Simplifying Design Element Deployment Tasks Using the New DocAve®5 Platform

This document is intended for anyone wishing to familiarize themselves with the user interface and basic functionality of the DocAve Deployment Manager module v5. It is not intended to be used for advanced installation, configuration, or troubleshooting. All other modules and topics are covered in the User Guides located on http://www.avepoint.com/support/user-guides/.
Deployment Manager Basics

This section will teach you a few simple steps to quickly replicate design elements in your SharePoint environment or across SharePoint farms using the DocAve Deployment Manager – Design Manager.

Plan Settings

The Deployment Manager for DocAve will allow you to set up many plan options for deploying SharePoint design elements across a single farm or multiple farms, including email notification, filtering options, as well as offline export location. You can also choose to run this plan at a later time using a schedule.

Most of these details are not necessary to perform a simple design element deployment in SharePoint and will not be covered here. Please refer to the DocAve v5 User Guide for more information regarding these settings. For this guide, we recommend you accept all default settings when configuring a plan.

Layout and Navigation

The layout of GUI shows settings along the top, a source tree to the left, and a destination tree to the right. This tree will only display design elements unless “Hide All User Lists” is unchecked. For advanced usage of this feature, please refer to the DocAve v5 User Guide. There are several things to take note of in the data tree:

- “refresh” – The refresh button next to each level will refresh any sub-trees for this node.
- “search” – The search button will allow you to refine the contents shown in any sub-tree. The results will be returned beneath the selected node.
- “Page Browser” – This page browser indicates that the sub-tree has been split across multiple pages. This is done to increase the load performance of the SharePoint tree. Using the numbers or paging icons available, please scroll left or right as necessary to find the data you’d like.

Replicating SharePoint Design Elements

This section will teach you a few simple steps to quickly replicating your SharePoint design elements using DocAve Deployment Manager.

Choosing Design Elements

With DocAve, you can easily replicate design elements including Master Page Gallery, Site Template Gallery, Content Types, and others from one location to another seamlessly and quickly. To select design elements from the Source, follow the steps below:

1. **Navigate** to Administration -> Deployment Manager -> Design Manager.

2. In the left-hand column, select a **Source Agent** from the drop-down menu and click on the Farm name. The tree will be loaded for you to select design elements. Browse through the Farm, Web Application, Site Collection, and other levels to locate the design elements you wish to move.
3. Using the check boxes next to each level, select the design elements you’d like to include in your plan.

4. Using the Destination Agent drop-down, browse through the tree to locate the destination for your design elements. You can select a blank field and enter a URL to create a new location on the fly.

5. From the Deployment Options drop-down menu, select “Not Overwrite” or “Overwrite”. By default, “Not-Overwrite” is selected, which will not replace already existing design elements in the destination.

**Running the Plan**

In order to run the plan, enter a Plan Name on top and simply click Save. If you would like to set a schedule, please see the following section, and the move will initiate at scheduled time. If you do not plan on using a schedule or wish to perform a move immediately, click Run Now at the bottom of the screen, and click OK.

You can also chose to only perform a test run, which will report on which elements will be deployed.

**Schedule Options**

By default, you do not need to schedule a design element replication; you can simply click Run Now, but if you wish to setup a schedule, please follow these simple steps:

1. Navigate to the Schedule tab.

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

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

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

5. Click on the radio buttons next to Full or Incremental to either deploy all design elements or to only deploy the changes made to the design elements since the previous job.

**Viewing the Progress**

After a plan has been initiated, you can view the progress from the Job Monitor.

1. Navigate to the Job Monitor using the menu bar at the top of the interface.

2. From the dropdown menu on the top left, select Site Level Deployment and browse through the resulting table. This will display the current status and results of your design element deployment jobs.

**Congratulations!**

You have just performed a basic replication of SharePoint design elements. For more guides like this on DocAve’s other features, or detailed guidance regarding the DocAve Deployment Manager module, please reference the DocAve v5 User Guides at [http://www.avepoint.com/support/user-guides](http://www.avepoint.com/support/user-guides).