

# DocAve® 6 Vault

## User Guide



**Service Pack 11**

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## What's New in this Guide

- General improvements for enhanced functionality.

## About DocAve Vault

DocAve Vault allows you to export SharePoint content and accompanying metadata information, at any desired object level (from Web application down to list) to an external storage system. The tools available in DocAve Vault provide the following benefits:

- Secure and encrypted archiving
- Archived content with granularity and fidelity maintained
- Continual data collection
- Scheduled archiving
- Externalized archiving

Integrated with Autonomy and Concordance software, the data exported by Vault can also be managed in the Autonomy and Concordance platforms.

**\*Note:** DocAve Vault only supports SharePoint 2010 and SharePoint 2013 on-premises.

## Complementary Products

Many products and product suites on the DocAve 6 platform work in conjunction with one another. The following products are recommended for use with Vault:

- DocAve Connector for collaborating upon network file shares and cloud storage resources directly through SharePoint without migration. Connected content appears as normal SharePoint content, and can be leveraged exactly as if it were residing within a SharePoint document library.
- DocAve Content Manager for SharePoint for restructuring or moving SharePoint content.
- DocAve Report Center for SharePoint to examine pain points in the SharePoint infrastructure and report on SharePoint user behavior and changes.
- DocAve Data Protection for setting backup and recovery points prior to adjusting SharePoint governance policies in this product.
- DocAve Replicator to perform live or event-driven, as well as scheduled or offline replication. Synchronization and management of all content, configurations, and securities is performed with full fidelity.

# 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 sections for system and farm requirements that must be in place prior to installing and using DocAve Vault.

## 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.

## Notable Environment Exceptions

The following are notable exceptions to the supported DocAve environments. The following represent environment level support information, not feature level support. Feature level support, specific to each feature, is described throughout this guide where applicable.

- DocAve Vault only supports SharePoint 2010 and SharePoint 2013 on-premises.

## Configuration

In order to use DocAve Vault, the DocAve 6 platform must be installed and configured properly on your farm. Vault will not function without DocAve 6 present on the farm.

## Agents

DocAve Agents are responsible for running DocAve jobs and interacting with the SharePoint object model. DocAve Agents enable DocAve Manager to communicate with the respective servers, allowing for Vault 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 effect on server performance is negligible. For instructions on installing the DocAve Platform, DocAve Manager, and DocAve Agents, see the [DocAve 6 Installation Guide](#).

## Required Permissions

To install and use Vault properly, ensure that the Agent Account has the following permissions.

**Local System Permissions:** These permissions are automatically configured by DocAve during installation. Refer to [Local System Permissions](#) for a list of the permissions automatically



configured upon 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 of the required permissions.

**SharePoint Permissions:** These permissions must be manually configured prior to using DocAve 6 Vault; they are not automatically configured.

- User is a member of the Farm **Administrators** group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.
- Full Control to all zones of all Web applications via User Policy for Web Applications
- User Profile Service Application permissions for SharePoint 2010:
  - Use Personal Features
  - Create Personal Site
  - Use Social Features
- User Profile Service Application permissions for SharePoint 2013:
  - Create Personal Site (required for personal storage, newsfeed, and followed content)
  - Follow People and Edit Profile
  - Use Tags and Notes
- Managed Metadata Service – Term Store Administrator
- Business Data Connectivity Service – Full Control
- Search Service – Full Control
- User Profile Service – Administrator and Full Control
- Managed Metadata Service – Administrator and Full Control

**SQL Permissions:** These permissions must be manually configured prior to using DocAve 6 Vault; they are not automatically configured.

- Database Role of **db\_owner** for all of the databases related with SharePoint, including Content Databases, SharePoint Configuration Database, and Central Admin Database.

## 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 Vault.

## Launching Vault

To launch Vault and access its functionality, log onto DocAve. If you are already in the software, click the **DocAve** tab.

1. From the **DocAve** tab, click **Compliance** to view the compliance modules.
2. Click **Vault** to launch this module.

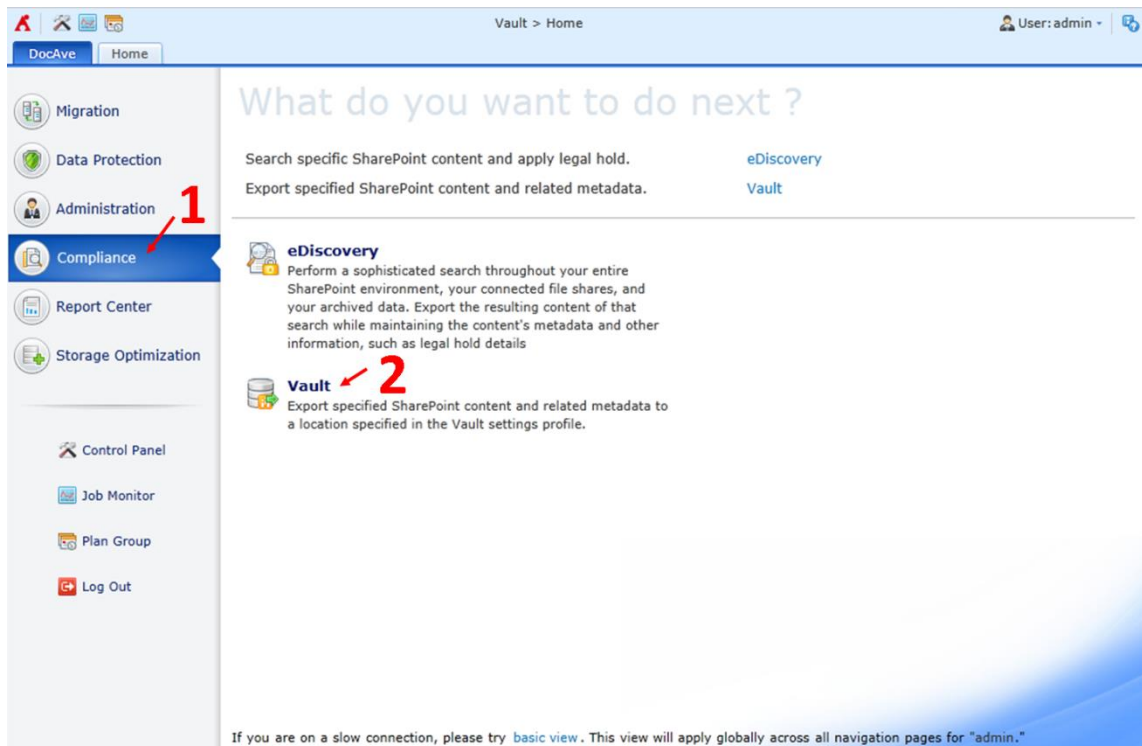
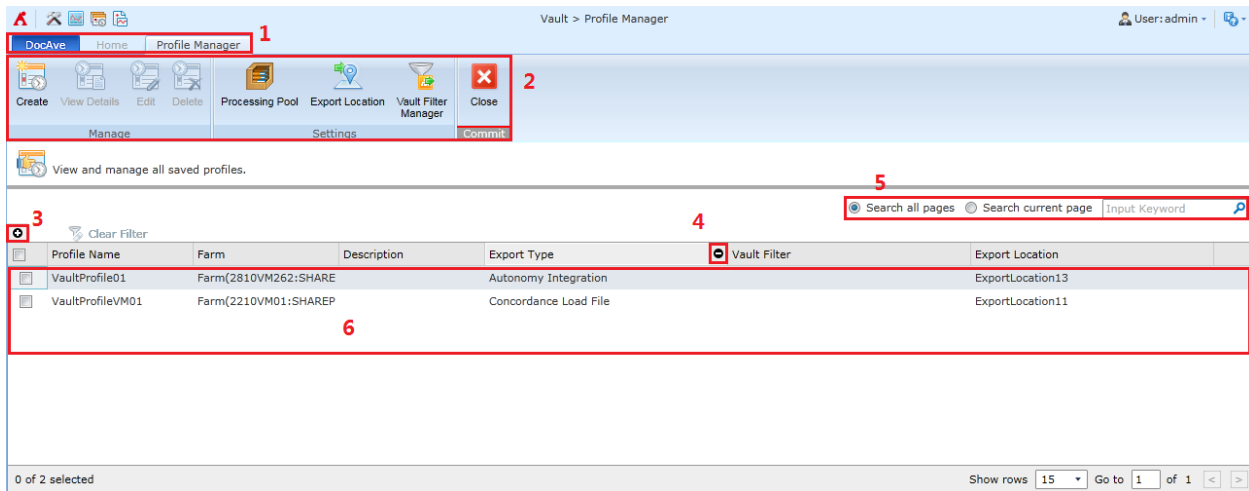


