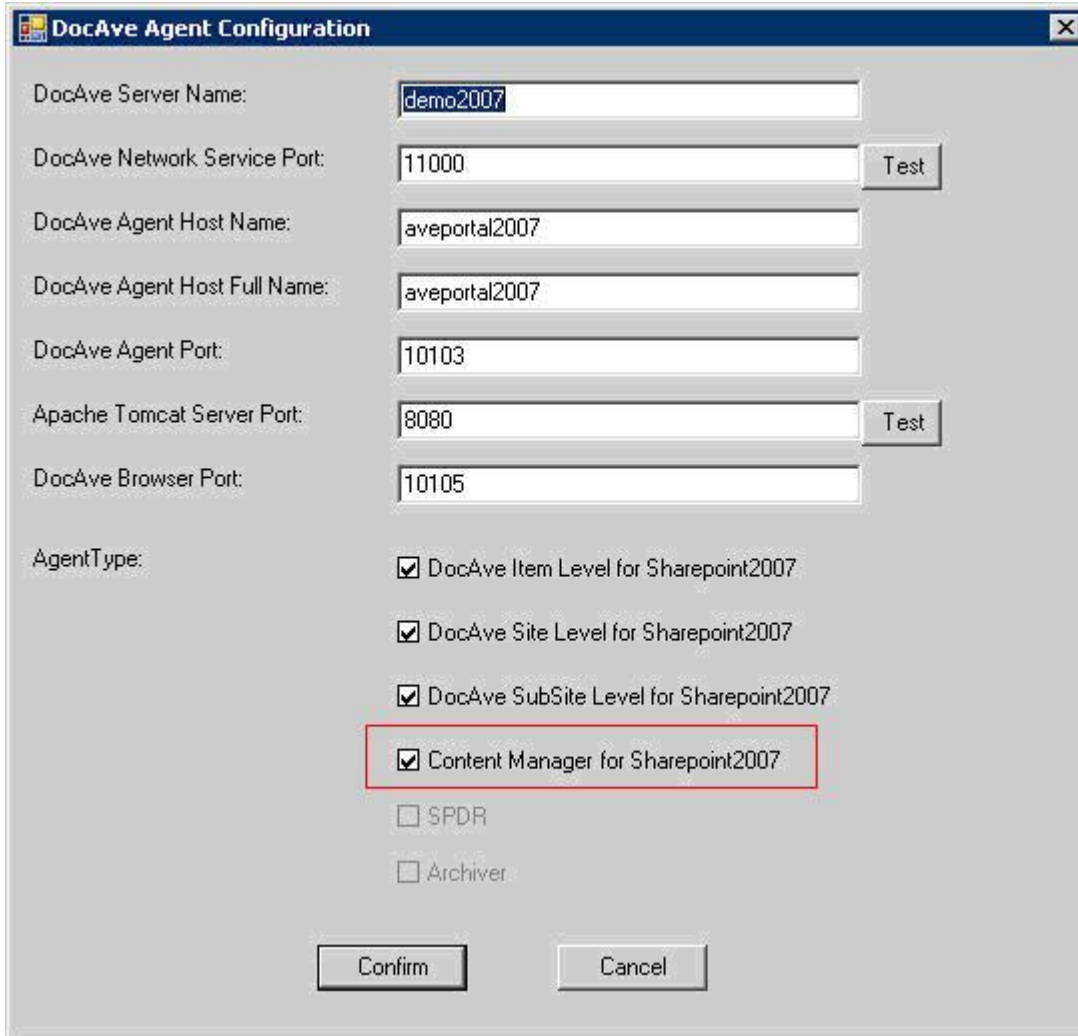


Figure 2: DocAve Agent Configuration Tool - Install

4 Content Manager 2.0

Content Manager can copy specific content from one location to another location. It is not meant to perform “automatic” real time replication of an entire Share Point farm. For such replication, please see AvePoint’s Share Point Disaster Recovery (SPDR) tool. Content Manager 2.0 does have scheduling options. If both the Source and Destination servers are up, then an administrator can set up scheduling that will perform the live copy.

The key use of Content Manager is to allow the administrator to copy documents, libraries, sites, etc. from one location to another seamlessly and quickly. Typically, to do this the administrator must first backup the content and then perform an out of place restore. This method requires that the administrator go through a more complicated two step process in order to copy content. With Content Manager, the administrator has a simple and easy-to-use interface that allows the process to be done in one step.

