



DocAve® 6.0.1

Content Manager

User Guide

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About Content Manager

DocAve Content Manager for SharePoint 2010 provides administrators with the ability to comprehensively move, copy, and restructure SharePoint sites, content, and topology within or across SharePoint environments – including to Office 365. Through a centralized, highly intuitive management console, featuring familiar ribbon-based controls and wizard-based, step-by-step guidance, administrators can seamlessly manage and restructure SharePoint content with minimal interruption to business processes in order to quickly respond to evolving information governance requirements.

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 Content Manager:

- 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 Replicator for SharePoint for copying SharePoint content within the same SharePoint farm or from one SharePoint farm to another
- 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

Submitting Documentation Feedback to AvePoint

AvePoint encourages customers to provide feedback regarding our product documentation. Click the following URL to access the **Submit Your Feedback** form on our Web site:

<http://www.avepoint.com/resources/documentation-feedback/?flush=1>

Before You Begin

Refer to the sections for below for system requirements for Content Manager.

Configuration

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

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

Licensing and Permissions

To install and use Content Manager 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 on the permissions, 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 Content Manager; 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:
 - User Personal Features
 - Create Personal Site
 - User Social Features
 - Managed Metadata Service: Term Store Administrator
 - Search Service: Full Control
 - Business Data Connectivity Service: Full Control
- **SQL Permissions:** These permissions must be manually configured prior to using DocAve 6 Content Manager; they are not automatically configured.
 - Database Role of db_owner for all the databases related with SharePoint, including Content Databases, Config Database, and Central Admin Database

Local System Permissions

The following Local System Permissions are automatically configured during DocAve 6 installation:

- User is 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\EventLog6
 - 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

Licensing and Permissions for Office 365 Agent

To install and use Content Manager properly, ensure that the agent account has the proper Local System Permissions. Local System 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 on the permissions, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.

Getting Started

Refer to the sections below for important information on getting started with Content Manager.

Launching Content Manager

To launch Content Manager and access its functionality, follow the instructions below:

1. Click the **DocAve** tab to display all product suites for DocAve v6.
2. Click **Administration** to access the Administration modules.
3. Click **Content Manager** to launch this module.

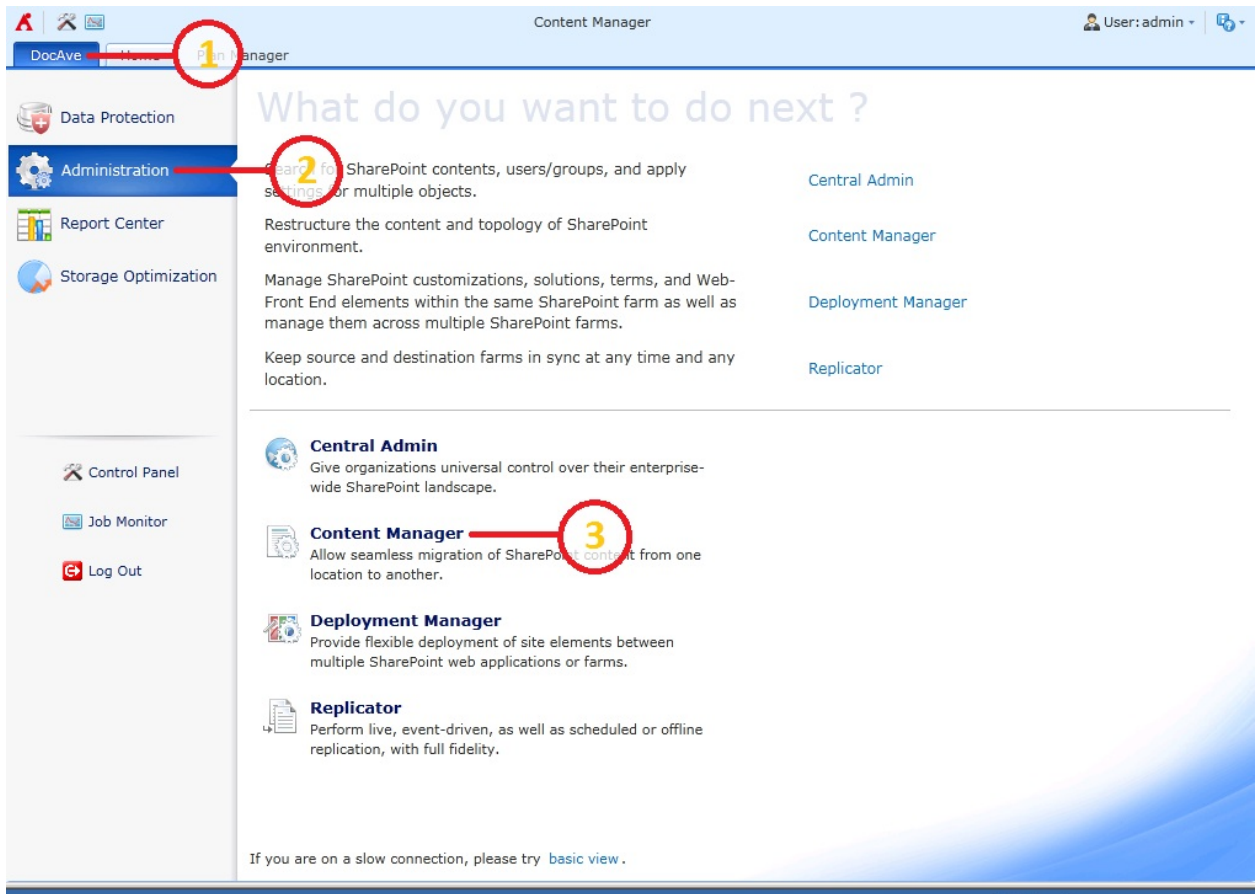


Figure 1: DocAve module launch window.

Content Manager Interface

When you launch Content Manager, you will be brought to the **Home** tab of the module. Here you will see the following:

1. Tabs – Navigate between the different tabs of Content Manager.
2. Ribbon – Tool bar where you can perform actions, configure settings, and access Job Monitor for Content Manager jobs.

Source pane – Access the SharePoint objects at different levels of your SharePoint farms where you wish to migrate content from.

3. Destination pane – Access the SharePoint objects at different levels of your SharePoint farms where you wish to migrate content to.

