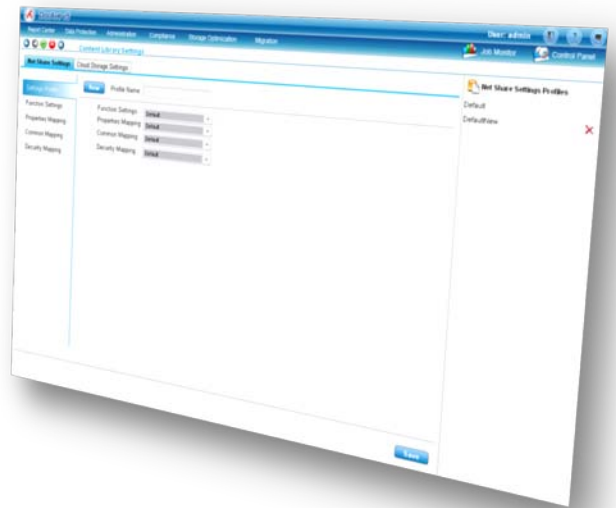


How to Guide

DocAve File Share Connector for MOSS 2007 and SPS 2010

Installing DocAve File Share Connector and Configuring Basic Connector Settings

This document is intended for anyone wishing to familiarize themselves with the initial setup and basic functionality of AvePoint's DocAve File Share Connector for Windows SharePoint Services 2007, Microsoft Office SharePoint Server 2007 and SharePoint Server 2010.



Before You Begin

About This Guide

This guide will walk you through a basic installation and configuration of the DocAve File Share Connector module for your SharePoint environment. This guide is meant only for SharePoint Farm Administrators who have advanced knowledge of SharePoint and wish to connect and manage their data stored in Cloud or Network storage through SharePoint.

DocAve File Share Connector Overview

DocAve File Share Connector allows you to present and collaborate upon network file shares, FTP data sources, and cloud storage resources directly through SharePoint without having to migrate the documents or content in to your SharePoint content databases. Connected content will appear in a dedicated SharePoint document library, and can be leveraged exactly as if it were residing within SharePoint. All of SharePoint's powerful document management functionality, including permissions management, workflows, alerts, and versioning can be applied to the connected content.

Connector System Requirements

Supported Platforms:

- DocAve File Share Connector utilizes EBS/RBS technology and requires SharePoint Server versions which have this capability:
 - Microsoft Office SharePoint
 - Microsoft Office SharePoint Server (MOSS) 2007 (x86 and x64) with Service Pack 1 (or higher)
 - Windows SharePoint Services (WSS) v3 (x86 and x64) with Service Pack 1 (or higher)
 - SharePoint Server 2010 Release Candidate Build 4730.1010 (other versions have not undergone full QA testing)
 - Microsoft Windows Server
 - Windows Server 2003 (x86 and x64)
 - Windows Server 2008 (x86 and x64)
 - Windows Server 2008 R2 (x86 and x64)
 - SQL Server
 - SQL Server 2000 (x86 and x64)
 - SQL Server 2005 (x86 and x64)
 - SQL Server 2008 (x86 and x64)

DocAve Requirements

- The following DocAve Manager Services must be running and properly configured (though it is recommended to run all DocAve Manager services):
 - *DocAve Manager Control Service*
 - *DocAve Manager Web Service*
 - *DocAve Manager Media Service*
- The following DocAve Agent Services must be running and properly configured:
 - *DocAve Agent Connector Service*

Security Permissions

- The account performing the installation must be the farm administrator account.
- The account running the Connector Jobs must have: Read/Write access to the SharePoint Content Database.

Installation and Configuration

DocAve File Share Connector must be enabled from the Agent Configuration tool before it can be configured. This is done either during the DocAve Agent installation, or can be performed later from the DocAve Agent Configuration tool by following the steps below.

Enabling the Connector Module

First, open the *DocAve Agent Configuration* tool:

1. Click the *Start Button > All Programs > AvePoint DocAve 5.4 (or your version) > DocAve Agent Tools > DocAve Agent Configuration*.
2. Under Agent Type, Click the *Storage Optimization* tab.
3. Select the **Connector** checkbox, and the **Content Library** checkbox below it.
4. Click **Confirm**, and close the tool.

