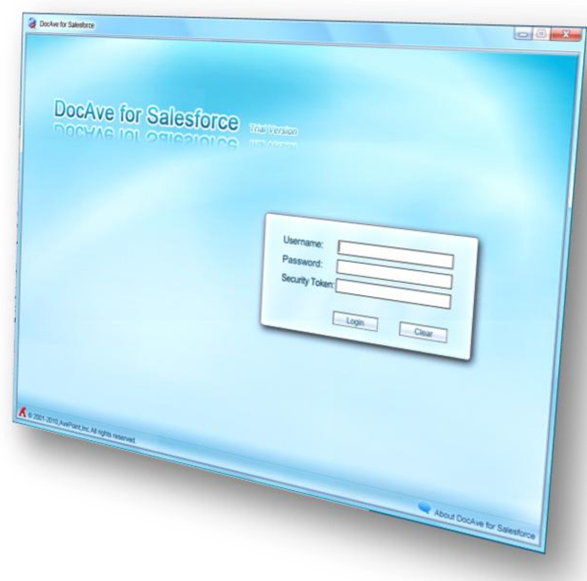
Quick Start Guide

DocAve for Salesforce
Version 1.3.1.0

Data Management Tools for *Salesforce* and SharePoint



This document is intended for anyone wishing to familiarize themselves with the user interface and basic functionality of AvePoint's *DocAve for Salesforce* tool.

AvePoint®

System Requirements and Installation

The Installation Wizard will guide you through the installation process. Please follow the steps below which will guide you through installing *DocAve for Salesforce*.

Please confirm that your system and user permissions meet the minimum requirements to run *DocAve for Salesforce*:

System Hardware and Operating System Requirements:

- .NET Framework v2.0 or higher
- Windows Server 2003/2008, XP, Vista, etc.
- At least 1 GHz CPU with 1.5 GB RAM
- 1 GB free space on your local system's hard drive for backups
- Internet Access

SharePoint Requirements:

For the *Data Replication* and *Content Integrator* functions:

- *DocAve for Salesforce* must be installed on a SharePoint Web Front-End Server
- Installation and Configuration user must have Domain User Permissions
- Installation and Configuration user must have Local Administrator Permissions
- Installation and Configuration user must be the Database owner for all SharePoint databases in the SQL server
- Installation and Configuration user must have Farm Administrator Permissions

Salesforce Requirements

- *Salesforce* Security Token
- Load, add or edit *Salesforce* data permissions for the *Salesforce* account
- At least an enterprise level account

Installation Steps

On the system you intend to install this software:

1. **Download** the *DocAve_Antivirus_for_SharePoint(TM)* .ZIP file, by either requesting a demo from http://www.avepoint.com/download/ or by contacting an AvePoint representative for links to this package.

2. **Unzip** this package on the computer on which you wish to install this tool.

3. Run the **Setup.exe** file found in the unzipped directory.

4. **Follow** the wizard for configuring this tool. You will be asked for your name, company information, and an installation directory. You can also apply your software license while installing the tool or choose to apply it later directly from the *DocAve for Salesforce* Control Panel.

5. After the installer completes, a screen will indicate that all *DocAve for Salesforce* services have been installed.

Congratulations! *DocAve for Salesforce* is now installed for your SharePoint and *Salesforce* environment.

Control Panel

The Control Panel allows users to configure *DocAve for Salesforce* and set many important options. There are six tabs: *User Settings, Storage Location, Job Pruning, License Manager, System Settings, and Content Integrator Settings* which will be described further below.

User Settings

The *User Settings* tab contains the information for the *Salesforce* and SharePoint accounts configured to use in *DocAve for Salesforce*.

The *Salesforce Account* page displays the *Salesforce* user information which will be used to authenticate with *Salesforce*.   You can change to a different account by entering in the corresponding username, password, and security token on this page. Clicking **Save** will authenticate with the new user credentials.

The SharePoint Account page displays the username and password used to log in to SharePoint. You can change to a different account by entering in the corresponding username and password, and then clicking **Save**.

Note for the *Content Integrator* module: the user must have Domain User, Local Administrator, Database owner permissions for all SharePoint databases in the SQL server, and Farm Administrator permissions to access SharePoint.