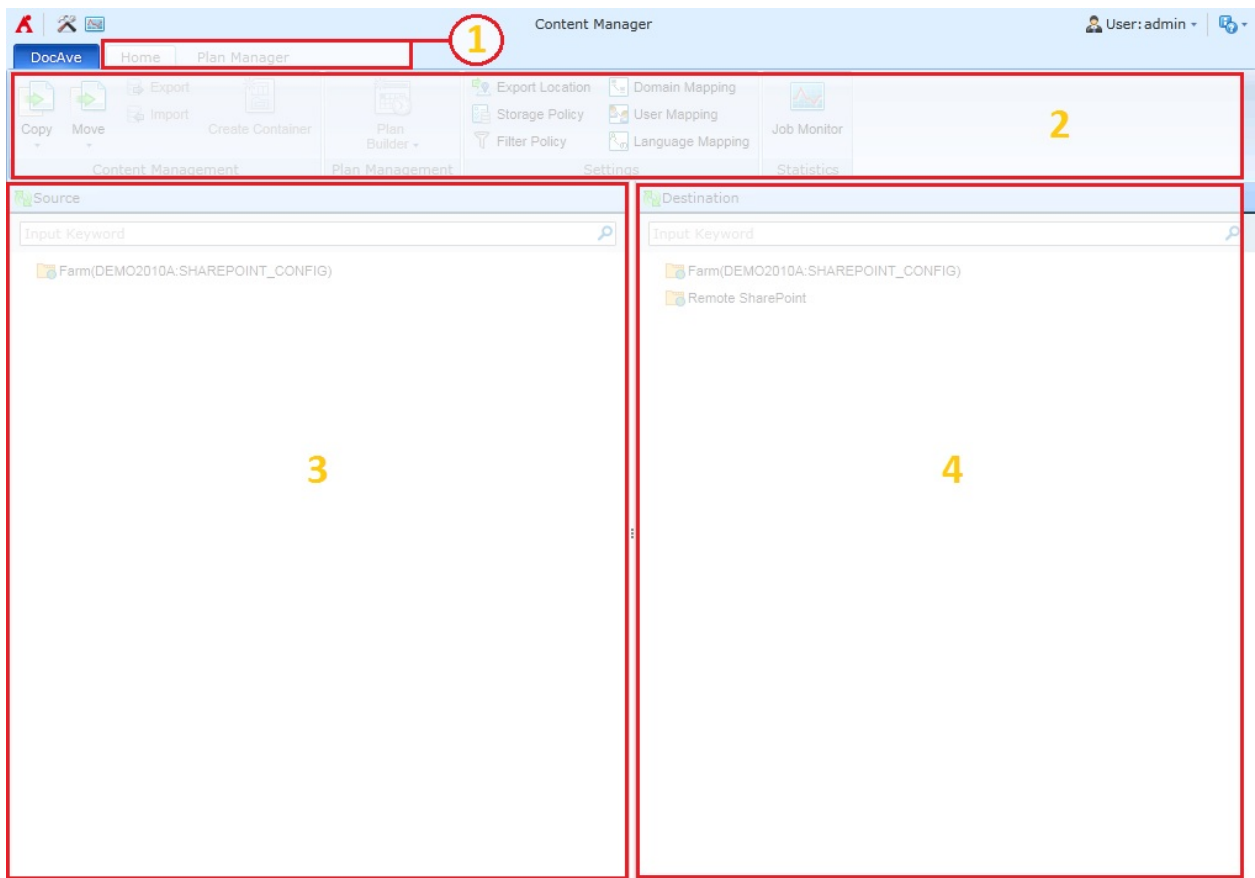


Figure 2: Content Manager Interface.

Basic Content Management Functions

While Content Manager allows you to create plans so that you can repeat copy and/or move jobs without having to reconfigure the settings each time, you can also perform these simple tasks without having to create an entire plan.

- **Copy** – When Content Manager runs a Copy job, content and permissions is copied from the source node to the destination node based on the settings you configured in Default Copy Settings.
- **Move** – When Content Manager runs a Move job, content and permissions is first copied from the source node to the destination node based on the settings you configured in Default Move Settings. The source node content and permissions is then deleted. The deletion of the source content and permissions can be configured to occur automatically after the copying part of the Move job is complete, or you may choose to manually delete the content after the Move job is complete.
- **Create Container** – This allows you to create containers within SharePoint without having to leave the DocAve interface. This is useful in cases where you wish to copy or move content from the source node to a new destination node without having to pre-create the destination node within SharePoint.

***Note:** If you check the **Include New** checkbox in the Source node, content created after the plan is saved will be included when the plan is executed.

Copying Content

Default Copy Settings

Default Copy Settings allow you to customize a template for your Copy Settings. These settings will be applied to any new copy jobs you create. You will be able to edit these settings before running the copy job.

To configure Default Copy Settings, click **Copy** on the ribbon, then select **Default Copy Settings** from the drop-down menu. To configure the settings in Default Copy Settings, refer to the Configuring Copy Settings section of this guide.

Configuring Copy Settings

In both Default Copy Settings and Edit Copy Settings, you can configure the following settings:

1. Action – Select **Attach** to transfer the source node as a child node underneath the destination node. Select **Merge** to add the content, securities, and configurations of the source node to the destination node.
2. Filter Policy – Select a filter policy you previously created from the drop-down menu, or click **New Filter Policy** from the drop-down menu. Filter policies allow you to select specific objects or data within each SharePoint level from web application down to the item level. For information on creating a Filter Policy, see the [DocAve 6 Control Panel Reference Guide](#).
3. Configuration – Check the **Copy configuration** checkbox to copy the properties, descriptions and titles from the source node to the destination node. If this checkbox is unchecked, you may configure the following options:
 - Select **Copy the item dependent columns and content types to maintain item integrity** to copy columns and content types which are necessary. Then select a conflict resolution method for these items from the drop-down menu:
 - **Do not copy the columns and content types, or the corresponding items** – Ignore the conflicting columns and content types, and do nothing on the source and destination node.
 - **Overwrite the columns and content types** – Overwrite the destination columns and content types with that of the source node.
 - **Append the columns and content types to destination** – Keep the destination columns and content types when there is a conflict. In addition, copy the source columns and content types to the destination node with a numerical suffix added. (For example, ColumnName_1, ColumnName_2, etc.)
 - Select **Do not copy the item dependent columns or content types** to not copy columns and content types which are necessary. The job report will show items if the corresponding column or content type is not found in the destination node.
4. Security – Check the **Copy security** checkbox to copy the user and/or group permissions from the source node to the destination node.
5. Content – Check the **Copy content** checkbox to copy content in libraries, folders and items from the source node to the destination node. Check the **Include list attachment** to also copy attached content in lists from the source node to the destination node.
6. User Profile – Check the **Copy user profile** checkbox to copy user profiles from the source node to the destination node.
7. Workflow – Check the **Include workflow definition** to copy the definition of existing workflows for the selected content from the source node to the destination node. Check the **Include workflow instance** to also copy the state, history and tasks of existing workflows for the selected content from the source node to the destination node.
8. Preserve the Null Column Values – Select **Yes** to preserve the null values of item columns (such as newly created column(s)). Select **No** to replace null values with default values in the destination node.
9. Data Compression – Check the **Compression** checkbox to compress the data when it is copied. If you choose to compress the data, use the slider to select the compression rate. Fastest

compression rate results in a larger data set. Best compression rate results in a smaller, better quality data set, but the compression takes more time to perform. Note that smaller data sets take longer to backup and recover.

10. Data Encryption – Check the **Encryption** checkbox to encrypt the data. Note that encrypted data takes longer to backup and recover.
11. Mappings – If you have previously configured mapping settings in Control Panel, you may choose to apply them to your Copy Settings. For more information on Domain Mapping, User Mapping and Language Mapping, see the [DocAve 6 Control Panel Reference Guide](#).
12. Backup Environment Before Running Plan – Check the **Backup the destination environment** checkbox to create a copy of the destination node prior to performing the copy. This allows you to undo the copy. If you choose to back up the destination environment before performing a copy, you must designate a Storage Policy. Select a previously configured Storage Policy or click **New Storage Policy** to create a new one. For more information on Storage Policy, see the [DocAve 6 Control Panel Reference Guide](#).
13. Conflict Resolution – Choose **Skip**, **Merge** or **Replace** from the **Container level conflict resolution** drop-down menu. Check the **Recursion** checkbox to configure content level conflict resolution. Choose **Skip**, **Overwrite** or **Overwrite by Last Modified Time** from the **Content level conflict resolution** drop-down menu. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A](#).
14. Notification - Configure the e-mail notification settings for a default copy job:
 - Select **Summary Report Recipient(s)** or **Detailed Report Recipient(s)** from the drop-down menu.
 - Type in the e-mail address of the desired recipient(s) in the textbox, then click **Add**. (If you wish to add numerous recipients for the same report, it may be more efficient to create mailing lists prior to configuring notification recipients.)
 - Summary Report Level(s) – Set when to send the summary report. By default, **Success**, **Failure** and **Warning** are all selected. After the job completed/failed/completed with exception, a summary report will be sent to the recipient.
 - Detailed Report Level(s) – Set when to send the detailed report. By default, **Success**, **Failure** and **Warning** are all selected. After the job completed/failed/completed with exception, a detailed report will be sent to the recipient.
 - Choose whether to have the e-mail notification be in **HTML** format or **Plain text** format.
 - Send all logs to recipient – Select **Yes** to send all logs to recipient when the job failed or select **No** to not send the logs.