Figure 1: DocAve Vault launch window.

## 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.

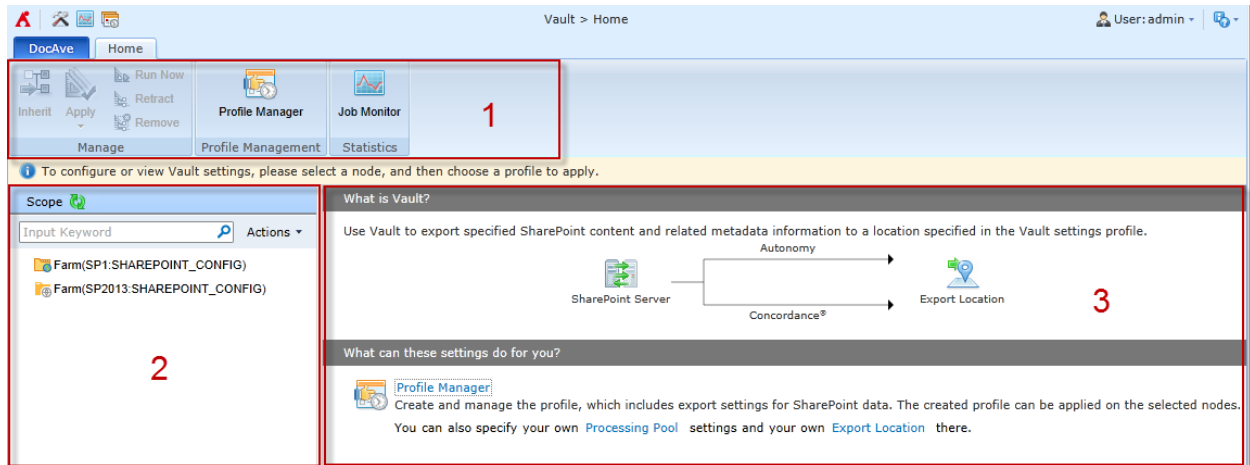


**Figure 2: Navigating DocAve.**

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. 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.
6. Management Pane – Displays the actionable content of the DocAve module.

## User Interface Overview

The Vault interface launches with the **Home** tab active. This tab displays your farm environment and allows for quick access to a list of Vault features.



**Figure 3: Vault User Interface.**

1. The **ribbon** shows the available actions and wizards for the selected nodes. This content is dynamic; it will often change depending on what is selected on the SharePoint tree.
2. The **SharePoint tree (Scope panel)** displays all content within your farms (SharePoint 2010 farms and SharePoint 2013 farms). Use this panel to select the content that you want to perform actions on. Selecting content often reveals new tabs and functionality on the **ribbon**.
3. The **landing page** displays the brief instructions of Vault and the settings, guiding you to quickly start a Vault job.

## Setting Up a Vault Profile

A Vault Profile, which contains the Processing Pool and Export Location settings, must be configured prior to setting up a Vault job. If you want to use Vault filters in a Vault profile, configure the filters prior to setting up a Vault job. Refer to the instructions below to configure a Vault Profile.

**\*Note:** By default, all of the contents under a Web application or a site collection are exported once a Vault profile is applied and run.

## Configuring the Processing Pool

The **Processing Pool** feature allows you to control the maximum number of Vault jobs that can be run by an agent at the same time. Normally, a Vault job is fairly resource-intensive, so running multiple vault jobs simultaneously may affect the performance of the server. To avoid such a situation, configure the **Processing Pool** feature.

Vault jobs that are added into the Processing Pool become threads. The number of jobs that you allow in the **Processing Pool** is the maximum number of Vault jobs that can be run simultaneously by an agent. The remaining Vault jobs are placed in a queue.

Each SharePoint farm has one default processing pool named **Default\_Farm(Farm Name)**. The number of threads set in this pool is **5**.

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

1. Click **Profile Manager** from the **Profile Management** group. The **Profile Manager** tab appears.
2. Click **Processing Pool** from the **Settings** group. The **Processing Pool** tab appears.
3. Click **Create** from the **Manage** group on the **Processing Pool** tab. The **Create a New Processing Pool** page appears. Configure the following settings to create a new processing pool:
  - **Processing Pool Name** – Enter a **Name** and an optional **Description** for the processing pool.
  - **Farm** – Select a **Farm** from the drop-down list where the processing pool will be used.
  - **Agent Group** – Select an **Agent Group** from the drop-down list. The agents in the specified agent group are used by this Processing Pool to perform the Vault jobs. For more information about creating agent groups, refer to the [DocAve 6 Control Panel Reference Guide](#).

- **Maximum Number of Jobs** – Specify the maximum number of the concurrent jobs for this processing pool. For example, if you enter **8** in this field, as many as eight Vault jobs can be run simultaneously by an agent.

After completing the configurations, the created processing pool will be listed on the **Processing Pool** page.

To edit an existing processing pool, select one pool from the **Processing Pool** tab and click **Edit** in the **Manage** group on the **Processing Pool** tab.

