

DocAve® 6 File System Archiver

User Guide



Service Pack 11

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What's New in this Guide

- General improvements for enhanced functionality.

About DocAve File System Archiver

DocAve File System Archiver is the industry's business rule aware, granular archiving solution for Windows file system with full text index, federated search, tiered storage management, and backup and download support.

With file system data volumes increasing rapidly, companies need a solution to attenuate data growth, manage long-term retention, and save money by leveraging a tiered storage system. File System Archiver can help your company resolve these issues.

Submitting Documentation Feedback to AvePoint

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

Before You Begin

Refer to the following sections for system requirements that must be in place prior to installing and using DocAve File System Archiver.

AvePoint's Testing Policy and Environment Support

Supported Software Environments

AvePoint is committed to testing against all major versions and service packs of SharePoint as well as the latest versions of Windows Server and SQL Server, as Microsoft announces support and compatibility.

***Note:** AvePoint does not recommend or support installing DocAve on client operating systems.

Supported Hardware

AvePoint is committed to maintaining a hardware agnostic platform to ensure that DocAve operates on common Windows file sharing and virtualization platforms. To ensure that DocAve is hardware agnostic, AvePoint tests hardware that is intended to support SharePoint and DocAve infrastructure, storage targets, and hardware-based backup and recovery solutions, as supported by AvePoint's partnerships. AvePoint directly integrates with the following platforms: any Net Share, FTP, Amazon S3, AT&T Synaptic, Box, Caringo Storage, Cleversafe, Amazon S3-Compatible Storage, DELL DX Storage, Dropbox, EMC Atmos, EMC Centera, Google Drive, HDS Hitachi Content Platform, IBM Spectrum Scale Object, IBM Storwize Family, Microsoft Azure Storage, NetApp Data ONTAP, NFS, OneDrive, Rackspace Cloud Files, and TSM.

All other hardware platforms that support UNC addressable storage devices are supported.

***Note:** AvePoint has ended the test and development for Caringo Storage and DELL DX Storage in DocAve since DocAve 6 SP7 CU1, as the providers of these two platforms have stopped the platform maintenance.

***Note:** Due to changes in the IBM Tivoli Storage Manager API, DocAve 6 Service Pack 6 and later versions require that TSM Client version 7.1.2 is installed on the Control Service and Media Service servers.

***Note:** Most of the hardware partnerships referenced in this guide are intended to make use of advanced functionality (such as snapshot mirroring, BLOB snapshots, indexing, long-term storage, WORM storage, etc.), and are not indications that any changes to the product are required for basic support. In most cases, hardware can be supported with no change to the product.

Supported Backup and Recovery

DocAve supports BLOB backup storage according to the list of hardware platforms above. BLOB snapshot function, however, is currently only supported on OEM versions and NetApp hardware.

DocAve supports SQL content and Application database backups via the SharePoint Volume Shadow Copy Service (VSS) on all Windows and SQL server platforms listed above. DocAve also supports snapshot-based SharePoint VSS on all hardware listed above where the hardware partner has certified support with Microsoft.

DocAve supports application and configuration server backups for all the supported software environments listed above. DocAve 6 SP5 or later supports VM backup via Hyper-V/VMWare for the following operating systems: Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2, and Microsoft Hyper-V Server 2012 R2.

Configuration

In order to use DocAve File System Archiver, the DocAve 6 platform must be installed and configured properly, and the Microsoft .Net Framework of version 4.5 or above must be used.

Agents

DocAve Agents are responsible for running DocAve jobs. DocAve Agents enable the DocAve Manager to communicate with the respective servers, allowing for File System Archiver commands to function properly.

***Note:** The use of system resources on a server increases when the installed Agent is performing actions. This may affect server performance. However, if the Agent installed on a server is not being used, the use of system resources is very low and, therefore, the impact on server performance is negligible.

***Note:** It is recommended that the Agent used to run File System Archiver jobs is not installed on a SharePoint environment.

***Note:** The **File System Archiver** Agent type must be selected for the Agents that will be used to run file system archiver jobs. To configure the Agent type, navigate to **Control Panel > Agent Monitor**. Select the Agent that you want to use to run file system archiver jobs, and click **Configure** in the **Manage** group on the ribbon. In the **Agent Type Configuration** section, click the **Registered SharePoint Sites** tab, click **Storage Optimization**, and select **File System Archiver**. Click **Save** to save the configurations.

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

Required Permissions

To install and use File System Archiver properly, ensure that the Agent account has the following permissions.

File System Permission

To install and use File System Archiver properly, ensure the Agent account and the connection users (specified when configuring connections) have the following permissions:

1. Agent account permissions:
 - [Local System Permissions](#): These permissions are automatically configured by DocAve during installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all the required permissions.
 - SQL Permissions:
 - User has the Database Role of **db_owner** for the File System Archiver Database.
 - User has the Database Role of **db_datareader** for the Compliance Guardian Database.
 - User has the Server Role of **dbcreator** and **securityadmin** to SQL Server.
2. Connection user permissions:
 - A member of the local **Administrators** group.
***Note:** If the UNC path of the file system connection is a shared folder, this permission is not needed.
 - **Full control** to the UNC path of the file system connection.
 - **Modify** to the folders and/or files that have broken permission inheritance from the UNC path of the file system connection.

Local System Permissions

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

- IIS WPG (for IIS 6.0) or IIS IUSRS (for IIS 7.0)
- Performance Monitor Users

- DocAve Users (the group is created by DocAve automatically; it has the following permissions):
 - Full Control to the Registry of
HKEY_LOCAL_MACHINE\SOFTWARE\AvePoint\DocAve6
 - Full Control to the Registry of
HKEY_LOCAL_MACHINE\System\CurrentControlSet\Services\EventLog
 - Full Control to the Communication Certificate
 - Permission of **Log on as a batch job** (it can be found within **Control Panel > Administrative Tools > Local Security Policy > Security Settings > Local Policies > User Rights Assignment**)
 - Full Control permission for DocAve Agent installation directory

Getting Started

Refer to the sections below for important information on getting started with File System Archiver.

Launching File System Archiver

To launch File System Archiver, complete the following steps:

1. Log into DocAve. If you are already in the software, click the **DocAve** tab. The **DocAve** tab displays all product suites on the left side of the window.
2. Click **Storage Optimization** to view the Storage Optimization modules.
3. Click **File System Archiver** to launch this module.