Storage Location

Before running any backup jobs in *DocAve for Salesforce*, the storage location path must be specified in the *Storage Location* tab by following the steps below:

1. Click **Browse** and select the location where you want to save the backup data. You can create a new folder in any location by clicking the **Make New Folder** button. Click **Okay** once you have selected your desired location.

2. Click **Save** to save the location path, or click **Clear** to cancel the settings.

Job Pruning

Job Pruning allows users to set up a pruning rule for their selected job records according to either a job life cycle or job count. It is highly recommended to have a job pruning policy in place if you run frequent backups. This will ensure that your database will not be overloaded with outdated data and minimize database maintenance required by administrators.

To set up job pruning please follow the steps below:

1. First, select a general job pruning rule by clicking its radio button:

   - **No Pruning**: All types of job records will be saved indefinitely (or until the database exceeds the server size.)

   - **By Job Life Cycle**: Allows you to set the number of days, weeks, or months to keep the job records before they are automatically pruned.

   - **By Job Count**: Allows you to set the number of previous job records to keep. Once this limit is reached, the oldest record will be removed before each new job is run (unless a pruning schedule is set.)

2. Select which job types to include in the pruning rule.

3. If desired, you can set up a schedule for the pruning rule by un-checking the **No schedule** checkbox. Use the calendar icon next to the **Start Time** field to select a date and time for the pruning job to run. You can also set an interval for recurring rules by selecting either a daily, weekly, or monthly schedule from the **Select One** drop-down.

4. Specify a location to export the *Job Pruning* report. Click **Browse** to select the location where you want to save the report, and click **OK**. Click **Save** to save the configuration.

License Manager

In order to use *DocAve for Salesforce*, you must apply a license first which can be applied and updated in the *License Manager*. You can obtain this license from your AvePoint sales representative or through the *AppExchange* in *Salesforce*.

To apply a license, please follow the steps below:

1. Click the **Browse** button and select the license file you wish to apply.

2. Click the **Apply** button, and the license information will populate the Current License Information.

System Settings

In the *System Settings* tab you can select the language of the *DocAve for Salesforce* and log detail level for jobs which have run.

Language Setting

Language setting allows you to specify the language to use for *DocAve for Salesforce*. It has three options: Default; English; and Japanese. If you select the Default option, it will setup the language for *DocAve for Salesforce* according to your browser's default language.

Note if you change the language to another one, you need to restart *DocAve for Salesforce* to ensure changing the language successful.

Log Setting

There are four options:

1.) **Error**: Logs all whole job failures and job part failures.

2.) **Warning**: Logs minor errors and warnings, useful for operations which complete successfully, but with minor issues.

3.) **Info**: Logs informational messages passed to the log, such as date and time event information.

4.) **Debug**: Collects all log-able information. Use this level for troubleshooting.

Content Integrator Settings

Before integrating content with *Content Integrator*, you must set up the default storage settings for the mapping files.

For all SharePoint environments where multiple load balancing web front-end servers are used, you must provide a location to save the temporary information available to all of the web front-end servers.

1. For the **Path:** field, enter any path in the format: **\\<hostname>\c$\....**

2. Enter in the **username** in the format Domain\Username and the **password** for connecting to this drive.

3. Click **Test** to verify the information, and then click **Save** to save the configuration.

Note if you do not specify a location in this section: Content Integrator will use the default location: **...\AvePoint\Atlas\data\Salesforce\ContentReplicator\RealTimeMessage.** All Web Application Pool users can access this location on any web front-end server by default.

1. To perform Real-time Replication in Content Integrator, the solution must be installed on your SharePoint Farm first. By default, the Content Integrator solution is installed while installing the DocAve for Salesforce. To install or uninstall the solution, please follow the steps below. Click **Install** under the *Install Solution* column.

2. To remove the solution, click **Retract**. You may then choose to uninstall it or re-deploy it.

Performing a Backup

This section will teach you how to set up a basic backup plan and then perform a backup of your *Salesforce* data using *DocAve for Salesforce*.

