AvePoint® DocAve 4.0®
(Enterprise Solutions for SharePoint)
User Guide
August 2006
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Revision History

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About This Publication

This preface provides the following information about this DocAve 4.0 User Guide.

- **Purpose**
- **Intended Audience**
- **How To Use This Publication**
- **Related Information**

**Purpose**

This user guide explains in detail the system architecture, feature list, and integrated web interface of AvePoint’s DocAve 4.0 solution.

**Intended Audience**

This information is intended for:

- SharePoint administrators
- System integrators
- Value added resellers (VARs)
- Original Equipment Manufacturers (OEMs)

**How To Use This Publication**

This DocAve 4.0 user guide is organized as follows:

- **Section 1, “Overview”** gives a high level feature overview of the DocAve 4.0 product.
- **Section 2, “System Requirements”** detail the minimum system requirements needed to install both DocAve 4.0 server and client(s).
- **Section 3, “DocAve 4.0 System Architecture”** describes DocAve 4.0’s distributed server and clients system architecture.
- **Section 4, “Supported Installation Setups”** discusses some possible DocAve 4.0 installation scenarios.
- **Section 5, “DocAve 4.0 Web Interface & Usage”** describes the various centralized management components of the new web based interface. This new web interface integrates all AvePoint products into one easy-to-use, centralized administration and management panel.
Related Information

For additional information related to DocAve 4.0 product installation, configurations, and administration, please see DocAve 4.0 Install Guide, DocAve 4.0 online FAQs, and DocAve 4.0 usage Flash movies.
1 Overview

This user guide explains the product features of AvePoint’s latest extension in the SharePoint backup solution space. DocAve 4.0 is an enterprise strength item-level backup, recovery, and content management solution for Microsoft Windows SharePoint Services, Microsoft SharePoint Portal Server, and Microsoft Project Server (including the x64 Editions).

DocAve 4.0 consists of two modules, DocAve 4.0 Server and DocAve 4.0 Client. Both modules must be installed in order to run DocAve 4.0. The installation requirements, location, and process are discussed in DocAve 4.0’s install guide (http://www.avepoint.com/download/DocAve 4.0_Install_Guide.pdf).

Operating on AvePoint’s latest distributed software platform, DocAve 4.0 run on any environment, accessible from anywhere in your network via Microsoft Internet Explorer (IE), and monitors multiple SharePoint environments across the network. Specifically, DocAve 4.0’s main features include:

- Provide scheduled full, incremental, or differential backup at the site-level, subsite-level, and item-level.
- Real-time time restore of items, subsites, and sites directly onto your production server, or cross restore to any server on the network.
- Offer “point & click” simplicity to content management at the item-level, subsite level, and site level.
- Automated data-pruning and coalescing lets users manage backup data. Allow users to specify backup data size, storage medium, and location.
- Central administration of all SharePoint backup/recovery/management jobs scheduling/monitoring/reporting, user account management, and software agent management across multiple SharePoint farms from a SINGLE “accessible-from-ANYWHERE” web interface.

This document is organized as follows, Section 2 covers DocAve 4.0’s system requirements, Section 3 covers DocAve 4.0’s overall system architecture, Section 4 covers various backup/recovery/management configurations supported by DocAve 4.0, and Section 5 covers all the main features of DocAve 4.0’s “access-from-ANYWHERE” web interface and its usage.
2 System Requirements

2.1 DocAve 4.0 Server

2.1.1 Server Platforms
- Microsoft Server 2003 (including x64 Editions)
- Microsoft Server 2000
- Microsoft XP

2.1.2 Server Memory Space
1GB (Minimum), 2GB (Recommended)

2.1.3 Server Disk Space
1GB (Minimum), 3GB (Recommended)

2.2 DocAve 4.0 Client

2.2.1 Client Platforms
- Microsoft Server 2003 (include x64 Editions)
- Microsoft Server 2000 with .NET 1.1 Framework

2.2.2 Client Memory Space
512MB (Minimum), 1GB (Recommended)

2.2.3 Client Disk Space
SharePoint Server Client: 1GB (Minimum), 3GB (Recommended)
3 DocAve 4.0 System Architecture

DocAve 4.0 represents the next generation of AvePoint software architecture, where administrators can manage SharePoint backup, content management, archiving, and disaster recovery for multiple SharePoint environments within a single interface, accessible from ANYWHERE via Microsoft Internet Explorer (IE).

As shown in Figure 1, DocAve 4.0’s server and client components can be distributed across the network. Note that DocAve 4.0’s server and client could reside on the SAME machine. The DocAve 4.0 client resides on a SharePoint web server.

DocAve 4.0’s web interface is hosted by the DocAve 4.0 Server, which could be accessed from anywhere across the network. Please note that http tunneling can be configured across corporate firewalls so as to enable remote administration of SharePoint environments via DocAve 4.0.
3.1 *DocAve 4.0 Server*

![Diagram of DocAve 4.0 Server Services](image)

Each DocAve 4.0 installation has just ONE DocAve 4.0 server. Any machine running Windows Operating System such as Windows 2000 or later (including Windows XP) can be used to host the DocAve 4.0 server. DocAve 4.0’s server is the central administrative component for all of DocAve 4.0’s client components. Thus as long as DocAve 4.0 clients are installed, DocAve 4.0 enables the SharePoint administrators to monitor and provide backup, recovery, and content management to any SharePoint environment.

Each DocAve 4.0 Server installation includes installation of DocAve webservice, DocAve network service, DocAve database service, and DocAve Media Service. Note that each of these services can be run on separate dedicated machines, and there can be multiple dedicated Media servers.

DocAve Media Servers are dedicated for backup storage and backup data management. Backup data on the Media server supports full text indexing and search, and can be encrypted and compressed. DocAve media servers performs the actual SharePoint data backup, thus effectively distribute the backup work load across multiple physical servers. DocAve database services maintain internal DocAve data such as SharePoint auditing data, DocAve usage data, DocAve backup plans, and DocAve internal logs. DocAve network services facilitates the network communication between DocAve 4.0 Servers and DocAve 4.0 Clients.
3.2 **DocAve 4.0 Client**

Each DocAve 4.0 client resides directly on a SharePoint front-end web server. A DocAve 4.0 client communicates with the DocAve 4.0 server over the network. A DocAve 4.0 client communicates with SharePoint front-end web servers via Microsoft’s SharePoint Object Model API, and communicates with the SQL server via Microsoft’s SQL API.