4.1 Layout, Features, and Options

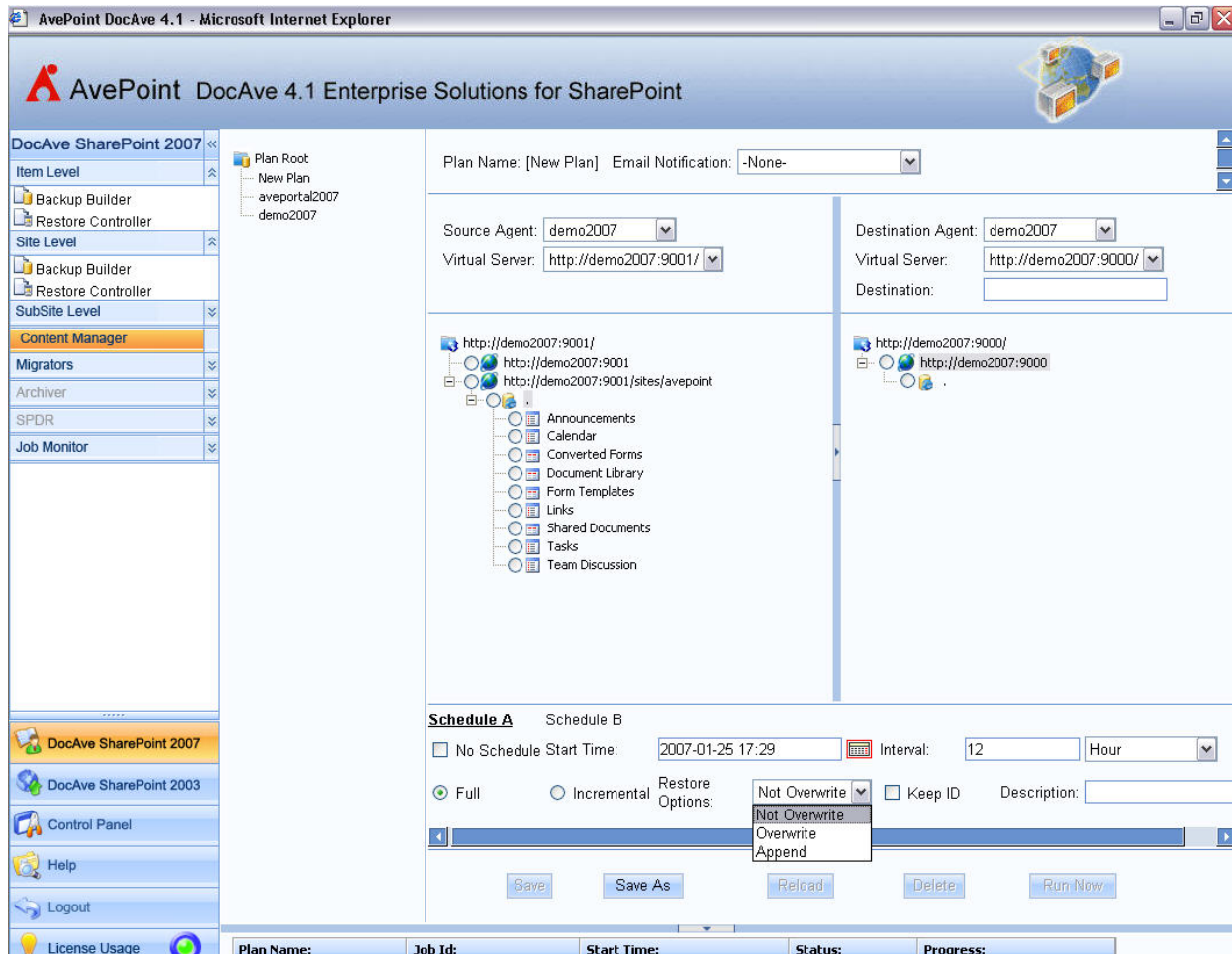


Figure 3: Content Manager 2.0 Layout, Features, and Options

4.1.1 Plan Name and Email Notification

DocAve 4.1 Content Manager 2.0 operates on the concept of plans. A previously created plan can be selected from the Plan Root, or a new plan can be created. The two general fields for any plan are:

Plan Name: Lists the plan name if a specific plan that was created is selected. If no plan is selected or created by default it displays “New Plan”.

Email Notification: Shows a drop down of possible email notifications to choose from. These profiles are triggered in the event of a Failure or Success of a job. They are created within the Reporting section of the Control Panel.

4.1.2 Source and Destination

Leftside (Source): This is where the user selects the content that is to be migrated to the destination location.

Rightside (Destination): This is where the user selects the where the selected content should go.

4.1.3 Schedule A / B

Copy or Restore time and method options can be set via two schedules, where administrators can choose one time only, hourly, daily, weekly, or monthly schedules. For each schedule, administrators can also specify Not Overwrite, Overwrite, Append, Full, Incremental, or KeepID.

Scheduling: Just like the Backup and Restore modules, the user can set schedules that would cover their SharePoint environment via a “live” copy. In most cases, the administrator will likely copy content immediately. However, this option can be used to schedule the copy for off-hours or to periodically push specific content to other sites.

4.1.4 Full / Incremental

Full: Copies all contents from the source to the destination.

Incremental: This option is for the Site / Web level and copies the changes (including creating, deleting, or updating the Document Library, Folder, or Document) that have been made to the contents of the source to the destination in accordance with the last job. In the event where the source Site / Web is large, choosing the incremental option will save a lot of time.

4.1.5 Restore Options (Not Overwrite, Overwrite, Append)

Not Overwrite: Copies contents from the source to the destination only if these contents (List, Folder, or Document) do not already exist in the destination.

Overwrite: Copies contents from the source to the destination by overriding any contents (List, Folder, or Document) in the destination with the same name.

Append: This option is for versioning purposes and copies contents from the source to the destination. In the case where the same name already exists in the destination, an additional copy will be created as a newer version. This feature will be functional in a future build of DocAve 4.1.

4.1.6 Description

Allows the administrator to uniquely tag the copy job so that it can be identified amongst other jobs in the Job Monitor Job Report.

4.1.7 Keep ID

The option is for Site/ Web level and copies the contents from the source to the destination by keeping the exact same ID in the destination which corresponds to the source.

Note: We recommend using “Incremental” and “KeepID” together. This ensures that the destination is identically to the source (destination is exactly a mirror image of source).