1. Begin by opening *Data Protection*. Click the **Backup** button to set up a backup job.
2. Select the *Salesforce* objects you want to include in the backup. By default, all objects are selected (you can unselect all objects by checking the box next to *Table Name.)* If you want to view the number of records for each *Salesforce* object, you can check **Show the records number in every object**. Once they have loaded, the number of records will be listed in the *Records Number* column.
3. Click **Next** to select if you wish to use the DataRange feature and to set the backup type and schedule options.
4. If you do not plan on using a schedule or wish to perform a backup immediately, click **Run Now.** This will prompt you with a pop-up window where you can specify a DataRange (see DataRange description below.) and then click **Run Now** again to initiate a one-time full back up.
5. If you wish to set up your back up jobs to run on a schedule or with a selected DataRange, configure the **Schedule Settings.**
    - **DataRange Backups**: If unchecked, a backup job will contain all the data specified by the backup type. If **DataRange** is checked, only the data added or modified in a specified time frame according to the options configured:
        - **Backup data for the past... hour, day, or month:** backs up data from today to the previous point in time specified.
        - **Backup data from:** Specify a range between two dates by clicking the calendar icons to specify time frame from where the backup data can be gathered.
6. Next, configure any or each of the backup types: **Full**, **Incremental**, or **Differential**.
        - **Full**: backs up all *Salesforce* records selected in the previous screen.
        - **Incremental**: backs up only the records added or modified since the last backup job, regardless of the backup type.
        - **Differential**: backs up all records that have been added or modified since the last **Full** backup was run.

    Using the calendar icon next to each backup type, you can configure the schedule for each individual type of backup job. A schedule is not required to run a backup, but if you wish to set up a schedule, please follow the steps below:

    1.) Uncheck **No Schedule**

    2.) Using the Calendar Icon () set a **Start Time** for this job.

    3.) Using the **Interval** options, you can make this a recurring job or have it run only once.

For best results, we recommended running a **Full** backup job monthly with a weekly **Incremental** backup.

Note if this is your first backup: we recommend scheduling a **Full** backup.

7. Click the **Finish** button to complete the configuration. If you have set a schedule, you can wait until the scheduled time when the backup will initiate automatically.

Viewing the Progress of a Backup

After a backup has been initiated, you can view its progress from the *Job Monitor*.

1. Begin by opening the *Job Monitor*.
2. From the **Type:** drop-down menu, select **Data Protection/ Backup** and browse through the table. This will display the current status and results of all backup jobs.
3. You can click the **Blue Arrow** at the top right of the table to download any selected reports.

Changing Backup Settings

If you have already set up a backup plan, you can also update the settings (the content backed up or schedules) by following the steps below:

1. In *Data Protection,* click **Backup**.
2. If a backup job was previously run, the backup information will be listed in *Backup status*. You can run the backup job immediately by clicking **Backup Now**, or click **Change backup settings** to change the configuration.
3. You can also click **Turn off** or **Turn on** to change the schedule status.

Restoring Backup Data

Restoring or recovering data is a very quick and simple process using *DocAve for Salesforce*. *DocAve for Salesforce* has the flexibility to restore data both to its original account within *Salesforce* or to any other *Salesforce* account.

1. Begin by opening *Data Protection*. Click the **Restore** button.
2. Select the backup job you want to restore, and click the **Next** button.
3. Check the content you wish to restore. More detailed information of what is contained in the item will be listed on the right-hand side.
4. You can also check the **Include related list items** option. This will ensure that if a record has dependent objects, the dependent objects will also be restored with the record. For example, if you select an account to restore, and there is a dependent contact for this account, it will restore

both the account and the corresponding contact; if you do not select this option, *Data Protection* will only restore the account.

5. Click **Next** to configure the Restore Settings.

    - Choose a Restore Option. **Not Overwrite** is selected by default, which will not replace existing content in the destination. **Overwrite** will replace any items that already exist in the restore destination with the same name.

    - Choose to either run the restoration now by selecting **Run Now** or to set a restore time for this restore job, select **At a specified time** and click the calendar icon to specify when to run the restore job. Select **Finish**. This will restore the data selected to its backed up location and state.

Out of Place Restore

If you wish to restore backup data to a different *Salesforce* account please perform the following steps:

1. Login to *DocAve for Salesforce* with a different user account (For example: Admin@BusinessUnit2.com instead of Admin@BusinessUnit1.com).