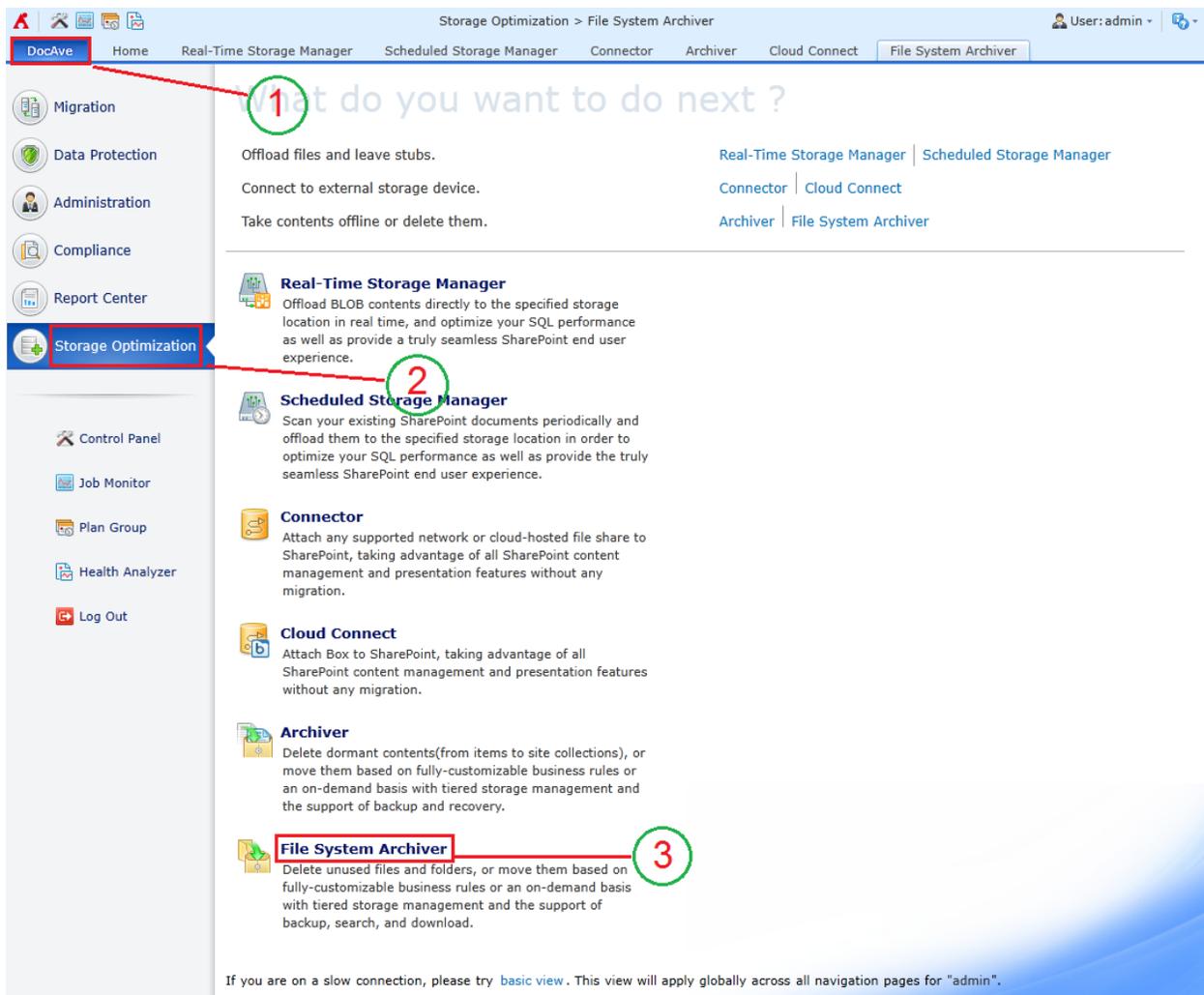


Figure 1: DocAve module launch window.

Navigating DocAve

DocAve mimics the look and feel of many Windows products, making for an intuitive and familiar working environment. While there are many windows, pop-up displays, and messages within DocAve products, they share similar features and are navigated in the same ways.

Below is a sample window in DocAve. It features a familiar, dynamic ribbon, and a searchable, content list view.

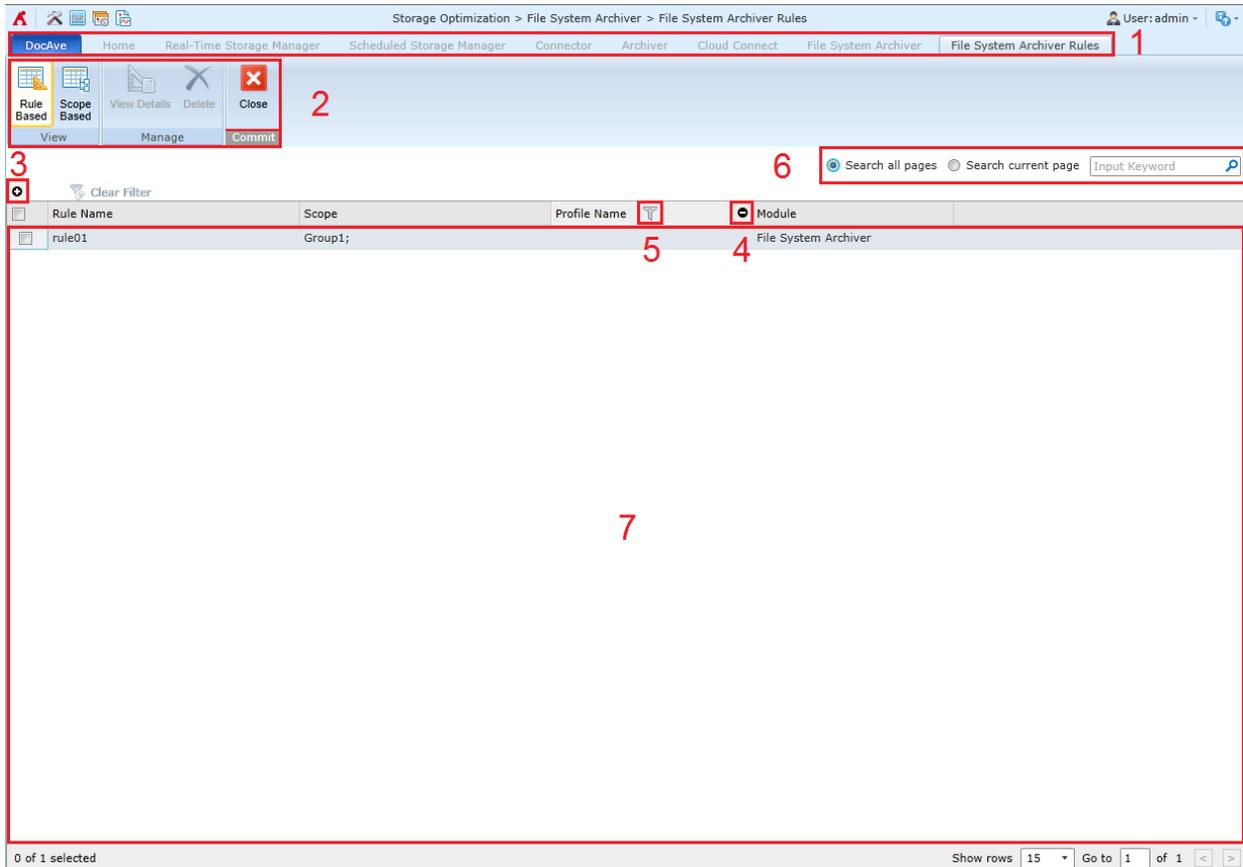


Figure 2: Navigating DocAve.

1. Ribbon Tabs – Allows users to navigate to the DocAve Welcome page and within the active module.
2. Ribbon Panes – Allows users to access the functionality of the active DocAve module.
3. Manage columns (⊕) – Allows users to manage which columns are displayed in the list. Click the manage columns (⊕) button, and then select the checkbox next to the column name in the drop-down list.
4. Hide the column (⊖) – Allows users to hide the selected column.

5. Filter the column (🔍) – Allows users to filter the information in the List View. Click the filter the column (🔍) button next to the column and then select the checkbox next to the column name.
6. Search – Allows users to search the List View pane for a keyword or phrase. You can select **Search all pages** or **Search current page** to define the search scope.
***Note:** The search function is not case sensitive.
7. Management Pane – Displays the actionable content of the DocAve module.

User Interface Overview

After clicking **File System Archiver**, the Storage Optimization suite interface launches with the **File System Archiver** tab active. This tab displays the configured file system connections and allows for quick access to a list of File System Archiver features.