3.3 **Data Packet Fault Tolerance**

When performing SharePoint backup or recovery tasks, DocAve 4.0 server could direct two DocAve 4.0 clients to communicate with each other, transferring all relevant SharePoint contents. Special care was taken in the DocAve 4.0 software architecture to ensure that this communication can survive very noisy or even intermittent data channels. Strenuous quality assurance tests on data packet fault tolerance include backing up and restoring SharePoint data across the Pacific Ocean for a period of three days, where Ethernet cables were intermittently unplugged to simulate disrupted data communications. Successful results from such data transfer tests showcased the strength of DocAve 4.0’s data packet level fault tolerance features.
4 DocAve 4.0 Supported Installation Setups

This section lists some possible setup configurations supported by DocAve 4.0. Please note that DocAve 4.0’s distributed architecture can be leveraged to support a variety of customized configurations. DocAve 4.0 offers a variety of installation options for the DocAve 4.0 Server, DocAve 4.0 Media Server, and the DocAve 4.0 Client. Please contact AvePoint for more details.

4.1 All-in-one Installation Setup

As shown in Figure 3, both the DocAve 4.0 Server and the DocAve 4.0 Client can be installed on the same machine. This machine must be where the SharePoint Server resides on. Backup data storage will be stored on the same machine as well. Please note that this is NOT the recommended configuration since machine failure will negate you the ability to retrieve your backup data files.

Figure 3. All-in-one installation setup

SharePoint administrators can use DocAve 4.0’s “point & click” web interface to schedule or manually run full, incremental, or differential backups of any SharePoint environment as long as DocAve 4.0 client is installed on a front-end web server of the designated SharePoint environment. The backup data files will be stored on a local drive.
4.2 DocAve 4.0 Dedicated Server Installation Setup

The DocAve 4.0 server can be installed on its own machine where it will use dedicated resources to run the backup jobs. The DocAve 4.0 Server will communicate with DocAve 4.0 Clients to retrieve the data to be backed up. The DocAve 4.0 Media server is installed on the same machine as the DocAve 4.0 Server and will store the backup data for recovery. Backup data will travel along the blue dashed line illustrated below between the DocAve 4.0 Client and the DocAve 4.0 Media Server.

Figure 4. DocAve 4.0 dedicated server installation setup
4.3 *DocAve 4.0 Dedicated Media Server Installation Setup*

The DocAve 4.0 Media server can be installed on a separate machine than where the DocAve 4.0 Server is installed. The DocAve 4.0 Server will manage all DocAve 4.0 Clients and command clients to send backup data to be stored in a separate Media server. The backup plan configurations and reports will be stored on the DocAve 4.0 server. The backup data for recovery will be stored in the dedicated Media server. Backup data travels along the blue dashed line illustrated below from the DocAve 4.0 Client to the DocAve 4.0 Media Server. Backup data can be encrypted and compressed both on the Client side and the Media server side.

![Diagram of DocAve 4.0 dedicated Media Server installation setup](image)

*Figure 5. DocAve 4.0 dedicated Media Server installation setup*
4.4 DocAve 4.0 fully distributed installation setup

There can be multiple DocAve 4.0 Media servers dedicated for backup data storage. Backup data travels along the blue dashed line illustrated below from the DocAve 4.0 Client to the DocAve 4.0 Media Server. Users can specify which Media Server will store the backup data per backup plan. Backup data can be encrypted and compressed both on the Client side and the Media server side.

Figure 6. DocAve 4.0 fully distributed installation setup
5 DocAve 4.0 Web Interface & Usage

DocAve 4.0’s “accessible from ANYWHERE” web interface represents AvePoint’s next generation user interface where all AvePoint applications in the space of SharePoint backup, content management, archiving, and disaster recovery can be accessed from the same integrated interface via Microsoft Internet Explorer.

Common interface features that are available across all future releases of AvePoint products include:

- Central administration of user accounts and application access privileges. This will control the type of actions certain administrators or AvePoint application users can perform via the integrated web interface
- Central administration of AvePoint product licenses across multiple SharePoint environments
- Central administration of AvePoint product patch management and software upgrades across multiple SharePoint environments
- Central monitoring, management, and reporting of all AvePoint software agents/clients distributed across multiple SharePoint environments and Microsoft Windows servers and SQL servers.
- Central administration of all network storage locations for backup data, including data compression and encryption options.

DocAve 4.0’s specific functional availability in the integrated web interface allows the administrators to:

- Perform full, incremental, or differential backups of any Portal, top-level site collections, sub-sites, document libraries, lists, folders, areas, and sub-areas to a local/networked/mapped file system.
- Build “business-rule aware” backup plans via intuitive backup plan rule filters.
- Create multiple backup schedules for any backup plan to satisfies the most stringent scheduling constraints.
- Conduct “point & click” SharePoint content management in moving entire top-level site collections or down to single document to another URL, with the option to preserve securities and metadata.
- Setup and monitor backup reporting at different reporting levels, for different services, to different customizable user groups.

The rest of section 5 will explain the above features and their usage instructions in full detail.
5.1 Accessing DocAve 4.0

DocAve 4.0’s web interface can be accessed anywhere within your network via Microsoft Internet Explorer (IE). In IE, enter the following:

http://<machine>:8080/DocAve

where <machine> is the name or IP address of the machine running DocAve 4.0 Server

* Please note that any pop-up blockers must be disabled for this URL

The DocAve 4.0 Login screen will pop up. Enter the Initial Login and click Login (as shown in Figure 7).

The Initial Login for the Local System is as follows:

LoginId: admin
Password: admin

The default admin password can be changed via DocAve’s Account Manager (see Section 5.3.7 for more details on resetting passwords and assigning DocAve access rights to existing Microsoft Active Directory (AD) users)

Figure 7. Login into DocAve 4.0
5.2 DocAve 4.0 GUI Overview

The DocAve 4.0 browser-based GUI is structured for optimal SharePoint back office operations management. As shown in Figure 8, the DocAve GUI’s default view is the DocAve SharePoint view. This view includes

- Item-level backup & restore
- Site-level backup & restore
- Sub-site level backup & restore
- Content Manager (“point-n-click” item-level SharePoint content management)
- SP Auditor (full granular SharePoint Auditor, available Q3, 2006)
- SP Archiver (full granular SharePoint archiving with Full index and search support, available Q3, 2006)
- SPDR (Many-to-one “one-switch” SharePoint Disaster Recovery)
- Job Monitor (SharePoint backup, restore, and content management jobs)
- Performance (Backup data compression, encryption, pruning, and coalescing)

![Figure 8. DocAve 4.0 default view](image)

Note that as part of the GUI navigation and usage, any left or right arrow icons denotes screen collapse and expand features. Figure 9 shows DocAve 4.0 default view with the left and right side panel “collapsed”.