Once the DocAve Connector module has been enabled, you must next configure the external storage location profiles for the devices you wish to connect to SharePoint.

Configuring External Storage Settings Profiles

External Storage Settings profiles allow you to customize how the external storage drives will interact with your SharePoint environment, for example how illegal characters in SharePoint are treated or how security permissions are mapped from the file system. These profiles should be configured before connecting any external storage systems to your SharePoint environment; however, the pre-created default profile will suffice for testing purposes.

We will first walk through configuring a Net Share Settings profile, if you are configuring a Cloud Share Settings Profile you may skip to that section below.

Net Share Settings Profile

From the DocAve Welcome Screen:

- 1.) Click *Storage Optimization > Connector > Content Library > Settings*.
- 2.) By default you will be taken to the Net Share Settings tab. From here there are four additional sections to configure: *Function Settings, Properties Mapping, Common Mapping, and Security Mapping*.

After you have configured your desired settings from each of the previous four sections detailed below, you will compile them in to one aggregate *Settings Profile*.

- 3.) Click the *Function Settings* section. Enter in a Profile Name at the top and configure the settings below. Most are self-explanatory, however, more information regarding these options can be found in the DocAve User Guide. Click **Save** to save this Function Settings Profile. It will now be selectable from the *Settings Profile* section.
- 4.) Click the *Properties Mapping* section. Enter in a Profile Name at the top and configure the settings below. Most are self-explanatory, however, more information regarding these options can be found

in the DocAve User Guide. Click **Save** to save this Properties Mapping File. It will now be selectable from the *Settings Profile* section.

- 5.) Click the *Common Mapping* section. Enter in a Profile Name at the top and configure the settings below. Most are self-explanatory, however, more information regarding these options can be found in the DocAve User Guide. Click **Save** to save this Common Mapping file. It will now be selectable from the *Settings Profile* section.
- 6.) Click the *Security Mapping* section. Enter in a Profile Name at the top and configure the settings below. Most are self-explanatory, however, more information regarding these options can be found in the DocAve User Guide. Click **Save** to save this Security Mapping file. It will now be selectable from the *Settings Profile* section.
- 7.) Click the *Settings Profile* tab. Enter in a Profile Name at the top and select a function settings profile, a properties mapping file, a common mapping file, and a security mapping file. Click **Save** to save the Net Share Settings Profile. It will now be selectable when connecting a Net Share drive.

Cloud Storage Settings Profile

From the DocAve Welcome Screen:

- 1.) Click *Storage Optimization > Connector > Content Library > Settings*.
- 2.) Click the Cloud Storage Settings tab.

From here there are two additional sections to configure: *Function Settings* and *Common Mapping*.

After you have configured your desired settings from each of the previous two sections detailed below, you will compile them in to one aggregate *Settings Profile*.

- 3.) Click the *Function Settings* section. Enter in a Profile Name at the top and configure the settings below. Most are self-explanatory, however more information regarding these options can be found in the DocAve User Guide. Click **Save** to save this Function Settings Profile. It will now be selectable from the *Settings Profile* section.
- 4.) Click the *Common Mapping* section. Enter in a Profile Name at the top and configure the settings below. Most are self-explanatory, however more information regarding these options can be found in the DocAve User Guide. Click **Save** to save this Common Mapping file. It will now be selectable from the *Settings Profile* section.
- 5.) Click the *Settings Profile* tab. Enter in a Profile Name at the top and select a function settings profile, a properties mapping file, a common mapping file, and a security mapping file. Click **Save** to save the Net Share Settings Profile. It will now be selectable when connecting a Cloud Storage drive.

After you have configured your external storage location profiles, you may now install the File Share Connector for any SharePoint web application through the DocAve Interface.