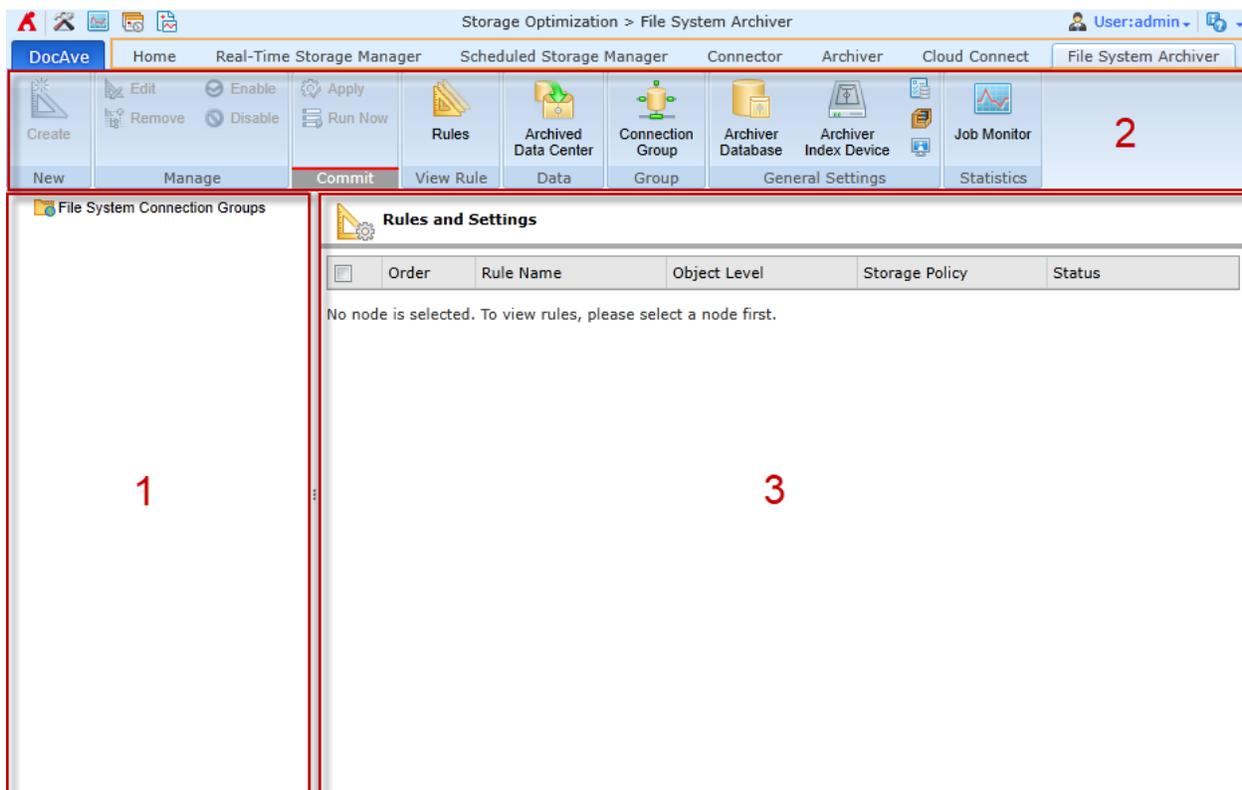


Figure 3: File System Archiver User Interface.

1. **File System Connection Groups** displays all configured connection groups. Use this panel to select the scope that you want to perform actions on. Selecting content often reveals new tabs and functionality on the ribbon.
2. The **ribbon** shows the available actions and wizards for the selected node. This content is dynamic; and will change depending on what is selected in the tree.

3. The **workspace** shows all form-based content that is used during the configuration of actions performed in DocAve products.

Pre-Archiver Job Configurations

The sections below detail the configurations you must make prior to setting up a File System Archiver job. Configuring File System Archiver involves performing the following steps in the order given:

1. [Configuring File System Connection Groups](#)
2. [Configuring Devices and Setting up Storage Policies](#)
3. [Configuring the Archiver Database](#)
4. [Configuring the Archiver Index Device](#)
5. [Configuring the Processing Pool](#)

Configuring File System Connection Groups

A file system connection group is a container of file system connections, which allows you to manage the file system connections within it simultaneously.

A file system connection connects a DocAve Agent to your file system server. In order to work properly, the DocAve Agent must be able to connect to the file system server that contains the content you want to archive.

Managing File System Connection Groups

The **Connection Group** window displays all file system connection groups that you have previously created.

In this window, you can change the number of file system connection groups displayed per page and the order in which they are displayed. To change the number of file system connection groups displayed per page, select the desired number from the **Show rows** drop-down list in the lower-right corner. To sort the file system connection groups, click the **Name**, **Description**, or **Last Modified Time** column.

You can perform the following actions in the **Connection Group** interface:

- Click **Create** on the ribbon to create a new connection group. In the **Connection Group > Create** window, enter a **Name** and optional **Description** for the group, and click **Save** to create the group.
- Select a connection group and click **Edit** on the ribbon to change the name and/or description for this connection group.
- Select one or multiple connection groups and click **Delete** on the ribbon. A confirmation window appears. Click **OK** to delete the selected connection groups,

or click **Cancel** to return to the connection group window without deleting the selected connection groups.

- Select a connection group and click **Configure Connection** on the ribbon to configure connections for the group. The **Connection Group > Configure Connection** window appears.

Configuring File System Connections

To create a new file system connection, click **Create** on the ribbon. To modify a previously configured file system connection, select the file system connection, and then click **Edit** on the ribbon. To delete previously configured file system connections, select the file system connections, and then click **Delete** on the ribbon.

On the **Connection Group > Configure Connection > Create** or **Connection Group > Configure Connection > Edit** page, configure the following settings:

1. **Connection Name** – Enter a **Name** for the file system connection. Then, enter an optional **Description** for this file system connection for future reference.
2. **Connection Settings** – Configure the following settings to connect the file system server to the DocAve Agent.
 - a. **Storage Type** – Only **Net Share** can be selected as the storage type.
 - b. **UNC Path** – Enter the UNC path in the following format:
\\admin-PC\c\$\data or \\admin-PC\shared folder
 - c. **Managed Account Profile** – Select a managed account profile from the drop-down list or create a new managed account profile by selecting **New Managed Account Profile**.
 - d. **Advanced:** (optional) – Select the checkbox to enter **Extended Parameters**. If you have multiple parameters to enter, press **Enter** on the keyboard to separate the parameters. Refer to the instructions below to add parameters:
 - **IsRetry** – Whether or not to try again when DocAve failed to perform an operation in the file system connection.
 - If you enter **IsRetry=true**, it will try again when DocAve failed to perform an operation in the file system connection.
 - If you enter **IsRetry=false**, it will not try again when DocAve failed to perform an operation in the file system connection.
 - **BufferSize** – Configure the data size for temporary storage. The format is **BufferSize=Number**. The unit is **MB**.

- o **AuthMethod** – Enable different permission validation methods for different users to visit Net Share.
 - If you enter **AuthMethod=LogonUser**, it will enable the LogonUser user permission validation method.
 - If you enter **AuthMethod=NetUse**, it will enable the NetUse user permission validation method.
 - If you enter **AuthMethod=NetUse_DeleteOld**, it will enable the NetUse user permission validation method and delete the previous validation method.
 - e. Click **Validation Test** to verify the validity of the entered information.
3. **Compliance Guardian Database** (optional) – Select the **Retrieve data from Compliance Guardian database** checkbox and enter the information of an existing Compliance Guardian database in the following situations:
- You want to use the **Compliance Guardian Tag** criterion in a File System Archiver rule.
 - You want to search for files based on Compliance Guardian tags.

Complete the following information of the Compliance Guardian database that you want to connect.

- a. **Database Server** – Enter the hostname or IP address of the database server where the Compliance Guardian database to be connected resides.
 - b. **Database Name** – Enter the name of the Compliance Guardian database to be connected.
 - c. **Table Name** – Enter the name of the table where the data that you want to retrieve resides.
 - d. Select **Windows authentication** or **SQL authentication** as the authentication method to connect to the Compliance Guardian database. If **SQL authentication** is selected, enter the **Account** and **Password** used to connect the database.
 - e. **Failover Database Server** (optional) – Select the checkbox, and then enter a disaster recovery database server.
 - f. Click **Validation Test** to verify the validity of the entered information.
4. Click **Save** to save the connection, or click **Cancel** to return to the **Connection Group > Configure Connection** window without saving any changes.

Configuring Devices and Setting up Storage Policies

In order to perform a File System Archiver job, you must configure at least one logical device and at least one storage policy. File System Archiver can write to the storage devices in the following types: Net Share, Microsoft Azure Storage, and Amazon S3-Compatible Storage.

DocAve has the ability to treat multiple physical storage devices as a single logical unit (known as a Logical Device) when saving archived data. This is especially useful for large archive plans, as many small devices can be combined. Storage Policies define which logical devices, Media Service, and retention rule to use for each File System Archiver job. You can also pre-scan the expiring retention policies of archived data by configuring storage policies.

For instructions on defining logical devices and setting up storage policies, refer to the [DocAve 6 Control Panel Reference Guide](#).

Configuring the Archiver Database

After setting up the storage policy, configure an Archiver Database. An Archiver Database stores the information of the files and/or folders that meet the criteria configured in the File System Archiver rules and the information of their parent containers. The Archiver Database can be configured on any SQL server that is available for the DocAve Agent to connect to.

To configure an Archiver database, complete the following steps:

1. Navigate to: **File System Archiver** tab > **General Settings** group > **Archiver Database**. The **Archiver Database** tab appears.
2. Click **Configure** in the **Manage** group on the ribbon to configure the database for the **File System Connection Groups**. You can also hover the mouse over the **File System Connection Groups** node, and click **Configure** to the right of the node.
3. After being redirected to the configuration page, configure the **Database Server** and **Database Name** in the **Configure Archiver Database** section.
 - **Database Server** – Enter the hostname or IP address of the selected database server.
 - **Database Name** – Enter the Archiver Database's name.
4. In the **Authentication** section, **Windows authentication** is selected unless manually configured. If desired, select **SQL authentication** to use SQL authentication instead, and then enter the **Account** and **Password** used to connect to the specified SQL Server. If desired, select the **Failover Database Server** checkbox, and then enter a disaster recovery database server. Click **Validation Test** to verify the validity of the entered information.
5. Click **Advanced** to expand the advanced configuration. Use the **Connection String** feature to create and configure Archiver databases using command lines. Select the

Manually Input Connection String checkbox to use the **Connection String** method to create and connect the Archiver Database using Windows authentication or SQL authentication.