Click **OK** to save these configurations and return to the Home tab of Content Manager, or click **Cancel** to return to the Home tab of Content Manager without saving any changes made.

Performing a Simple Copy

To perform a simple Copy in Content Manager, select the node you wish to copy from in the Source pane, and select the node you wish to copy to in the Destination pane. Click **Copy** on the ribbon, then select **Copy** from the drop-down menu. You will be brought to the Copy tab. Here you can do the following before running the Copy job:

1. **View** – Click **View** on the ribbon to review your Copy Settings in the View Copy Settings page.
2. **Edit** – Click **Edit** on the ribbon to make changes to the Copy Settings. You will be brought to the Edit Copy Settings page. To configure the settings in Edit Copy Settings, refer to the Configuring Copy Settings section of this guide.
3. **Preview** – Click **Preview** on the ribbon to see what the data tree of the destination node will look like after the Copy job is run. Note that the Preview function supports Web Application, Site Collection, and Site level objects.
4. **Run Now** – Click **Run Now** on the ribbon to execute the Copy job. Your Copy job will begin immediately, and you will be brought back to the Home tab of Content Manager.

Click **Cancel** on the ribbon to close the Copy tab without running the Copy job.

Moving Content

Default Move Settings

Default Move Settings allow you to customize a template for your Move Settings. These settings will be applied to any new move jobs you create. You will be able to edit these settings before running the copy job.

To configure Default Move Settings, click **Move** on the ribbon, then select **Default Move Settings** from the drop-down menu. To configure the settings in Default Move Settings, refer to the Configuring Move Settings section of this guide.

Configuring Move Settings

In both Default Move Settings and Edit Move Settings, you can configure the following settings:

1. **Action** – Select **Attach** to transfer the source node as a child node underneath the destination node. Select **Merge** to add the content, securities, and configurations of the source node to the destination node.
2. **Filter Policy** – Select a filter policy you previously created from the drop-down menu, or click **New Filter Policy** from the drop-down menu. Filter policies allow you to select specific objects or data within each SharePoint level from web application down to the item level. For information on creating a Filter Policy, see the [DocAve 6 Control Panel Reference Guide](#).
3. **Configuration** – Check the **Move configuration** checkbox to move the properties, descriptions and titles from the source node to the destination node. If this checkbox is unchecked, you may configure the following options:
 - Select **Move the item dependent columns and content types to maintain item integrity** to move columns and content types which are necessary. Then select a conflict resolution method for these items from the drop-down menu:
 - **Do not move the columns and content types, or the corresponding items** – Ignore the conflicting columns and content types, and do nothing on the source and destination node.
 - **Overwrite the columns and content types** - Overwrite the destination columns and content types with that of the source node.
 - **Append the columns and content types to destination** – Keep the destination columns and content types when there is a conflict. In addition, copy the source columns and content types of the destination node with a numerical suffix added. (For example, ColumnName1, ColumnName2, etc.)
 - Select **Do not move the item dependent columns or content types** to not move columns and content types which are necessary. DocAve will report the items if the corresponding column or content type is not found in the destination node.

4. Security – Check the **Move security** checkbox to move the user and/or group permissions from the source node to the destination node.
5. Content – Check the **Move content** checkbox to move content in libraries, folders and items from the source node to the destination node. Check the **Include list attachment** to also move attached content in lists from the source node to the destination node.
6. User Profile – Check the **Move user profile** checkbox to move user profiles from the source node to the destination node.
7. Workflow – Check the **Include workflow definition** to move the definition of existing workflows for the selected content from the source node to the destination node. Check the **Include workflow instance** to also move the state, history and tasks of existing workflows for the selected content from the source node to the destination node.
8. Preserve the Null Column Values – Select **Yes** to preserve the null values of item columns (such as newly created column(s)). Select **No** to replace null values with default values in the destination node.
9. Data Compression – Check the **Compression** checkbox to compress the data when it is moved. If you choose to compress the data, use the slider to select the compression rate. Fastest compression rate results in a larger data set. Best compression rate results in a smaller, better quality data set, but the compression takes more time to perform. Note that smaller data sets take longer to backup and recover.
10. Data Encryption – Check the **Encryption** checkbox to encrypt the data. Note that encrypted data takes longer to backup and recover.
11. Mappings – If you have previously configured mapping settings in Control Panel, you may choose to apply them to your Move Settings. For more information on Domain Mapping, User Mapping and Language Mapping, see the [DocAve 6 Control Panel Reference Guide](#).
12. Source Documents/Items Deleted Method – Select **Manually** to delete the source content yourself once the move job is complete. This can be done by selecting the move job in Job Monitor, then clicking **Delete** on the ribbon and selecting **Delete Content** from the drop-down menu. Select **Automatically** to have DocAve delete the source content once the move job is complete.
13. Delete Source Checked Out Documents – Select **Yes** to have DocAve delete the checked out documents on the source node when source content is deleted. By default, **No** is selected.
14. Backup Environment Before Running Plan – Check the **Backup the source environment** checkbox to create a copy of the source node prior to performing the move. Check the **Backup the destination environment** checkbox to create a copy of the destination node prior to performing the copy. This allows you to undo the move. If you choose to back up the source and/or destination environment before performing a copy, you must designate a Storage Policy. Select a previously configured Storage Policy or click **New Storage Policy** to create a new one. For more information on Storage Policy, see the [DocAve 6 Control Panel Reference Guide](#).
***Note:** The source node is deleted as the second step in a Move job. If **Backup the source environment** is not selected, you will not be able to restore the source node to its state prior to the Move job.

15. Conflict Resolution – Choose **Skip**, **Merge** or **Replace** from the **Container level conflict resolution** drop-down menu. Check the **Recursion** checkbox to configure content level conflict resolution. Choose **Skip**, **Overwrite** or **Overwrite by Last Modified Time** from the **Content level conflict resolution** drop-down menu. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A](#).
16. Notification - Configure the e-mail notification settings for a default copy job:
 - Select **Summary Report Recipient(s)** or **Detailed Report Recipient(s)** from the drop-down menu.
 - Type in the e-mail address of the desired recipient(s) in the textbox, then click **Add**. (If you wish to add numerous recipients for the same report, it may be more efficient to create mailing lists prior to configuring notification recipients.)
 - Summary Report Level(s) – Set when to send the summary report. By default, **Success**, **Failure** and **Warning** are all selected. After the job completed/failed/completed with exception, a summary report will be sent to the recipient.
 - Detailed Report Level(s) – Set when to send the detailed report. By default, **Success**, **Failure** and **Warning** are all selected. After the job completed/failed/completed with exception, a detailed report will be sent to the recipient.
 - Choose whether to have the e-mail notification be in **HTML** format or **Plain text** format.
 - Send all logs to recipient – Select **Yes** to send all logs to recipient when the job failed or select **No** to not send the logs.

