



DocAve® 6.0.1

Installation Guide

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About the Installation Guide

The DocAve 6 Installation Guide will provide you the following information:

- Order of installation
- System Requirements (Minimum standards to proceed with the installation.)
- System Recommendations (Recommended standards for improved performance.)

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

***Note:** On a server running Windows Server 2003 or Windows Server 2003 R2, before you install DocAve Manager using the Built-in database, Windows Installer 4.5 must be installed first. Refer to the link below to download and install Windows Installer 4.5 prior to installing DocAve 6 Manager:

<http://www.microsoft.com/download/en/details.aspx?id=8483>

DocAve Manager System Requirements

DocAve Manager consists of three services, Control Service, Media Service and Report Service. They can either be run on the same server as your DocAve Agent, or split across several servers.

While it is possible to have the DocAve Manager and DocAve Agent on a single server, it is not recommended. For the best performance, install the Manager's services across multiple servers, and install only the necessary Agents on the Agent servers.

Refer to these tables for the system requirements of each DocAve Manager service:

- System Requirements for Control Service Installation
- System Requirements for Media Service Installation
- System Requirements for Report Service Installation

***Note:** If all Manager services are installed on the same server, all the system requirements mentioned in the [System Requirements for Control Service Installation](#) section must be met. Moreover, the required physical memory is 1.5 GB. The recommended physical memory is 2 GB. The available disk space must be at least 1GB.

System Requirements for Control Service Installation

	Rules	Requirements
Operating System Edition: Windows Server 2008, Windows Server 2008 R2, Windows 7	Total Physical Memory	Required: 512MB or above Recommended: 2GB
	Available Disk Space	Required: 1GB or above
	.Net Framework Version	.NET Framework 3.5 SP1 or above (excluding .NET Framework 4.0)
	.Net Framework Features	The Windows features, including WCF Activation, HTTP Activation and Non-HTTP Activation must be installed
	Net.Tcp Port Sharing Service	Net.Tcp Port Sharing Service is started
	Windows Process Activation Service	<ul style="list-style-type: none"> • Windows Process Activation Service is started • Process Model, .NET Environment and Configuration APIs are installed
	World Wide Web Publishing Service	World Wide Web Publishing Service is started
	Web Server(IIS) Role	Windows features installed: <ul style="list-style-type: none"> • Web Server • Common HTTP Features (Static Content, Default Document) • Application Development (ASP.NET, .NET Extensibility, ISAPI Extensions and ISAPI Filters) • Management Tools (IIS Management Console, IIS 6 Management Compatibility and IIS 6 Metabase Compatibility)
	PowerShell Version	PowerShell 2.0 or above
Operating System Edition: Windows Server 2003, Windows Server 2003 R2	Total Physical Memory	Required: 512MB or above Recommended: 2GB
	Available Disk Space	Required: 1GB or above
	.Net Framework Version	.NET Framework 3.5 SP1 or above (excluding .NET Framework 4.0)
	Net.Tcp Port Sharing Service	Net.Tcp Port Sharing Service is started
	World Wide Web Publishing Service	World Wide Web Publishing Service is started
	ASP.NET	ASP .Net 2.0.50727 or above

	Application Server	<ul style="list-style-type: none"> • Network COM+ access is enabled. • Internet Information Services (IIS) is started, including the following installed features: <ul style="list-style-type: none"> ○ Common Files ○ IIS Manager ○ World Wide Web Service
	IIS Service	IIS Admin Service is started
	HTTP SSL	HTTP SSL Service is started
	PowerShell Version	PowerShell 2.0 or above

System Requirements for Media Service Installation

Rules		Requirements
Operating System Edition: Windows Server 2003, Windows Server 2003 R2, Windows Server 2008, Windows Server 2008 R2, Windows 7	Total Physical Memory	Required: 512MB or above Recommended: 2GB
	Available Disk Space	Required: 1GB or above
	.NET Framework Version	.NET Framework 3.5 SP1 or above (excluding .NET Framework 4.0)
	.Net Framework Features (only in Windows Server 2008, Windows Server 2008 R2, Windows 7 environments)	The Windows features, including WCF Activation, HTTP Activation and Non-HTTP Activation are installed
	Net.Tcp Port Sharing Service	Net.Tcp Port Sharing Service is started
	PowerShell Version	PowerShell 2.0 or above

System Requirements for Report Service Installation

Rules		Requirements
Operating System Edition: Windows Server 2003, Windows Server 2003 R2, Windows Server 2008, Windows Server 2008 R2, Windows 7	Total Physical Memory	Required: 512MB or above Recommended: 2GB
	Available Disk Space	Required: 1GB or above
	.NET Framework Version	.NET Framework 3.5 SP1 or above (excluding .NET Framework 4.0)
	.Net Framework Features (only in Windows Server 2008, Windows Server 2008 R2,	The Windows features, including WCF Activation, HTTP Activation and Non-HTTP Activation are installed

	Windows 7 environments)	
	Net. Tcp Port Sharing Service	Net. Tcp Port Sharing Service is started
	PowerShell Version	PowerShell 2.0 or above

DocAve Agent System Requirements

DocAve Agent has one service, DocAve Agent Service. The DocAve Agent can be installed on different machines according to the role of the machine and the DocAve modules and functions you wish to use. For more information on where to install the DocAve Agents, refer to the [Where to Install DocAve Agent](#) section of this guide.

System Requirements for Agent Service Installation

Rules		Requirements
Operating System Edition: Windows Server 2003, Windows Server 2003 R2, Windows Server 2008, Windows Server 2008 R2, Windows 7	Total Physical Memory	Required: 512MB or above Recommended: 2GB
	Available Disk Space	Required: 1GB or above
	.NET Framework Version	.NET Framework 3.5 SP1 or above (excluding .NET Framework 4.0)
	.Net Framework Features (only in Windows Server 2008, Windows Server 2008 R2, Windows 7 environments)	The Windows features, including WCF Activation, HTTP Activation and Non-HTTP Activation are installed
	Net.Tcp Port Sharing Service	Net.Tcp Port Sharing Service is started
	PowerShell Version	PowerShell 2.0 or above

Installing DocAve

The DocAve Installation Wizard is there to guide you through the installation process. By following the steps below, you will have DocAve up-and-running on your environment very quickly. In order to complete the installation successfully, a local administrator must be used to run the Installation Wizard.

***Note:** Install DocAve in the following order:

1. Install the DocAve Manager with the Manager Installation Wizard.
2. Install the DocAve Agents with the Agent Installation Wizard
3. Log in to DocAve to make sure the Manager and Agent are able to communicate with each other properly.

DocAve Manager

Make sure the system requirements are met before starting installation for DocAve Manager. For more information, refer to the [System Requirements for Control Service Installation](#), [System Requirements for Media Service Installation](#) and [System Requirements for Report Service Installation](#) sections of this guide.

***Note:** When running the Manager Installation Wizard on the server running Windows Server 2003/Windows Server 2003 R2, make sure the Windows components are not being added or removed during the rule scanning, otherwise, the scanning result will be affected.