To delete the existing processing pools, select one or more pools from the **Processing Pool** tab and click **Delete** in the **Manage** group on the **Processing Pool** tab.

## Configuring the Export Location

The export location allows you to configure locations using the Universal Naming Convention (UNC) path where you want to store the exported items and documents by Vault.

For more information on creating export locations, refer to the [DocAve 6 Control Panel Reference Guide](#).

## Configuring Vault Filters

Vault filters allow you to select specific objects or data within the SharePoint level: **Site Collection**, **Item**, and **Document**.

To create a new filter, complete the following steps:

1. Click **Profile Manager** from the **Profile Management** group. The **Profile Manager** tab appears.
2. Click **Vault Filter Manager** from the **Settings** group. The **Vault Filter Manager** tab appears.
3. Click **Create** from the **Manage** group on the **Vault Filter Manager** tab. The **Create a New Vault Filter** page appears. Configure the following settings to create a new filter:
  - **Vault Filter Name** – Enter a **Name** and an optional **Description** for the filter.
  - **Farm Selection** – Select a **Farm** from the drop-down list to specify the filter scope of the filter.
  - **Criteria** – Select specific objects or data within the SharePoint level: **Site Collection**, **Item**, and **Document**. Each level has a unique set of rules that can be applied to enhance configurations. Refer to [Appendix B: Examples of Vault Filters](#) for examples of the filters that users can configure.
    - Click **Add a Filter Level Group** to add a new rule of the specified level and then click **Add a Criterion** to add criteria for the new rule by

completing the fields below, and select the delete button (✖) to remove the rule that is no longer needed.

- **Rule** – Select the new rule you want to create from the drop-down list.
  - **Condition** – Select the condition for the rule.
  - **Value** – Enter a value you want the rule to use in the text box.
- To add more filters to the rule, repeat the previous step.

**\*Note:** Depending on the filters you enter, you can change the logical relationships between the filter rules. There are currently two logical relationships: **And** and **Or**. By default, the logic is set to **And**. To change the logical relationship, click on the logical relationship link. The **And** logical relationship means that the content which meets all the rules will be filtered and included in the result. The **Or** logic means that the content which meets any one of the rules will be filtered and included in the result.

- **Basic Filter Condition** – View the logical relationship of the filter rules in this area.

For example, if the logical relationship is ((1 And 2) Or 3) in the Basic Filter Condition area, the contents that meet both the filter rule 1 and filter rule 2, or meet the filter rule 3, will be filtered out.

- **Export Location** – Select an **Export Location** from the drop-down list where you want to store the exported data. You can also choose to create a new one by clicking on the **New Export Location**. For more information on creating a new Export Location, refer to [DocAve 6 Control Panel Reference Guide](#).

After completing the configurations, the created filter will be listed on the **Vault Filter Manager** tab.

To edit an existing filter, select one from the **Vault Filter Manager** tab and click **Edit** in the **Manage** group.

**\*Note:** If the Vault filter you select to edit is used by a profile, the **Farm Selection** and **Export Location** fields are grayed out and cannot be edited.

To view details of an existing filter, select one from the **Vault Filter Manager** tab and click **View Details** in the **Manage** group.

To delete the existing filters, select one or more filters from the **Vault Filter Manager** tab and click **Delete** in the **Manage** group.

**\*Note:** The Vault filter you select to delete cannot be deleted if it is used by a profile.



## Configuring Vault Profiles

To configure the job-related settings in the Vault Profile, complete the following steps:

1. Click **Profile Manager** in the **Profile Management** group on the ribbon of the Vault **Home** page. The **Profile Manager** tab appears.
2. Click **Create** in the **Manage** group on the **Profile Manager** tab. The **Create a New Profile** page appears. Configure the following settings to configure a Vault Profile :
  - **Profile Name** – Enter a **Name** and an optional **Description**. These can be used to locate the profile in the **Profile Manager**.
  - **Export Type** – Select an export type from the drop-down list. **Autonomy Integration** means the content can be managed in the Autonomy platform. **Concordance Load File** means the content exported by Vault can be imported to the Concordance platform for management. For more information about the generated folders, refer to [Exported Content Folders](#).
  - **Farm Selection** – Select a **Farm** where you want to use this profile from the drop-down list.
  - **Processing Pool** – Select a **Processing Pool** from the drop-down list. You can also choose to create a new one by clicking on the **New Processing Pool**. For more information on creating a new Processing Pool, refer to [Configuring the Processing Pool](#).
  - **Vault Filter Selection** – Choose whether or not to use rules in this profile:
    - **No filter** – Select this option to use no Vault filter in this profile.
    - **Configure the filter myself** – Select this option to configure customized filters. The **Vault Filter Settings** field appears after selecting the **Configure the filter myself** radio button.

Select one or more previously-created filters, and then click **Add**. The selected filters are added to this profile. And the following information of the filters is listed in this field: **Vault Filter Name, Level, and Export Location**. To remove filters from this profile, select the delete button (✕) next to the filter that you want to remove.

You can also click **New Vault Filter** from the drop-down menu to create a new one. For information on creating a Vault filter, see the [Configuring Vault Filters](#) section of this guide.

**\*Note:** You can only load and select the filter whose selected farm is the same as the farm selected in the profile. The export locations of the filters selected for a profile must be different.

- **Export Location** – Select an **Export Location** from the drop-down list where you want to store the exported data. You can also choose to create a new one by clicking on the **New Export Location**. For more information on creating a new Export Location, refer to [DocAve 6 Control Panel Reference Guide](#).
- **Notification** – To notify the specified users of the status about this Vault job, select a previously-created notification profile from the drop-down list, or click **New Notification Profile** to create a new one. For more information on creating a new notification profile, refer to [DocAve 6 Control Panel Reference Guide](#). You can also click **View** next to the textbox to view the detailed information of the selected notification profile.
- **Schedule** – Select the schedule type for this profile to use.
  - **No schedule** – Select this option to run the Vault job immediately.
  - **Configure the schedule myself** – Select this option to configure a customized schedule, and run the vault job by schedule. The **Schedule Settings** field appears after clicking **Configure the schedule myself**.
    - **Start Time** – Specify the time when the schedule starts.
    - **Interval** – Specify the frequency to run this schedule. Enter an integer into the text box and select Hours, Days, or Months from the drop-down list.
    - **End Time** – Specify an end time for this schedule by selecting the corresponding radio button. **No end date** will repeat the schedule indefinitely; **End after \_ occurrence(s)**: the schedule will end at the specified occurrence; **End by**: the schedule will end at the specified time point.

After configuring the schedule for the Vault job, click **Calendar View** to view the scheduled search by day, week, or month.