Click **OK** to save these configurations and return to the Home tab of Content Manager, or click **Cancel** to return to the Home tab of Content Manager without saving any changes made.

Performing a Simple Move

To perform a simple Move in Content Manager, select the node you wish to move from in the Source pane, and select the node you wish to move to in the Destination pane. Click **Move** on the ribbon, then select **Move** from the drop-down menu. You will be brought to the Move tab. Here you can do the following before running the Move job:

1. **View** – Click **View** on the ribbon to review your Move Settings in the View Move Settings page.
2. **Edit** – Click **Edit** on the ribbon to make changes to the Move Settings. You will be brought to the Edit Move Settings page. To configure the settings in Edit Move Settings, refer to the Configuring Move Settings section of this guide.
3. **Preview** – Click **Preview** on the ribbon to see what the data tree of the destination node will look like after the Move job is run. Note that the Preview function supports Web Application, Site Collection, and Site level objects.

4. **Run Now** – Click **Run Now** on the ribbon to execute the Move job. Your Move job will begin immediately, and you will be brought back to the Home tab of Content Manager.

Click **Cancel** on the ribbon to close the Copy tab without running the Copy job.

Creating Containers

DocAve allows you to create containers in SharePoint without leaving the DocAve interface. This way you can continue to perform content management tasks without having to create all of the necessary containers before using Content Manager.

***Note:** Create Container cannot currently be used to create containers on Office 365 environments.

To create a container, in the Destination pane, enter the name of a new container in the available field, then click **Create Container**. The Create Container interface will pop up. Depending on the container type you are creating. (Note that when creating a folder, no settings need to be configured, and clicking **Create Container** at folder level will create a folder immediately.) Configure the settings for each type of container as such:

Creating a Site Collection

Configure these settings in the Create Site Collection page;

- Title and Description – Enter the **Title** of the new site collection, and a **Description** for future references.
- Template Selection – Select the desired language from the **Select a language** drop-down menu. Then select a site template for this new site collection. Click on a tab to access the templates listed in that category, or click on the Custom tab and select **<Select Template Later ...>** to not choose a template upon creation.
- Primary Site Collection Administrator – Enter the **Username** of the primary administrator for this site collection.
- Secondary Site Collection Administrator – Enter the **Username** of the secondary administrator for this site collection.
- Quota Template – Select the storage quota template to apply to this site collection.
- Content Database – Select the Content Database for this site collection.

Click **OK** to create the new site collection, or click **Cancel** to close the Create Container interface.

Creating a Site

Configure these settings in the Create Site page;

- Title and Description – Enter the **Title** of the new site, and a **Description** for future references.
- Template Selection – Select the desired language from the **Select a language** drop-down menu. Then select a site template for this new site. Click on a tab to access the templates listed in that category.

- Permissions – Select **Use unique permissions** to allow a unique set of users access to this new site. Select **Use same permissions as parent site** to allow the same users who can access the parent site access to this new site.

Click **OK** to create the new site, or click **Cancel** to close the Create Container interface.

Creating a List/Library

Configure these settings in the Create List page;

- Object Type – Choose whether you wish to create a **List** or a **Library**.
- **Category** – Select the category for the new list or library.
- **Document Template** (for Library only) – For a new library, you may also select the default document template for new files created in this library.

Click **OK** to create the new site collection, or click **Cancel** to close the Create Container interface.

Building Plans

In Content Manager, you can create plans to Copy or Move content so that you can repeat the process without having to reconfigure all of the settings. Plans also allow you the flexibility of performing the Copy or Move at a scheduled time. You can create plans in one of two ways:

- Wizard Mode – For users who are not familiar with creating Content Manager plans, Wizard Mode provides you step-by-step guidance when creating a plan.
- Form Mode – For more advanced users, Form Mode provides you with more flexibility in which settings you configure first.

Building Plans using Wizard Mode

To create a plan using Wizard Mode, select the source node in the Source pane, and select the destination node in the Destination pane. Click **Plan Builder** on the ribbon, then select **Wizard Mode** from the drop-down menu. You will be brought to the Wizard Mode tab. In the plan creation wizard interface, follow the instructions below to create your plan:

1. Step ***1. Plan Name** – Enter the new **Plan Name**, then enter a **Description** for future references. Click **Next**.
2. Step ***2. Method** – Configure the Method and Action for this plan:
 - Method - Select **Copy** or **Move** for the type of job you wish Content Manager to run when this plan is executed. If you select **Move**, you may also configure the following:
 - Source Documents/Items Deleted Method – Select **Manually** to delete the source content yourself once the copy/move job is complete. This can be done by selecting the copy/move job in Job Monitor, then clicking **Delete** on the ribbon and selecting **Delete Content** from the drop-down menu. Select **Automatically** to have DocAve delete the source content once the copy/move job is complete.
 - Delete Source Checked Out Documents - Select **Yes** to have DocAve delete the checked out documents on the source node when source content is deleted. By default, **No** is selected.
 - Action - Select **Attach** to transfer the source node as a child node underneath the destination node, or select **Merge** to add the content, securities, and configurations of the source node to the destination node.
To see what the data tree of the destination node will look like after the job is executed, click **Preview**.

When you have finished configuring the Method for this plan, click **Next**.

3. Step **3. Data Selection** – Configure the following settings in Data Selection:
 - Filter Policy – Select a filter policy you previously created from the drop-down menu, or click **New Filter Policy** from the drop-down menu. Filter policies allow you

to select specific objects or data within each SharePoint level from web application down to the item level. For information on creating a Filter Policy, see the [DocAve 6 Control Panel Reference Guide](#).

- Configuration – Check the **Copy/Move configuration** checkbox to copy/move the properties, descriptions and titles from the source node to the destination node. If this checkbox is unchecked, you may configure the following options:
 - Select **Copy/Move the item dependent columns and content types to maintain item integrity** copy/move the item dependent columns and content types to destination.
 - **Do not copy/move the columns and content types, or the corresponding items** – Ignore the conflicting columns and content types, and do nothing on the source and destination node.
 - **Overwrite the columns and content types** – Overwrite the destination columns and content types with that of the source node.
 - **Append the columns and content types to destination** – Keep the destination columns and content types when there is a conflict. In addition, copy the source columns and content types of the destination node with a numerical suffix added. (For example, ColumnName1, ColumnName2, etc.)
 - Select **Do not copy/move the item dependent columns or content types** to not copy/move item dependent columns or content types to destination which are necessary. DocAve will report the items if the corresponding column or content type is not found in the destination node.
- Security – Check the **Copy/Move security** checkbox to copy/move the user and/or group permissions from the source node to the destination node.
- Content – Check the **Copy/Move content** checkbox to copy/move content in libraries, folders and items from the source node to the destination node. Check the **Include list attachment** to also copy/move attached content in lists from the source node to the destination node.
- Workflow – Check the **Include workflow definition** to copy/move the definition of existing workflows for the selected content from the source node to the destination node. Check the **Include workflow instance** to also copy/move the state, history and tasks of existing workflows for the selected content from the source node to the destination node.

When you have finished configuring the Data Selection settings, click **Next**.

4. Step 4. **Schedule** – Configure a schedule for this plan:

- Select **No Schedule** to manually execute this plan.