***Note:** When running the Manager Installation Wizard on the server running Windows Server 2008/Windows Server 2008 R2/Windows 7, make sure the Server Manager is not being used to add or remove Windows features during the rule scanning, otherwise, the scanning result will be affected.

Installing the DocAve Manager

Follow the steps below to install the DocAve Manager.

1. Download the Manager ZIP file, either by requesting a demo version from: <http://www.avepoint.com/download/>, or by contacting an AvePoint representative for links to this package.
2. Unzip this package. Open this unpacked DocAve Manager directory. Double click the *Setup.exe* file.
3. After the welcome screen appears, click **Next**.
4. Enter your name and the organization into the provided field. Click **Next**.
5. Carefully review the Software License Agreement. After you have read the agreement, check the **I accept the terms in the license agreement** checkbox, and click **Next**.

6. Click the **Browse** button. Select the location for the Manager installation. By default, the installation location is *C:\Program Files\AvePoint*. Click **Next**.
 7. Select the DocAve Manager services you want to install. There are two installation methods you can select, **Complete** or **Advanced**.
 - Complete – It will install all the services on one machine.
 - Advanced – It will only install the service(s) you select. Select the service(s) you want to install by checking the corresponding checkbox(es). There are three services you can install.
 - Control Service – Manage all DocAve operations and achieve the web-based DocAve platform, allowing users to interact with the software. All agents can communicate with the manager by Control Service, so it is imperative that the machine you install the control service on is accessible by all agent machines. This service can be run on a server cluster to ensure high availability; if the control service were to go down, a standby service in the cluster would be enabled by an administrator. For more information, refer to the [DocAve Control Service High Availability](#) section of this guide.
 - Media Service – Performs assistant jobs such as managing the retention rules and managing the backup job data. This service can be installed on multiple machines. Using multiple media services allows for high availability and load-balanced access to the data storage locations.
 - Report Service – Manage all SharePoint data collection and management, monitor SharePoint activities and return the data to the Control Service for processing. This must be configured with the associated SQL databases and SQL Report Services. This service is critical for using the DocAve Report Center module.
- *Note:** DocAve 6 only supports to install one DocAve Report service and does not support the load balance installation of DocAve Report service.

Click **Next**.

8. DocAve will perform a brief pre-scan of the environment to ensure that all rules meet the requirements. The status for each rule will be listed in the Status column. Click the hyperlink of the status, the detailed information about the scan result will be listed in the popup window. You may click **Details** to can view the detailed information of all the requirements.

If any rules have failed the pre-scan, update your environment to meet the requirements, then click the **Rescan** button to check your environment again. Once all rules pass, click **Next**.

9. Set up the Control Service Configuration:
 - Control Service Host – Specify the current machine’s hostname or IP address. The Control Service manages internal configuration data, user access control, scheduling, and job monitoring.
 - IIS Web Site Settings – Configure the IIS web site settings for the Control Service. You can select to use an existing IIS web site or create a new IIS web site. The IIS web site is used to access DocAve Manager.

- **Use an existing IIS web site** – Select an existing IIS web site from the drop-down list, and if necessary, you can adjust the **Web Site Port** used to access the DocAve Control Service.
- **Create a new IIS web site** – Enter the web site name and create a new IIS web site for the Control Service. The default **Web Site Port** used to access DocAve Control Service is 14000, you do not need to change it unless a known port conflict exists.
- **Web Site Port** – Control Service communication port. The default port is 14000.
- Application Pool Settings – Configure the IIS application pool settings for the corresponding web site. You can select to use an existing application pool or create a new application pool. The application pool is used to handle the requests sent to the corresponding web site.
 - **Use an existing application pool (not recommended)** – Select an existing application pool from the drop-down list. If you choose to use an existing application pool, the Application Pool Account settings are greyed out and cannot be changed.
 - **Create a new application pool** – Enter the application pool name and application pool account settings to create a new IIS application pool for the corresponding web site.

***Note:** The application pool account for connecting an existing IIS web site or creating a new IIS web site must have the following **Local System Permissions:**

- Member of the following local group:
 - IIS_WPG (for IIS 6.0) or
 - IIS_IUSRS (for IIS 7.0)
 - Full control to HKEY_LOCAL_MACHINE\SOFTWARE\AvePoint
 - Full control to DocAve Manager folder
 - Member of the Performance Monitor Users group
 - Full control to DocAve Certificate private keys
 - Full Control (or Read, Write, Modify and Delete) to C:\WINDOWS\Temp (only for Windows 2003 environment)

You can add the application pool account to the local Administrators group to meet the required permissions.

***Note:** The following application pool settings are required by DocAve Manager Installation no matter you choose to use an existing application pool or create a new one.

IIS Version	IIS Setting	Value	Note
IIS7	Advanced Settings	v2.0 / v4.0	No Managed Code is not

> General > .NET Framework Version		supported.
Advanced Settings > General > Enable 32-bit Applications	False	False is required since DocAve must load some third-party dlls which are 64-bit ones.
Advanced Settings > General > Managed Pipeline Mode	Integrated / Classic	It is not supported to use Classic together with .NET Framework v4.0 .
Process Model > Load User Profile	True	True is required by DocAve SSO, and False is not supported.
Advanced Settings > General > Start Automatically	True / False	True is strongly recommended because if you set the value to False , the application pool requires manual starting up.

Click **Next** to continue to configure the database settings for Control Service.

10. Select the Database Type from the drop-down list. The available options are **MS SQL** or **Built-in Database**.

- For the MS SQL database, the following information must be configured:
 - Database Server – The MS SQL server name.
 - Control Service Database Name – Enter a database name for the Control Service, if the database does not exist, it will be created in the provided MS SQL server.
 - Database Credentials – Select the credential for this control service database.
 - **Windows Authentication** (the default option) – Use this method when you want the user identity to be confirmed by Windows.
 - **SQL Authentication** – SQL server will confirm the user identity itself according to the specified account and password. The specified account must have the following permission: DB Owner of the existing DocAve 6 control database or DB Creator of the newly created DocAve 6 control database.
 - Advanced Database Settings – You can choose to associate the DocAve Control database with a specific failover SQL server that is used in conjunction with SQL Server database mirroring.
- For Built-in Database, there is no further configuration for it, you can go to the next step directly.

***Note:** The built-in database only supports the all-in-one installation. After the Manager installation completes, it cannot be changed using the **Change** function.

Click **Next**.

11. Set up the Media Service Configuration.

- Media Service Host – Specify the current machine’s hostname or IP address. The Media Service manages backup job data (for example, job metadata and backup index from Data Protection).
- Media Service Port – Media service control messages and backup data transfer port. The default port is 14001.
- Media Service Data Port – Transmit the data between DocAve and the storage device. The default port is 14002.
- Control Service Host – The hostname or IP address of the machine where Control service is installed.
- Control Service Port – The port number for the Control Service entered above.

***Note:** The Control Service Host and Control Service Port must be consistent across all DocAve Manager Services in order to properly function.

Click **Next**.

12. Set up the Report Service Configuration.

- Report Service Host – The hostname or IP address of the machine where Report Service is installed.
- Report Service Port – The port number for Report Service. The default port is 14003.
- Control Service Host – The hostname or IP address of the machine where Control service is installed.
- Control Service Port – The port number for the Control Service entered above.
- Report Service Account – Enter the username and password for Report Service in the provided fields. This account is used to register Report Service.