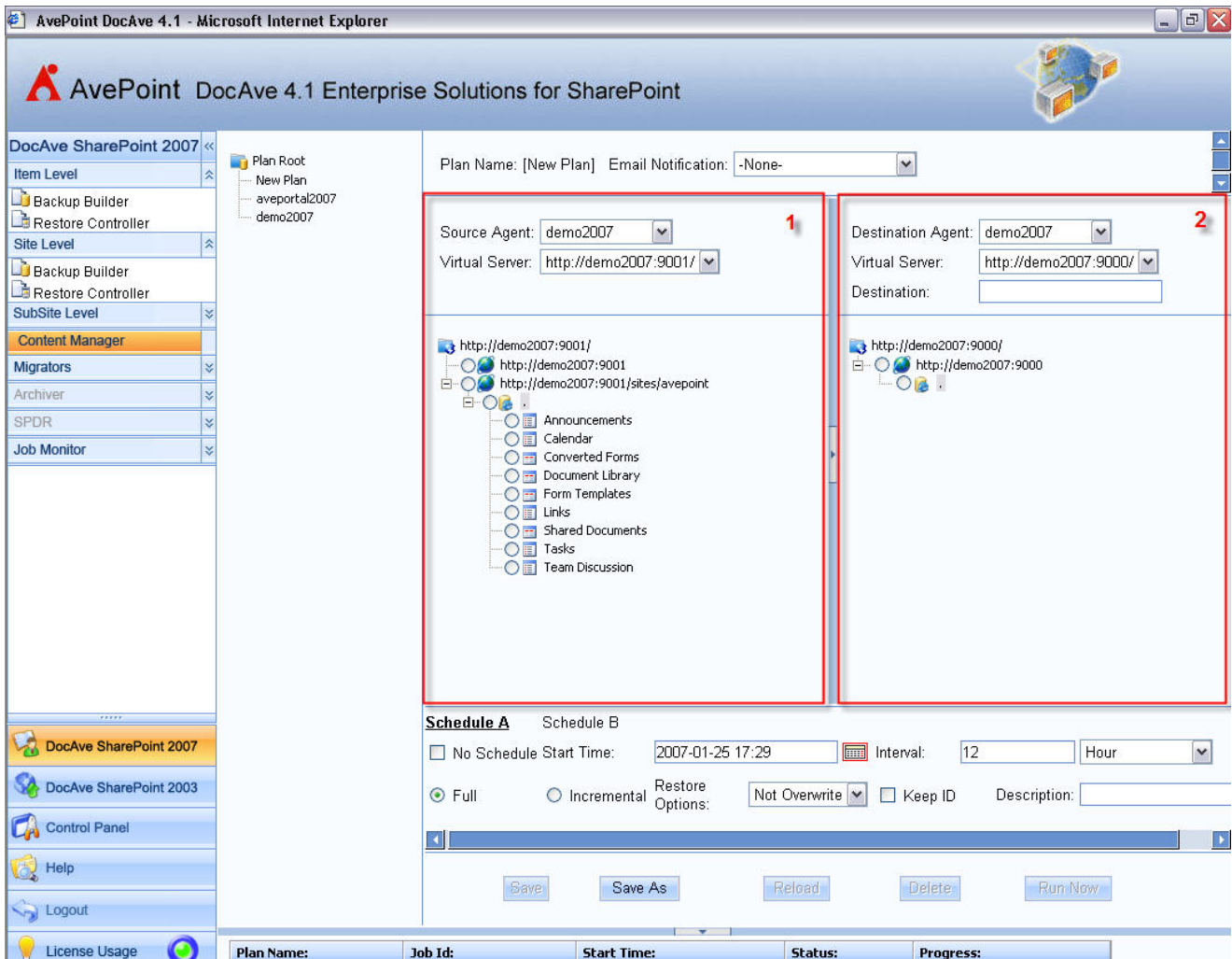


Figure 5: Drilling Down Source and Destination

4.2.1.1 Source Agent

Zone 1 on the left refers to the Source Agent where the user can select the location of the files or folders to be copied from the Source URL Tree. First select the “Source Agent”, then select the “Virtual Server” that populates for that Agent. Next, click on the Virtual Server name to load the SharePoint structure. Keep clicking on the links to expand the tree, until the desired location is reached.

4.2.1.2 Destination Agent

Zone 2 on the right refers to the Destination Agent where the user can select the location of where to copy the selected data. First select the “Destination Agent”, then select the “Virtual Server” that populates for that Agent. Next, click on the Virtual Server name to load the SharePoint structure. Keep clicking on the links to expand the tree, until the desired location is reached.

Note: One particular pain point of MOSS 2007 related to APIs currently restricts the Destination Agent’s URL Tree from being fully expanded to the item level. When trying to expand the Destination URL Tree to the item level, users are notified with a popup stating “Cannot go further”. As MOSS 2007 APIs stabilize, these restrictions will be addressed.

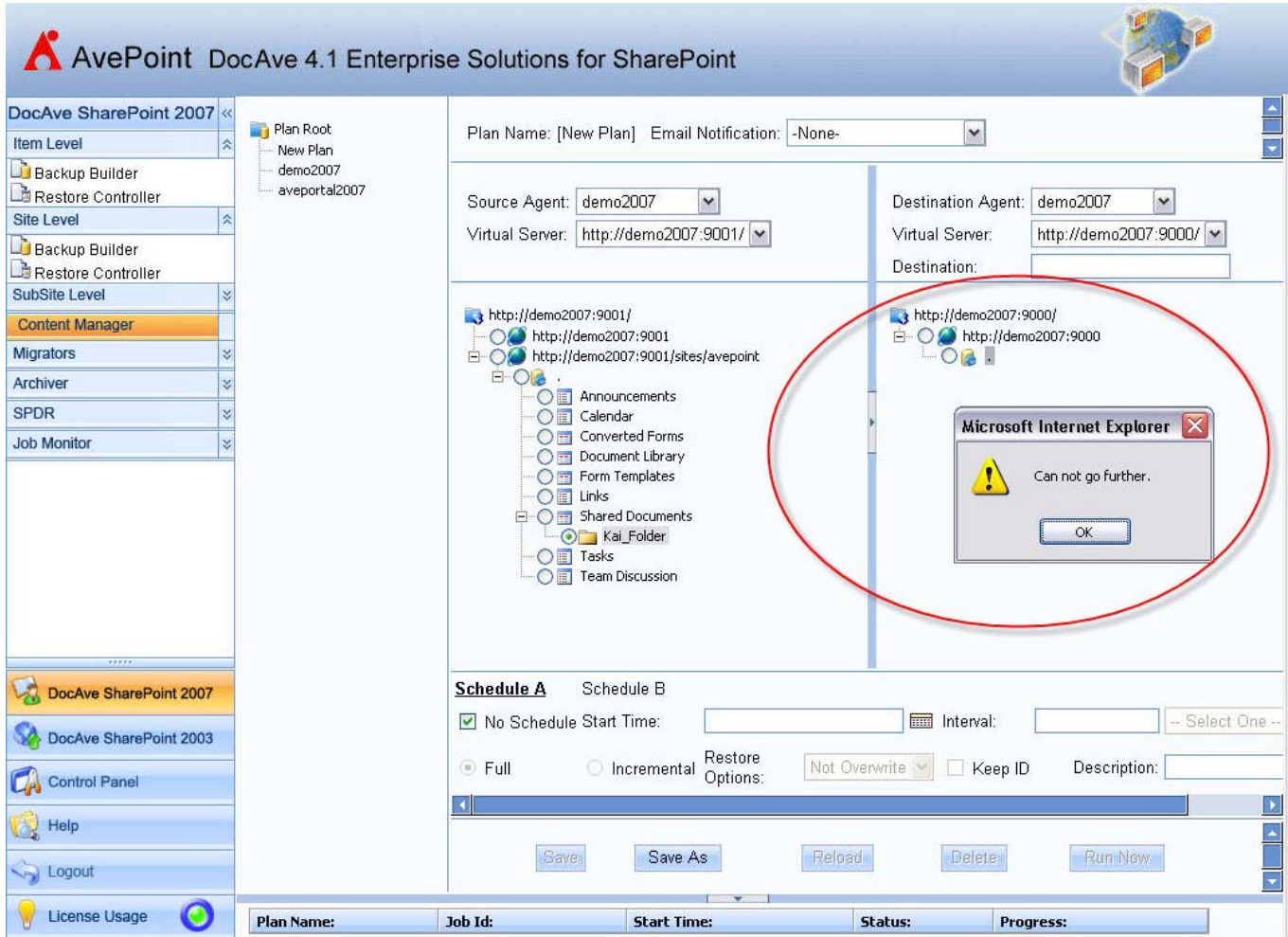


Figure 6: SharePoint API Pain Point

Additionally, these API restrictions limits the way Content Manager 2.0 drops selected data onto the destination location; it is not a 1-to-1 copy and data is dropped at the Web Level. In short, Content Manager allows administrators to copy a Site / Web / List / Folder / Document / ListItem from its source to a Site / Web at its destination. Data that is copied to the destination location will keep parent associations as well.

4.2.1.3 Selecting the File Preview Button

After selecting the folder from the Source URL Tree, the administrator has the option to preview the documents associated with that selected folder. This is done by clicking the expansion arrow in the center. This screen can be re-collapsed by clicking the collapse arrow on the right.