## Applying and Running Vault Profiles

In order to run a Vault job, you must apply an existing Vault profile to a SharePoint object level. This will export the object level's content according to the profile settings. To apply and run a Vault profile, complete the following steps:

1. Click the farm node in the **Scope** panel to expand the tree; all of the SharePoint components that can be exported will be displayed.
2. Select a node in the expanded tree where you want to perform export action. If a profile is already applied to the selected node, the profile applied **Status** and the **Vault Settings** in this profile will be displayed in the workspace field. To **Remove** or **Retract** the applied profile, see [Managing Vault Profiles](#).
3. Select an existing profile to apply to the specified node from the drop-down list in the workspace field, or create a new profile for the selected node. For more information on creating a new profile, see [Configuring Vault Profiles](#).
4. Click **Apply** from the **Manage** group in the **Home** tab to apply the selected profile. The selected profile is applied to the selected node and all nodes below it by default. For more information on inheritance, see [Inheriting and Stop Inheriting](#).
5. Click **Run Now** to run the applied profile immediately. By default, Vault exports the changes and modifications that were made to the selected SharePoint content since the last export job. If you are running a Vault export job on the selected node for the first time, all of the selected SharePoint content is exported.
6. You can also click **Apply And Run Now** to both apply and run the profile with one click.

**\*Note:** Before running a Vault export job on a SharePoint node that has applied an SSL certificate, ensure that the SSL certificate is issued by a trusted certificate authority. Also, ensure that the SSL certificate's name is the same as the host header used by the Web application of the selected SharePoint node. If these requirements are not met, the metadata information will not be exported to the **mht** folder upon completion of the Vault export job.

## Checking a Job Status

Vault contains a Job Monitor button where users can view the status of the running jobs. This is useful for monitoring jobs or troubleshooting for errors.

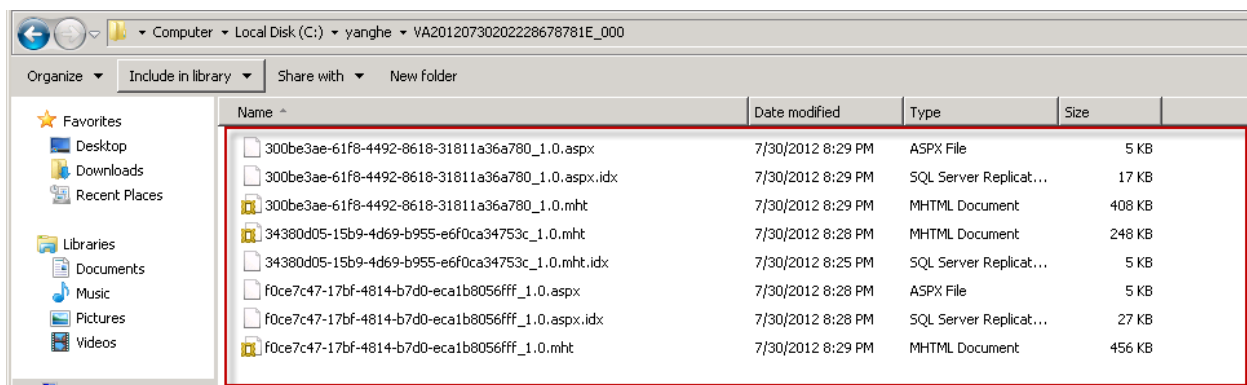
Refer to the [DocAve 6 Job Monitor Reference Guide](#) for more information.

## Exported Content Folders

When a Vault job finishes, you can view and manage the exported content in the specified export location. The content in each folder and the file type differs due to their export types. The following section contains detailed information about the generated folders of these two export types.

### Exported Content Folders Integrated with Autonomy

As [Figure 4](#) shows below, a folder containing the exported files is generated at the specified export location.



**Figure 4: Vault folders generated from Autonomy after job completion.**

There are three naming rules for the exported content in order to distinguish the type of content. A corresponding .idx file will also be generated to store the metadata information for each file, item, and attachment and can be opened in the Autonomy system. Refer to the following section to use the files in the exported folder:

- **File** – One file will be exported as two types of files. The files will be named:
  - Content: **DocId\_UIVersion.ext**
  - IDX: **DocId\_UIVersion.ext.idx**
- **Item** – One item will be exported as two types of files. The files will be named:
  - Content: **ItemId\_UIVersion.mht**
  - IDX: **ItemId\_UIVersion.mht.idx**

- **Attachment** – One attachment will be exported as two types of files. The files will be named:
  - Content: **ItemId\_AT###.ext**
  - IDX: **ItemId\_AT###.ext.idx**

**\*Note:** To map the title names of the metadata information displayed in the .idx file, you can configure the **AgentCommonAutonomyMapping.config** file prior to running a Vault job. To configure the mappings, complete the following steps:

1. Navigate to ...\*AvePoint\DocAve6\Agent\bin* and locate the **AgentCommonAutonomyMapping.config** file.
2. Open the **AgentCommonAutonomyMapping.config** file with Notepad.
3. Locate the **nameMapping** node in the configuration file and refer to the information below to configure the mapping:

```
<configuration>
  <configSections>
    <section name="autonomy" type="AvePoint.GCommon.Media.StorageService.AutonomySectionHandler,
CommonMediaStorageService"/>
  </configSections>
  <autonomy xmlns="urn:AvePoint.GCommon.Media.StorageService">
    <metaData>
      <mapping>
        <nameMappings>
          <nameMapping originalName="Title" targetName="TITLE"/>
          <nameMapping originalName="SP_Author" targetName="AUTHORS"/>
          <nameMapping originalName="SP_Editor" targetName="EDITOR"/>
          <nameMapping originalName="DisplayName" targetName="FILE-NAME"/>
          <nameMapping originalName="SP_UIVersion" targetName="VERSION-NUMBER"/>
          <nameMapping originalName="SP_ContentType" targetName="TYPE"/>
          <nameMapping originalName="ContentSize" targetName="FILE-SIZE"/>
          <nameMapping originalName="SP_Last_x0020_Modified" targetName="LAST-MODIFIED"/>
          <nameMapping originalName="SP_Created_x0020_Date" targetName="CREATION-DATE"/>
        </nameMappings>
      </mapping>
    </metaData>
  </autonomy>
</configuration>
```

**Figure 5: AgentCommonAutonomyMapping.config file.**





- **originalName** – The original name of the corresponding metadata information that is displayed in the .idx file.
- **targetName** – Enter the name you want to use in the .idx file as the value of this parameter. The corresponding original name will be mapped to the specified target name when a Vault job is completed.

4. Save your changes made in the configuration file.

After configuring this configuration file, the next time you run a Vault export job, the configured mapping will work. The title names will be the specified target names in the exported .idx file when the Vault job is completed.

## Exported Content Folders Integrated with Concordance

As [Figure 6](#) shows below, a folder containing the exported files is generated at the specified export location.