***Note:** If you select **Manually Input Connection String**, the **Configure Archiver Database** and **Authentication** sections are grayed out and unavailable.

To create an Archiver database using Windows authentication, enter the following information:

- **Server** – Enter the name of an SQL Server instance. The value must be either the server's name on the network, an IP address, or the name of a Configuration Manager alias. To connect to the default instance on the local server, refer to the following examples:
 - **Server=.**;
 - **Server=IP Address;**
 - **Server=localhost;**
 - **Server=localDatabase\instancename;**
- **Database** – Enter the database name. If a database is not manually entered, the default database defined for the login is used. To connect to the database, refer to the following example: **Database=Database's name**.
- **Trusted_Connection** – Select the **true** value to use Windows Authentication Mode for login validation.
- **DataSource** – Enter the instance's name, the hostname, or the IP address of an SQL Server. If this field is not specified, a connection is made to the default instance on the local computer.
- **Failover Partner** – Enter the name of the failover server used for database mirroring.
- **Initial Catalog** – Enter the Archiver database's name.
- **Integrated Security** – Select the **true** value to accept the value "SSPI" for Windows Authentication.

To create an Archiver database using SQL authentication, input the following information:

***Note:** Each instruction's key and value must be connected with "=" . The instructions are separated using ",".

- **Server** – Enter the name of an SQL Server instance. The value must be either the server's name on the network, an IP address, or the name of a Configuration

Manager alias. To connect to the default instance on the local server, refer to the following examples:

- **Server=.**;
 - **Server=IP Address;**
 - **Server=localhost;**
 - **Server=localDatabase\instancename;**
- **Database** – Enter the database name. If a database is not manually entered, the default database defined for the login is used. To connect to the database, refer to the following example: **Database=Database's name**.
 - **Trusted_Connection** – Select the **False** value to not use the Windows Authentication Mode for login validation. You can specify the credentials that will be used to connect to the database.
 - **User ID** – Enter the login name.
 - **Password** – Enter the password.
 - **DataSource** – Enter the instance's name, the hostname, or the IP address of an SQL Server. If not manually entered, a connection is made to the default instance on the local computer.
 - **Failover Partner** – Enter the name of the failover server used for database mirroring.
 - **Initial Catalog** – Enter the Archiver database's name.
6. Click **Save** to apply the configuration.

Configuring the Archiver Index Device

In order to set a File System Archiver rule on a given node, the node must have an Archiver index device configured for it. The index device stores the index of data archived during a File System Archiver job. This index is needed in order to search for and download archived data. It is recommended that you back up the Archiver index device frequently to ensure availability of content should a catastrophic database failure occur.

The size of the index is related to the complexity of the data being indexed. As archived content is pruned, so is the related data in the index.

While there are no particular recommendations as to where to configure an index device, it may be most convenient to do so at the **File System Connection Groups** node.

To configure an Archiver index device, complete the following steps:

1. Navigate to: **File System Archiver** tab > **General Settings** group > **Archiver Index Device**. The **Archiver Index Device** tab appears.
2. Click the **File System Connection Groups** node and expand the tree structure. From the **Object** column, select where to apply the Archiver index device.

***Note:** When selecting the **File System Connection Groups** node, the Archiver index device is only applied to all existing connection groups and connections. The Archiver index device is not configured for newly created connection groups or connections. If you do not configure an Archiver index device for a newly added connection group or connection, then the newly added node inherits its upper-level node's index device.

3. To configure the Archiver index device for the selected objects, there are two conditions to consider:
 - To configure the index device for the selected nodes and their sub-nodes, click **Configure** in the **Manage** group.
 - To configure the index device for a selected node only, hover the mouse over the selected node and click **Configure** to the right this node.

***Note:** When creating a new File System Archiver rule on a selected node, DocAve verifies that an index device has been configured for the node. If there are no Archiver index devices configured for the node, you must manually configure an index device for the selected node in order to create a File System Archiver rule on that node.

4. Select one **Logical Device** from the drop-down list for the selected objects in the **Archiver Index Device** section.

***Note:** Only the logical devices in the **Net Share** storage type can be displayed in the drop-down menu.

5. To generate a full text index during a File System Archiver job, select the **Enable full text index** checkbox in the **Full Text Index** section. Then, select one predefined full text index profile from the displayed drop-down list. For more detailed information on creating an index profile, refer to the **Index Manager** section of the [DocAve 6 Control Panel Reference Guide](#).

***Note:** To correctly search for archived data using [Search Mode](#), you must select the **Enable full text index** checkbox. AvePoint recommends that you install the iFilter plug-ins that are related to the corresponding file formats on the server where the Media Service for full text index is installed before generating the full text index. The iFilter plug-ins are used to retrieve the file content to generate the full text index.

See the screenshot below for a list of the file types that support full text index.



Figure 4: File types that support full text index.

6. Click **Save** to apply the settings.

Configuring the Processing Pool

The Processing Pool feature allows you to control the maximum number of File System Archiver jobs that can be run simultaneously. Normally, a File System Archiver job is fairly resource intensive, so running multiple File System Archiver jobs simultaneously may affect the performance of the server. To avoid this condition, configure the Processing Pool feature.

File System Archiver jobs that are added into the processing pool become processes. The number of jobs you allow in the processing pool is the maximum number of File System Archiver jobs that can be run simultaneously. The remaining File System Archiver jobs are placed in a queue.

To create a new processing pool, complete the following steps:

1. Navigate to: **File System Archiver** tab > **General Settings** group > **Processing Pool**. The **Processing Pool** tab appears.
2. Click **Create** in the **Manage** group. The **Create Processing Pool** tab appears.
3. **Processing Pool Name** – Enter a processing pool **Name** and an optional **Description**.

4. **Farm** – Select the **File System Connection Groups** from the drop-down list.
5. **Agent Group** – Select an **Agent group** from the drop-down list. The Agents in the selected Agent group are used by this processing pool to run File System Archiver jobs. For more information about creating Agent groups, refer to the [DocAve 6 Control Panel Reference Guide](#).
6. **Maximum Number of Jobs** – Specify the **Maximum number of jobs** that can run simultaneously. For example, if you enter **8** in the text box, as many as eight File System Archiver jobs can be run at the same time.
7. Click **Save** to save the settings.

To view detailed information on an existing processing pool, complete the following steps:

1. Navigate to: **File System Archiver** tab > **General Settings** group > **Processing Pool**.
2. Select a pool from the **Processing Pool** tab.
3. Click **View Details** in the **Manage** group.

To edit an existing processing pool, complete the following steps:

1. Navigate to: **File System Archiver** tab > **General Settings** group > **Processing Pool**.
2. Select a pool from the **Processing Pool** tab.
3. Click **Edit** in the **Manage** group.

To delete existing processing pools, complete the following steps:

1. Navigate to: **File System Archiver** tab > **General Settings** group > **Processing Pool**.
2. Select one or more pools from the **Processing Pool** tab.
3. Click **Delete** in the **Manage** group.

Configuring File System Archiver Jobs

To run a File System Archiver job, a connection group must have one or more File System Archiver rules applied to it, as well as configured settings. File System Archiver rules and settings define which content in the connection group is included in the job and where the content is saved, along with the processing pool information, notification settings, and job schedule.

Configure rules on a connection group, manually configure the settings for that group, and then apply both the rules and the settings to the group.

Creating and Configuring File System Archiver Rules

A File System Archiver rule defines the criteria, object level, storage policy, and data management configurations for the selected group.