***Note:** The Control Service Host and Control Service Port must be consistent across all DocAve manager services in order to properly function.

Click **Next** to continue to configure the database settings for Report Service.

13. For the report service database, you can select to use the previous database settings or configure it yourself:

- **Use the previous database settings** – If you select this option, the previous database settings for Control database will be used for the report database.

To set a database for report service only, the following information must be configured.

- Select the database type from the drop-down list, now only MS SQL can be selected.
 - Database Server – The MS SQL server name.

- Report Service Database Name – Enter a database name for the Report Service, if the database does not exist, it will be created in the provided MS SQL server.
- Database Credentials – Select the credential for this report service database.
 - **Windows Authentication** (the default option) – Use this method when you want the user identity to be confirmed by Windows.
 - **SQL Authentication** – SQL server will confirm the user identity itself according to the specified account and password. The specified account must have the following permission: DB Owner of the existing DocAve 6 report service database or DB Creator of the newly created DocAve 6 report service database.
- Advanced Database Settings – You can choose to associate the DocAve Report database with a specific failover SQL server that is used in conjunction with SQL Server database mirroring.

Click **Next** to continue to configure the Auditor database settings for Report Service.

14. For the Auditor database, you can select to use the previous database settings or configure it by yourself.

- **Use the previous database settings** – If you select this option, the previous database server for Control Service will be used for the auditor database.

To set an auditor database for report service only, the following information must be configured.

- Select the database type from the drop-down list, now only MS SQL can be selected.
 - Database Server – The MS SQL server name.

***Note:** It is recommended creating the DocAve Auditor database on a different SQL server other than the SQL server which stores the SharePoint databases.

If you put the DocAve Auditor database and SharePoint database on the same SQL Server, as the SharePoint Auditor data grows, large amount of disk space of the SQL Server machine will be occupied when DocAve Compliance Reports fetches data from SharePoint Auditor database and stores it to DocAve Auditor database. Thus the response of both SQL Server and SharePoint will become slow.

- Auditor Database Name – Enter a database name for the Auditor database, if the database does not exist, it will be created in the provided MS SQL server.
- Database Credentials – Select the credential for this Auditor database.
 - Windows Authentication (the default option) – Use this method when you want the user identity to be confirmed by Windows.
 - SQL Authentication – SQL server will confirm the user identity itself according to the specified account and password. The specified account must have the following permission: DB Owner of the existing DocAve 6

auditor database or DB Creator of the newly created DocAve 6 auditor database.

- Advanced Database Settings – You can choose to associate the DocAve Auditor database with a specific failover SQL server that is used in conjunction with SQL Server database mirroring.

Click **Next**.

15. Set up the Advanced Configuration.

- SSL Certification – Specify the method about encrypting information and providing authentication for DocAve you want to use.
 - Build-in Certificate – Uses the certificate provided by DocAve. No additional configuration is necessary.
 - User-defined Certificate

Click **Next**.

16. In the Ready to install DocAve Manager page, all of the information configured in the previous steps is listed. Click **Install** to begin the installation. Click **Back** to change any of the previous settings. Click **Cancel** to abandon all configurations and exit the installation wizard.

17. When the Manager installation is completed, the Manager Passphrase which is used to protect DocAve Manager data, will be generated automatically. Save this passphrase as you need to enter it for the agent installation.

After the installation is complete, click **Finish** to exit the installation wizard.

DocAve Control Service High Availability

DocAve Control service high availability can be achieved by installing multiple DocAve Control services on several servers using the same Control Service database.

- If you installed DocAve Control service on each server of the Windows Network Load Balance environment, the high availability of DocAve Control service will be performed automatically by Windows operating system.
- Before using the DocAve Control Service high availability in this case, make sure the following requirements are met:
 - Enter the hostname or IP address of each server when installing DocAve Control service.
 - Use the public IP address when installing other DocAve Manager service(s)
 - Use the public IP address when accessing DocAve.
- If you installed DocAve Control service on several separated servers, the high availability of DocAve Control service must be performed manually. When accessing DocAve, you must choose the most available DocAve Control service to connect to.

***Note:** A **Report Location** must be configured in Job Monitor before you can use the Log Manager and Job Monitor when DocAve Control Service High Availability is used. For more information, refer to the [DocAve 6 Job Monitor Reference Guide](#).

DocAve Agent

Make sure the system requirements are met before starting the DocAve Agent installation. For more information, refer to the [System Requirements for Agent Service Installation](#) section of this guide.

Check that the DocAve Manage services have started before installing the DocAve Agents.

Where to Install DocAve Agent

Refer to the table below for the detailed places to install DocAve Agents in order to use each product of the DocAve platform.

The specified places to install DocAve Agents are the basic requirements to make all of the functions and configurations of each product available.

All of the installed DocAve Agents must be properly licensed in the modules and functions you want to use.

Product Suites	Product	Detailed Places to Install DocAve Agents
Data Protection	Granular Backup & Restore	DocAve Agent must be installed on at least one of the Front-end Web servers.
	Platform Backup & Restore	DocAve Agent must be installed on the following servers: <ul style="list-style-type: none"> • The SharePoint Central Administration server • The Search Service Application server where you want to back up the components of the specified Search Service Application. • The SharePoint Foundation (Help) Search server where you want to back up the components of the SharePoint Foundation (Help) Search. • Each SharePoint server where you want to back up the following object(s): IIS Settings, SharePoint Hive, Global Assembly Cache, Custom Features, SharePoint Site Definitions and Extra File System Folders. • Each FAST Search server where you want to back up the FAST Search server settings • The server with Microsoft SQL Server installed • Each node of Microsoft SQL Cluster
Administration	Central Admin	DocAve Agent must be installed on at least one of the Front-end Web servers.
	Content Manager	
	Deployment Manager	

	Replicator	DocAve Agent must be installed on at least one of the Front-end Web servers. *Note: If you want to use Realtime Replication, DocAve Agents must be installed on all the Front-end Web servers.
Report Center		DocAve Agents must be installed on all the Front-end Web servers.
Storage Optimization	Realtime/Scheduled Storage Manager(In RBS environment)	<ul style="list-style-type: none"> • DocAve Agents must be installed on all the Front-end Web servers. • DocAve Agent must be installed on the server which installs the Office Web App service. <p>Office Web App service includes Word Viewing Service Application, PowerPoint Service Application and Excel Calculation Services.</p> <ul style="list-style-type: none"> • DocAve Agent must be installed on the server which installs the SQL Reporting Service.
	Realtime/Scheduled Storage Manager(In EBS environment)	<ul style="list-style-type: none"> • DocAve Agents must be installed on the SharePoint Central Administration server and all the Front-end Web servers. • DocAve Agent must be installed on the server which installs the Office Web App service. <p>Office Web App service includes Word Viewing Service Application, PowerPoint Service Application and Excel Calculation Services.</p> <ul style="list-style-type: none"> • DocAve Agent must be installed on the server which installs the SQL Reporting Service.
	Connector(In RBS environment)	<ul style="list-style-type: none"> • DocAve Agents must be installed on all the Front-end Web servers. • DocAve Agent must be installed on the server which installs the Office Web App service. <p>Office Web App service includes Word Viewing Service Application, PowerPoint Service Application and Excel Calculation Services.</p> <ul style="list-style-type: none"> • DocAve Agent must be installed on the server which installs the SQL Reporting Service.