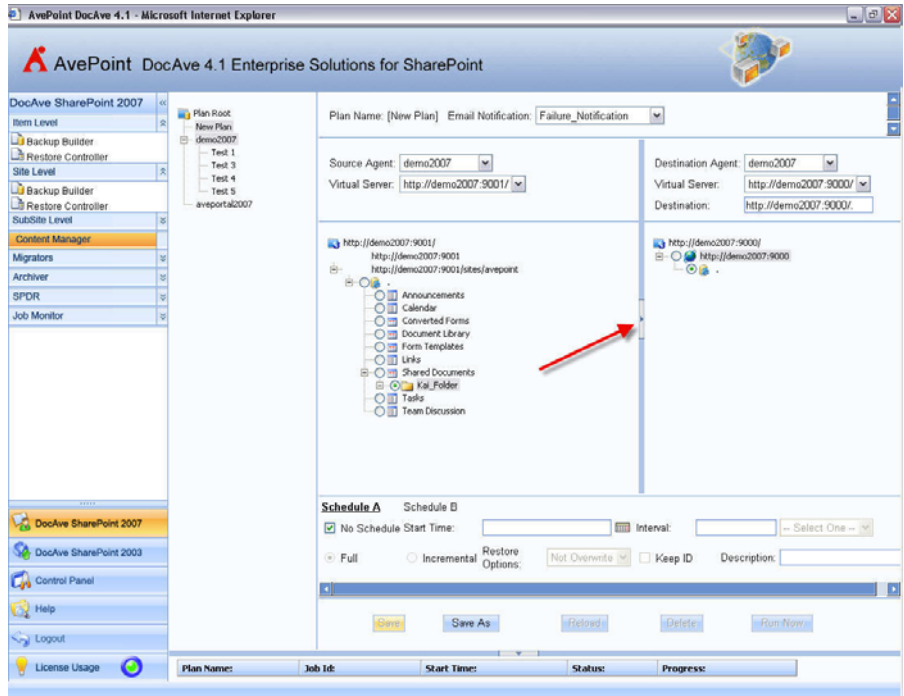


Figure 7: Selecting the File Preview Button

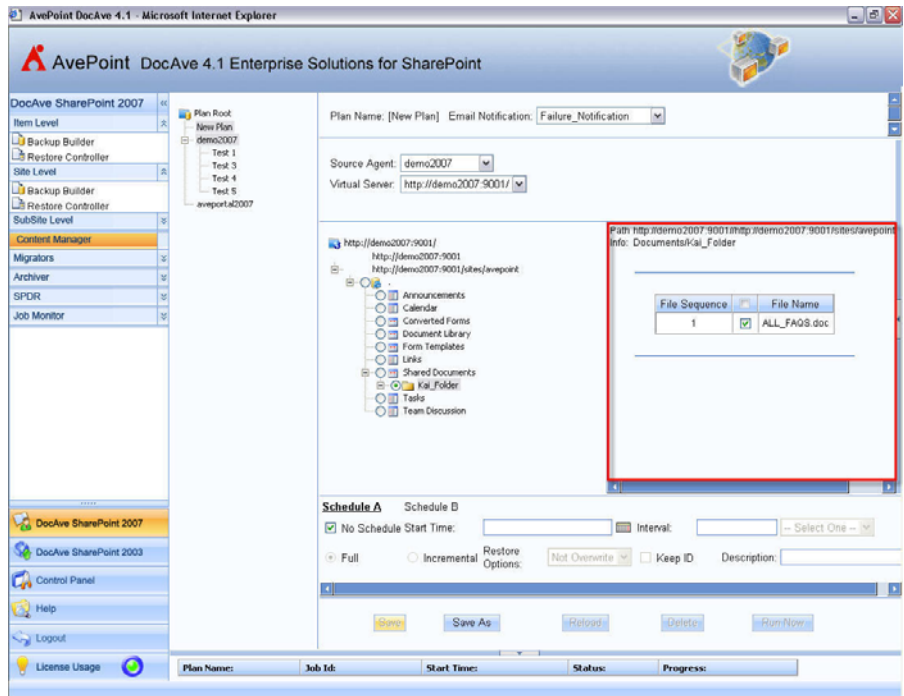


Figure 8: Previewing the Files within the Selected Document

4.2.1.4 Finalizing the Copy

At this point, the administrator would choose whether they want to run a manual or scheduled (along with the various options) job and then press “GO” to start the migration process. Figure 9 displays that the file was successfully copied over from **Demo2007:9001** to **Demo2007:9000**.