Creating File System Archiver Rules

To create a File System Archiver rule, complete the following steps:

1. Select a connection group under **File System Connection Groups**.
2. Access the **File System Archiver Rule** interface by clicking **Create** in the **New** group on the **File System Archiver** tab. The **File System Archiver Rule** pop-up window appears.
3. In the **File System Archiver Rule** interface, configure a desired rule. For more information, refer to [Configuring File System Archiver Rules](#).
4. After creating the File System Archiver rule, it will be displayed in the Rules and Settings pane. You can view the general information (**Order**, **Rule Name**, **Object Level**, **Storage Policy**, and **Status**) of the rule. For more detailed information, click it and observe the **Details** pane.
5. For instructions on applying the created rule and running a job, refer to [Applying Rules to a Group and Running a Job](#).

Configuring File System Archiver Rules

To configure a File System Archiver rule in the **File System Archiver Rule** interface, complete the following steps:

1. **How would you like to archive the file system data?** – Select one of the following options:
 - **Reuse an existing rule** – Select an existing rule from the drop-down list.
***Note:** An existing rule cannot be modified from this screen.

- **Copy from an existing rule** – Select an existing rule to copy from the drop-down list. Use this selection to modify the settings of an existing rule and save the modification as a new rule with a different rule name.
 - **Create a new rule** – Enter a **Name** for the new rule, and optionally, enter a **Description**.
2. **What type of content would you like to archive?** – Select the type of content for this File System Archiver rule from the drop-down list.
- *Note:** Only one type of content can be selected for each rule.
3. **How would you like to define the content to be archived?** – Configure the criteria for the selected type of content. Refer to [Appendix A: Criteria Filter Conditions](#) for more information.
- *Note:** Multiple criteria can be added to the **Criteria** field; however, to create a rule successfully, at least one criterion is required.
- When you've finished setting a criterion, click **Add** to add the new criterion. You can change the logical relationship between the criteria by clicking the **And** links after the rules (**And** is the default logical relationship). To remove an added criterion, hover the mouse over the criterion and click the Remove (✖) button.
 - **And** – The content that meets all of the rules is archived.
 - **Or** – The content that meets any one of the rules is archived.
 - Under **Basic Filter Conditions**, view the File System Archiver rules logical relationship. For example, if the logical relationship is **(1 And 2 Or 3)**, the content that meets both the criterion 1 and criterion 2, or meets the criterion 3 is archived.
4. **What would you like to do with the file system data?** – Select one option to control the file system data which will be archived or backed up.
- **Archive and remove data** – Select this option to archive the data that meets the criteria configured above in the selected group and store it in a storage location based on the selected storage policy below. The corresponding data in the file system will be deleted.
 - **Archive and leave a stub for each file** – Select this option to archive the data that meets the criteria configured above in the selected group and leave stubs in the file system. The suffix **stub.html** is added to each file name. For example, the stub of the file **ABC.docx** will be **ABC.docx.stub.html**. Click a stub in the file system, and the stub will be opened with the following message displayed: **This file has been archived. To view details of this file, you can go to Archived Data Center for End User.** This message can be customized, refer to [Customizing the Message for Stubs](#) for detailed information.

***Note:** This option is only available when **File** is selected in the **What type of content would you like to archive?** section.

5. **Where would you like to store the archived data?** – Select one of the configured storage policies for the archived data from the drop-down list, or select **New Storage Policy** to create a new one.

6. **Data Compression** – If you want to enable data compression, select the **Compression** checkbox, choose a compression level using the slider, and then select whether to leverage DocAve Media Service or Agent Service resources for compression.

***Note:** A low compression level results in a faster compression rate but a larger data set. A high compression level results in a slower compression rate but a smaller and better quality data set. Small data sets may cause slower backup times.

7. **Data Encryption** – If you want to enable data encryption, select the **Encryption** checkbox, and configure the following options:

***Note:** Encrypting data causes slower backup times.

- Choose whether you want to leverage DocAve Media Service or Agent Service resources for encryption.
- Choose a security profile from the **Security profile** drop-down list, or select **New Security Profile** to create a new one. For more information on creating a security profile, refer to the [DocAve 6 Control Panel Reference Guide](#).

8. Click **Save** to save the configurations and create this new rule, or click **Cancel**.

Configuring Settings

In addition to rules, a selected node must also have settings configured in the Rules and Settings workspace.

To configure File System Archiver job settings, complete the following steps under **Settings**:

1. **Processing Pool** – Select an existing processing pool, or click **New Processing Pool** to create a new pool. For more information, refer to [Configuring the Processing Pool](#).
2. **Notification** – Select how to be notified of executed Archiver jobs. Select the desired notification profile from the drop-down list, or click **New Notification Profile** to create a new profile. For instructions on setting up a notification profile, refer to the [DocAve 6 Control Panel Reference Guide](#).
3. **Schedule** – Select one of the following scheduling options:
 - **No Schedule** – Select this option to run the File System Archiver job immediately.

- **Configure the schedule myself** – Select this option to configure a customized schedule, and run the File System Archiver job by schedule. Fill in the parameters according to your desired schedule. After configuring the schedule, click **Calendar View** to view the scheduled search by day, week, or month.
4. **Schedule Settings** – If the **Configure the schedule myself** option is selected, the following settings appear:
- a. **Start time** – Set up the time to start the File System Archiver job. Time Zone can be changed under the **Start time**.

***Note:** The start time cannot be earlier than the current time.
 - b. **Interval** – Configure an interval for the File System Archiver job. Enter an integer greater than zero in the text box and choose a unit for the interval from the drop-down list. The units are: **Hour(s)**, **Day(s)**, and **Month(s)**.
 - c. **No end date** – Select this option to repeat running the File System Archiver job until it is manually stopped.
 - d. **End after specified occurrence(s)** – Select this option to stop the File System Archiver job after the specified number of occurrences.
 - e. **End by** – Set up the time to end the recurrence of the File System Archiver job.

Applying Configurations and Running Archiver Jobs

Before you can run a File System Archiver job, you must first apply rules to the group. Refer to the information below to apply your applicable configurations to a selected group and run a File System Archiver job.

Applying Rules to a Group and Running a Job

To apply a rule to a selected group and then run a File System Archiver job, complete the following steps:

1. Select a connection group under **File System Connection Groups**. All rules created for that particular group are displayed in the Rules and Settings workspace.
2. If desired, create more File System Archiver rules or specify which rule will run first by changing the number in the **Order** column. To reorder rules, modify the values in the **Order** column.
3. Click **Apply** in the **Commit** group to apply all configured rules and corresponding settings. The configured rules and settings are applied to the selected group and all connections below it.
4. Click **Run Now** in the **Commit** group to run the applied rules and settings immediately (the running jobs can be viewed in the Job Monitor).

File System Archiver Job Running Status

To view File System Archiver jobs that are running, click **Job Monitor** in the **Statistics** group.

During the job process, the first two tasks listed below are run, one by one, during the File System Archiver job. If the **Enable full text index** checkbox was selected during the Archiver index device configuration, then the third task is performed as well.

1. **File System Archive** – The first task archives the data that meets the configured rules according to the storage policy and other configured settings. If no data has been archived in this task, then the **Merge Index** task described below will not be performed.
2. **Merge Index** – The second task is the **Merge Index** task. Each connection has a major index, and the minor index generated by each File System Archiver job must be merged into the major index. The major index increases in size as the archived data size increases. As such, the index may become large in size. In the event that the merge index job status reads **Failed/Finished with Exception**, the generated minor indexes can be re-merged to the major index by clicking **Start** in Job Monitor and starting the corresponding merge index job again.
3. **File System Archiver Full Text Index** – If the **Enable full text index** checkbox was selected in the **Archiver Index Device** configuration page and the Archiver index device was applied to the selected connection group, and then the File System Archiver job run on this group will generate a full text index of the archived content.

Managing Archiver Rules

Once created and applied, File System Archiver rules can be edited, removed, disabled, and deleted. Review the following sections for information on managing File System Archiver rules.

Editing or Removing File System Archiver Rules

Existing File System Archiver rules can be edited or removed from connection groups. See the sections below.

Editing Existing File System Archiver Rules

Certain File System Archiver rule settings can be modified using the **Edit** feature. All rule settings can be edited, except for the rule name. The **Rule Name** is a fixed setting and cannot be changed using the **Edit** feature.

To edit an existing File System Archiver rule, complete the following steps:

1. Select the connection group under **File System Connection Groups** that contains the rule you would like to edit.
2. Select the rule from the Rules and Settings workspace by selecting the checkbox to the left of the rule.
3. Click **Edit** in the **Manage** group on the ribbon.
4. The **File System Archiver Rule** pop-up window appears; you can edit the settings of this rule. For more information, refer to [Creating and Configuring File System Archiver Rules](#).