	Connector(In EBS environment)	<ul style="list-style-type: none"> • DocAve Agents must be installed on the SharePoint Central Administration server and all the Front-end Web servers. • DocAve Agent must be installed on the server which installs the Office Web App service. Office Web App service includes Word Viewing Service Application, PowerPoint Service Application and Excel Calculation Services. • DocAve Agent must be installed on the server which installs the SQL Reporting Service.
	Archiver	DocAve Agent must be installed on at least one of the Front-end Web servers.

Installing DocAve Agents

After the Manager's services have started, follow the steps below to install the DocAve Agent.

1. Download the Agent ZIP file, either by requesting a demo version from: <http://www.avepoint.com/download/>, or by contacting an AvePoint representative for links to this package.
2. Unzip this package. Open this unpacked DocAve Agent directory. Double click the *Setup.exe* file.
3. After being presented with the welcome screen, click **Next**.
4. Enter your name and the organization into the provided field. Click **Next**.
5. Carefully review the Software License Agreement.

After you have read the terms in the license agreement, check the **I accept the terms in the license agreement** checkbox, then click **Next**.

6. Click the **Browse** button. Select the location for the Agent installation. By default, the installation location is *C:\Program Files\AvePoint*. Click **Next**.
7. Set up the Communication Configuration.
 - DocAve Agent Address – Specify the current server's hostname, IP address or fully qualified domain name (FQDN).
 - DocAve Agent Port – The port specified here is used by the Manager or other Agents for communication. The default port number is 14004.
 - Control Service Name – The hostname or IP address of the machine where installed Control service.
 - Control Service Port – This is the port used for communication with Control Service and should match the information provided during the Manager configuration. The default port number is 14000.
 - Advanced Configuration – Specify the SSL Certification used for the specified DocAve Manager.

Click **Next**.

8. Set up the Agent Configuration:

- Agent Authentication – Specify the Manager Passphrase generated when completing the DocAve Manager installation. If you forget the passphrase, you can view it by navigating to **DocAve > Control Panel > General System Settings > System Options > Security Settings**. For more information, refer to the [DocAve 6 Control Panel Reference Guide](#).
- Agent Account – Specify the Agent account under which the Agent activities are performed. The detailed permissions are as follows:

Local System Permissions

- Member of the following groups
 - IIS_WPG (for IIS6.0) or IIS_IUSRS (for IIS7)
 - Administrators
 - Performance Monitor Users
 - DocAve Users(The group is created by DocAve automatically and 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 of DocAve Agent installation directory
- **SharePoint Permissions**
 - Member of the Farm Administrators group
 - Full Control permission to all zones of all web applications via User Policy for Web Applications
 - User Profile Service:
 - User Personal Features
 - Create Personal Site
 - Use Social Features
 - Managed Metadata Service: Term Store Administrator
 - Business Data Connectivity Service: Full Control

- Search Service: Full Control
- **SQL Server Permissions**
 - Database Role of db_owner for all the databases related with SharePoint, including content databases, SharePoint configuration database and Central Admin database.
 - Database Role of dbcreator and Security Admin to SQL Server.

Click **Next**.

9. DocAve will perform a brief pre-scan of the environment to ensure that all rules meet the requirements. The status for each rule will be listed in the Status column. Click the hyperlink of the status, the detailed information about the scan result will be listed in the popup window.

Click **Details** and you can view the detailed information of all the requirements.

Update your environment to meet the requirements if there are some rules checked failed. Click the **Rescan** button to check your environment again.

Once all rules pass, click **Next**.

10. In the Ready to install DocAve Agent Page, all of the information you configured in the previous steps is displayed here. Click **Install** to begin the installation. Click **Back** to change any of the previous settings. Click **Cancel** to abandon all configurations and exit the installation wizard.
11. After the installation is complete, click **Finish** to exit the installation wizard.

Congratulations! DocAve is now installed and configured, once you have completed the product installation, you can begin to configure logical and physical devices needed to store backup data.

Unattended Installation

The DocAve Agent can be installed remotely using the unattended installation after the Manager's services have started.

Make sure the system requirements are met before starting the DocAve Agent unattended installation. For more information, refer to the [System Requirements for Agent Service Installation](#) section of this guide.

For more information on where to install the DocAve Agents, refer to section [Where to Install DocAve Agent](#).

Generating the Installation Answer File

The Answer file is an XML file which provides required configuration information in the unattended installation. Before performing the unattended installation, the Answer file must be generated using the DocAve 6 Setup Manager.

Navigate to the ...*UnattendedInstall*\SetupManager folder inside the unzipped Manager installation package, and double click *SetupManager.exe* to run it. You will be guided through the following steps.

1. After being presented with the welcome screen, click **Next**.
2. Set up the options for creating the Answer file. In this case, we select to create a new answer file.
 - Create a new answer file – Create a new answer file. You must enter all of the required information in the corresponding areas. Use this option if you want to create a new answer file.
 - Modify an existing answer file – Modify an existing answer file. If select this option, the path field will be enabled. You can enter the path where the answer file is or click **Browse** to browse for the specified answer file. The path entered must be detailed to the name of the answer file. For example, C:\AnswerFile.xml. Use this option to reuse an existing answer file.


***Note:** It is recommended creating a common Answer file which can be reused later after some modifications.

Click **Next**.

3. Carefully review the Software License Agreement.

After you have read the terms in the license agreement, click on the check-box to select **I accept the terms in the license agreement**. Click **Next**.

4. Enter your name and the organization into the provided field. Click **Next**.
5. Set up the installation location using the following conditions.
 - Default Directory – The DocAve Agent will be installed to the default installation location on the specified server, which is ...*AvePoint*\DocAve6\Agent.
 - Customized Directory – If select this option, the **Installation Path** field will be enabled, enter a customized path and the DocAve Agent will be installed to the specified path.
 - Use the default directory if your customized directory is invalid – If this option is selected, the DocAve Agent will be installed to the default directory when the customized directory is invalid. For example, the path you specified is on a drive which does not exist on the destination server.
6. Set up the Control Service configuration:
 - DocAve 6 Control Service Host – The hostname or IP address of the machine where installed Control service.