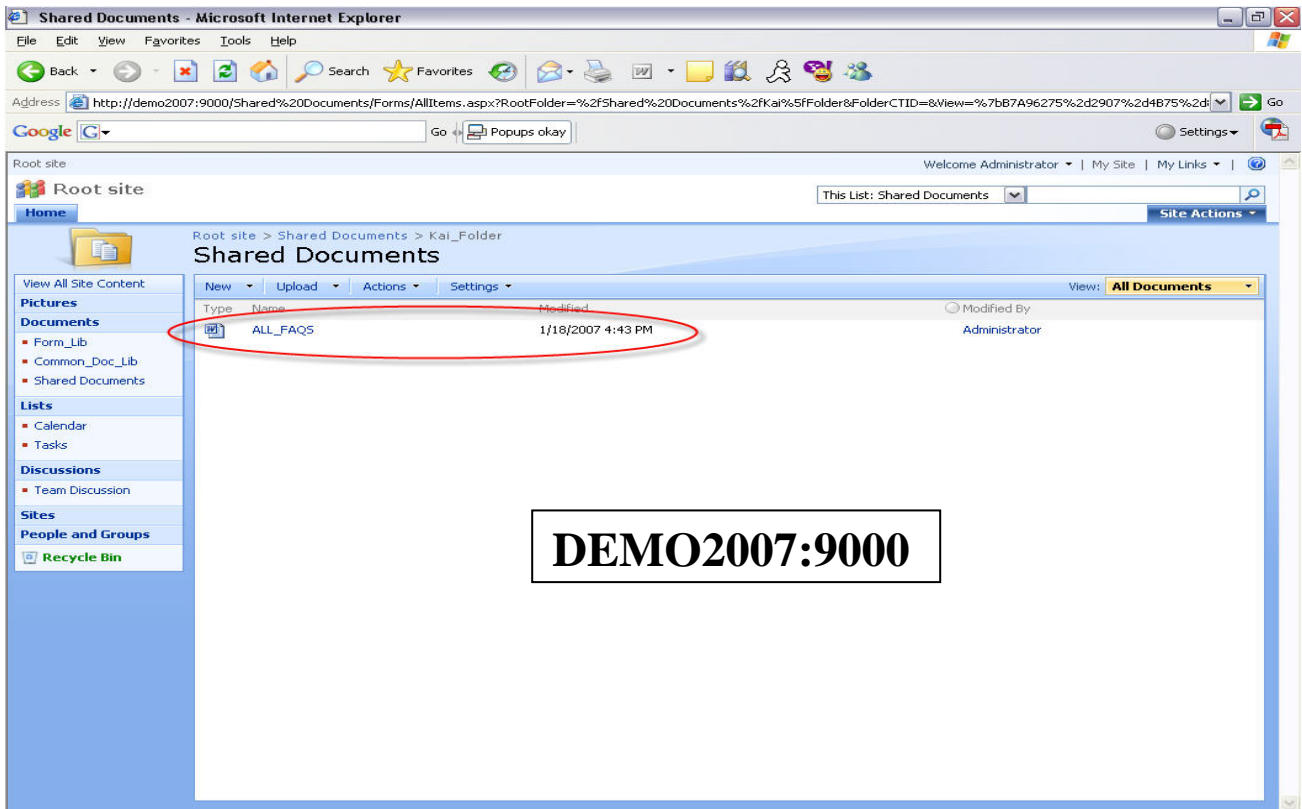


Figure 9: File Copied to Destination Location – Single Farm

4.2.2 Cross Farm

For a Cross Farm migration of data, the same steps that were taken in a Single Farm migration would be implemented. The only difference would be that the destination reflects the name of the Agent that was installed on the other front-end web server (Figure 11).