Name ^	Date modified	Type	Size
 Docs	7/13/2012 2:25 PM	File folder	
 CommonCreateConcordanceDB.CPL	6/26/2012 11:11 AM	Control panel item	9 KB
 CommonCreateHyperlinks.cpl	6/26/2012 11:11 AM	Control panel item	7 KB
 MetaData.dat	6/26/2012 11:11 AM	DAT File	4 KB

**Figure 6: Vault folder generated from Concordance after job completion.**

- **Cpt, cpl** – These files store the detailed information of the exported items that can be viewed in the Concordance platform.
- **Docs** – This folder stores the real content that is exported by Vault.
- **Dat** – This file stores the metadata information of the exported items.

# Managing Vault Profiles

Once a Vault profile is created, you can view, edit, delete, inherit, or break the inheritance of the profile. Review the following sections to manage the Vault profiles.

## Viewing, Editing, and Deleting Profiles in Profile Manager

Refer to information below to view, edit, or delete the Vault profiles in the Profile Manager page.

- **View Details** – Select a profile you would like to view from the **Profile Manager** tab and click **View Details** in the **Manage** group on the **Profile Manager** tab. In the **View Details** page, you can also edit the current profile by clicking **Edit** in the **Manage** group on the **Profile Manager** tab.
- **Edit** – Select a profile you would like to edit from the **Profile Manager** tab and click **Edit** in the **Manage** group on the **Profile Manager** tab. You can also edit a profile by clicking **Edit** displayed in the **Vault Settings** field from workspace page when expanding a node with a profile applied.  
  
\***Note:** If the selected node inherits the profile from a higher node, you cannot edit the profile at this node level. Go to the highest node where the profile is applied to edit it.
- **Delete** – Select one or more profiles you would like to delete from the **Profile Manager** tab and click **Delete** in the **Manage** group on the **Profile Manager** tab.

## Inheriting and Stop Inheriting

After applying a Vault profile on the selected node, the sub-node automatically inherits the profile that is applied to its parent node. **Stop Inheriting** logically separates the profile in the lower-level node from the upper-level node.

To manually break the inheritance relationship between the child node and its parent node, select the lower-level node that inherited the profile from the higher-level node. Click **Stop Inheriting** from the **Manage** group to break the inheritance. After clicking **Stop Inheriting**, this button changes to **Inherit**.

To manually apply a profile inheritance to a node, select the node that will inherit the profile from the higher node level. Click **Inherit** from the **Manage** group to inherit from the parent node. After clicking **Inherit**, this button changes to **Stop Inheriting**.

## Helpful Notes for Using Inheriting

- By default, the Vault profile applied to a higher level is inherited by the lower levels.

- You cannot apply a new profile on the node if it inherits the profile of the higher level.
- An inherited Vault profile cannot be edited, retracted, or removed at the lower nodes.
- When you change the profile settings of a higher-level node, the changes made to this profile also affect the inherited lower-level nodes.

### Helpful Notes for Using Stop Inheriting

- When breaking the profile's inheritance at a specified level, the inheritance is only broken at this level; the profile's inheritance of the lower levels is not broken.
- After the profile's inheritance is broken, you can apply a new profile and edit the corresponding profile settings at the lower level.
- If you break the profile inheritance on a node and then edit the inherited profile, the changes affect all of the SharePoint objects that use this profile.

### Retracting a Vault Profile

Use the **Retract** feature to disable the profile settings on the node that already has an applied profile. After retracting the profile, the **Apply Status** displayed in the **Status** field will be changed to **Retracted**. You can re-apply this profile by clicking **Apply** if necessary.

To retract an already applied Vault profile, select the node in the **Scope** panel that contains the profile you would like to retract. Click **Retract** from the **Manage** group from the **Home** tab. The profile is retracted from the selected node and sub-nodes on the tree.

### Removing Vault Profiles

When a created profile is no longer useful for the nodes in the farm tree, you can remove this profile from the node. There will be no profile information displayed in workspace page after removing the profile from the specified node, and you can select a new profile to apply from the drop-down list on the upper workspace page. Use the **Remove** feature to simplify profile management and lessen unnecessary created profiles in the nodes.

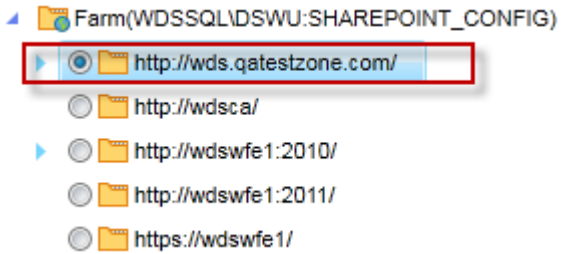
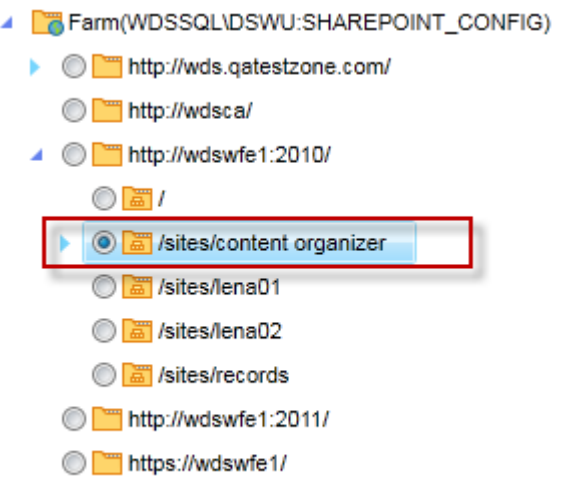
To remove an already applied profile, select the node in the **Scope** panel that contains the profile you would like to remove. Click **Remove** from the **Manage** group from the **Home** tab. The profile is removed from the selected node and sub-nodes on the tree.

**\*Note:** The removed profile still exists in the profile list for re-applying if necessary.



## Appendix A: Vault Customization Table

The following table provides available customizations for Vault. A √ represents the supported corresponding SharePoint level where the content can be exported by Vault.