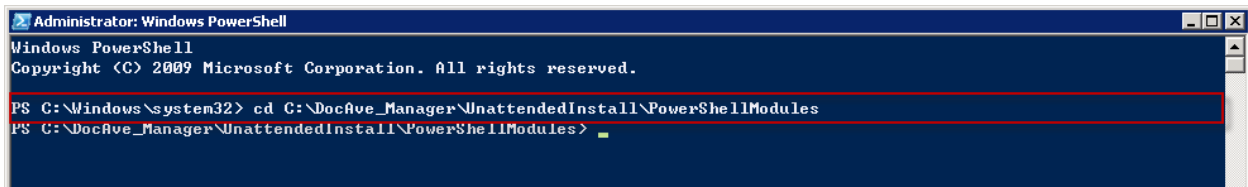
- DocAve 6 Control Service Port – This is the port used for communication with Control Service and should match the information provided during the Manager configuration. The default port number is 14000.
7. Set up the Agent port:
 - DocAve 6 Agent Port – The port specified here is used by the Manager or other Agents for communication. The default port number is 14004.
 - Use a random port number if the specified one is being used – If select this option, DocAve will use a random port number if the port you specified has already been used. This option is selected by default.
 8. Specify the SSL Certification used for the specified DocAve Manager.
 9. Set up the Agent configuration:
 - Manager Passphrase – Enter the Manager Passphrase generated when completing the DocAve Manager installation.
 - DocAve Agent Account – Specify the username and password of the Agent account under which the Agent activities are performed. Refer to [Agent Account](#) for the detailed permissions required for this account.
 10. Review the configuration, if the configuration is marked with , you must provide the required information before this Answer file can be saved.
 11. Once all the required information has been configured, click **Save**, and specify the path you want to save the Answer file to. You can also modify the Answer file's name in the pop-up window.

Perform the DocAve Agent Unattended Installation

Import the UnattendedInstallation.dll File

Before performing the DocAve Agent unattended installation, the UnattendedInstallation.dll file must be imported using either of the two methods below.

- To manually import the UnattendedInstallation.dll file, complete the steps below.
 1. Click **Start**, and find Windows PowerShell. Right click on it, and select **Run as administrator** to run it.
 2. Change the current directory to the ...*UnattendedInstall*\PowerShellModules folder

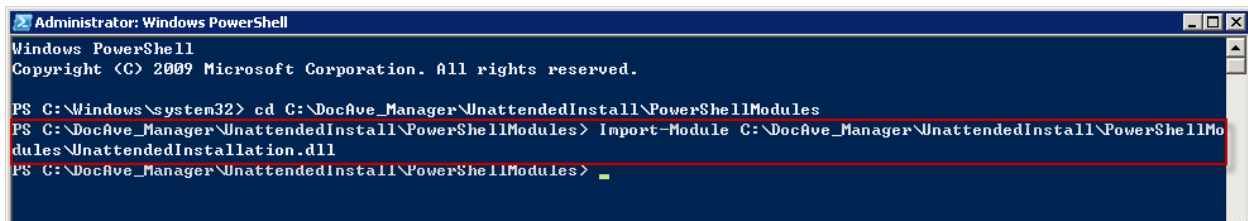


```
Administrator: Windows PowerShell
Windows PowerShell
Copyright (C) 2009 Microsoft Corporation. All rights reserved.

PS C:\Windows\system32> cd C:\DocAve_Manager\UnattendedInstall\PowerShellModules
PS C:\DocAve_Manager\UnattendedInstall\PowerShellModules> █
```

inside the unzipped Manager installation package.

3. Enter the following command, and press **Enter** to import the UnattendedInstallation.dll file:



```
Administrator: Windows PowerShell
Windows PowerShell
Copyright (C) 2009 Microsoft Corporation. All rights reserved.

PS C:\Windows\system32> cd C:\DocAve_Manager\UnattendedInstall\PowerShellModules
PS C:\DocAve_Manager\UnattendedInstall\PowerShellModules> Import-Module C:\DocAve_Manager\UnattendedInstall\PowerShellModules\UnattendedInstallation.dll
PS C:\DocAve_Manager\UnattendedInstall\PowerShellModules> █
```

*Import-Module ...*UnattendedInstall*\PowerShellModules\UnattendedInstallation.dll*

- To automatically import the UnattendedInstallation.dll file, navigate to the ...*UnattendedInstall*\PowerShellModules folder inside the unzipped Manager installation package. Right click on the *UnattendedInstallationLauncher.bat* file, and select **Run as administrator** to run it.
- *Note:** Make sure the Execution Policy is set to *RemoteSigned*. If the UnattendedInstallationLauncher.bat file still could not run with the exception displayed in the screenshot below, change the Execution Policy to *Unrestricted*. The commands are:

Set-ExecutionPolicy *RemoteSigned*

Set-ExecutionPolicy Unrestricted

Now you can run the DocAve Agent unattended installation command in the opened Windows PowerShell window. For the detailed information of each parameter in the command, refer to the [Command Parameters of DocAve Agent Unattended Installation](#) section of this guide.

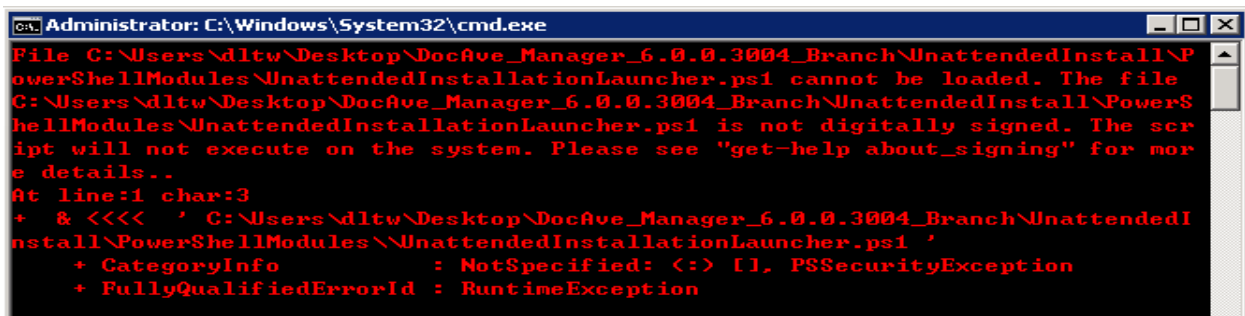
Command Parameters of DocAve Agent Unattended Installation

The DocAve Agent Unattended Installation command is Install-DocAveAgent. For example:

```
Install-DocAveAgent -TargetName 10.0.0.1 -Username AvePoint\DocAve -Password 'Ave' -  
PackageFilesFolder "C:\DocAve_Agent" -AnswerFilePath "C:\AnswerFile.xml" -RemoteTempPath  
"C:\TempFolder"
```

The detailed information of the parameters is listed below:

Parameter	Type	Description
-TargetName	Required	The name or IP address of the destination machine where you want to install the DocAve Agent. *Note: If the hostname is used, ensure that the specified computer name can be resolved through the local Hosts file, by using Domain Name System (DNS) queries, or through NetBIOS name resolution techniques.



```
Administrator: C:\Windows\System32\cmd.exe  
File C:\Users\dltw\Desktop\DocAve_Manager_6.0.0.3004_Branch\UnattendedInstall\PowerShellModules\UnattendedInstallationLauncher.ps1 cannot be loaded. The file C:\Users\dltw\Desktop\DocAve_Manager_6.0.0.3004_Branch\UnattendedInstall\PowerShellModules\UnattendedInstallationLauncher.ps1 is not digitally signed. The script will not execute on the system. Please see "get-help about_signing" for more details..  
At line:1 char:3  
+ & <<<< ' C:\Users\dltw\Desktop\DocAve_Manager_6.0.0.3004_Branch\UnattendedInstall\PowerShellModules\UnattendedInstallationLauncher.ps1 '  
+ CategoryInfo : NotSpecified: (<> []), PSSecurityException  
+ FullyQualifiedErrorId : RuntimeException
```