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*AvePoint DocAve 4.0 User Guide – August 2006* 20
The DocAve GUI also offers “Control Panel” view and “Help” View. The Control panel view includes:

- Server Monitor to monitor and restart DocAve services
- Agent Monitor to monitor and restart DocAve software clients
- Email Notification to setup user groups for customized email alerts
- License Manager for online DocAve services license management
- Patch Manager for online DocAve services patch management
- Storage Manager to setup multiple storage locations for backup data
- Account Manager to setup and manage user access to DocAve
- Database Manager to setup DocAve database for backup plan storage and log tracking
- Agent Browser to display SharePoint structures covered by respective DocAve software agents and whether the structures are associated with any backup, or disaster recovery plans.
- Log Manager to set various DocAve service log quotas and policies

The Help view simply display online help documentation for DocAve 4.0.

The following sections will be organized as follows. Section 5.3 details Control panel’s general DocAve management services, Section 5.4 covers DocAve’s SharePoint value added functionalities, and Section 5.5 overviews DocAve online help menu. All sections also cover DocAve 4.0 usage instructions.
5.3 **DocAve Control Panel**

DocAve Control Panel offers the following general administrative services

- **Data Management**
  - **Data Security Manager** Configure data compression and encryption profiles
  - **Data Retention Manager** Configure pruning guidelines for backup data stored on the local or network drive
  - **Storage Manager** Setup drive locations for data storage for various DocAve Media Servers

- **Control Services**
  - **Server Monitor** Monitor and restart DocAve servers
  - **Agent Monitor** Monitor/restart DocAve software clients, setup DocAve client work areas for temporary work files, enter access rights to agent hosts

- **Reporting**
  - **Email Notification** Setup email notification groups for different types of services and log level reporting

- **System**
  - **Log Manager** Setup and management DocAve log quotas
  - **Account Manager** Centralized user access management to DocAve
  - **Agent Browser** Monitor and restart DocAve clients
  - **Database Manager** Manage DocAve’s internal database for DocAve backup/restore plans, usage tracking, job reporting, and SharePoint auditing

- **License Management**
  - **License Manager** Centralized license management for all DocAve solutions
  - **Patch Manager** Centralized software upgrade management for all DocAve solutions
  - **Patch Report**

*The ability to access DocAve control panel should be limited to users with highest level of administrative privileges. This could be controls via the user’s security roles (as discussed in Section 5.3.7).*

The following subsections explain each administrative services in detail.
5.3.1  *DocAve Server Monitor*

Server monitor (Figure 10) provides a central interface to monitor and restart DocAve media servers, DocAve database servers, and DocAve network services. This functionality is also available for various AvePoint software agents/clients (see Section 5.3.2 for more details) located across your SharePoint environment(s).

As mentioned above,
- DocAve media servers performs actual SharePoint data backup, thus effectively distribute the backup work load across potentially multiple physical servers.
- DocAve database servers maintenance internal DocAve data such as SharePoint auditing data, DocAve usage data, and DocAve internal logs
- DocAve network services facilitates the network communication between DocAve servers and DocAve software clients

*Please note that the ability to restart servers should be limited to users with highest level of administrative privileges. This could be controls via the user’s security roles (as discussed in Section 5.3).*
5.3.2 **DocAve Agent Monitor**

DocAve Agent Monitor (Figure 11) monitors and restarts multiple DocAve software clients.

User local system access may need to be set to a service account that has Administrator privileges to SharePoint if the DocAve software client can not access SharePoint content from local account.

Staging Location can be setup so DocAve software clients will not write temporary data to default temporary location, which is `<DocAve 4.0 Install Directory>\VaultClient\temp` on the DocAve software client’s host machine. This feature can be used by the AvePoint SPDR solution to perform standard SQL backups. (please see AvePoint SPDR Whitepaper)

![Figure 11. DocAve Agent Monitor](image-url)
5.3.3 *DocAve Email Notification*

The Email Notification manager allows the administrator to create various email profiles containing different mailing lists. Any backup, restore, content management, archive, or disaster recovery plans could then be configured to email to different email profiles for different error or success conditions. This allows the administrator to effectively control which personnel gets notified under which conditions.

Email Notification also allows the administrator to specify exactly what is reported, from simple summary reports to detailed URL specific reports.

Future versions of AvePoint software will allow administrators to create and modify reporting templates so as to output customized reports that satisfy customers’ specific corporate reporting requirements.

![Figure 12. DocAve Email Notification Manager](image)

Let’s begin our configuration of our mailing list profile. Select the Application Type and choose one of the three options: All, Backup, or Archive.
Next, enter your POP3 or Microsoft Exchange Outgoing Mail Server (SMTP), the email address you would like the notifications to come from, as well as the login credentials for the specified email address.
Next, enter the email recipients for the Summary and Detailed Reports. Multiple recipients can be added to the “Report Recipients” text box, delimited by “;”. There are different notification levels: All, Success, Warning, or Failure. Notification levels can also be customized per profile. For instance, you may want a specific person or group of people to only receive reports for Backups and/or Archives that have failed.

Lastly, select the format which the message will be delivered in: HTML or plain text. Click on the Test Account Settings button to ensure that your notification profile is configured properly. All email recipients entered in the Summary and Detailed Report fields will receive a test message from the email address you specified in the Sender field.
Figure 12.4

Click the Save As button, create a notification name for this profile, and click OK. All mail notifications profiles will be selectable from within DocAve’s various backup, restore, content management, auditing, archiving, and disaster recovery plan builders.

Figure 12.5
You should now see the profile you have created listed to left. To modify a profile, simply click on the profile in the list and make your modifications. Once you are done making your modifications, click the Save button. You may also click the Save As button to create another notification profile.

Figure 12.6

Figure 12.7
Figure 12.8
5.3.4 *DocAve License Manager*

DocAve license manager allows SharePoint administrators to view the license type and schedule of the DocAve 4.0 server. Future versions of AvePoint applications will add additional tabs to the server manager so as to encompass various license schedules across different AvePoint products and across different SharePoint environments.
As shown in Figure 13.1, the new “Server License Management” section allows the administrator of AvePoint’s web interface to update AvePoint server level licenses with ease by simply clicking on the import button and browsing for a newly uploaded license file.