2. Open *Data Protection* and click the **Restore** button to set up an out of place restore job.

3. Select the backup job which was backed up by the account you wish to restore data from, and then click the **Next** button.

4. Select the records you wish to restore. More detailed information of the records will be listed in the table on the right-hand side. You can also check the **Include related list items** option. This will ensure that if the record has dependent objects, the dependent objects will also be restored with the record. For example, if you select an account to restore and there is a dependent contact for this account, it will restore both the account and the corresponding contact; if you do not select this option, it will restore only the account.

6. Click **Next** to configure the Restore Settings.

    - Choose a Restore Option. **Not Overwrite** is selected by default, which will not replace existing content in the destination. **Overwrite** will replace any items that already exist in the restore destination with the same name.

    - Choose to either run the restoration now by selecting **Run Now** or to set a restore time for this restore job, select **At a specified time** and click the calendar icon to specify when to run the restore job. Select **Finish**. This will restore the data selected to its backed up location and state.

Replicating Data to SharePoint

This section will teach you to replicate *Salesforce* data to your SharePoint environment using the *DocAve for Salesforce Data Replicator*. Before replicating any data, you must create a data replication mapping plan by following the steps below.

Building a Data Replication Plan

Choosing Content

Replication plans rely on content mapping which creates replication pairs between objects in *Salesforce* and SharePoint.

1. Click on **Add** next to *Mapping Table.* A pop-up window will appear.

2. In the left-hand column, click the ⊞ icon next to *Salesforce* to list the *Salesforce* objects. Select the objects and records you wish to map from *Salesforce* to SharePoint.

3. Above the right-hand column, enter the SharePoint Site URL, and click the icon to load the content under this specified site. If you leave the SharePoint Site URL blank, it will load all SharePoint sites after clicking the icon. Click the ⊞ icon to expand the tree, and then select the location (the site or the list) where you want to save the content.

4. Click **OK** to save the Replication Mapping Settings.

Editing a Mapping

Once a mapping has been created, you can edit the replication options by clicking the **Edit** button, view the contents, or choose whether it is **Enabled by checking the corresponding check-box.**.

Running the Plan

If you wish to run your replication on a set schedule, please see the *Schedule Options* section below. If you do not plan on using a schedule and wish to perform a replication immediately, click on a mapping and then click **Run Now** at the bottom of the screen. Click **OK** to run the plan.

Advanced Settings

In order to configure advanced options for a Replication mapping, highlight the plan and click on the **Advanced** button. You can then edit the settings for *Schedule, Conflict Options, User Mapping, and List Mapping.*

Schedule Options

If you wish to schedule for each replication type please follow the steps below:

1. Select the replication type by clicking the corresponding tab to either replicate all content (Full), only the changes made since any previous replication (Incremental), or all the changes made since the last full replication (Differential.)

2. Uncheck **No Schedule** to enable the schedule and activate the options below.

3. Set a Start Time for this replication mapping by clicking the calendar icon.

4. Using the Interval options, you can make this a recurring job based on an hourly, daily, weekly, or monthly schedule or choose to have it only run once.

5. Click **Apply** to save the settings.

Conflict Options

You can set up the Conflict rules to configure how *DocAve for Salesforce* resolves conflicts between SharePoint and *Salesforce*.

1. Set the priority number for the conflict resolution rules by changing the number from the drop-down box.

2. Select the conflict action to be performed once the priority has been established by clicking the corresponding radio box. There are three options available: **Skip**, **Overwrite**, and **Manual Conflict Resolution**.

   - **Skip**: Files with the same name in the source and destination will not be replicated.

   - **Overwrite**: Files with the same name will be overwritten according to the priority set above.

   - **Manual Conflict Resolution**: Creates a new folder named *Salesforce* and then backs up the conflicted files into this folder. The file in the source will replace the original file. Only files which were uploaded to *Salesforce* manually can be saved in the new folder.