-Username	Required	<p>The username of the user used to access the destination machine where you want to install the DocAve Agent. The format of the username is: domain\username.</p> <p>The permissions of the user specified here are as follows:</p> <ul style="list-style-type: none"> • If the specified user is the local administrator of the destination machine, it can be used directly. Enter <i>.\administrator</i> for the <i>Username</i> parameter. • If the specified user is from the domain which the destination machine belongs to, the domain user must be added to the Administrators group on the destination machine. • The user specified here must have the Full Control permission to the path specified in <i>RemoteTempPath</i> parameter.
-Password	Required	<p>The password of the user specified above.</p> <p>Quote the password if it contains any special character in it, including the space.</p>
-PackageFilesFolder	Required	<p>The local path on the machine where you run the command. The specified path stores the unzipped DocAve Agent installation package (Agent ZIP file). The format of the path is: C:\package.</p> <p>Quote the path if it contains any special character in it, including the space.</p>
-AnswerFilePath	Required	<p>The local path where you saved the Answer file.</p> <p>The path must be detailed to the name of the Answer file. For example, C:\AnswerFile.xml.</p>
-RemoteTempPath	Required	<p>A local path on the destination machine that the DocAve Agent is installed to. The format of the path is: C:\temp.</p> <p>The path will be used to store the temporary files generated during the DocAve Agent unattended installation. The temporary files will be deleted as soon as the unattended installation finishes.</p>

-Log	Optional	<p>This is an optional parameter. If used, the logs of the unattended installation will be saved to the .txt file in the specified path.</p> <p>The path specified in this parameter must be detailed to the name of the log file. For example, <i>C:\Log.txt</i>.</p> <p>If there is a log file with the same name in the specified path, the new log file will be renamed automatically. The log file's name will be displayed in the Windows PowerShell interface.</p>
-UseIPv6forCommunication	Optional	<p>This is an optional parameter. It specifies the communication method between the machine where the command is run and the destination machine that the DocAve Agent is installed to. If an IPv6 address is entered in TargetName parameter, this parameter must be entered.</p> <p>*Note: When using this parameter, both the destination machine and the machine where you run this command must support IPv6.</p>

Accessing the DocAve GUI

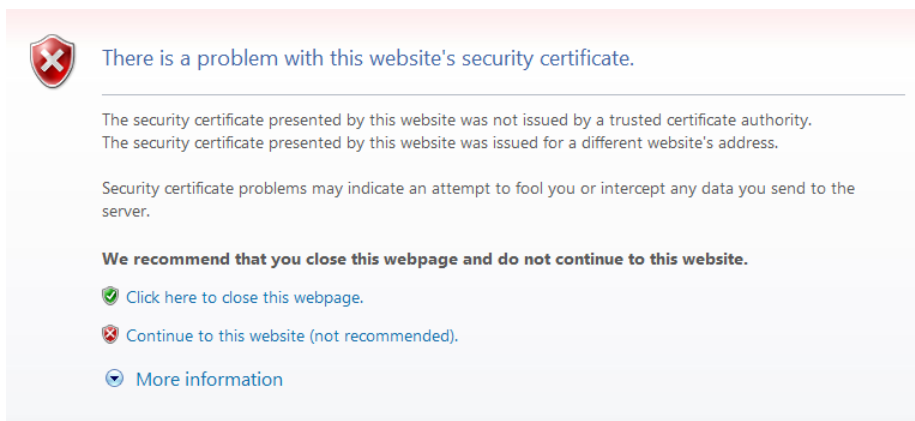
Following are the supported browsers and the requirement on the Silverlight version if you want to access DocAve GUI.

Rules	Requirements
Silverlight Version	4.0.50401.0 or above
Internet Explorer	IE 7 or above

Internet Explorer Setup

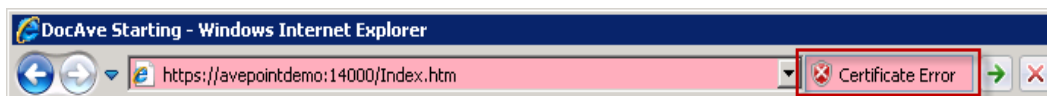
When first accessing DocAve using Microsoft Internet Explorer (IE), certain initial security settings must be configured. Run DocAve's server application found in the start menu on the machine running the DocAve Control Service, and follow the steps below.

1. When you access DocAve by IE, the Browser will display a security certificate prompt:

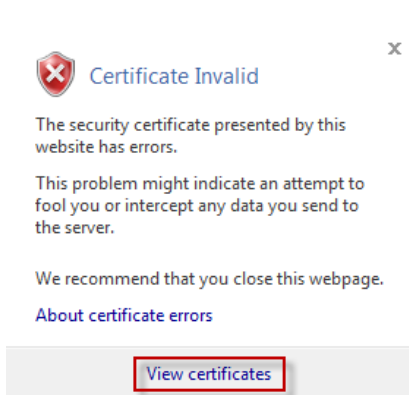


Select the option **Continue to this website** listed by the red bullet.

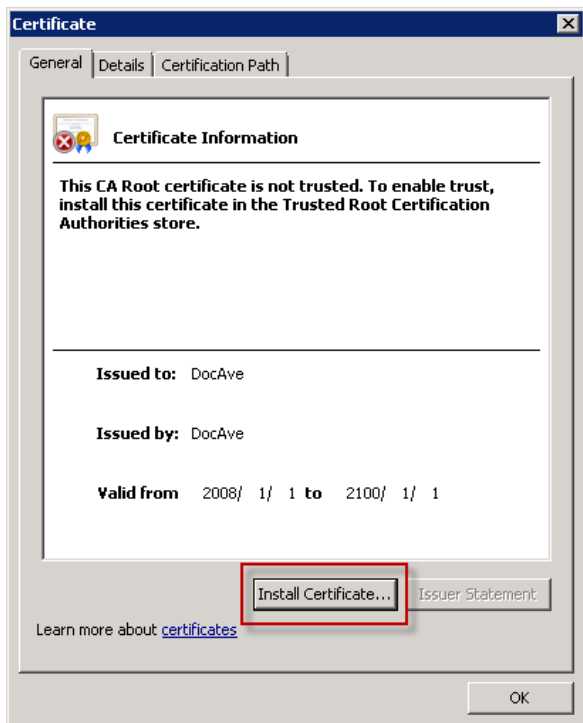
2. Click the **Security Report** icon next to the address URL.