Removing Existing Rules from Group

When a created rule is no longer useful for a group, you can remove this rule from the group. Use the **Remove** feature to simplify rules management and remove unnecessary rules from groups.

To remove an existing File System Archiver rule, complete the following steps:

1. Select the group under **File System Connection Groups** that contains the rule or rules you would like to remove.
2. Select one or more rules from the Rules and Settings workspace by selecting the checkboxes to the left of the rule.
3. Click **Remove** in the **Manage** group on the ribbon.
4. Click **Apply** in the **Commit** group on the ribbon.
5. The rule or rules are removed from the selected group on the tree.

***Note:** Removed rules still exist in the File System Archiver Rules list for re-application.

Enabling and Disabling Rules

Once rules are created and applied to a connection group, they can be enabled (to be included in a run) and disabled (to be omitted from a run) as desired. Disabling is useful, for example, when some of the rules do not need to be run in a particular job, but will be required in subsequent jobs. As opposed to deleting the rule, which removes it from the File System Archiver Rules list entirely, disabling the rule omits it from that particular run but saves it in the File System Archiver Rules list for future use.

Review the following two sections for information on disabling and enabling rules.

Disabling an Existing Rule

After creating and applying the rule, the **Status** of rule in the Rules and Settings workspace reads **Enabled** by default. In some situations, you may desire to disable a rule for a particular job.

To disable an enabled File System Archiver rule, complete the following steps:

1. Select the group under **File System Connection Groups** that contains the rule or rules you would like to disable.
2. Select one or more rules from the Rules and Settings workspace by selecting the checkboxes to the left of the rules.
3. Click **Disable** in the **Manage** group on the ribbon to disable the selected rules.
4. Click **Apply** in the **Commit** group on the ribbon. The rule statuses change to **Disabled**.

Enabling a Disabled Rule

To enable an existing disabled File System Archiver rule, complete the following steps:

1. Select the group under **File System Connection Groups** that contains the rule or rules you would like to enable.
2. Select one or more rules from the Rules and Settings workspace by selecting the checkboxes to the left of the rules.
3. Click **Enable** in the **Manage** group on the ribbon to enable the selected rules.
4. Click **Apply** in the **Commit** group on the ribbon. The rule statuses change to **Enabled**.

Using Rule Viewer

Use the Rule Viewer to search for and manage created File System Archiver rules. The basic operations described below are:

- Viewing and searching for rules using a Rule Based view
- Viewing and searching for rules using a Scope Based view
- Viewing the details of the rules which are created on the selected group using View Details
- Deleting rules that are useless to all connection groups
- Removing rules from the selected connection groups

To launch the Rule Viewer, click **Rules** in the **View Rule** group on the ribbon. The **File System Archiver Rules** tab appears. See the following sections for information on using the Rule Viewer.

Rule Based Viewing

The **Rule Based** table view initially displays all rules sorted alphabetically in the **Rule Name** column. There are four other columns: **Scope**, **Profile Name**, **Module**, and **Rule Type**.

***Note:** The **Scope**, **Profile Name**, **Module**, and **Rule Type** columns can be deselected from the column list by clicking the Manage columns (+) button, deselecting the checkboxes of these columns, and then clicking **OK**. You can also hover the mouse over one of these columns and click the Hide the column (-) button to hide the column from the current view.

Deleting Rules

Delete a created rule when it no longer has a use for any group. Deleting a rule permanently removes the rule from the File System Archive Rules list.

To delete a File System Archiver rule in the **Rule Based** view, complete the following steps:

1. Click the **File System Archiver** tab.
2. Click **Rules** in the **View Rule** group on the ribbon. The **File System Archiver Rules** tab opens.
3. Click **Rule Based** in the **View** group.
4. Select the rules you want to delete in the table by selecting the checkboxes to the left of the rules.
5. Click **Delete** in the **Manage** group to delete the selected rules. The rules are permanently deleted from the File System Archiver Rules list.

***Note:** Since the delete operation cannot be undone, make sure that the rules you are deleting are no longer needed.

Scope Based Viewing

The **Scope Based** table view initially displays all rule-related connection groups sorted alphabetically in the **Scope** column and includes the **Node Level**, **Rule Name**, **Farm Name**, and **Profile Name** columns as well. The **Rule Name** column lists every rule applied to the scope in the same row.

The **Node Level**, **Rule Name**, **Farm Name**, and **Profile Name** columns can be deselected from the column list by clicking the Manage columns (+) button, deselecting the checkboxes of these columns, and then clicking **OK**. You can also hover the mouse over one of these columns and click the Hide the column (-) button to hide the column from the current view.

Viewing Details of the Created Rules

This function allows you to view detailed information on File System Archiver rules that are created on the selected group.

To view File System Archiver rules that have been created in DocAve, follow the steps below.

1. Click the **File System Archiver** tab.
2. Click **Rules** in the **View Rule** group on the ribbon.
3. In the **File System Archiver Rules** tab, select one existing rule from the **Rule Based/Scope Based** table and click **View Details** in the **Manage** group on the ribbon.
4. In the **View Details** page, detailed information on the selected File System Archiver rule is displayed.

Removing Rules

To remove a File System Archiver rule from the **Scope Based** view, complete the following steps:

1. Click the **File System Archiver** tab.
2. Click **Rules** in the **View Rule** group on the ribbon.
3. In the **File System Archiver Rules** tab, click **Scope Based** in the **View** group on the ribbon.
4. Select the scopes where you want to remove the rules in the table by selecting the checkboxes to the left of the scopes.
5. Click **Remove** in the **Manage** group to remove all of the rules from the selected scopes.

For more information, refer to [Removing Existing Rules from Group](#).

Archived Data Center

Any data archived using DocAve File System Archiver can be searched and downloaded. Search for and download the archived data by clicking **Archived Data Center** in the **Data** group on the ribbon.

File System Archiver provides two data modes to locate the archived data that you want to download:

- **Browse Mode** – The Browse Mode allows a user to expand the archived data tree to locate the data for download.
- **Search Mode** – The Search Mode allows a user to search for and download the archived data with full text index. The archived data can be searched not only by filter level criterion, but also by file content.

Browse Mode

Complete the following steps to select and download the archived data using Browse Mode:

1. Click **Archived Data Center** in the **Data** group. The **Archived Data Center** tab appears. By default, **Browse Mode** is selected in the **View** group on the ribbon.
2. Select the archived data from the tree structure that you want to download.
 - a. Expand the **File System Connection Groups** node. All connection groups that contain archived data are displayed.
 - b. Click the node of a connection group to expand it.
 - c. To download all archived data in a connection, select the node of this connection and click **Download** in the **Manage** group on the ribbon.

To download partial data in a connection, complete the steps below:

- i. Click the node of this connection to expand it. The archived folders and files in this connection are displayed below.
- ii. To select specific files, click **Items**. The object selection window appears. Select one or multiple files to be downloaded. Click **OK** in the object selection window to save the selection and close the window. The number of selected objects is shown next to **Items**.

To select all files in a folder, select the checkbox to the left of the folder.

3. Click **Download** in the **Manage** group on the ribbon. The **Download** window appears. For more information on running a download job, refer to [Running a Download Job](#).

Search Mode

Complete the following steps to select and download the archived data using Search Mode:

1. Click **Archived Data Center** in the **Data** group. The **Archived Data Center** tab appears. Switch the mode by clicking **Search Mode** in the **View** group on the ribbon.
2. Expand the tree and select the nodes where archived data that you want to download resides. If you select a connection group node, all connections under this node are included in the search scope.
3. Search for the archived data that you want to download. You can choose one of the following search methods to find the data to be downloaded.
 - Use the **Search** text box to search for archived data. You can enter the keywords and characters of the file content here. These characters are not case sensitive. Then, click **Search** to search for the corresponding files. The wildcards (? and *) are supported in the search value.
 - Use the **Advanced** search feature to search for archived data by completing the steps below:
 - i. Click **Advanced** in the **Search** text box.
 - ii. Click **Add a Filter Level Group**. Only **File** can be selected as the filter level.
 - iii. Click **Add a Criterion** to configure the search criterion. Select a rule, configure the condition, and enter the value to add a criterion. Multiple criteria can be added. To delete the criterion that is no longer needed, hover the mouse over the criterion and click the Delete (X) button.