- Select **Start Time** if you wish to have this plan be executed at a specified time. Select the date and time you wish this plan to be executed. If applicable, you may change the time zone by clicking on the hyperlink to select a different time zone.

When you have finished configuring the Schedule, click **Next**.

5. **Step 5. Advanced** –Configure the following settings in the Advanced :

1. Preserve the Null Column Values – Select **Yes** to preserve the null values of item columns (such as newly created column(s)). Select **No** to replace null values with default values in the destination node.
2. Data Compression – Check the **Compression** checkbox to compress the data when it is copied. If you choose to compress the data, use the slider to select the compression rate. Fastest compression rate results in a larger data set. Best compression rate results in a smaller, better quality data set, but the compression takes more time to perform. Note that smaller data sets take longer to backup and recover.
3. Data Encryption – Check the **Encryption** checkbox to encrypt the data. Note that encrypted data takes longer to backup and recover.
4. Mappings – If you have previously configured mapping settings in Control Panel, you may choose to apply them to your Plan Settings. For more information on Domain Mapping, User Mapping and Language Mapping, see the [DocAve 6 Control Panel Reference Guide](#).
5. Backup Environment Before Running Plan – Configure the following:
 - (For Move jobs only) Check the **Backup the source environment** checkbox to create a copy of the source node prior to performing the move.
 - Check the **Backup the destination environment** checkbox to create a copy of the destination node prior to performing the copy. This allows you to undo the copy. If you choose to back up the destination environment before performing a copy, you must designate a Storage Policy. Select a previously configured Storage Policy or click **New Storage Policy** to create a new one. For more information on Storage Policy, see the [DocAve 6 Control Panel Reference Guide](#).
6. Conflict Resolution – Choose **Skip**, **Merge** or **Replace** from the **Container level conflict resolution** drop-down menu. Check the **Recursion** checkbox to configure content level conflict resolution. Choose **Skip**, **Overwrite** or **Overwrite by Last Modified Time** from the **Content level conflict resolution** drop-down menu. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A](#).
7. Notification - Configure the e-mail notification settings for a default copy job:
 - Select **Summary Report Recipient(s)** or **Detailed Report Recipient(s)** from the drop-down menu.
 - Type in the e-mail address of the desired recipient(s) in the textbox, then click **Add**. (If you wish to add numerous recipients for the same report, it

may be more efficient to create mailing lists prior to configuring notification recipients.)

- Summary Report Level(s) – Set when to send the summary report. By default, **Success**, **Failure** and **Warning** are all selected. After the job completed/failed/completed with exception, a summary report will be sent to the recipient.
- Detailed Report Level(s) – Set when to send the detailed report. By default, **Success**, **Failure** and **Warning** are all selected. After the job completed/failed/completed with exception, a detailed report will be sent to the recipient.
- Choose whether to have the e-mail notification be in **HTML** format or **Plain text** format.
- Send all logs to recipient – Select **Yes** to send all logs to recipient when the job failed or select **No** to not send the logs.

When you have finished configuring the Advanced, click **Next**.

6. **Overview** –Once you have finished configuring this plan, the final step of the Wizard is the Overview page, where you can review and edit the various settings for this plan. In the **Settings** tab of the Overview pane, click **Edit** in the respective section to make changes to the settings in that section. Click the **Preview** tab, and then **Show Preview** to see what the data tree of the destination will look like after the job is run.
7. After you have reviewed all of the settings and scopes in the Overview pane, click **Finish** on the ribbon, then select **Finish** from the drop-down menu to save the plan. To save the plan and execute it right away, click **Finish** on the ribbon, then select **Finish and Run Now** from the drop-down menu.

At any time, click **Cancel** on the ribbon to abandon the new plan's configuration and return to the Home tab of Content Manager.

Building Plans using Form Mode

To create a plan using Form Mode, select the source node in the Source pane, and select the destination node in the Destination pane. Click **Plan Builder** on the ribbon, then select **Form Mode** from the drop-down menu. You will be brought to the Form Mode tab. Follow the instructions below to create your plan:

1. Plan Name – Enter the new **Plan Name**, then enter a **Description** for future references. Click **Next**.
2. Method - Select **Copy** or **Move** for the type of job you wish Content Manager to run when this plan is executed. If you select **Move**, you may also configure the following:

- Source Documents/Items Deleted Method – Select **Manually** to delete the source content yourself once the copy/move job is complete. This can be done by selecting the copy/move job in Job Monitor, then clicking **Delete** on the ribbon and selecting **Delete Content** from the drop-down menu. Select **Automatically** to have DocAve delete the source content once the copy/move job is complete.
 - Delete Source Checked Out Documents - Select **Yes** to have DocAve delete the checked out documents on the source node when source content is deleted. By default, No is selected.
3. Action - Select **Attach** to transfer the source node as a child node underneath the destination node, or select **Merge** to add the content, securities, and configurations of the source node to the destination node.
To see what the data tree of the destination node will look like after the job is executed, click **Preview**.
 4. Backup Environment Before Running Plan – Configure the following:
 - (For Move jobs only) Check the **Backup the source environment** checkbox to create a copy of the source node prior to performing the move.
 - Check the **Backup the destination environment** checkbox to create a copy of the destination node prior to performing the copy. This allows you to undo the copy. If you choose to back up the destination environment before performing a copy, you must designate a Storage Policy. Select a previously configured Storage Policy or click **New Storage Policy** to create a new one. For more information on Storage Policy, see the [DocAve 6 Control Panel Reference Guide](#).
 5. Schedule – Configure a schedule for this plan:
 - Select **No Schedule** to manually execute this plan.
 - Select **Start Time** if you wish to have this plan be executed at a specified time. Select the date and time you wish this plan to be executed. If applicable, you may change the time zone by clicking on the hyperlink to select a different time zone.
 6. Click **Advanced** to configure further options.
 7. Filter Policy – Select a filter policy you previously created from the drop-down menu, or click **New Filter Policy** from the drop-down menu. Filter policies allow you to select specific objects or data within each SharePoint level from web application down to the item level. For information on creating a Filter Policy, see the [DocAve 6 Control Panel Reference Guide](#).
 - Configuration – Check the **Copy/Move configuration** checkbox to copy/move the properties, descriptions and titles from the source node to the destination node. If this checkbox is unchecked, you may configure the following options:
 - Select **Copy/Move the item dependent columns and content types to maintain item integrity** copy/move the item dependent columns and content types to destination.
 - **Do not copy/move the columns and content types, or the corresponding items** – Ignore the conflicting columns and content types, and do nothing on the source and destination node.