![Figure 13.1](image)

Click Open and then click the Apply button. If the license file is valid, a message will appear indicating that the license update was successful. You will then be prompted to log in to DocAve 4.0.
Figure 13.2
5.3.5 **DocAve Patch manager**

The DocAve Patch Manager allows the administrator to easily apply latest AvePoint server patches or software upgrades to different AvePoint servers (if applicable) online. Similar to server license management, the administrator can view the current software version of various AvePoint servers, and bring the servers up-to-date by browsing and applying any new software update files released by AvePoint.

![DocAve Patch Management Figure](image.png)
5.3.6 *DocAve Storage Manager*

The DocAve Storage Manager can set up multiple data storage locations per DocAve Media Server installation. DocAve 4.0 supports multiple media servers. Thus with the aid of the Storage Manager, the DocAve administrator can now effectively partition all SharePoint contents from multiple environments across the corporate network.

In our example, we chose not to install a DocAve Media Server during the DocAve 4.0 Server installation and installed the Media Server on a separate machine called Puma.

![Figure 15. DocAve Storage Management](image-url)
The default drive for both the backup and archive drives are pre-populated. To change the Path, simply click on Default Drive for backup and/or archive and enter the new path to point to your desired storage path or server. If you wish to change the name of drive, edit the name here as well.

In our example, we will use the name of the media server, Puma. Select the data type, Backup Drive or Archive Drive, and the Drive Type, Local drive or Network drive. Since the media server was installed on a different machine, we will select network drive.

![Figure 15.1](image-url)
Click the Test Storage Settings button to ensure that your settings are correct and click the Save button if the test is successful.

Figure 15.2

The default drive has been renamed to Puma Backup and the settings have been changed to a network drive with the UNC path `\puma\DocAve\backup`

Figure 15.3
To add an additional drive, click on the New Drive link. Enter your Drive Name, select your Data Type and Drive Type, and enter the path for the new drive. Once you have saved your new drive, an additional drive will now be listed.

If you have two or more drives configured for each data type, DocAve will use the top drive for backup until the drive no longer has enough disk space. Once the disk space is full, DocAve will store the backups on the secondary drive.

To delete a drive, click on the drive you wish to delete and click on the Delete Button. If there is only one drive listed under each data type, DocAve will not allow you to delete this drive until a new drive is created.

Figure 15.4
5.3.7 **DocAve Data Retention Manager**

The DocAve Data Retention Manager allows administrators to define data retention and expiration policies. Data Pruning is a feature in DocAve4.0 for clearing up old backup data. A Data pruning rule specifies the time and type of backup processes that trigger Data pruning and the amount of time to keep the backup data.

First, select the backup type to trigger the data pruning followed by the time data pruning should occur; before or after the backup. Then enter the number of full backup cycles you wish to run before data pruning begins followed by the number of days, weeks, or months of data to keep. In our example, we have entered 2 full backup cycles. Once a third backup cycle runs and completes, data pruning will be begin and data older than 2 weeks will be expunged.

![Figure 16. DocAve Data Retention Management](image)

Data Coalescing "merges/collapses" INCREMENTAL or DIFFERENTIAL data chunks onto the previous FULL backup so as to save disk space needed to store backup data. Data Coalescing allows DocAve administrators to effectively stretch out Backup Cycles (Full backup plus X number of incremental backups till the next Full backup) without the added risk of losing incremental data. For example, usage could be to set a monthly backup cycle where FULL backup is
performed on the 1st of every month, and INCREMENTAL backup is performed daily. The resulting data is just one set of FULL backup residing on your local/network drive or SAN environment.

To save your data pruning rule, click the Save As button and you will be prompted to enter a name for the rule created. Once you have entered your data pruning rule name, click OK and you will now be able to select your data pruning rule in the Item-Level, Site-Level, and Sub-Site Level backup modules.

Figure 16.1
5.3.8 **DocAve Account Manager**

The DocAve account manager allows SharePoint administrators to
- Change initial admin password
- Create new roles for different users

DocAve access roles are used to differentiate different types of access privileges within the AvePoint application. All DocAve 4.0 application access and usage are tracked and recorded for DocAve application level auditing and reporting.

When DocAve 4.0 is installed in “Domain User” mode (see DocAve 4.0 Install Guide), DocAve will match up users with Windows Active Directory (AD), so no new users need to be created. In this mode, only user roles need to be created and assigned.

When DocAve 4.0 is installed in “Local User” mode (see DocAve 4.0 Install Guide), the DocAve administrator can create new users and roles to control DocAve 4.0 access.

As shown in Figure 17, access permission for different role types can be edited. New user roles can then be created and assigned different AD users. AD users that have access privileges to DocAve 4.0 will login with their existing Windows user name and password.
5.3.9 **DocAve Database Manager**

DocAve Database Manager (available June 30th, 2006) manages DocAve’s internal database which store user defined backup plans, DocAve application audit data, and various DocAve service logs in regard to SharePoint content management and restores. This database will also be used by AvePoint’s SharePoint Auditor and Archiver to store logs and plans.

5.3.10 **DocAve Agent Browser**

A significant advantage of AvePoint’s new distributed Server and Clients software architecture is the ability to view multiple SharePoint environments from a single interface and monitor their backup, archiving, and disaster recovery coverage.

The Agent Browser gives the administrator a centralized view of multiple SharePoint environments, their associated virtual servers and content databases, and in the case of DocAve SPDR, whether any content database is covered by any regularly scheduled disaster recovery plan.

![Diagram of Agent Browser](image)

**Figure 18. DocAve Agent Browser**

Figure 16 shows an example scenario where the server “orange” hosts a standby SharePoint virtual server that would be used to backup the production virtual server, and its two content databases, DEFAULT_SITE and FINANCE_SITEDB, residing on the server “apple”. Expanding on the content databases within the “DocAve 4.0 Demo Production Server” shows that neither DEFAULT_SITE nor FINANCE_SITEDB are covered by any regularly scheduled backup or disaster recovery plans.

As evident from the above example, Agent Browser is very useful in identifying any SharePoint contents across your entire SharePoint deployment environment that would need data backup or disaster recovery coverage.
Note: *It is essential that software agents (DocAve 4.0 clients) on the production and backup SharePoint web servers are running properly for data backup, restore, content management, and disaster coverage to function as intended.*

If you have any SharePoint web server that is not represented in the Agent Browser, it could be due to one of the following reasons:

- The “AvePoint DocAve 4.0 Service” may be down. In which case, please restart the service on the machine where the DocAve 4.0 Server is installed.
- The DocAve software client residing on the SharePoint web server that is missing in the Agent Browser may be down. You could try to
  - restart the client via the Agent manager
  - or restart the “AvePoint Communication Service” on the SharePoint web server which the AvePoint software client reside.