***Note:** The following condition rules can be selected: **Name, Size, Modified Time, Created Time, Last Accessed Time, URL, File Format, Archived Time, Custom Property(Text)**.

***Note:** Depending on the conditions you configured, you can change the logical relationships between the condition rules. There are currently two logical relationships: **And** and **Or**. By default, the logic is set to **And**. To change the logical relationship, click the logical relationship link. The **And** logical relationship means that the data which meets all of the rules will be filtered and included in the result. The **Or** logical relationship means that the data which meets any one of the rules will be filtered and included in the result. You can view the logical relationship of the conditions in the **Basic Filter Condition** section. If the logical relationship

is **(1 Or 2 And 3)**, the data that meets the condition rule 3 either meet the condition rule 1 or condition rule 2 will be filtered.

- iv. After configuring the search criteria, click **Search** to search for the corresponding files.
4. The files that meet the search criteria are displayed in the **Search Results** section. You can click the file name to view details about this file.
5. Select one or multiple files that you want to download, and click **Download** in the **Manage** group on the ribbon. The **Download** window appears. For more information on running a download job, refer to [Running a Download Job](#).

Running a Download Job

After selecting the archived data to be downloaded using [Browse Mode](#) or [Search Mode](#), you can click **Download** in the **Manage** group on the ribbon. Configure the download destination and setting in the **Download** window to start a download job by completing the steps below:

1. Configure the download destination and setting.
 - **Export Format** – Select an export type from the drop-down list.
 - **Original** means the format of the exported content will be kept.
 - **EDRM XML** means the exported content can be managed by EDRM (Electronic Discovery Reference Model).
 - ***Note:** This section is only available when the archived data is selected in the [Search Mode](#).
 - **Destination** – Enter a path in the **UNC path** text box and select a managed account profile from the drop-down list to access the entered UNC path, or click **New Managed Account Profile** to create a new managed account profile. Then, click **Validation Test** to verify the path and user information.
 - **Download Setting** – Select the **Compression** checkbox if you want to enable data compression.
2. Click **Save** to start a download job.

End-User Configuration

The End-User Configuration feature allows end users to log into the Archived Data Center to view and download archived files.

To access the **End-User Configuration** page, log into the DocAve Manager and navigate to **Storage Optimization > File System Archiver > End-User Configuration**.

Configuring and Managing Domains

On the **End-User Configuration** page, all configured domains are listed. The following actions can be performed on existing domains:

- **Edit** – Select a domain and click **Edit** in the **Manage** group on the ribbon. The window displaying the connection protocol and domain information appears.
- **Delete** – Select one or multiple domains that you want to delete and click **Delete** in the **Manage** group on the ribbon. A confirmation window appears. Click **OK** to delete the selected domains or click **Cancel** to cancel the delete action.
- **Enable** – To enable a disabled domain, select it and click **Enable** in the **Manage** group on the ribbon.

***Note:** Only users in the enabled domains can sign in the archived data center and can be configured as connection owners.
- **Disable** – To disable an enabled domain, select it and click **Disable** in the **Manage** group on the ribbon.

To add a new domain, complete the following steps:

1. On the **End-User Configuration** page, click **Add** in the **Manage** group on the ribbon.
2. Complete the following settings to add a domain:
 - **Connection Protocol** – Select a protocol (**Global Catalog** or **LDAP**) and connect to the specified Active Directory Domain Services based on the selected protocol. Enter the listening port of the Active Directory that you are about to add. Select the **Use SSL-based Encryption** checkbox to improve the security if your Active Directory Domain Services support the SSL-based encryption.
 - **Domain Information** – Configure the information of the domain where Active Directory (AD) users you want to allow them to log into the Archived Data Center. Enter the full name of the domain or the address of the domain controller in the Domain text box, and select a managed account profile where the account is in the entered domain from the drop-down list. You can also create a new managed account profile by clicking **New Managed Account Profile** in the drop-down list. Click **Validation Test** to verify the entered information.

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

Configuring the General Setting

General setting defines the session how long it will time out after end users log into the Archived Data Center.

Click **General Setting** in the **Settings** group on the ribbon. The **General Setting** window appears. Enter a number in the text box and select a time unit **Minute(s)** or **Hour(s)** from the drop-down list to define the session time-out value. Click **OK** to save the setting.

Configuring Connection Owner

A connection owner has the permission to view and download all archived data in the connection.

Refer to the following steps to configure connection owners.

1. Click **Connection Owner** in the **Settings** group on the ribbon. The **Connection Owner** tab appears.
2. Click **File System Connection Groups** to load all existing connection groups.
3. Select a group, and click **Configure** in the **Manage** group on the ribbon to configure connection owners for connections under the selected group. Or, you can click a group to load all connections under the group. Select one or multiple connections, and click **Configure** in the **Manage** group on the ribbon to configure connection owners for the selected connections.
4. Complete the following settings to configure connection owners.
 - **Domain Selection** – Select a domain where the AD users you want to configure as connection owners from the Domain drop-down list. All enabled domains on the **End-User Configuration** page are selectable here.
 - **Connection Owner** – Enter the name of the user that you want to configure as the connection owner, and then click the Check Names (👤) button to verify that the user name you entered is valid. Alternatively, you can click the Browse (🔍) button to search for the desired user. In the pop-up window, enter the value to search for in the **Find** text box, and then click the Search (👤) button. Select the desired user and click **Add ->**. Click **OK** to add the selected user, or click **Cancel** to close the window without adding the user.
5. Click **Save** to save the connection owners, or click **Cancel** to exit without saving any changes.

Archived Data Center for End Users

Archived Data Center allows end users to view and download files that have been archived. All AD users in the domains that are configured and enabled on the **End-User Configuration** page are able to sign in the archived data center.

Use the following URL to access the data center: *https://hostname:port*. Use the hostname or IP address of the server where DocAve Manager is installed to replace *hostname*. The default port is **14800**.

***Note:** Only when the archived data center deployment has finished can end users sign in the archived data center. For more information, refer to [Archived Data Center for End User Deployment](#).

On the **Sign In** page of the Archived Data Center for End User, complete the following information and click **Sign In** to login:

- **Login ID** – Enter the username of the account in the domain selected below.
- **Password** – Enter the password of the account.
- **Log On To – AD Integration** is the default value and cannot be changed.
- **Domain** – Select the domain of the account.

Select the **Remember me** checkbox before clicking **Sign In**, the entered information except the password will be kept when you access the **Sign In** page next time.

After signing into the archived data center, the connection groups and connections under them where folders and files you have permission to view are listed. Connections under a connection group are displayed as tiles. Owners of a connection have the permission to view all folders and files in the connection.

Clicking the connection path link on the top of a connection tile allows you to view all archived folders and files in the connection that you have permission.

- View basic information – The following information on the folders and files is displayed in the table: **Name, Type, Size, Created By, Created Time, Modified Time, and Archived Time**.
- Sort – Sort folders and files displayed in the table by **Name** or **Size** in ascending order or descending order.
- Search – You can search for a specific folder or file by entering keywords of the folder name or file name in the text box and clicking the search (🔍) button. The keywords are not case sensitive.

- View Details – Click the name link of a folder, and all folders and files in the folder are displayed.
- Download – Select one or multiple files by selecting the checkboxes next to the file names. The number of files that are selected is displayed in the lower-left corner of the page. Click **Clear All** to deselect all selected files. Click **Download** above the table to download the selected files. The files are collected into a .zip file named in the format of *ArchivedFiles_MMddyyHHmmss* and the .zip file is downloaded to the download location of the current browser.
- Show rows – Change the number of folders and files displayed per page. Select a number (**5**, **10**, or **15**) from the drop-down list in the lower-right corner.
- Page turning – View folders and files in another page. To view folders and files in the previous or next page, click the left arrow (←) button to go to the previous page or click the right arrow (→) button to go to the next page. You can also click the (⏪) button to go to the first page or click the (⏩) button to go to the last page.

Clicking the **Full Text Index Search** link on the bottom of a connection tile allows you to search for the archived files in this connection.

- Search – You can search for a specific file by entering keywords and clicking the search (🔍) button. The keywords are not case sensitive. The file whose name or content contains the entered keywords will be searched and displayed in the table. Wildcards such as "*" and "?" are available.
- Advanced Search – Click **Advanced** to show the advanced settings section. Click the **Add a Criterion** link, and a criterion appears. Click the rule and a drop-down list appears displaying all available rules. Click the condition and a drop-down list appears displaying all available conditions for the rule. After selecting a condition, enter a value to the right of the condition. After configuring the criteria, you can click the remove (✖) button in the row of a criterion to remove it. You can also modify the logical relationship among the added criteria by clicking the **All** link in the message above the section and selecting a logical relationship **All** or **Any** from the drop-down list.