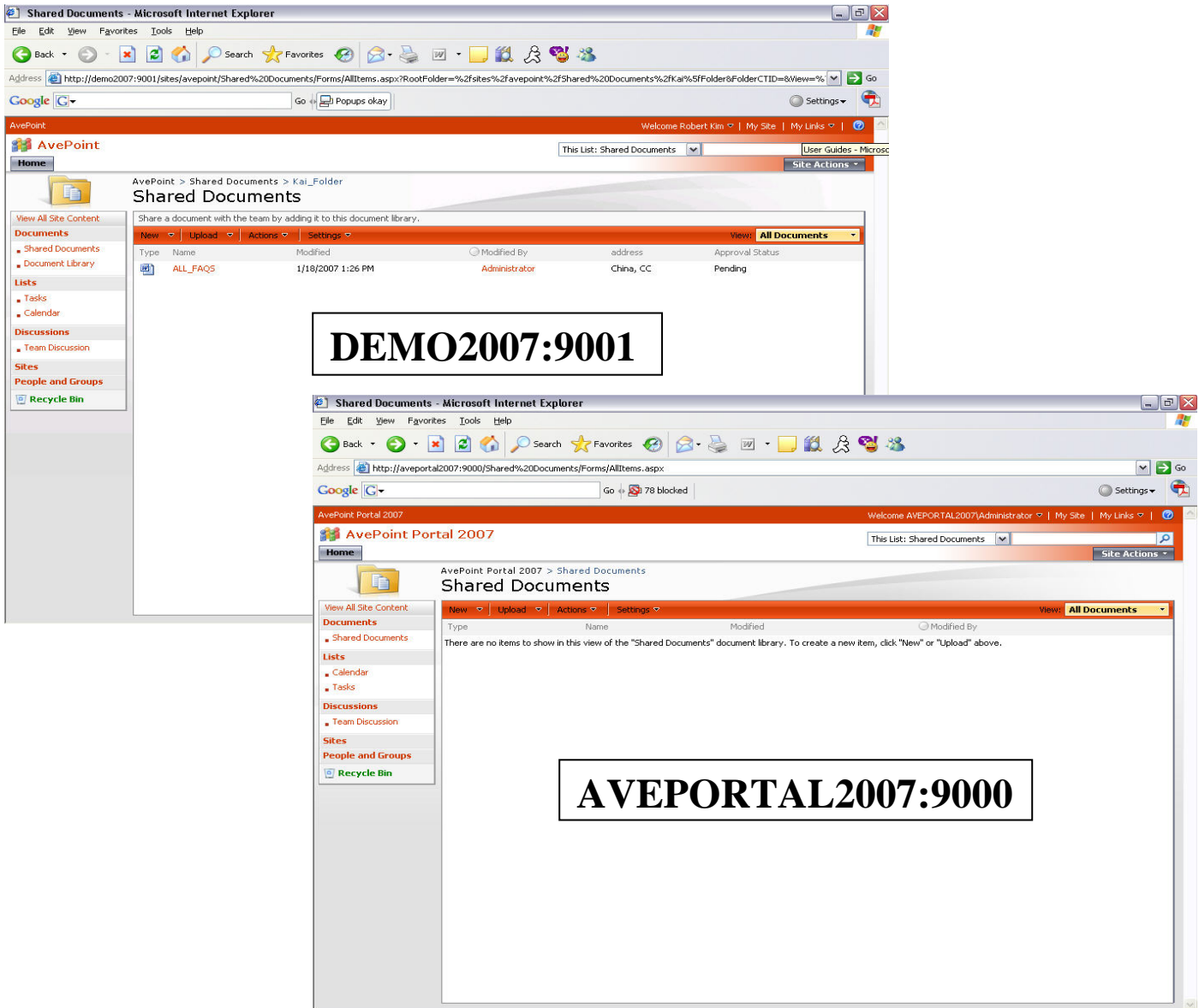


Figure 10: Cross Farm Copy

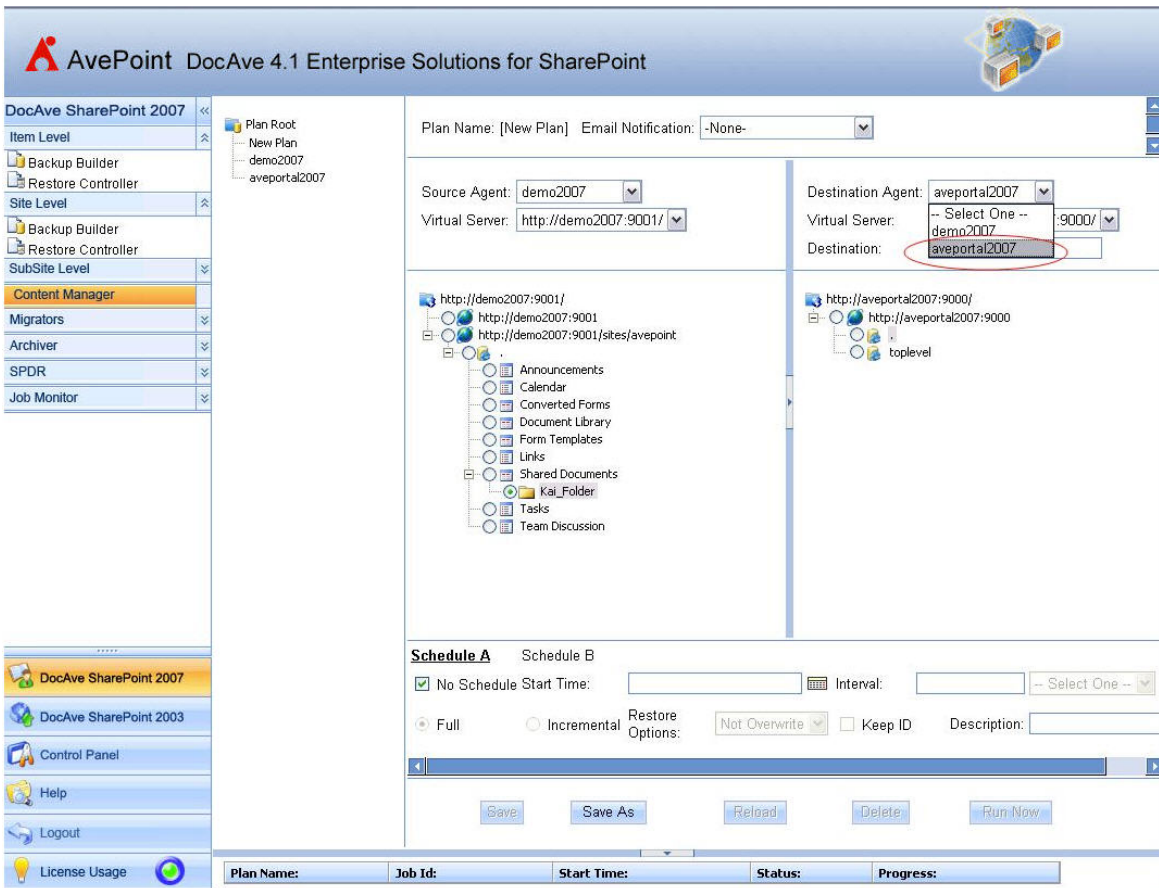


Figure 11: Selecting the Cross Farm Agent

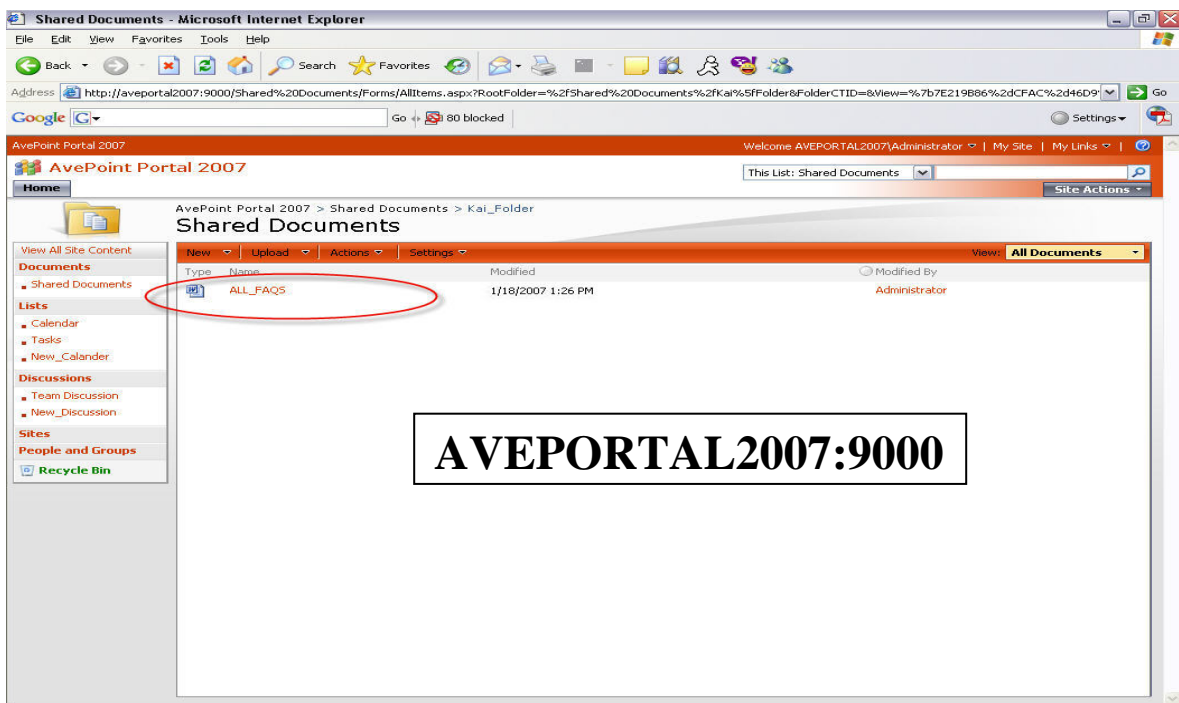


Figure 12: File Copied to Destination Location – Cross Farm

4.2.3 Keep ID Feature

4.2.3.1 What is “KeepID”

KeepID designates that the destination side is identical with the source side. Content Manager 2.0 allows administrators to make an exact mirror image from the source to the destination of a different virtual server.

4.2.3.2 How to use “KeepID”

First, create a new blank site and select it to be the destination site. Make sure the source side and the destination sides have different virtual servers (see Figure 13 & 14).