5.3.11 **Log Manager**

The DocAve Log Manager (Figure 19) controls the amount of logs to record via **“Log Level Setting”** panel and the amount of data to retain via the **“Log Data Pruning”** panel.

**Log Level Setting** can be used to set log levels for log recording for the following services

- DocAve Web services - DocAve 4.0 GUI hosting service
- DocAve .Net services - SharePoint backup, content management, and disaster recovery software agents
- DocAve Media services - backup data processing and storage management service. Here, administrators can choose different log levels for recording across multiple DocAve media servers.
Log Data Pruning is used to specify retention policies for the DocAve .Net, Web, and Media services. Old logs can also be downloaded to plat files for archiving.

All DocAve log data are stored within DocAve databases, which can be managed via the DocAve Database Manager.
5.4 DocAve SharePoint View

DocAve SharePoint view offers the following SharePoint value-added functionalities:

- Item-level backup & restore
- Site-level backup & restore
- Sub-site level backup & restore
- Content Manager ("point-n-click" item-level SharePoint content management)
- SP Auditor (full granular SharePoint Auditor, available Q3, 2006)
- SP Archiver (full granular SharePoint archiving with Full index and search support, available Q3, 2006)
- SPDR (Many-to-one “one-switch” SharePoint Disaster Recovery)
- Job Monitor (SharePoint backup, restore, and content management jobs)
- Performance (Backup data compression, encryption, pruning, and coalescing)

The ability to access DocAve solutions can be controlled via user accounts & access roles as discussed in Section 5.3.8.

The following subsections explain each DocAve solution in detail.
5.4.1 **Item-level Backup & Restore**

DocAve 4.0 provides full granular item-level backup and restore for SharePoint contents. Via DocAve, SharePoint administrators can

- setup scheduled or immediate FULL, Incremental, or Differential backups for any SharePoint environment (as long as DocAve software clients are installed)
- backup to a specific data pruning & coalescing schedule by selecting a **Backup Data Manager**
- setup encryption and compression to backup data via a **Data Manager**
- select email notification rules created in the Control Panel’s email notification manager
- choose designated DocAve media server to off load actual backup work
- selectively restore SharePoint contents, down to specific versions, with or without security and properties, to the same or **different** URL location across one or **MULTIPLE** SharePoint environments.
- monitor real-time progress of any backup or restore jobs (via DocAve Job Monitor)

DocAve 4.0 operates on the concept of backup plans, where each backup plan allow SharePoint administrators to specify

1. what to backup (via URL tree selection or “Smart Backup Plan Builder” **Filter Mode**)
2. when to backup (via 7 different schedules where administrators can choose one time only, hourly, daily, weekly, or monthly schedules),
3. how to backup (via Full, Incremental, or Differential)
4. where to backup (via media servers which then writes data to designated network/local/mapped disk drives)
5. and how to handle to backup data in terms of data retention (pruning and coalescing via Data Manager) and security (compression and encryption via Backup Data Manager)

*DocAve backup plans DO NOT lock up SharePoint SQL database index files, and thus can be scheduled to run during normal production hours.*

Figure 20 shows an example of building a FULL backup plan for site “**avepoint:9000/personal/clara**”. The orange triangle in the folder icon indicates that all future modifications and additions to the selected folders will be automatically included in the backup plan. The email notification is of the rule “**success_alerts**”, which was previously created in DocAve Control Panel’s “Email Notification” manager. The SharePoint web server host is “**avepoint**”, the
DocAve media server that handles backup data processing is “/5c”. Lastly, the Backup Data and Backup Data Manager are left as default, which implies perpetual data retention on disk and no data compression and encryption.

Figure 21 shows an example of building a backup plan for any SharePoint contents that have URLs that match the expression “http://mycompany/HR*” and the file name does NOT contain “*.mp3”. This showcases the power of DocAve 4.0’s “Smart Backup Plan Builder”, where sophisticated business rules can be constructed from chaining simple category based expression matching rules with Negate, And, OR logic operators.
DocAve Item-Level Backup Builder: Filter Mode

DocAve administrators can monitor the progress of backup jobs via the DocAve Job Monitor. (see Section 5.4.8)

Details of how to do item-level backup will be covered in the usage section, Section 5.6.2.

Figure 22 shows an example of restoring a single document folder from a previous FULL backup plan for site "avepoint:9000/sites/marketing". Note that versions of documents can be selectively restored. Also evident in Figure 20 is the ability to restore documents “out-of-place” to a different URL, which effectively replicates SharePoint contents. DocAve can also replicate live contents via the DocAve Content Manager. Backup jobs can be executed immediately or scheduled to a later time.
DocAve administrators can monitor the progress of restore jobs via the DocAve Job Monitor. (see Section 5.4.8)

Details of how to do item-level restore will be covered in the usage section, Section 5.6.2.
5.4.2 *DocAve SharePoint Site-Level*

DocAve 4.0 also provides top level SharePoint site collection backup and restore. The difference here compared to item-level backup is that when the DocAve administrators do a restore from a “site-level backup”, the *entire* site will be restored. Via DocAve, SharePoint administrators can

- setup scheduled or immediate FULL, Incremental, or Differential backups for any SharePoint environment (as long as DocAve software clients are installed)
- backup to a specific data pruning & coalescing schedule by selecting a **Backup Data Manager**
- setup encryption and compression to backup data via a **Data Manager**
- select email notification rules created in the Control Panel’s email notification manager
- choose designated DocAve media server to off load actual backup work
- selectively restore SharePoint site collections to the same or different URL location across one or **multiple** SharePoint environments.
- monitor real-time progress of any backup or restore jobs (via DocAve Job Monitor)

DocAve 4.0 operates on the concept of backup plans, where each backup plan allow SharePoint administrators to specify

1. what to backup (via URL tree selection or “Smart Backup Plan Builder” **Filter Mode**)
2. when to backup (via 7 different schedules where administrators can choose one time only, hourly, daily, weekly, or monthly schedules),
3. how to backup (via Full, Incremental, or Differential)
4. where to backup (via media servers which then writes data to designated network/local/mapped disk drives)
5. and how to handle to backup data in terms of data retention (pruning and coalescing via Data Manager) and security (compression and encryption via Backup Data Manager)

*DocAve backup plans DO NOT lock up SharePoint SQL database index files, and thus can be scheduled to run during normal production hours.*

Figure 23 shows an example of building a FULL backup plan for sites “*avepoint:9000/sites/hr*” and “*avepoint:9000/sites/IS*”. The orange triangle in the folder icon indicates that all future modifications and additions to the selected sites will be *automatically* included in the backup plan.
The filter mode and restore is similar to that of item-level backup and restore (Section 5.4.1). The difference is in the granularity of SharePoint content which the DocAve administrator can choose to backup or restore.