- **Overwrite the columns and content types** – Overwrite the destination columns and content types with that of the source node.
 - **Append the columns and content types to destination** – Keep the destination columns and content types when there is a conflict. In addition, copy the source columns and content types of the destination node with a numerical suffix added. (For example, ColumnName1, ColumnName2, etc.)
 - Select **Do not copy/move the item dependent columns or content types** to not copy/move item dependent columns or content types to destination which are necessary. DocAve will report the items if the corresponding column or content type is not found in the destination node.
8. Security – Check the **Copy/Move security** checkbox to copy/move the user and/or group permissions from the source node to the destination node.
 9. Content – Check the **Copy/Move content** checkbox to copy/move content in libraries, folders and items from the source node to the destination node. Check the **Include list attachment** to also copy/move attached content in lists from the source node to the destination node.
 10. Workflow – Check the **Include workflow definition** to copy/move the definition of existing workflows for the selected content from the source node to the destination node. Check the **Include workflow instance** to also copy/move the state, history and tasks of existing workflows for the selected content from the source node to the destination node.
 11. Preserve the Null Column Values – Select **Yes** to preserve the null values of item columns (such as newly created column(s)). Select **No** to replace null values with default values in the destination node.
 12. Data Compression – Check the **Compression** checkbox to compress the data when it is copied. If you choose to compress the data, use the slider to select the compression rate. Fastest compression rate results in a larger data set. Best compression rate results in a smaller, better quality data set, but the compression takes more time to perform. Note that smaller data sets take longer to backup and recover.
 13. Data Encryption – Check the **Encryption** checkbox to encrypt the data. Note that encrypted data takes longer to backup and recover.
 14. Mappings – If you have previously configured mapping settings in Control Panel, you may choose to apply them to your Plan Settings. For more information on Domain Mapping, User Mapping and Language Mapping, see the [DocAve 6 Control Panel Reference Guide](#).
 15. Conflict Resolution – Choose **Skip**, **Merge** or **Replace** from the **Container level conflict resolution** drop-down menu. Check the **Recursion** checkbox to configure content level conflict resolution. Choose **Skip**, **Overwrite** or **Overwrite by Last Modified Time** from the **Content level conflict resolution** drop-down menu. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A](#).
 16. Notification - Configure the e-mail notification settings for a default copy job:

- Select **Summary Report Recipient(s)** or **Detailed Report Recipient(s)** from the drop-down menu.
- Type in the e-mail address of the desired recipient(s) in the textbox, then click **Add**. (If you wish to add numerous recipients for the same report, it may be more efficient to create mailing lists prior to configuring notification recipients.)
- Summary Report Level(s) – Set when to send the summary report. By default, **Success**, **Failure** and **Warning** are all selected. After the job completed/failed/completed with exception, a summary report will be sent to the recipient.
- Detailed Report Level(s) – Set when to send the detailed report. By default, **Success**, **Failure** and **Warning** are all selected. After the job completed/failed/completed with exception, a detailed report will be sent to the recipient.
- Choose whether to have the e-mail notification be in **HTML** format or **Plain text** format.
- Send all logs to recipient – Select **Yes** to send all logs to recipient when the job failed or select **No** to not send the logs.

When you are finished configuring the Notification, click **Next**.



17. Click **OK** on the ribbon, then select **OK** from the drop-down menu to save the plan. To save the plan and execute it right away, click **OK** on the ribbon, then select **OK and Run Now** from the drop-down menu.



At any time, click **Cancel** on the ribbon to abandon the new plan's configuration and return to the Home tab of Content Manager.

Managing Plans

Content Manager allows you to create plans for Copy and Move jobs so that you can repeat the job without having to reconfigure all of the settings. When a plan is created, it will appear in Plan Manager. To access Plan Manager, click the **Plan Manager** tab at the top of the DocAve interface.

In Plan Manager, you will see a list of all of your previously created plans. You can customize how these plans are displayed in a number of different ways:

- Search – Search allows you to filter the plans displayed by the keyword you designate; The keyword must be contained in a column value. At the top of the viewing pane, type in the keyword for the plan you wish displayed. You can select for search to **Search all pages** or **Search current page**. Note that the search function is not case sensitive.
-  - You can manage which columns are displayed in the list so that only information you want to see is shown. Click , then check the checkbox next to the column name to have that column shown in the list.

-  – This allows you to filter which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than based on a keyword. Click the  of the column you want to filter, then check the checkbox next to the item name to have that item shown in the list.

You may perform one of the following actions on a selected plan:

- **View Details** – Click **View Details** on the ribbon to see the Plan Details page of the selected plan. Here you can also click **Edit** on the ribbon to make changes to the plan's settings. You will be brought to the Edit Plan page where you can change the Source and Destination nodes for this plan in the **Preview** tab, or click the **Settings** tab to edit the plan's settings in the Edit Plan interface. Configure the settings in Edit Plan as you would when [Building Plans using Form Mode](#). Click **Save** on the ribbon, then select **Save** from the drop-down menu to save the plan. To save the plan and execute it right away, click **Save** on the ribbon, then select **Save and Run Now** from the drop-down menu. To save a changed plan as a new one, click **Save As** on the ribbon. At any time, click **Cancel** on the ribbon to return to the Plan Manager without saving any changes made.
- **Edit** – Click **Edit** on the ribbon to make changes to the selected plan's settings. You will be brought to the Edit Plan page where you can change the Source and Destination nodes for this plan in the **Preview** tab, or click the **Settings** tab to edit the plan's settings in the Edit Plan interface. Configure the settings in Edit Plan as you would when [Building Plans using Form Mode](#). Click **Save** on the ribbon, then select **Save** from the drop-down menu to save the plan. To save the plan and execute it right away, click **Save** on the ribbon, then select **Save and Run Now** from the drop-down menu. To save a changed plan as a new one, click **Save As** on the ribbon. At any time, click **Cancel** on the ribbon to return to the Plan Manager without saving any changes made.
- **Delete** – Click **Delete** on the ribbon to delete the selected plan. A warning message will pop up confirming the deletion. Click **OK** to delete the selected plan, or click **Cancel** to return to Plan Manager without deleting the selected plan.
- **Test Run** – Click **Test Run** on the ribbon to simulate the execution of the selected plan. You can see the results of the test run in Job Monitor. For more information, see the [DocAve 6 Job Monitor Reference Guide](#).
- **Run Now** – Click **Run Now** on the ribbon to execute the plan immediately. You can see the review details about the plan's execution in Job Monitor. For more information, see the DocAve 6 Job Monitor Reference Guide.

Using Import and Export

In cases where the desired source and destination nodes cannot communicate with each other (for example, if there is a firewall), Content Manager allows you to Export the content from the source node to an Export Location, then import it into the destination node.

Exporting Content

To export content to an Export Location, select the desired source node in the Source pane, then click **Export** on the ribbon. The Destination pane will be replaced with the Export configuration interface.

Configure the following settings to export content:

1. Plan Name – Enter the new **Plan Name**, then enter a **Description** for future references. Click **Next**.
2. Export Location – Select an Export Location you previously created in Control Panel, or click **New Export Location** to create a new one. For information on creating Export Locations, see the [DocAve 6 Control Panel Reference Guide](#).
3. Schedule – Configure a schedule for this plan:
 - Select **No Schedule** to manually execute this plan.
 - Select **Start Time** if you wish to have this plan be executed at a specified time. Select the date and time you wish this plan to be executed. If applicable, you may change the time zone by clicking on the hyperlink to select a different time zone.
4. Click **Advanced** to configure further options.
5. Filter Policy – Select a filter policy you previously created from the drop-down menu, or click **New Filter Policy** from the drop-down menu. Filter policies allow you to select specific objects or data within each SharePoint level from web application down to the item level. For information on creating a Filter Policy, see the [DocAve 6 Control Panel Reference Guide](#).
6. Content – Check the **Copy/Move content** checkbox to copy/move content in libraries, folders and items from the source node to the destination node. Check the **Include list attachment** to also copy/move attached content in lists from the source node to the destination node.
7. Workflow – Check the **Include workflow definition** to export the definition of existing workflows for the selected content from the source node to the destination node. Check the **Include workflow instance** to also export the state, history and tasks of existing workflows for the selected content from the source node to the destination node.
8. Data Compression – Check the **Compression** checkbox to compress the data when it is exported. If you choose to compress the data, use the slider to select the compression rate. Fastest compression rate results in a larger data set. Best compression rate results in a smaller, better quality data set, but the compression takes more time to perform. Note that smaller data sets take longer to backup and recover.