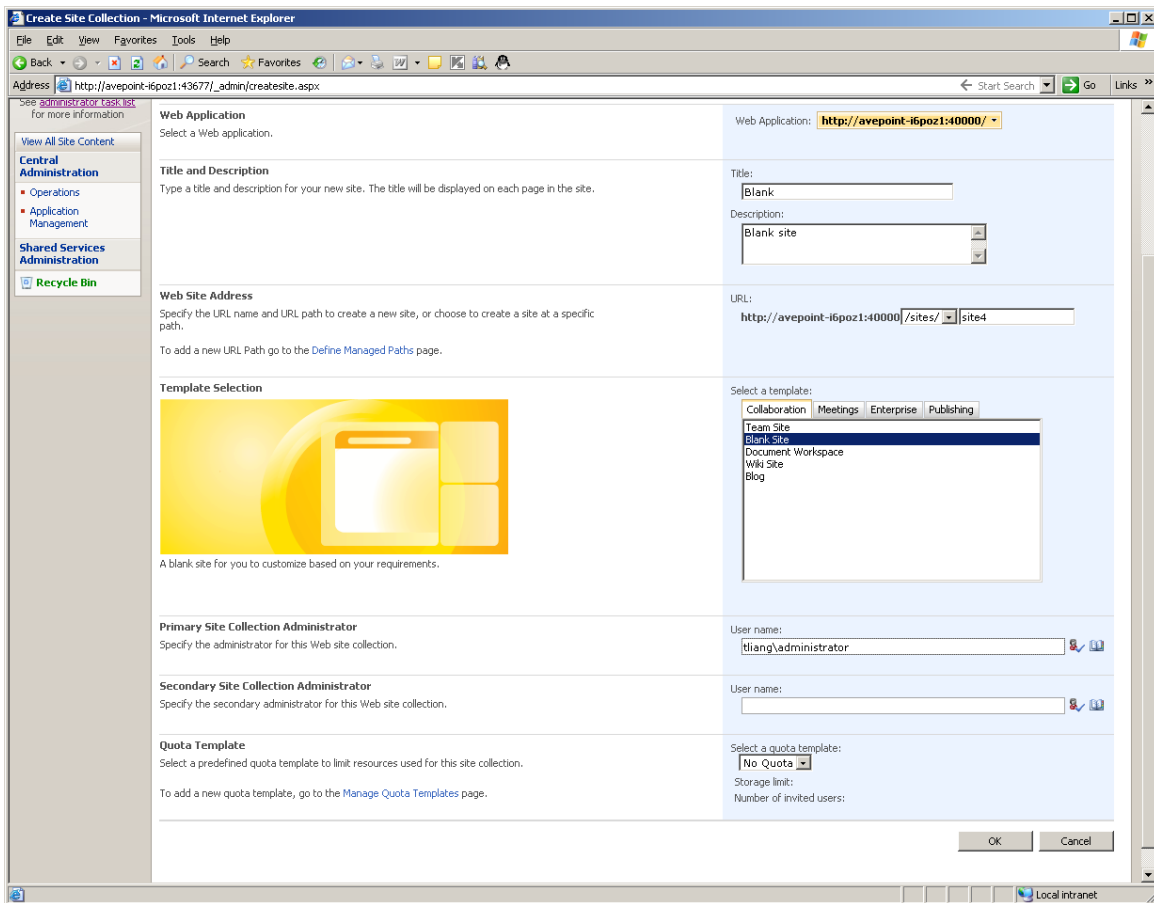


Figure 13: Create a Blank Site http://avepoint-i6poz1:40000/sites/site4

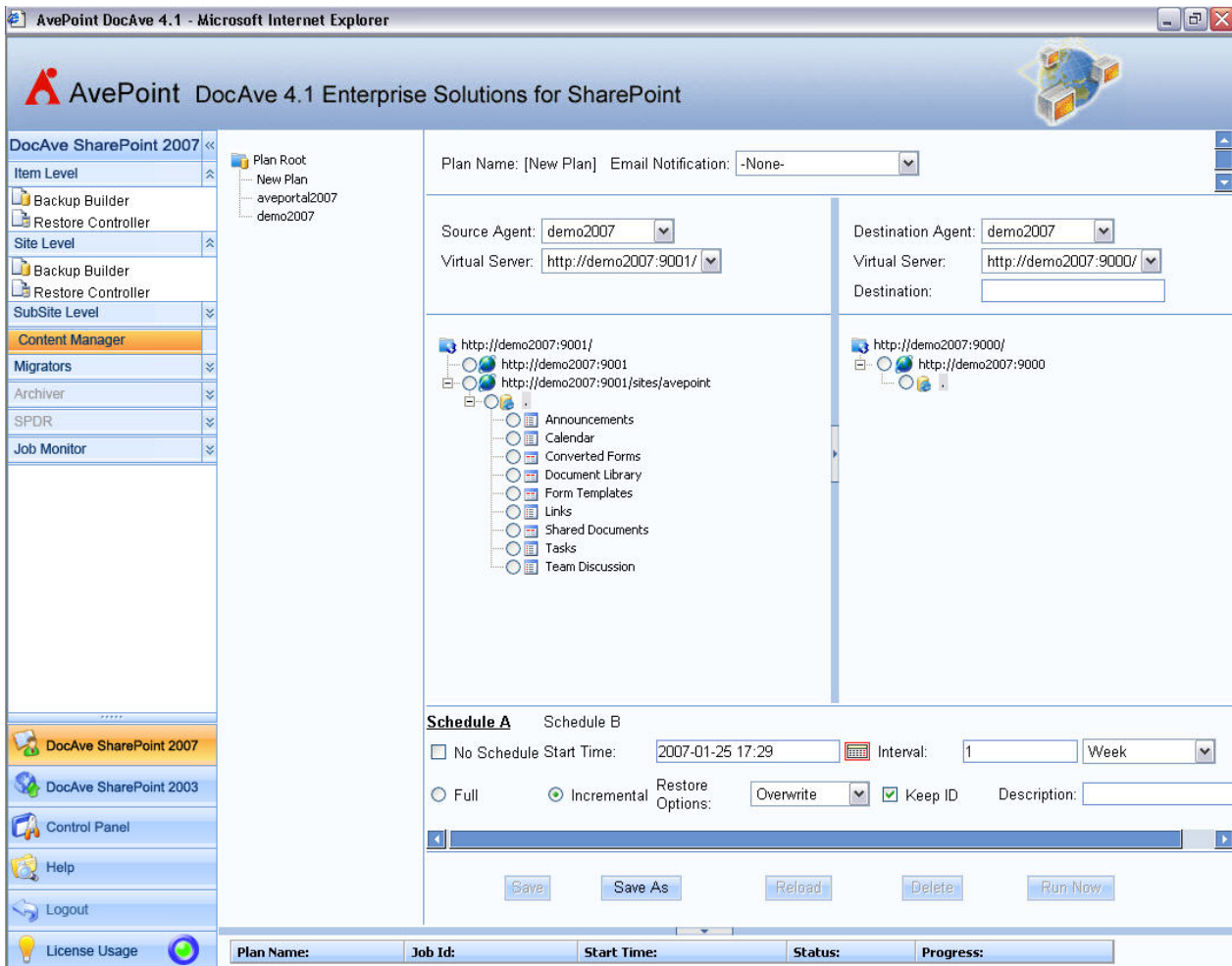


Figure 14: A Content Manager Job with “KeepID”

Then, keep the destination side unchanged. The administrator can create, update, and delete (including Web / List / Folder / Document/ ListItem, properties and permissions) freely on the source side. Lastly, select “Keep ID” and run the job. This will associate the source and destination content with a unique tag.