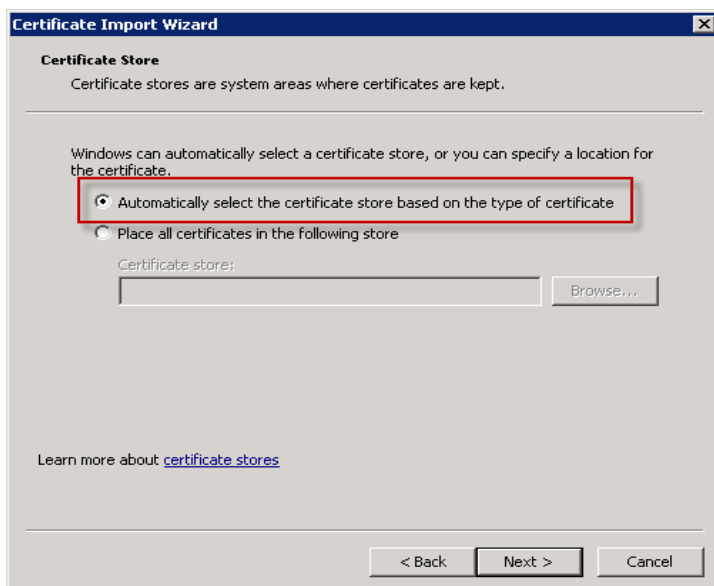
3. Click **View certificates** in the pop-up. The Certificate window appears.



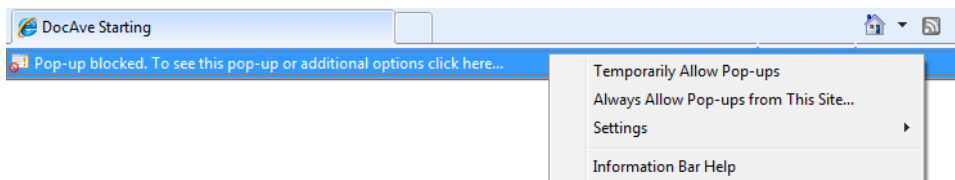
4. Click **Install Certificate...** button to install DocAve certificate.



5. Click **Next** to continue with the Certificate Import.
6. Select the **Automatically select the certificate store based on the type of certificate** option and click **Next**.



7. Click **Finish** to complete the certificate import.
8. Click **OK** in the prompt acknowledging the successful import.
9. Select temporarily allow popping up the DocAve GUI or always allow in the security prompt.



Now you can log into DocAve from Internet Explorer.

Logging In to DocAve

The DocAve GUI can be launched from any web browser within the same network as the DocAve Manager. In order to connect to the interface, you must record the IP/Hostname for the DocAve Manager - Control Service, as well as the Control Service Port if it was changed.

1. Open an Internet Explorer window and enter:

<https://<machine>:14000>

Where <machine> is the hostname or IP address of the machine running the DocAve Control Service. If the default port number has been changed from 14000, enter the new port number.

***Note:** If the hostname of the machine running the DocAve Control Service contains the *underline* (_), use the IP address of the corresponding machine to access DocAve.

2. The DocAve login screen pops up. Select Local System and enter the default login account information:

- Login ID : admin
- Password : admin

Click **Login**.

***Note:** When you log on DocAve for the first time, it is strongly recommended backing up the DocAve security keys for protection, for more information, refer to the [DocAve 6 Control Panel Reference Guide](#).

You can also log on DocAve using the integration with other authentication methods, for more information, refer to the Control Panel user guide.

Maintenance of the DocAve Installation

Use the DocAve Manager/Agent Configuration Tool

If you want to modify the configuration of DocAve Manager/Agent after the installation, open the **Start Menu** in Windows on the DocAve Manager server, and navigate to **All Programs > AvePoint DocAve 6**. Then open the **DocAve 6 Manager Tools/DocAve 6 Agent Tools** folder. Click **Manager Configuration Tool/Agent Configuration Tool**.

Click on the items listed on the left part of the tool and you can modify the corresponding settings.

Refer to sections [Installing the DocAve Manager](#) and [Installing the DocAve Agents](#) for the detailed information of the settings.

Use the DocAve Manager/Agent Restart Service Tool

If you want to restart the service(s) of DocAve Manager/Agent after the installation, open the **Start Menu** in Windows on the DocAve Manager server and navigate to **All Programs > AvePoint DocAve 6**. Then open the **DocAve 6 Manager Tools/DocAve 6 Agent Tools** folder. Click **Manager Restart Service Tool/Agent Restart Service Tool**.

You can check the status of the service(s) in the tool interface. Select one service from the tool interface and you can perform the following actions.

- **Start** – Start the selected service(s) which has been stopped.
- **Stop** – Stop the selected service(s).
- **Restart** – Restart the selected service(s).

Use the DocAve Manager/Agent Uninstallation Wizard

You can use either of the two methods below to access the uninstallation wizard of DocAve Manager/Agent after the Manager/Agent has been installed.

- Method 1 – Double click the *Setup.exe* file in the unpacked DocAve Manager/Agent directory and run it.

***Note:** This is the recommended method since it makes the most use of the installation package.

- Method 2 – Open the Start Menu in Windows on the DocAve Manager/Agent server and navigate to *All Programs > AvePoint DocAve 6*. Open **DocAve 6 Manager Tools/DocAve 6 Agent Tools** folder. Click **Manager Uninstall/Agent Uninstall**.

Now you can perform the operations introduced in the following two sections.

Change the Manager Installation

You can install/uninstall the specified Manager service(s) by selecting the **Change** option in the DocAve Manager uninstallation wizard. This option is very useful when you want to add new service(s) onto the server or remove existing service(s) from the server.

After the **Installation Rule Scanning**, you will then be guided through the installation/uninstallation of the selected Manager service(s).

Repair the Manager/Agent Installation

You can try to repair the DocAve Manager/Agent files after they have been corrupted.

Select the **Repair** option in the DocAve Manager/Agent uninstallation wizard, and DocAve will try to repair the corrupted files.

However, there are some limitations to the **Repair** function.

- If some crucial files have been lost or corrupted, the DocAve installation cannot be repaired.
- If you have cleared the temporary files after the first installation, you can only perform the repair using [Method 1](#).
- If the register key *HKEY_LOCAL_MACHINE > SOFTWARE > Microsoft > Windows > CurrentVersion > Uninstall > DocAve6Manager* is corrupt, the repair function cannot be used in this case. You must use [Method 1](#) to perform a new installation of DocAve.

Removing DocAve Manager/Agent

The DocAve Uninstallation Wizard is there to guide you through this uninstallation process. By following the steps below, you will have DocAve removed from your environment very quickly.

Removing DocAve Manager

In order to uninstall DocAve Manager, please ensure the manager service being removed is not in use by another process.

1. Open the **Start Menu** in Windows on the DocAve Manager server, and navigate to **All Programs > AvePoint DocAve 6**.
2. Open **DocAve 6 Manager Tools** folder. Click **Manager Uninstall**.
3. Select the **Remove** option. Click **Next**.
4. In Ready to Remove DocAve 6 Manager page, configure the following option.
 - Remove configuration file – Select this option if you want to remove all the folders and configuration files generated by the DocAve 6 Manager installation.

***Note:** The Logs folder will not be removed no matter you select **Remove configuration file** option or not.

Click **Remove** to start the Manager uninstallation process.