Export Level/What to Export	What to Select When Exporting
Web application	 <p>                     Farm(WDSSQL\DSWU:SHAREPOINT_CONFIG)                     <ul style="list-style-type: none"> <li><input checked="" type="radio"/> http://wds.qatestzone.com/</li> <li><input type="radio"/> http://wdsca/</li> <li><input type="radio"/> http://wdswe1:2010/</li> <li><input type="radio"/> http://wdswe1:2011/</li> <li><input type="radio"/> https://wdswe1/</li> </ul> </p>
Site collection	 <p>                     Farm(WDSSQL\DSWU:SHAREPOINT_CONFIG)                     <ul style="list-style-type: none"> <li><input type="radio"/> http://wds.qatestzone.com/</li> <li><input type="radio"/> http://wdsca/</li> <li><input checked="" type="radio"/> http://wdswe1:2010/                             <ul style="list-style-type: none"> <li><input type="radio"/> /</li> <li><input checked="" type="radio"/> /sites/content organizer</li> <li><input type="radio"/> /sites/lena01</li> <li><input type="radio"/> /sites/lena02</li> <li><input type="radio"/> /sites/records</li> </ul> </li> <li><input type="radio"/> http://wdswe1:2011/</li> <li><input type="radio"/> https://wdswe1/</li> </ul> </p>

## Export Level/What to Export

## What to Select When Exporting

Site

- ▶ Farm(WDSSQL\DSWU:SHAREPOINT\_CONFIG)
- ▶  http://wds.qatestzone.com/
- http://wdsca/
- ▶  http://wdswe1:2010/
  - /
  - ▶  /sites/content organizer
  - ▶  /sites/lena01
    - ▶  top-level site{xcc01}
      - Lists
      - Sites
  - ▶  /sites/lena02
    - ▶  top-level site{lena02}
      - Lists
      - ▶  Sites
        - d01{s01}
        - d02{d02}
        - d03{s02}
        - d04{s03}
        - d05{s03}
        - d06{s03}
        - d07{s03}
        - d08{s03}
        - d09{s03}
        - d12{s03}

Export Level/What to Export	What to Select When Exporting
List	<ul style="list-style-type: none"> <li>▶ Farm(WDSSQL\DSWU:SHAREPOINT_CONFIG) <ul style="list-style-type: none"> <li>▶ <input type="radio"/> http://wds.qatestzone.com/</li> <li><input type="radio"/> http://wdsca/</li> <li>▶ <input type="radio"/> http://wdsufe1:2010/ <ul style="list-style-type: none"> <li><input type="radio"/> /</li> <li>▶ <input type="radio"/> /sites/content organizer</li> <li>▶ <input type="radio"/> /sites/lana01</li> <li>▶ <input type="radio"/> top-level site{xcc01} <ul style="list-style-type: none"> <li>▶ <input checked="" type="radio"/> Lists <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Announcements</li> <li><input type="radio"/> Calendar</li> <li><input type="radio"/> Customized Reports</li> <li><input type="radio"/> Form Templates</li> <li><input type="radio"/> lb1</li> <li><input type="radio"/> Links</li> <li><input type="radio"/> list01</li> <li><input type="radio"/> Shared Documents</li> <li><input type="radio"/> Site Assets</li> <li><input type="radio"/> Site Pages</li> </ul> </li> </ul> </li> </ul> </li> </ul> </li> </ul>

## Export Level/What to Export

## What to Select When Exporting

Library

- ▶ Farm(WDSSQL\DSWU:SHAREPOINT\_CONFIG)
- ▶  http://wds.qatestzone.com/
- http://wdsca/
- ▶  http://wdswe1:2010/
  - /
  - ▶  /sites/content organizer
  - ▶  /sites/lena01
    - ▶  top-level site{xcc01}
      - ▶  Lists
        - Announcements
        - Calendar
        - Customized Reports
        - Form Templates
        - lb1
        - Links
        - list01
        - Shared Documents
        - Site Assets
        - Site Pages

## Appendix B: Examples of Vault Filters

**\*Note:** The **Equals** condition is not case sensitive.

Hierarchy Level	Rule	Condition	Value	Result
Site Collection	URL	Contains	test	The site collection whose URL contains <i>test</i> will be filtered and included in the results. For example, <i>http://webapp:20000/sites/test</i> and <i>http://webapp:20000/sites/testA</i> will be filtered and included in the results.
		Does Not Contain	test	The site collection whose URL does not contain <i>test</i> will be filtered and included in the results. For example, <i>http://spapp:20000/sites/AP</i> will be filtered and included in the results.
		Equals	<i>http://webapp:20000/sites/test</i>	The site collection whose URL is <i>http://webapp:20000/sites/test</i> will be filtered and included in the results.
		Does Not Equal	<i>http://webapp:20000/sites/test</i>	The site collection whose URL is not <i>http://webapp:20000/sites/test</i> will be filtered and included in the results.
		Matches	<i>http://tes*collectionA</i>	The site collection whose URL begins with <i>http://tes</i> and ends with <i>collectionA</i> will be filtered and included in the results. For example, <i>http://tesABC:1111/sitecollectionA</i> will be filtered

Hierarchy Level	Rule	Condition	Value	Result
				and included in the results.
			http://test:20000/sites/sitecollection?nA	The site collection whose URL is the same as <i>http://test:20000/sites/sitecollection?nA</i> except character <b>?</b> will be filtered and included in the results. For example, <i>http://test:20000/sites/sitecollectionA</i> and <i>http://test:20000/sites/sitecollectionBnA</i> will both be filtered and included in the results.
		Does Not Match	http://tes*collectionA	All the site collections except those whose URLs begin with <i>http://tes</i> and end with <i>collectionA</i> will be filtered and included in the results. For example, <i>http://webapp:20000/sites/test</i> will be filtered and included in the results.
			http://test:20000/sites/sitecollection?nA	All the site collections except those whose URLs are the same as <i>http://test:20000/sites/sitecollection?nA</i> except character <b>?</b> will be filtered and included in the results. For example, <i>http://webapp:20000/sites/test</i> will be filtered and included in the results.
	Title	Contains	test	The site collection whose title contains <i>test</i> will be filtered and included in the results.
		Does Not Contain	test	The site collection whose title does not

Hierarchy Level	Rule	Condition	Value	Result
				contain <i>test</i> will be filtered and included in the results.
		Equals	test	The site collection whose title is <i>test</i> will be filtered and included in the results.
		Does Not Equal	test	The site collection whose title is not <i>test</i> will be filtered and included in the results.
		Matches	te*t	The site collection whose title begins with <i>te</i> and ends with <i>t</i> will be filtered and included in the results. For example, <i>teABct</i> will be filtered and included in the results.
			te?t	The site collection whose title is the same as <i>te?t</i> except character <b>?</b> will be filtered and included in the results. For example, <i>test</i> will be filtered and included in the results.
		Does Not Match	te*t	All the site collections except those whose titles begin with <i>te</i> and end with <i>t</i> will be filtered and included in the results. For example, <i>DocAve</i> will be filtered and included in the results.
			te?t	All the site collections except those whose titles are the same as <i>te?t</i> except character <b>?</b> will be filtered and

Hierarchy Level	Rule	Condition	Value	Result
				included in the results. For example, DocAve will be filtered and included in the results.
	Modified Time	Before	2011-11-11 12:15:50	The site collection which is modified before <i>12:15:50 11/11/2011</i> will be filtered and included in the results.
		After	2011-11-11 12:15:50	The site collection which is modified after <i>12:15:50 11/11/2011</i> will be filtered and included in the results.
		On	2011-11-11 12:15:50	The site collection which is modified on <i>12:15:50 11/11/2011</i> will be filtered and included in the results.
	Created Time	Before	2011-11-11 12:15:50	The site collection which is created before <i>12:15:50 11/11/2011</i> will be filtered and included in the results.
		After	2011-11-11 12:15:50	The site collection which is created after <i>12:15:50 11/11/2011</i> will be filtered and included in the results.
		On	2011-11-11 12:15:50	The site collection which is created on <i>12:15:50 11/11/2011</i> will be filtered and included in the results.
	Primary Administrator	Contains	test\user	The site collection whose creators contain <i>test\user</i> will be filtered and included in the results.
		Equals	test\user	The site collection whose creator is