9. Data Encryption – Check the **Encryption** checkbox to encrypt the data. Note that encrypted data takes longer to backup and recover.
10. Notification - Configure the e-mail notification settings for a default copy job:
 - Select **Summary Report Recipient(s)** or **Detailed Report Recipient(s)** from the drop-down menu.
 - Type in the e-mail address of the desired recipient(s) in the textbox, then click **Add**. (If you wish to add numerous recipients for the same report, it may be more efficient to create mailing lists prior to configuring notification recipients.)
 - Summary Report Level(s) – Set when to send the summary report. By default, **Success**, **Failure** and **Warning** are all selected. After the job completed/failed/completed with exception, a summary report will be sent to the recipient.
 - Detailed Report Level(s) – Set when to send the detailed report. By default, **Success**, **Failure** and **Warning** are all selected. After the job completed/failed/completed with exception, a detailed report will be sent to the recipient.
 - Choose whether to have the e-mail notification be in **HTML** format or **Plain text** format.
 - Send all logs to recipient – Select **Yes** to send all logs to recipient when the job failed or select **No** to not send the logs.
11. Click **OK** to save the export plan. To save the export plan and execute it right away, click **OK and Run Now**.

At any time, click **Cancel** to abandon the new export plan's configuration and return to the Home tab of Content Manager.

Importing Content

To import content from an Export Location, select the desired destination node in the Destination pane, then click **Import** on the ribbon. The Source pane will be replaced with the Import configuration interface. Configure the following settings to import content:

1. Plan Name – Enter the new **Plan Name**, then enter a **Description** for future references. Click **Next**.
2. Browse – In the **Browse** tab, click on the Export Location to expand its data tree. Select the exported content. Click the **Details** tab to see what content are included.
3. Action - Select **Attach** to transfer the source node as a child node underneath the destination node, or select **Merge** to add the content, securities, and configurations of the source node to the destination node.

To see what the data tree of the destination node will look like after the job is executed, click **Preview**.

4. Schedule – Configure a schedule for this plan:
 - Select **No Schedule** to manually execute this plan.
 - Select **Start Time** if you wish to have this plan be executed at a specified time. Select the date and time you wish this plan to be executed. If applicable, you may change the time zone by clicking on the hyperlink to select a different time zone.
5. Click **Advanced** to configure further options.
6. Conflict Resolution – Choose **Skip**, **Merge** or **Replace** from the **Container level conflict resolution** drop-down menu. Check the **Recursion** checkbox to configure content level conflict resolution. Choose **Skip**, **Overwrite** or **Overwrite by Last Modified Time** from the **Content level conflict resolution** drop-down menu. For detailed information on how Content Manager resolves conflicts based on these configurations, see [Appendix A](#).
 - Configuration – Check the **Copy/Move configuration** checkbox to copy/move the properties, descriptions and titles from the source node to the destination node. If this checkbox is unchecked, you may configure the following options:
 - Select **Copy/Move the item dependent columns and content types to maintain item integrity** copy/move the item dependent columns and content types to destination.
 - **Do not copy/move the columns and content types, or the corresponding items** – Ignore the conflicting columns and content types, and do nothing on the source and destination node.
 - **Overwrite the columns and content types** – Overwrite the destination columns and content types with that of the source node.
 - **Append the columns and content types to destination** – Keep the destination columns and content types when there is a conflict. In addition, copy the source columns and content types of the destination node with a numerical suffix added. (For example, ColumnName1, ColumnName2, etc.)
 - Select **Do not copy/move the item dependent columns or content types** to not copy/move item dependent columns or content types to destination which are necessary. DocAve will report the items if the corresponding column or content type is not found in the destination node.
7. Security – Check the **Import security** checkbox to import the user and/or group permissions from the source node to the destination node.
8. Workflow – Check the **Include workflow definition** to import the definition of existing workflows for the selected content from the source node to the destination node. Check the **Include workflow instance** to also import the state, history and tasks of existing workflows for the selected content from the source node to the destination node.

9. Preserve the Null Column Values – Select **Yes** to preserve the null values of item columns (such as newly created column(s)). Select **No** to replace null values with default values in the destination node.
10. Mappings – If you have previously configured mapping settings in Control Panel, you may choose to apply them to your Plan Settings. For more information on Domain Mapping, User Mapping and Language Mapping, see the [DocAve 6 Control Panel Reference Guide](#).
11. Backup Environment Before Running Plan – Check the **Backup the destination environment** checkbox to create a copy of the destination node prior to performing the copy. This allows you to undo the copy. If you choose to back up the destination environment before performing a copy, you must designate a Storage Policy. Select a previously configured Storage Policy or click **New Storage Policy** to create a new one. For more information on Storage Policy, see the [DocAve 6 Control Panel Reference Guide](#).
12. Notification - Configure the e-mail notification settings for this plan:
 - Select **Summary Report Recipient(s)** or **Detailed Report Recipient(s)** from the drop-down menu.
 - Type in the e-mail address of the desired recipient(s) in the textbox, then click **Add**. (If you wish to add numerous recipients for the same report, it may be more efficient to create mailing lists prior to configuring notification recipients.)
 - Summary Report Level(s) – Set when to send the summary report. By default, **Success**, **Failure** and **Warning** are all selected. After the job completed/failed/completed with exception, a summary report will be sent to the recipient.
 - Detailed Report Level(s) – Set when to send the detailed report. By default, **Success**, **Failure** and **Warning** are all selected. After the job completed/failed/completed with exception, a detailed report will be sent to the recipient.
 - Choose whether to have the e-mail notification be in **HTML** format or **Plain text** format.
 - Send all logs to recipient – Select **Yes** to send all logs to recipient when the job failed or select **No** to not send the logs.
13. Click **OK** to save the plan. To save the plan and execute it right away, click **OK and Run Now**.

At any time, click **Cancel** to abandon the new plan's configuration and return to the Home tab of Content Manager.

Advanced Settings

For advanced users, Content Manager offers these additional settings that can be configured and saved to apply to Content Manager plans:

- Domain mapping is used to replace a source domain name with a domain name in the destination. The user in the source group will be mapped to the destination user which has the same name.
- User Mapping is beneficial for migrating groups of users from one domain to another (for example, if a company is acquired by another), and for migrating an individual user's content and permissions to another user.
- Language Mapping allows you to set a different language for the destination than the language used in the source. By creating a rule for Language Mapping, any plans using the rule can repeat the process without having to manually re-enter the settings.
- Export Location allows you to configure locations on external system storage that you wish Content Manager to export data to. By configuring external system storage, you can also export design elements to the file system. This is useful in cases where two farms are unable to communicate with each other. You can use Export Locations to perform offline deployments whereby you deploy from an external device.
- Storage Policy allows you to specify which logical device to use when storing content, or when performing imports and exports for offline deployment.
- Filter Policy allows you to set up filter rules so you can control what objects and data within any SharePoint level appear so that you can target content to migrate more precisely. By setting up and saving filter policies, you can apply the same filter policies to different plans without having to recreate them each time.

While these settings can be accessed in Content Manager, they are configured in the Control Panel. For more detailed information about these settings, see the [DocAve 6 Control Panel Reference Guide](#).