5 Supported and Pending Functionalities

The following table details the supported, not supported, and pending functionalities as well as known issues as of the date of this publication (Known issues are being investigated and addressed continuously. Please check with support@avepoint.com for the latest update):

<u>Source</u>	<u>Destination</u>	<u>Status</u>	<u>Known Issues*</u>
File	Root / Sub-Site	Supported	Securities are not preserved
	To Top-Site from Root	Supported	Securities are not preserved
	To Top-Site with same Sub-Site from Sub-Site	Supported	Securities are not preserved
	To Top-Site without same Sub-Site from Sub-Site	Pending	
Folder	Root / Sub-Site	Supported	Securities are not preserved
	To Top-Site from Root	Supported	Securities are not preserved
	To Top-Site with same Sub-Site from Sub-Site	Supported	Securities are not preserved
	To Top-Site without same Sub-Site from Sub-Site	Pending	
Document Library	Root / Sub-Site	Supported	Securities are not preserved
	To Top-Site from Root	Supported	
	To Top-Site with same Sub-Site from Sub-Site	Supported	
	To Top-Site without same Sub-Site from Sub-Site	Not Supported	
Customized List	Root / Sub-Site	Supported	Securities are not preserved
	To Top-Site from Root	Supported	
	To Top-Site with same Sub-Site from Sub-Site	Supported	
	To Top-Site without same Sub-Site from Sub-Site	Not Supported	
Root (.)	Root	Supported	Top link is lost
	Sub-Site (.)	Supported	
	Top-Site	Supported	
Sub-Site	To Root / Top-Site as its Sub-Sites	Supported	Top link is lost
	To Sub-Site as its Sub-Sub-Sites	Supported	Top link is lost
Top-Site	Top-Site	Supported	
	Sub-Site	Supported	
Survey	Top-Site	Supported	
	To Sub-Site from Root	Supported	
	To Sub-Site with same Sub-Site from Sub-Site	Supported	
	To Sub-Site without same Sub-Site from Sub-Site	Not Supported	
List with Content Type	Root / Sub-Site	Supported	Securities are not preserved
	To Sub-Site from Root	Supported	
	To Sub-Site with same Sub-Site from Sub-Site	Supported	
	To Sub-Site without same Sub-Site from Sub-Site	Not Supported	
Discussion Board	Root / Sub-Site	Supported	
	To Sub-Site from Root	Supported	

To Sub-Site with same Sub-Site from Sub-Site	Supported
To Sub-Site without same Sub-Site from Sub-Site	Not Supported

Site with New Site Columns	Root / Top-Site / Sub-Site	Supported
----------------------------------	----------------------------	-----------

Site with Customized Properties	To Root / Top-Site / Sub-Site for the Search Visibility Site Settings	Supported	Property lost
	To Root / Top-Site / Sub-Site for the Scopes Site Settings	Supported	Display group lost
	To Root / Top-Site / Sub-Site for the Portal Site Collection Site Settings	Supported	Property lost
	To Root / Top-Site / Sub-Site for the Configure Audit Settings Site Settings	Supported	Property lost

* Known issues are as of the date of this publication. All known issues are continually being investigated and addressed. Please check with support@avepoint.com for the latest information.

6 Uninstall

To uninstall Content Manager 2.0, open up the DocAve Agent Configuration tool and uncheck “Content Manager for Sharepoint 2007”.

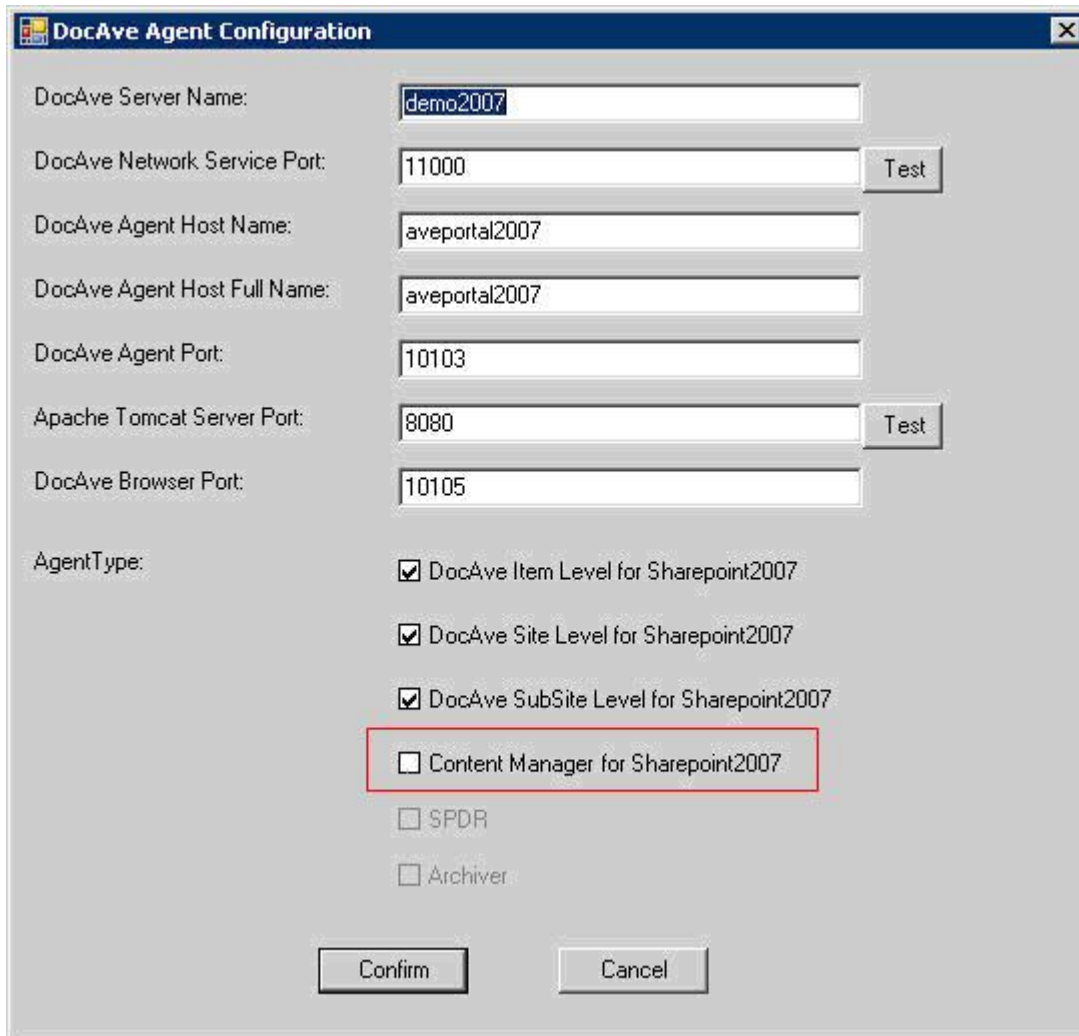


Figure 15: DocAve Agent Configuration Tool - Uninstall