3. Click **Apply** to save the settings.

User Mappings

DocAve for Salesforce allows you to create custom replication mappings for data from *Salesforce* users to SharePoint users manually. If you do not configure user mapping, *Salesforce* users will be matched with SharePoint users automatically, however, for *Salesforce* users which cannot be automatically matched with a SharePoint user, *DocAve for Salesforce* will map these users to a system account. To create custom user mappings follow the steps below:

1. Specify a **Default Domain** into the provided field. This will add the users which are not configured in the mapping profile to that domain. If you leave this field blank, it will use the domain of the current machine.

2. Check the **User Mapping** checkbox to enable user mapping. Next, enter the *Salesforce* username which you want to replicate and the SharePoint username that you want to replicate to. You can also map a *Salesforce* user to a SharePoint group using the **Group Mapping** checkbox. By default, the **User Mapping** and **Group Mapping** options are checked.

3. Click the plus icon and minus icon to add or remove additional mappings.

4. Click **Apply** to apply the mapping.

After configuring the mapping, you can click **Save Mapping** to save the mapping profile as an XML file which can then be loaded later by clicking **Load an Existing Mapping**. If you have a large number of users, we recommend mapping them in XML first, as this is the fastest way to populate a mapping.

List Mapping

DocAve for Salesforce can map *Salesforce* objects to SharePoint lists manually. To create a manual list mapping, please follow the steps below:

1. Check the **List Mapping** checkbox to enable a manual list mapping. Next, enter the *Salesforce* object name which you want to replicate and the SharePoint list name which you want to replicate to. You can also specify the SharePoint list type and the SharePoint list type ID if necessary.

2. *DocAve for Salesforce* can also map *Salesforce* objects to SharePoint columns by specifying the *Salesforce* object name, the *Salesforce* column name you want to map, the SharePoint Field Name, and the SharePoint field type which you want to map to in the **Column Mapping** area. By default, **List Mapping** and **Column Mapping** are checked.

3. You can click the plus icon and minus icon to add or remove additional mappings.

4. Click **Apply** to apply the mapping.

After configuring the mapping, you can click **Save Mapping** to save the mapping profile as an XML file which can then be loaded later by clicking **Load an Existing Mapping**.

Replicating SharePoint Content to *Salesforce* with *Content Integrator*

This section will teach you how to replicate content from SharePoint in to *Salesforce* using the *DocAve for Salesforce Content Integrator*. Before replicating any data to *Salesforce*, you must create a *Content Integrator* mapping plan by following the steps below.

Note for all SharePoint environments where multiple load balance web front-end are used: you can install *DocAve for Salesforce* on only one web front-end server.

Building a Content Integrator Plan

Choosing Content

Content Integrator relies on content mapping plans which allow you to select content to create replication pairs.

1. Click the **Add** button next to *Mapping Table.* A pop-up window with all of the SharePoint farms and *Salesforce* workspaces will load.

2. In the left-hand column, click the farm name to view its contents. Select the Document library you wish to replicate from SharePoint to *Salesforce*.

3. In the right-hand column, click the salesforce workspace name to expand the *Salesforce* data, and then select the location where you want to save the content.

4. For larger SharePoint environments or *Salesforce* content, you can use the search function to rapidly target content. Enter the site collection/site URL or workspace name into the corresponding field, and click the icon to search.

5. Click **OK** to continue to configure the mapping settings.

Additional Mapping Settings

There are three additional options you can configure for the *Content Integrator* mapping plan.

- **Folder path settings**: Determines whether to replicate the folder's SharePoint path in to *Salesforce*. You can select to keep up to the first 100 characters of the folder path as a tag in the destination, or save the folder path as an attribute of the destination file in *Salesforce*.
- **Include all subfolders**: Replicates all subfolders and files in the subfolders of the selected mapping.
- **Enable Real Time Replication**: Keeps the source and destination synchronized.
- **Filter Profile**: Select the filter profile from the drop-down box. For more information, please refer to Filter Options section.

Click the **OK** button to save the plan.

Editing a Mapping

Once a mapping has been created, you edit the mapping options, view the contents, or choose whether it is **Enabled** by clicking the **Edit** button.

Running the Mapping Plan

If you would like to set any advanced options including a mapping schedule, please see the following section. If you wish to perform a replication immediately, click **Run Now** at the bottom of the screen**,** and click **OK**.

Advanced Settings

In order to configure any advanced options for the *Content Integrator* Mapping Plan, click on the **Advanced** button.