Similar to item-level restore, DocAve can restore entire site collections to different URLs via “out-of-place” restores, which effectively replicates SharePoint sites.

Figure 23. DocAve Site-Level Backup Builder - Tree Mode
5.4.3 DocAve SharePoint Subsite-Level

* To enable subsite-level backup, please update the IE’s intranet security settings for all SharePoint web servers that hosts the DocAve software client (see DocAve 4.0 Install Guide)

DocAve 4.0 also provides subsite level SharePoint site collection backup and restore. The difference here compare to item-level backup is that when the DocAve administrators do a restore from a “subsite-level backup”, the ENTIRE subsite will be restored. Via DocAve, SharePoint administrators can

- setup scheduled or immediate FULL, Incremental, or Differential backups for any SharePoint environment (as long as DocAve software clients are installed)
- backup to a specific data pruning & coalescing schedule by selecting a Backup Data Manager
- setup encryption and compression to backup data via a Data Manager
- select email notification rules created in the Control Panel’s email notification manager
- choose designated DocAve media server to off load actual backup work
- selectively restore SharePoint site collections to the same or different URL location across one or MULTIPLE SharePoint environments.
- monitor real-time progress of any backup or restore jobs (via DocAve Job Monitor)

DocAve 4.0 operates on the concept of backup plans, where each backup plan allow SharePoint administrators to specify

1. what to backup (via URL tree selection or “Smart Backup Plan Builder” Filter Mode)
2. when to backup (via 7 different schedules where administrators can choose one time only, hourly, daily, weekly, or monthly schedules),
3. how to backup (via Full, Incremental, or Differential)
4. where to backup (via media servers which then writes data to designated network/local/mapped disk drives)
5. and how to handle to backup data in terms of data retention (pruning and coalescing via Data Manager) and security (compression and encryption via Backup Data Manager)

DocAve backup plans DO NOT lock up SharePoint SQL database index files, and thus can be scheduled to run during normal production hours.
Figure 24 shows an example of building a INCREMENTAL backup plan for subsites “avepoint:9000/sites/marketing/Advisor Live/” and “avepoint:9000/sites/marketing/Microsoft TechEd, 2005/”. The backup plan is scheduled to run at 5PM and 8PM. The orange triangle in the folder icon indicates that all future modifications and additions to the selected subsites will be automatically included in the backup plan.

The filter mode and restore is similar to that of item-level backup and restore (Section 5.4.1). The difference is in the granularity of SharePoint content which the DocAve administrator can choose to backup or restore.

Similar to item-level restore, DocAve can restore subsites to different URLs via “out-of-place” restores, which effectively replicates or promote SharePoint subsites.
5.4.4 *DocAve SharePoint Content Manager*

DocAve SharePoint Content Manager is the only true item-level “point-n-click” content management solution in changing or replicating SharePoint structures/topology. Similar to DocAve’s “out-of-place” restores, DocAve Content Manager allow SharePoint administrators to copy/replicate SharePoint structure and content. DocAve Content Manager enhances this ability by allowing administrators to **copy/replicate** LIVE data in real time from one SharePoint environment (by selecting “Source Target: SP/WSS”, see Figure 25) to the same or different SharePoint environment(s).

In addition, DocAve content manager can pull data from a **standby SharePoint SQL instance** (by selecting “Source Target: SQL”, see Figure 26) and import data to a LIVE SharePoint environment. This feature allow companies that run “point-in-time” SQL snapshot backups to perform item-level restores/deployment to any SharePoint environment(s).

Note that in the current version, DocAve Content Manager only supports **one-to-one copy/replication**, where one object could be a web site collection, a subsite, an area, an subarea, a document library, a folder, a list, a list item, or a single document. In future versions, this will be enhanced to support **one-to-many copy/replication** of SharePoint contents from entire site collections down to a single document.

There are currently 3 content restore options

1. **None**: copy contents from source to destination only if contents with the same name do not exist in destination
2. **Override**: copy contents from source to destination by overriding any contents in the destination with the same name
3. **Append**: copy contents from source to destination. In case contents with same name exist in destination, this will create an additional copy.

As an example of copying from a LIVE SharePoint environment, Figure 25 shows how DocAve Content Manager may be used to copy the TrashBin Whitepaper.pdf from document folder [http://avepoint.no-ip.info:9000/sites/marketing/Shared Documents/AvePoint Product Whitepapers/](http://avepoint.no-ip.info:9000/sites/marketing/Shared Documents/AvePoint Product Whitepapers/) to document folder [http://avepoint.no-ip.info:9000/sites/clara/Shared Documents/](http://avepoint.no-ip.info:9000/sites/clara/Shared Documents/).

Note the “half-solid-dot” filling the “AvePoint Product Whitepapers” folder circle in the source tree to denote that only part of the folder contents are selected to be copied/replicated.
The schedule button enables the administrator to schedule the move to a later time point. And the description field allows administrators to uniquely tag this copy/replication job so it could be clearly identified in the job monitor (see Section 5.4.8).

Figure 25. DocAve SharePoint “Point-n-Click” Content Manager: SPS Source
As an example of copying from a standby SQL instance, Figure 26 shows how DocAve Content Manager may be used to copy a URL from the link list http://68.236.222.83:9000/sites/spring/Links/ and append it to the link list http://avepoint.no-ip.info:9000/sites/clara/Links/.

Note the “half-solid-dot” filling the “Links” circle in the source tree to denote that only part of the Links list are selected to be copied/replicated.

Figure 26. DocAve SharePoint “Point-n-Click” Content Manager: SQL Source

DocAve administrators can monitor the progress of content management jobs via the DocAve Job Monitor. (see Section 5.4.8)

Details of how to do item-level “point-n-click” SharePoint content management will be covered in the usage section, Section 5.6.3.
### 5.4.5 *DocAve SharePoint Auditor*

DocAve SharePoint Auditor (Available Q3 2006) will allow SharePoint administrators to record and track all user SharePoint interactions:
- Time Viewed
- Modified
- Added
- Deleted
- Archived

In addition to auditing content interactions, DocAve SharePoint Auditor can track any metadata or security changes. For improved performance, granular SharePoint auditing can be enable/disable for the entire SharePoint Portal down to specific objects or specific users.