Hierarchy Level	Rule	Condition	Value	Result
				<i>test\user</i> will be filtered and included in the results.
	Template Name	Contains	Team	The site collection whose template name contains <i>Team</i> will be filtered and included in the results. For example, <i>Team Site</i> will be filtered and included in the results.
		Does Not Contain	Team	The site collection whose template name does not contain <i>Team</i> will be filtered and included in the results. For example, <i>Blank Site</i> will be filtered and included in the results.
		Equals	Blank Site	The site collection whose template name is <i>Blank Site</i> will be filtered and included in the results.
		Does Not Equal	Blank Site	The site collection whose template name is not <i>Blank Site</i> will be filtered and included in the results.
		Matches	B*Workspace	The site collection whose template name begins with <i>B</i> and ends with <i>Workspace</i> will be filtered and included in the results. For example, <i>Basic Meeting Workspace</i> and <i>Blank Meeting Workspace</i> will both be filtered and included in the results.

Hierarchy Level	Rule	Condition	Value	Result	
			Bl?g	The site collection whose template name is the same as <i>Bl?g</i> except character <i>?</i> will be filtered and included in the results. For example, Blog will be filtered and included in the results.	
		Does Not Match	B*Workspace	All the site collections except those whose templates' names begin with <i>B</i> and ends with <i>Workspace</i> will be filtered and included in the results. For example, Team Site be filtered and included in the results.	
			Bl?g	All the site collections except those whose templates' names are the same as <i>Bl?g</i> except character <i>?</i> will be filtered and included in the results. For example, Team Site will be filtered and included in the results.	
	Custom Property: Text	Text	Contains	test	The site collection whose <i>Text</i> property contains <i>test</i> will be filtered and included in the results.
			Does Not Contain	test	The site collection whose <i>Text</i> property does not contain <i>test</i> will be filtered and included in the results.
			Equals	test	The site collection whose <i>Text</i> property is <i>test</i> will be filtered and included in the results.

Hierarchy Level	Rule	Condition	Value	Result		
			Does Not Equal	test	The site collection whose <i>Text</i> property is not <i>test</i> will be filtered and included in the results.	
			Matches	te*t	The site collection whose <i>Text</i> property begins with <i>te</i> and ends with <i>t</i> will be filtered and included in the results. For example, teABct will be filtered and included in the results.	
				te?t	The site collection whose <i>Text</i> property is the same as <i>te?t</i> except character <b>?</b> will be filtered and included in the results. For example, test will be filtered and included in the results.	
			Does Not Match	te*t	All the site collections except those whose <i>Text</i> property begins with <i>te</i> and ends with <i>t</i> will be filtered and included in the results. For example, DocAve will be filtered and included in the results.	
		te?t		All the site collections except those whose <i>Text</i> property is the same as <i>te?t</i> except character <b>?</b> will be filtered and included in the results. For example, DocAve will be filtered and included in the results.		
			Choice	Equals	Yes	The site collection whose <i>Choice</i> property is

Hierarchy Level	Rule	Condition	Value	Result	
	Custom Property: Yes/No		No	Yes will be filtered and included in the results.	
				The site collection whose <i>Choice</i> property is <i>No</i> will be filtered and included in the results.	
	Custom Property: Date/Time	Date	Before	2011-11-11 12:15:50	The site collection whose <i>Date</i> property is before <i>12:15:50 11/11/2011</i> will be filtered and included in the results.
			After	2011-11-11 12:15:50	The site collection whose <i>Date</i> property is after <i>12:15:50 11/11/2011</i> will be filtered and included in the results.
On			2011-11-11 12:15:50	The site collection whose <i>Date</i> property is on <i>12:15:50 11/11/2011</i> will be filtered and included in the results.	
Item	Title	Contains	test	The item whose title contains <i>test</i> will be filtered and included in the results.	
		Does Not Contain	test	The item whose title does not contain <i>test</i> will be filtered and included in the results.	
		Equals	test	The item whose title is <i>test</i> will be filtered and included in the results.	
		Does Not Equal	test	The item whose title is not <i>test</i> will be filtered and included in the results.	
		Matches	te*t	The item whose title begins with <i>te</i> and ends with <i>t</i> will be filtered and	

Hierarchy Level	Rule	Condition	Value	Result
				included in the results. For example, teABct will be filtered and included in the results.
			te?t	The item whose title is the same as <i>te?t</i> except character <b>?</b> will be filtered and included in the results. For example, test will be filtered and included in the results.
		Does Not Match	te*t	All the items except those whose titles begin with <i>te</i> and end with <i>t</i> will be filtered and included in the results. For example, DocAve will be filtered and included in the results.
			te?t	All the items except those whose titles are the same as <i>te?t</i> except character <b>?</b> will be filtered and included in the results. For example, DocAve will be filtered and included in the results.
	Modified Time	Before After On	Refer to the same filter rule for Site Collection level.	
	Created Time	Before After On	Refer to the same filter rule for Site Collection level.	
	Created By	Contains Equals	Refer to the same filter rule for Site Collection level.	
	Modified By	Contains	test\user	The items whose modifiers contain <i>test\user</i> will be filtered and included in the results.

Hierarchy Level	Rule	Condition	Value	Result	
		Equals	test\user	The item whose modifier is <i>test\user</i> will be filtered and included in the results.	
	Content Type	Contains	Task	The item whose content type contains <i>Task</i> will be filtered and included in the results.	
		Does Not Contain	Task	The item whose content type does not contain <i>Task</i> will be filtered and included in the results.	
		Equals	Task	The item whose content type is <i>Task</i> will be filtered and included in the results.	
		Does Not Equal	Task	The item whose content type is not <i>Task</i> will be filtered and included in the results.	
		Matches		Ev*t	The item whose content type begins with <i>Ev</i> and ends with <i>t</i> will be filtered and included in the results. For example, <i>Event</i> will be filtered and included in the results.
				Ta?k	The item whose content type is the same as <i>Ta?k</i> except character <i>?</i> will be filtered and included in the results. For example, <i>Task</i> will be filtered and included in the results.
			Does Not Match	Ev*t	All the items except those whose content types begin with <i>Ev</i> and end with <i>t</i> will be filtered and included in the results. For example,