Archived files that meet the search keywords or search criteria and you have permission to view are displayed in the table below. Each file is displayed with its name and the summary of its content. Select one or multiple files and click **Download** to download the files. The files are collected into a .zip file named in the format of *ArchivedFiles_MMddyyHHmmss* and the .zip file is downloaded to the download location of the current browser.

Checking a Job Status

File System Archiver contains a Job Monitor button where users can view the status of File System Archiver jobs. This module is useful for monitoring jobs or troubleshooting errors.

Refer to the [DocAve 6 Job Monitor Reference Guide](#) for more information.

Appendix A: Criteria Filter Conditions

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

***Note:** Multiple criteria can be added into the **Criteria** row. But, to create a rule successfully, at least one criteria row is required.

Folder Object Level

The only rule in the **Folder** level is **Name**. Enter the name of the folder.

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

File Object Level

1. **Name** – Enter the name of the file.

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

- **Equals** – Enter the complete file name. This selection archives the file whose name equals the entered name. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete file name. This selection archives all the files except for those that equal the entered name. Wildcards are unavailable.
2. **File Size** – Enter a data size value for the file. The units for this value can be selected as **KB**, **MB** or **GB** from the drop-down list.
- **>=** – Archive all files whose size is equal to or greater than the entered size.
 - **<=** – Archive all files whose size is equal to or less than the entered size.
3. **File Type** – Enter the type of the file.
- **Matches** – Wildcards such as "*" and "?" are available when using **Matches**; it is the most flexible way of specifying the files you would like to archive. The files that match the entered file type will be archived.
 - **Does not Match** – As with **Matches**, wildcards are available. However, this selection archives all the files that do not match the entered file type.
 - **Contains** – Wildcards cannot be used in this field; all the files that contain the entered type name will be archived.
 - **Does not Contain** – You can enter part of the file type name here. This selection archives all the files that do not contain the entered type name. Wildcards are unavailable.
 - **Equals** – Enter the complete file type name. This selection archives the file whose type equals the entered type name. Wildcards are unavailable.
 - **Does Not Equal** – Enter the complete document type name. This selection archives all the files except for those that equal the entered type name. Wildcards are unavailable.
4. **Modified Time** – Set a date range for the modified files.
- **From ... To** – Archive all files that are modified between the two dates selected.
 - **Before** – Archive all files modified before the date selected.
 - **Older Than** – Archive all files with a modification date that is older than the **Day(s)**, **Week(s)**, **Month(s)**, or **Year(s)** selected from the drop-down list.
5. **Created Time** – Set a date range for the created files.
- **From ... To** – Archive all files that were created between the two dates selected.
 - **Before** – Archive all files that were created before the date selected.
 - **Older Than** – Archive all files with a creation date that is older than the **Day(s)**, **Week(s)**, **Month(s)**, or **Year(s)** selected from the drop-down list.

6. **Last Accessed Time** – Set a date range for the last accessed time of the files.
 - **From ... To** – Archives all files that were last accessed between the two dates selected.
 - **Before** – Archives all files that were last accessed before the date selected.
 - **Older Than** – Archives all files that have a last accessed date that is older than the **Day(s), Week(s), Month(s),** or **Year(s)** selected from the drop-down list.
7. **Compliance Guardian Tag** – Enter the Compliance Guardian tag name, followed by the tag value.

***Note:** To use the **Compliance Guardian Tag** criterion in a File System Archiver rule, make sure the Compliance Guardian database is configured in the file system connection to which the rule will be applied. Compliance Guardian tag information will be retrieved from the configured database.

- **Matches** – Wildcards such as "*" and "?" are available when using **Matches**; it is the most flexible way of specifying the files you would like to archive. The files that contain the Compliance Guardian tag whose value matches the entered text will be archived.
- **Does not Match** – As with **Matches**, wildcards are available; however, this selection archives all files that contain the Compliance Guardian tag whose value does not match the entered text.
- **Contains** – Wildcards cannot be used in this field; all files that contain the Compliance Guardian tag whose value contains the entered text will be archived.
- **Does not Contain** – Wildcards cannot be used in this field; this selection archives all files that contain the Compliance Guardian tag whose value does not contain the entered text.
- **Equals** – Wildcards cannot be used in this field; enter the complete tag value. This selection archives the files that contain the Compliance Guardian tag whose value is the entered text.
- **Does Not Equal** – Wildcards cannot be used in this field; enter the complete tag value. This selection archives all files that contain the Compliance Guardian tag whose value that is not the entered text.

Appendix B: Advanced Settings in Configuration Files

Customizing the Message for Stubs

By configuring the **AgentCommonFSArchiverStub.html**, you can customize the message displayed when you open a stub in the file system.

Complete the following steps to configure this file:

1. On the server where DocAve Agent is installed, navigate to `... \AvePoint\DocAve6\Agent\data\SP2013\Arch` directory and find the **AgentCommonFSArchiverStub.html** file.
2. Open the file with Notepad.
3. Find the `<div id="stub"> </div>` nodes and replace **This file has been archived. To view details of this file, you can go to Archived Data Center for End User.** with the message you want to configure.
4. Save changes to the file and close it.

Customizing the Suffix for Stubs

By configuring the **AgentCommonStorageEnv.cfg** file, you can customize the suffix for stubs.

Complete the following steps to configure this file:

1. On the server where DocAve Agent is installed, navigate to `... \AvePoint\DocAve6\Agent\data\SP2013\Arch` directory and find the **AgentCommonStorageEnv.cfg** file.
2. Open the file with Notepad.
3. Find the **FSASubNameFormat="stub.html"** attribute and replace **stub** with the text that you want to configure as the suffix for stubs.
4. Save changes to the file and close it.

When the **Archive and leave a stub for each file** action is configured in the rule, stubs left in the file system by the File System Archiver job will be renamed by adding the suffix specified above. For example, if the suffix you configure above is **FSASub**, the stub of the file **ABC.docx** will be **ABC.docx.FSASub.html**.

Archived Data Center for End User Deployment

The Archived Data Center for End User will only be accessible after the deployment. Complete the following steps to deploy the Archived Data Center for End User:

1. On the server where DocAve Manager is installed, navigate to the ...*AvePoint\DocAve6\Manager\Shared\Tools\FileSystemArchiverDeploy* directory and find the **DocAveFSAEndUserDeploy.exe.config** file.
2. Open the **DocAveFSAEndUserDeploy.exe.config** file with Notepad.
3. The following nodes can be found in the **<appSettings> ... </appSettings>** nodes. Edit the corresponding information if desired.
 - **<add key="ApplicationPoolName" value="Archived File Repository"/>** – The name of the application pool that will be used by the Archived Data Center for end user.
 - **<add key="WebSiteName" value="Archived File Repository"/>** – The name of the web site that will be used by the Archived Data Center for end user.
 - **<add key="Schema" value="https"/>** – The protocol that will be used to connect to the Archived Data Center for end user.
 - **<add key="Port" value="14800"/>** – The protocol port of the Archived Data Center for end user.
 - **<add key="DocAveHost" value="localhost"/>** – The host name of the DocAve Manager.
 - **<add key="DocAvePort" value="14000"/>** – The port of the DocAve Manager.
4. Save changes to the file and close it.

After configuring the **DocAveFSAEndUserDeploy.exe.config** file, the **DocAveFSAEndUserDeploy.exe** must be run to deploy the Archived Data Center for end user.

***Note:** Make sure the server where this tool is run has the Internet Information Services (IIS) 7.0 or above installed.

1. On the server where DocAve Manager is installed, navigate to the ...*AvePoint\DocAve6\Manager\Shared\Tools\FileSystemArchiverDeploy* directory and find the **DocAveFSAEndUserDeploy.exe** file.
2. Right-click the **DocAveFSAEndUserDeploy.exe** file and select **Run as administrator** from the drop-down list.
3. In the window, enter the username of the account that you want to configure as the application pool identity, and press **Enter** on the keyboard.

***Note:** It is recommended using the same application pool account configured for the DocAve Manager.
4. Enter the password of the account and press **Enter**.
5. When the deployment finishes, press any key to exit.

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