Installing the File Share Connector Module

From the DocAve Welcome Screen:

1. Click *Storage Optimization > Connector > Content Library > Installer*.

2. Select your farm from the column on the left. This will populate the *Install Connector* column with the web applications in this farm.
3. Click the **Install Feature** button. DocAve will install the Connector module to be available across each of the web applications in your farm. Click the **OK** button once the installation has completed.
4. (DocAve 5.4) You may optionally click the **Configure** button under *Net Share Server Configuration* and enter in the connection information to any Net Share Drives you will set up content libraries for. Click **Save** after you have completed entering a profile, and close out the window when you have added profiles for each of the net share servers you plan to connect to.
5. Click the **Activate** button in the *Active Feature* column for each Web Application that you wish to enable the File Share Connector for.
6. After you have activated the File Share Connector for a web application, you must configure it by clicking the **Configure** button under the *Connector Type* column.

Select to enable a Net Share drive, a Cloud Storage drive, or both for this web application by checking the corresponding checkboxes. You must also specify a previously configured Settings Profile that each should use in their connection. Click the **Apply** button when finished.

7. If any file share content management will be performed outside of SharePoint, it is recommended that you schedule a sync data interval by clicking the clock icon  in the *Sync Data* column.

(SharePoint is unable to track events not initiated by SharePoint, for example file changes initiated in the file system or items being deleted in the cloud. By syncing data on a regular interval you will ensure that SharePoint is working with up to date information.)

Configuration for the DocAve File Share Connector is now complete. You can now create special content libraries in SharePoint that can host their content externally.

Creating a Connected Content Library in SharePoint

From your SharePoint Site Home Screen:

1. Click *Site Actions > Create*.
2. Under the *Libraries* column, select **Content Library**.
3. Configure the New Content Library settings.

Most of these settings are the same as a typical document library, however in the *Content Library Template* row, specify whether you wish to connect a Net Share drive, a Cloud Storage drive, or a Net Share drive with Window Media Service enabled.

4. Click the **Create** button.

Configure the Connected Content Library Settings

The next screen will allow you to specify the location and login credentials for the type of drive specified. We will first walk through configuring a Net Share Drive, if you are configuring a Cloud Share drive, you may skip to that section below.

Net Share Settings

1. If you configured a server profile from the DocAve interface, you may select the **Use Server Profiles** Checkbox.

Select the desired profile from the drop-down box that appears, complete the path to where the documents resides on that server, and enter in a domain\username and password to connect to that location.

2. If you did not configure server profiles from the DocAve interface, enter in the desired server path, and a domain\username and password to connect to that location.
3. Configure the remaining Content Library settings:
 - *Basic Load Configuration*: If selected, uploads the root folder. This will connect all of the current documents housed in the Net Share Storage device to SharePoint, if this option is left unselected, only newly uploaded documents will be displayed in SharePoint.
 - *Load Permission from File System*: If selected, the permissions set in the file system will override the permissions given to SharePoint users.
 - *Load Metadata from File System*: If selected, loads any metadata found in the file system.
 - *Keep Name Consistent*: If selected, renames the SharePoint folder to match the Net Share folder name.
4. Click the **Save** button to complete the configuration.

DocAve will automatically store any new files uploaded to this library in the specified Net Share folder. If the connection profile you specified in DocAve for this web application includes a data sync interval, it will also continue to re-sync the data at that interval.

Cloud Storage Settings

1. Enter your desired container name and the username and API key given by your cloud service provider.
2. Select the Content Library Permission Settings.
3. Configure the remaining Content Library settings:
 - *Basic Load Configuration*: If selected, uploads the root folder. This will connect all of the current documents housed in the Net Share Storage device to SharePoint, if this option is left unselected, only newly uploaded documents will be displayed in SharePoint.
 - *File Load Limited Number*: If selected, you may specify the maximum number of sub folders and files to upload per load operation.

- *Keep Name Consistent*: If selected, renames the SharePoint folder to match the Net Share folder name.

4. Click the **Save** button to complete the configuration.

DocAve will automatically store any new files uploaded to this location in the specified Cloud Storage location. If the connection profile you specified in DocAve for this web application includes a data sync interval, it will also continue to re-sync the data at that interval.

Congratulations!

You have now connected an external content library to your SharePoint environment. To help manage this, and other infrastructure concerns, please visit www.avepoint.com/products for more information.

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