Schedule Options

By default, content replication from SharePoint to *Salesforce* is not scheduled. If you wish to schedule a replication for the future or to schedule a recurring replication, please follow the steps below:

1. Navigate to the *Schedule* tab.
2. Select the replication type by clicking the corresponding tab to either replicate all content (Full) or only the changes made since the previous replication (Incremental).
   If you select an Incremental replication job, there are two additional options you can select:
   - *Replicate Modifications*: Files which have been modified in the source since the last replication job was run will replicate with the version with new modifications overwriting the destination.
   - *Replicate Deletion*: Replicated files which have been deleted from the source will also be deleted in the destination.
3. Uncheck **No Schedule** to enable the schedule and activate the options below.
4. Set a Start Time for this job by clicking the calendar icon and selecting a date.
5. Using the interval options, you can make this a recurring job based on an hourly, daily, weekly, or monthly schedule or choose to have it run only once.

6. Click **Apply** to save the settings.

***Note**: the interval between two replication jobs should not be longer than the time specified for the change log configured in the Web Application.

Filter Options

Similar to the filter built-in to SharePoint, if you do not want to replicate all files in a selected folder, you can set up a filter policy to filter out any files that you do not want replicate.

1. Click the *Filter* tab. Enter a Filter Name in the provided field, and select which version levels and file statuses you wish to apply the filter to.

2. Select the filter condition first and then the operator from the drop-down boxes. Next, enter the condition value you want to filter for.

3. Click the **Add** plus-sign icon to add a new filter condition. You can then add additional conditions to the filter using AND or OR logic.

4. Click **Save** to save the filter policy. If you wish to create additional filters you must click the **New** button before filling in any fields. Highlight the filter profile and click the **Apply** button to apply the policy for the replication job.

Conflict Options

If you opt to perform a two way replicator job you must configure how *DocAve for Salesforce* resolves conflicts between SharePoint and *Salesforce*.

1. Set the priority number for the conflict resolution rules by changing the number from the drop-down box.

2. Select the conflict action to be performed once the priority has been established by clicking the corresponding radio box. There are two options available: **Skip or Overwrite**.

   - **Skip**: Files with the same name in the source and destination will not be replicated.

   - **Overwrite**: Files with the same name will be overwritten according to the priority set above.

3. Click **Apply** to save the settings.

User Mappings

DocAve for Salesforce allows you to create custom replication mappings from SharePoint users to *Salesforce* users manually. If you do not configure user mapping, *Salesforce* users will be matched with SharePoint users automatically, however, for SharePoint users which cannot be automatically matched with a *Salesforce* user, *DocAve for Salesforce* will map these users to a system account. To create custom user mappings follow the steps below:

1. Click the **Add** Button. Enter the *Salesforce* username which you want to replicate and the SharePoint username which you want to replicate to.

2. You can click the plus icon and minus icon to add or remove additional new mappings.

3. Click **Apply** to apply the mapping.

After configuring the mapping, you can click **Save Mapping** to save the mapping profile as an XML file which can then be loaded later by clicking **Load an Existing Mapping**. If you have a large number of users, we recommend mapping them in XML first, as this is the fastest way to populate a mapping.

Content Type Mapping

DocAve for Salesforce can map SharePoint content types to *Salesforce* objects manually.

1. Navigate to the *Content Type Mapping* tab.

2. Check the **Content Type Mapping** checkbox, and then enter the SharePoint content type name which you want to replicate and the *Salesforce* content type name which you want to replicate to.

3. You can also map the SharePoint field to *Salesforce* column by specifying the SharePoint field name you want to map, and the *Salesforce* column name which you want to map to in the **Column Mapping** area. By default, **Content Type Mapping** and **Column Mapping** are checked.

4. You can click the plus icon and minus icon to add or remove additional mappings.

5. Click **Apply** to apply the mapping.

After configuring the mapping, you can click **Save Mapping** to save the mapping profile as an XML file, which can then be loaded later by clicking **Load an Existing Mapping**.

Congratulations!

By installing and configuring *DocAve for Salesforce* you now have total control of your data's relationship in *Salesforce* and SharePoint. To help manage this, and other infrastructure concerns, please visit www.avepoint.com/products for more information.

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