Content Manager for Office 365

Content Manager allows you to copy/move content from Microsoft SharePoint 2010 to Office SharePoint Online. To perform this function properly, you must configure your Office 365 Instance Manager in Control Panel. For more detailed information about the configuration, see the [DocAve 6 Control Panel Reference Guide](#).

For details about how to perform a simple copy, run a simple move or build a plan, refer to [Copying Content](#), [Moving Content](#), and [Building Plans](#). Note that certain settings are different when the destination node is in an Office 365 environment. For supported settings for Office 365, see [Appendix C](#).

***Note:** Content Manager for Office 365 does not support the Create Container function in an Office 365 destination node.

DocAve Content Manager Use Cases

The following use cases demonstrate the use of features described in this guide in several real-world situations. These use cases are intended to give the user a sense of when to use certain features of Content Manager, as well as how the Content Manager work with other DocAve products to create a better user experience overall.

Restructuring SharePoint Environments

Bob heads the IT department for a medium sized company which uses Microsoft SharePoint as their main collaboration platform. Over time, as the organization grew, new verticals and departments were created to accommodate the additional business activities. With the growth, new Sites and Pages were created on SharePoint to allow these departments their own space for structuring content, projects, workflow. Bob knew that while ad hoc Sites and Pages were sufficient solutions when the departments were first added, their SharePoint environment would become disorganized over time, making content hard to find. As this problem became more apparent, Bob met with the company's management to plan out how to restructure their SharePoint environment so as to make it more efficient to use. Once Bob has planned out the new structure for their SharePoint environment, he launched DocAve Content Manager to create plans for Moving and Copying Site Collections, Sites, Pages, Lists, Libraries and items. When creating these plans, Bob also makes sure to configure the schedule so that the jobs run after business hours. This way, he can minimize disruption to daily business processes without having to work overnight. Once the restructuring is complete, Bob performs Admin Searches using DocAve Administrator for SharePoint to make sure all of the permissions for the new environment are correct.

Appendix A

Conflict Resolution

Container Level Conflict Resolution

Resolution	Object	Conflict	No Conflict
Skip	Configuration	<ul style="list-style-type: none"> Ignore the conflicting configuration and do nothing on the source and destination. 	<ul style="list-style-type: none"> A new SharePoint object will be created.
	Security	<ul style="list-style-type: none"> Ignore the conflicting security and do nothing on the source and destination. 	<ul style="list-style-type: none"> A new SharePoint object will be created.
Merge	Configuration	<ul style="list-style-type: none"> Overwrite the settings in the destination node with settings from the source node. 	<ul style="list-style-type: none"> A new SharePoint object will be created.
	Security	<ul style="list-style-type: none"> Permissions - Source Permissions that do not already exist in the destination node will be added to the destination node. Permission Levels – the permission levels from the source node will replace that of the destination node. 	<ul style="list-style-type: none"> A new SharePoint object will be created.
Replace	Configuration	<ul style="list-style-type: none"> Site Collection level, Site level or Folder level – Content, configurations and securities of the destination node will be overwritten with that of the source node. Root site level, List/Library level or Root Folder level – All 	<ul style="list-style-type: none"> A new SharePoint object will be created.

		<p>objects under the conflicting container will be deleted and replaced with source content, configurations and securities.</p> <p>*Note: Root site level and Sub-site level are regarded as the same level. This means that if the conflict exists at the Root site level, the sub-site will not be deleted.</p>	
	Security	<ul style="list-style-type: none"> • Conflicting securities on the destination node will be overwritten with that of the source node. 	<ul style="list-style-type: none"> • A new SharePoint object will be created.

Content Level Conflict Resolution

Resolution	Object	Conflict	No Conflict
Skip	Content	<ul style="list-style-type: none"> Ignore the conflicting content and do nothing on source and destination. 	<ul style="list-style-type: none"> A new SharePoint object will be created.
Overwrite	Content	<ul style="list-style-type: none"> Delete the conflicting content on destination first and overwrite it with the source content. 	<ul style="list-style-type: none"> A new SharePoint object will be created.
Overwrite by Last Modified Time	Content	<ul style="list-style-type: none"> If the last modified time of source conflicting content is later than that of destination one, it will overwrite the destination content by source one; otherwise, do nothing on the source and destination node. 	<ul style="list-style-type: none"> A new SharePoint object will be created.
Append	Content	<ul style="list-style-type: none"> The conflicting content will not be deleted; and the conflicting data will be transferred to the destination by adding a suffix (_1, _2,..., increasing in numerical value). 	<ul style="list-style-type: none"> A new SharePoint object will be created.

Appendix B

Supported Online Settings

The following lists the supported settings for Copy and Move jobs between non-Office 365 environments. Note that options which only exist in Move have been marked as (Move Only).

Action	Attach		
	Merge		
Filter Policy			
Select Source Components	Configuration	Copy/Move the item dependent columns and content types to maintain item integrity.	Do not copy/move the columns and content types, or the corresponding items
			Overwrite the columns and content types
			Append the columns and content types to destination
		Do not copy/move the item dependent columns or content types. Report the items if the corresponding column or content type is not found in destination.	
	Security		
	Content	Include list attachment	
User Profile			
Workflow	Include workflow definition		
	Include workflow instance		
Preserve the Null Column Values			
Data Compression			
Data Encryption			
Mappings	Domain Mapping		
	User Mapping		
	Language Mapping		
Source Documents/Items Deleted Method (Move Only)	Manually		
	Automatically		
Delete Source Checked Out Documents (Move Only)			
Backup Environment Before Running Plan	Backup the source environment (Move Only)		
	Backup the destination environment		

Conflict Resolution	Container level conflict resolution	Skip
		Merge
		Replace
	Recursion	
	Content level conflict resolution	Skip
		Overwrite
		Overwrite by Last Modified Time
Append		
Notification		

Supported Offline Settings

The following lists the supported settings for Copy jobs performed for Export and Import.

Export Settings

Filter Policy		
Select Source Components	Content	Include list attachment
	User Profile	
Workflow	Include workflow definition	
	Include workflow instance	
Data Compression		
Data Encryption		
Notification		

Import Settings

Action	Attach	
	Merge	
Conflict Resolution	Container level conflict resolution	Skip
		Merge
		Replace
	Recursion	
	Content level conflict resolution	Skip
		Overwrite
Overwrite by Last Modified Time		
Append		
Select Source Components	Configuration	
	Security	
Workflow	Include workflow definition	
	Include workflow instance	
Preserve the Null Column Values		
Mapping	Domain mappings	
	User mapping	
	Language mapping	
Backup Environment Before Running Plan	Backup the destination environment	
Notification		

Appendix C

Supported Office 365 Settings

The following lists the supported Office 365 settings for Copy and Move jobs. Note that options which only exist in Move have been marked as (Move Only).

Action	Attach		
	Merge		
Filter Policy			
Select Source Components	Configuration	Copy/Move the item dependent columns and content types to maintain item integrity.	Do not copy/move the columns and content types, or the corresponding items
			Overwrite the columns and content types
			Append the columns and content types to destination
		Do not copy/move the item dependent columns or content types. Report the items if the corresponding column or content type is not found in destination.	
	Security		
	Content	Include list attachment	
Preserve the Null Column Values			
Data Compression			
Data Encryption			
Mappings	User mapping	Normal User Mapping	
	Language mapping		
Source Documents/Items Deleted Method <i>(Only for Move)</i>	Manually		
	Automatically		
Delete Source Checked Out Documents (Move Only)			
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