The DocAve SharePoint Auditor solution will be HIPAA compliant to meet the most stringent auditing/compliance requirements.

### 5.4.6 *DocAve SharePoint Archiver*

DocAve SharePoint Archiver (Available Q3 2006) will allow SharePoint administrators to seamless schedule SharePoint item-level archiving via robust rule engines (similar to DocAve’s “Smart Backup Plan Builder”) which archives contents based on web sites, quotas, users, last time viewed, meta data values, and even versions.

DocAve SharePoint Archiver is unique in the industry in that it is fully integrated with SharePoint’s search engine to provide FULL indexing and search support for archived contents. DocAve Archiver offers seamless SharePoint archiving in that archived contents can still be searched, and upon clicking on the content stub, the SharePoint user can either
- “View” the archived content without retrieving the content back to SharePoint
- or “Retrieve” the archived content back to SharePoint to view and modify

Deletion of the archived content stub on SharePoint will delete it from the archived storage after a certain retention period. The retention and backup policy of archived data can also be managed via the DocAve SharePoint Archiver.

DocAve Archiver also offers flexible archiving formats ranging from
- Standby SQL server
- File system
- HP RISS (Reference Information Storage System)
5.4.7 **DocAve SharePoint Disaster Recovery (SPDR)**

The DocAve SharePoint Disaster Recovery solution (SPDR, pronounced “spider”) is a “one-switch” disaster recovery solution for Microsoft Windows SharePoint Services, Microsoft SharePoint Portal Server, and Microsoft Project Server (including the x64 Editions).

Specifically, SPDR’s main features include:

- Provide full, scheduled, or real-time replication of any Portal, Virtual Server, or specific content databases, to file system or to a standby SQL server.
- Industry strength data-packet level fault tolerance to ensure full fidelity data replications over any network.
- Offer “point & click” simplicity to SQL server replication and disaster recovery.
- Ensure minimal downtime disaster coverage of multiple SharePoint environments to ANY standby SQL server or across **MULTIPLE** online production SQL servers.
- Central administration of all disaster recovery tasks, database replication scheduling/monitoring/reporting, software patch and license management, user account management, and software agent management across multiple SharePoint servers from a SINGLE “access-from-ANYWHERE” web interface.

Two screens are available in the SPDR solution, “**Recovery Plan Builder**” and “**Recovery Control**”.
Recovery Plan Builder (Figure 27) helps the SharePoint administrator build standard SQL backup plans or scheduled or real-time SQL server replications across multiple SharePoint environments in a simple “point & click” interface.

Figure 27. DocAve SPDR Recovery Plan Builder

A recovery plan, in the context of DocAve 4.0, is defined as a plan that provides either a SQL backup or database level replication of a source SharePoint environment to file system or to another backup SharePoint environment. This could be done as a one time only event or scheduled as reoccurring events. In the case of real-time SQL replication, the plan will run and update the standby SQL server whenever the source SQL server receives content updates.

In terms of terminology, there are two types of recovery plan:

- SQL backup recovery plan - a straight SQL backup of selected virtual server or content database to file
- SQL replication recovery plan - replicating selected virtual server or content database contents to a standby SQL server that resides within a backup SharePoint environment
The DocAve SPDR Recovery Control (Figure 28) provides SharePoint administrators the “one-switch” disaster recovery solutions by bringing selective SharePoint virtual servers or content databases online or offline in real-time.

As shown in Figure 28, the SharePoint administrator could easily bring selected virtual servers or content databases online in real-time by simply selecting the SPDR agent host of the backup SharePoint server, its respective virtual server, and the standby SQL server (which could be located on the same physical Windows 2003 server as the backup SharePoint server). This will populate the standby content database tree which the administrator could then selectively choose the virtual server or content database to bring online.

To provide URL transparency to the SharePoint end user, the SharePoint administrator could perform a simple DNS flip once the selected standby content database or virtual server is online.
Note that if the “SQL Integrated Security” checkbox is not checked, the administrator must provide a “SQL User Name” and password that would allow SPDR to access the standby SQL server.

*For detailed SPDR usage and feature guide, please refer to SPDR Whitepaper.*
5.4.8 *DocAve SharePoint Job Monitor*

The Job Report Manager is essential in establishing your internal SharePoint backup, recovery, content management, archiving, and disaster recovery audit trails. Job Monitor offers two screens, “Log Viewer” and “Job Monitor”.

**Log Viewer** (Figure 29) offers detailed logs for various DocAve services. For efficient reporting, logs are broken into various log levels, they include:

- “Fatal”
- “Error”
- “Warning”
- “Info”
- “Debug”.

Logs are further partitioned into service logs. Services include:

- DocAve .Net services - SharePoint backup, content management, and disaster recovery software agents
- DocAve Media services - backup data processing and storage management service
- DocAve Web services - DocAve 4.0 GUI hosting service

![Figure 29. DocAve Log Viewer](image-url)
Clicking on a specific log ID will bring up detailed log reports for that specific log entry (Figure 30).

![Fig. 30. Detailed Log Entry Viewer](image)

**Job Monitor** (Figure 31) offer DocAve administrators to review backup, restore, content management, and disaster recovery jobs in terms of:

- job progress
- the name of DocAve software client that is executing the job
- job status
- type of job

The administrator could choose to re-run stalled or completed jobs or to delete the job entirely.

Clicking on any of job names will bring up a popup window displaying the previous history of that particular job. This is useful in tracking previous run times and results of reoccurring plans.

One time only jobs such as a one-time full database synchronization task would also leave an entry in the Job Monitor screen and its associated job details popup.
window would only contain one entry. The plans that are associated with one time only jobs are considered as "Inactive Plans" by the DocAve .Net service and will be listed as such in the respective backup, content management, and disaster recovery plan builder screens.

DocAve 4.0 also audits and tracks all actions performed via the DocAve 4.0 GUI by any user that has DocAve access privileges.
5.4.9 **DocAve Performance Manager**

DocAve Performance Manager (available June 30\(^{th}\), 2006) allows DocAve administrators to control

1. retention policy of backup data (pruning and coalescing policies via Data Manager)
2. security and size of backup data (encryption and compression policies via Backup Data Manager)

**Backup Data Pruning:** DocAve Media Services output backup data to disk, the location of which can be controlled via the DocAve Storage Manager. While DocAve can invoke scripts that initiate standard enterprise “File to Tape” disk backup, Data pruning controls how much backup data to retain on disk, either by days, months, or full backup cycles.