Hierarchy Level	Rule	Condition	Value	Result	
				Task will be filtered and included in the results.	
			Ta?k	All the items except those whose content types are the same as <i>Ta?k</i> except character <b>?</b> will be filtered and included in the results. For example, Event will be filtered and included in the results.	
	Column: Text	Text	Contains	test	The item whose <i>Text</i> column value contains <i>test</i> will be filtered and included in the results.
			Does Not Contain	test	The item whose <i>Text</i> column value does not contain <i>test</i> will be filtered and included in the results.
			Equals	test	The item whose <i>Text</i> column value is <i>test</i> will be filtered and included in the results.
			Does Not Equal	test	The item whose <i>Text</i> column value is not <i>test</i> will be filtered and included in the results.
			Matches	te*t	The item whose <i>Text</i> column value begins with <i>te</i> and ends with <i>t</i> will be filtered and included in the results. For example, teABct will be filtered and included in the results.
				te?t	The item whose <i>Text</i> column value is the same as <i>te?t</i> except character <b>?</b> will be filtered and included in

Hierarchy Level	Rule	Condition	Value	Result	
				the results. For example, test will be filtered and included in the results.	
		Does Not Match	te*t	All the items except those whose <i>Text</i> column values begin with <i>te</i> and end with <i>t</i> will be filtered and included in the results. For example, DocAve will be filtered and included in the results.	
			te?t	All the items except those whose <i>Text</i> column values are the same as <i>te?t</i> except character <i>?</i> will be filtered and included in the results. For example, DocAve will be filtered and included in the results.	
	Column: Yes/No	Choice	Equals	Yes	The item whose <i>Choice</i> column value is <i>Yes</i> will be filtered and included in the results.
			No	The item whose <i>Choice</i> column value is <i>No</i> will be filtered and included in the results.	
	Column: Date/Time	Date	Before	2011-11-11 12:15:50	The item whose <i>Date</i> column value is before <i>12:15:50 11/11/2011</i> will be filtered and included in the results.
			After	2011-11-11 12:15:50	The item whose <i>Date</i> column value is after <i>12:15:50 11/11/2011</i> will be filtered and included in the results.



Hierarchy Level	Rule	Condition	Value	Result	
		On	2011-11-11 12:15:50	The item whose <i>Date</i> column value is on <i>12:15:50 11/11/2011</i> will be filtered and included in the results.	
	Workflow	Flow	Equals	In Progress	The item associated with the <i>Flow</i> workflow whose status is <i>In Progress</i> will be filtered and included in the results.
			Completed	The item associated with the <i>Flow</i> workflow whose status is <i>Completed</i> will be filtered and included in the results.	
			Canceled	The item associated with the <i>Flow</i> workflow whose status is <i>Canceled</i> will be filtered and included in the results.	
			Approved	The item associated with the <i>Flow</i> workflow whose status is <i>Approved</i> will be filtered and included in the results.	
			Rejected	The item associated with the <i>Flow</i> workflow whose status is <i>Rejected</i> will be filtered and included in the results.	
			Customized	Deleted	The item associated with the <i>Flow</i> workflow whose status is <i>Deleted</i> will be filtered and included in the results.

Hierarchy Level	Rule	Condition	Value	Result
		Does Not Equal	In Progress	The item associated with the <i>Flow</i> workflow whose status is not <i>In Progress</i> will be filtered and included in the results. For example, Completed will be filtered and included in the results.
			Completed	The item associated with the <i>Flow</i> workflow whose status is not <i>Completed</i> will be filtered and included in the results. For example, Approved will be filtered and included in the results.
			Canceled	The item associated with the <i>Flow</i> workflow whose status is not <i>Canceled</i> will be filtered and included in the results. For example, Completed will be filtered and included in the results.
			Approved	The item associated with the <i>Flow</i> workflow whose status is not <i>Approved</i> will be filtered and included in the results. For example, Completed will be filtered and included in the results.
			Rejected	The item associated with the <i>Flow</i> workflow whose status is not <i>Rejected</i> will be filtered and included in the results. For example,

Hierarchy Level	Rule	Condition	Value	Result
				Completed will be filtered and included in the results.
			Customized	Deleted The item associated with the <i>Flow</i> workflow whose status is not <i>Deleted</i> will be filtered and included in the results. For example, Completed will be filtered and included in the results.
Document	Name	Contains	test	The document whose name contains <i>test</i> will be filtered and included in the results. For example, test.docx will be filtered and included in the results.
		Does Not Contain	test	The document whose name does not contain <i>test</i> will be filtered and included in the results. For example, DocAve.docx will be filtered and included in the results.
		Equals	test.docx	The document whose name is <i>test.docx</i> will be filtered and included in the results.
		Does Not Equal	test.docx	The document whose name is not <i>test.docx</i> will be filtered and included in the results.

Hierarchy Level	Rule	Condition	Value	Result
		Matches	te*.docx	The document whose name begins with <i>te</i> and ends with <i>t.docx</i> will be filtered and included in the results. For example, test.docx will be filtered and included in the results.
			te?t.docx	The document whose name is the same as <i>te?t</i> except character <i>?</i> will be filtered and included in the results. For example, teAt.docx will be filtered and included in the results.
		Does Not Match	te*.docx	All the documents except those whose names begin with <i>te</i> and end with <i>t.docx</i> will be filtered and included in the results. For example, DocAve.txt will be filtered and included in the results.
			te?t.docx	All the documents except those whose names are the same as <i>te?t.docx</i> except character <i>?</i> will be filtered and included in the results. For example, DocAve.txt will be filtered and included in the results.
	Modified Time	Before	Refer to the same filter rule for Site Collection level.	
		After		
		On		
	Created Time	Before	Refer to the same filter rule for Site Collection level.	
After				
On				

Hierarchy Level	Rule	Condition	Value	Result	
	Created By	Contains	Refer to the same filter rule for Site Collection level.		
		Equals			
	Modified By	Contains	Refer to the same filter rule for Item level.		
		Equals			
	Content Type	Contains	Refer to the same filter rule for Item level.		
		Does Not Contain			
		Equals			
		Does Not Equal			
		Matches			
	Column: Text	Text	Contains	Refer to the same filter rule for Item level.	
			Does Not Contain		
			Equals		
			Does Not Equal		
			Matches		
			Does Not Match		
Column: Yes/No	Choice	Equals	Refer to the same filter rule for Item level.		
Column: Date/Time	Date	Before	Refer to the same filter rule for Item level.		
		After			
		On			
Last Accessed Time		Before	2011-11-11 12:15:50	The document whose last accessed time is before <i>12:15:50 11/11/2011</i> will be filtered and included in the results.	
		After	2011-11-11 12:15:50	The document whose last accessed time is after <i>12:15:50 11/11/2011</i> will be filtered and included in the results.	
		On	2011-11-11 12:15:50	The document whose last accessed time is	

Hierarchy Level	Rule	Condition	Value	Result
				on 12:15:50 11/11/2011 will be filtered and included in the results.
	Workflow	Equals	Refer to the same filter rule for Item level.	
		Does Not Equal		

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