**Backup Data Coalescing:** DocAve is intelligent in traversing incremental backup data files, which includes only modified or new data, back in time to find the latest version of documents. However, if one instance of incremental data is lost or became corrupted, DocAve will not be able to complete the traversal. Now, with data coalescing, where DocAve “collapses” the incremental data to the previous FULL backup data files, the previous fault condition no longer exist and additional benefits include

- disk storage savings achieved from less data files
- further performance gains by extending backup cycles to a month at a time where FULL backup is only performed in the 1\(^{st}\) day of the month, and incremental backups are performed all other days of the month.

In terms of backup data encryption and compression, DocAve administrators can choose to encrypt (robust 128-bit encryption) and/or compress on either the DocAve software clients and/or the final disk output area managed by the DocAve Media services. These output locations can be local/network/mapped disks or standard SANs, configurable via the DocAve Storage Manager.

5.5 **DocAve Help Screen**

DocAve Help Screen (available June 30\(^{th}\), 2006) presents the entire online help documents to DocAve users and administrators.
5.6 **DocAve Usage**

This section covers actual usage of DocAve in terms of item-level SharePoint backup, restore, and content management. Site- and subsite-level backup, restore, and content management have the same operating procedure.

For more detailed DocAve usage guide, please refer to AvePoint’s online FAQs and DocAve usage Flash movies.

5.6.1 **SharePoint Backup via DocAve**

To run an item-level backup, click on “Backup Builder” under the “Item-Level” tab on the left.
Then select “New Plan” under the section titled “Item Level Backup Plan.”
Under the section titled “Item Level Backup Builder”, select the “Agent Host” where the SharePoint data you want to backup is located, and select a “Media Server” to process the backup plan and store the backup data.

After you have finished selecting your Agent Host and Media Server, click on the Portal name below to load your SharePoint structure.
After your SharePoint structure has finished loading, you can click on any of the links to further expand the content underneath them.
For our purposes, we will run a demo backup of AvePoint’s HR site. As you can see, if you click on a higher level site, everything underneath is selected for backup automatically by default, with new folders and items included.
To run an even finer granularity backup, simply click on any of the folders underneath the site. For our example, we will run a backup of only the announcements in the AvePoint HR site.
After you have selected the folders or sites you wish to backup, simply move over to the column on the right and schedule a time for the backup plan to run.

First uncheck the box titled “No Schedule” to activate the scheduling system.
After you have activated the scheduling system, you have 6 schedules to work with, from Schedule A to F. Active schedules will be highlighted in blue, inactive schedules are highlighted in red.

After selecting a Schedule, you can now choose the “Backup Type”, here you have a choice to run a Full, Incremental, or Differential backup.

You can specify a “Start Time” for the backup plan to run by filling in the space provided or clicking on the calendar icon to select a date and time. If you want the plan to run immediately, simply select some time in the past on the calendar.

After selecting the date and time for the backup plan to run, you can now specify the “interval” by selecting an interval provided to you in the drop down menu. More detailed settings can be tailored by filling in the spaces provided with each different interval(s) you choose.
After you have finished scheduling the backup, click “Save As” to save the plan. You will be prompted to enter a name for the backup plan, type in a name of your choosing and click “OK” to save the plan.

Congratulations! You have successfully created an item-level backup plan.
To view or retrieve a previously saved plan. In the section titled “Item Level Backup Plan”, under Portal name, open up the plan name displayed. From here you can select to “Reload” or “Delete” the plan, or force a scheduled plan to run immediately by selecting “Run Now”.

5.6.2 *SharePoint Restore via DocAve*

To run an item-level restore, click on “Restore Controller” under the “Item-Level” tab on the left.
For our purposes we will be restoring a word document named “AvePoint Brochure” in the Shared Documents folder under the AvePoint HR site. Select the “Media Server” where the backup data is stored and select the “Agent Host” to browse the backup plan.
After you have located the plan where the backup data you wish to restore is located, browse through the backup data to find the file you are looking to restore.

On the right side of the screen, check the boxes to select the document(s) or item(s) you wish to restore. Choose whether or not you want the properties and securities of the files to be kept during the restore by selecting the boxes above the files.
When you are finished selecting the files you wish to restore, you can choose a starting time for the restore to run. The default setting is “Now,” and the restore can be run immediately by clicking the “Go” button.

To Schedule the restore to run at a later time and date, simply click on the “Schedule” button and select a time and date in the future.

You also have a selection of “Restore Options” to choose whether you want the restore to overwrite, not overwrite, or append to the data currently in place.
5.6.3 *SharePoint Content Management via DocAve*

To run the DocAve4.0 Content Manager, click on the “Content Manager" tab on the left in the Main Window.
For our purposes we will be demonstrating copying a document from one site to another on a live production machine. We will be copying the document named “AvePoint Brochure” from the AvePoint HR Site’s Shared Documents folder to the Shared Documents folder under Tom’s personal site. Please note the time stamp and securities associated with the file.
The Content manager screen is split into 3 major sections.

The section on the left is the source URL tree where the user can select the location of the files or folders to be moved, copied, or replicated. First select the “Destination Agent”, then select the “Source Target”, “Database”, and “Content DB”. Click on the Portal name to load the SharePoint structure. Keep clicking on the links to expand content, until you have reached the desired location. In our case we want to access the Shared Documents folder under the HR site.
In the middle section are the actual files or folders that the user can select to be copied, moved, or replicated. After reaching the desired location, select the files you want and choose whether or not you want the properties and securities of the files to be kept during the transfer by selecting the boxes above the files. In our case we want to select the “AvePoint Brochure” file and want to maintain the properties and securities associated with the file.

On the right, you can select the destination where the files and folders will be copied, moved, or replicated to. In our case, we want the document to be copied to the Shared Documents folder under Tom’s personal site.

After you have made all of desired selections, click “Go” to run the job immediately or click “Schedule” and select a time and date in the future for the job to run.
After clicking “Go” to run the job immediately, make sure to double check the progress in the “Content Job Report” tab under the “Job Monitor” window.

Once the job has completed, refresh the page to see that the files or folders has been copied, moved, or replicated.

The “AvePoint Brochure” document was successfully copied into the Shared Documents folder under Tom’s personal page. Note that the original time stamp and securities has been maintained.