In case the application pool created by DocAve Manager installation is still useful, it will not be deleted during the Manager uninstallation. However, it will be stopped during the Manager uninstallation. The Manager uninstallation will not delete the Manager databases.

5. Click **Finish** to complete the uninstallation.

Removing DocAve Agent

In order to uninstall DocAve Agent, please ensure there are no current jobs running on the agent.

1. Open the **Start Menu** in Windows on the DocAve Agent server, and navigate to **All Programs > AvePoint DocAve 6**.
2. Open **DocAve 6 Agent Tools** folder. Click **Agent Uninstall**.
3. Select the **Remove** option. Click **Next**.
4. In Ready to Remove DocAve 6 Agent page, configure the following options.
 - **Disable EBS/RBS settings in SharePoint farm** – Select this option to disable the EBS/RBS settings in the SharePoint farm. If the EBS/RBS settings are disabled, the Storage Optimization stubs cannot be accessed. This option is selected by default. Uncheck this option if you want to reinstall the DocAve 6 Agent later.
 - **Remove configuration file** – Select this option if you want to remove all the folders and configuration files generated by the DocAve 6 Agent installation.

***Note:** The Logs folder will not be removed no matter you select **Remove configuration file** option or not.

Click **Remove** and the Agent uninstallation process starts.

5. Click **Finish** to complete the uninstallation.

Advanced Configuration

Modify the Port Used by DocAve Storage Manager and Connector

On a specified DocAve Agent server, if the default port (14005) used by DocAve Storage Manager and Connector is occupied, you can use the configuration file below to modify the port.

```
...\\AvePoint\\DocAve6\\Agent\\data\\SP2010\\Arch\\AgentCommonStorageEnv.cfg
```

The detailed steps are as follows.

1. Navigate to the installation path of the specified DocAve Agent, which is ...\\AvePoint\\DocAve6\\Agent\\data\\SP2010\\Arch by default.
2. Find the **AgentCommonStorageEnv.cfg** file and open it with Notepad.
3. Modify the value of **StorageServicePort** to an available port.
4. Save the configuration file.
5. Click **Start** and find the Command Prompt.
6. Right click on it and click **Run as administrator**.
7. Enter *iisreset* in the popup Command Prompt, and press **Enter** to restart IIS.
8. Restart the DocAve Agent service. For more information, refer to [Use the DocAve Manager/Agent Restart Service Tool](#) section.

Modify the Port Used by DocAve Replicator

On a specified DocAve Agent server, if the default port (14006) used by DocAve Replicator is occupied, you can use the configuration file below to modify the port.

```
...\\AvePoint\\DocAve6\\Agent\\data\\SP2010\\Replicator\\SP2010Replicator.xml
```

The detailed steps are as follows.

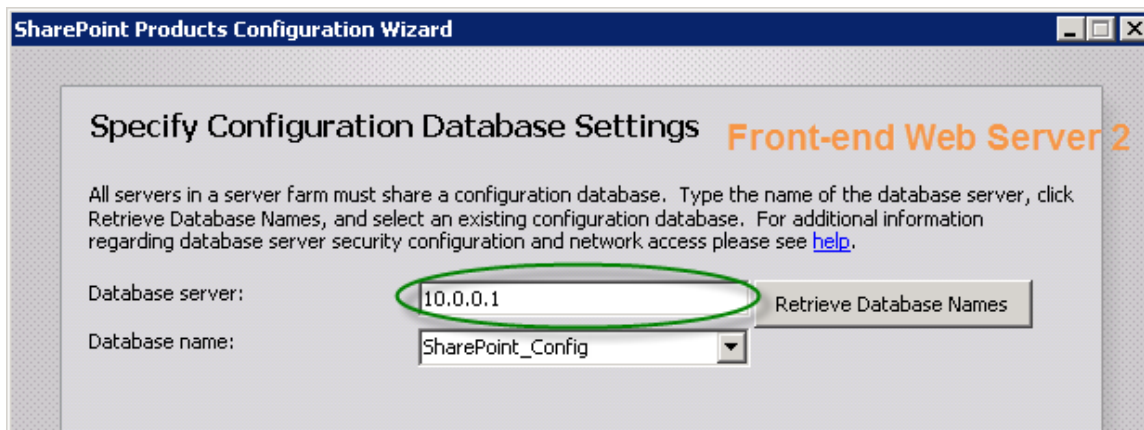
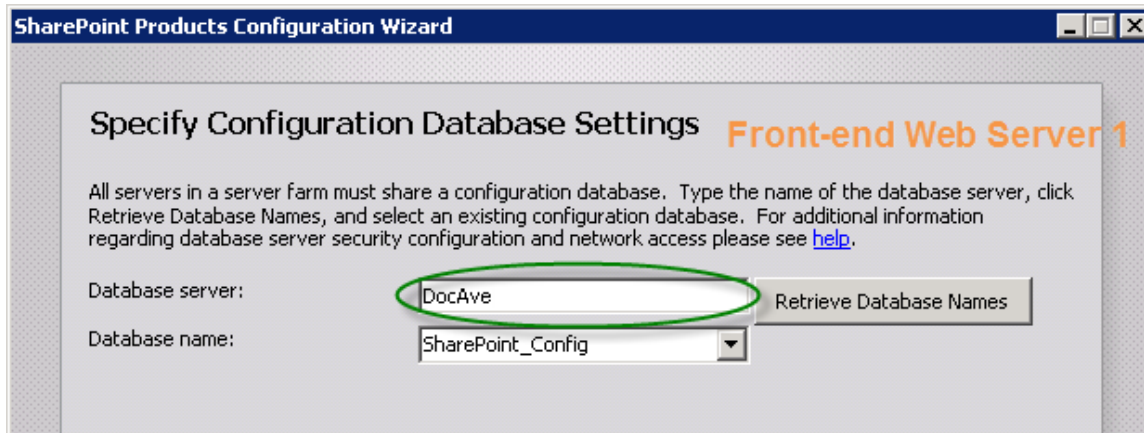
1. Navigate to the installation path of the specified DocAve Agent, which is ...\\AvePoint\\DocAve6\\Agent\\data\\SP2010\\Replicator by default.
2. Find the *SP2010Replicator.xml* file, and open it with Notepad.
3. Modify the value of **ListenerPort** to an available port.
4. Save the configuration file.
5. Click **Start**, and find the Command Prompt.
6. Right click on it and click **Run as administrator**.

7. Enter *iisreset* in the pop-up Command Prompt and press **Enter** to restart IIS.
8. Restart the DocAve Agent service. For more information, refer to [Use the DocAve Manager/Agent Restart Service Tool](#) section.

Troubleshooting

The Installed DocAve Agents cannot be Displayed in the Manager Interface

If both hostname and IP address are used to configure the Front-end Web servers when installing SharePoint, the DocAve agents installed on the Front-end Web servers may not be displayed in DocAve 6 > Control Panel > General System Settings > Monitor > Agent Monitor.



After the DocAve Agents have been installed on the Front-end Web servers successfully, refer to the detailed steps below to resolve this issue.

1. Remotely log on one Agent server which is displayed correctly in the Manager Interface.
2. Navigate to the installation path of DocAve Agent, by default it is *C:\Program Files\AvePoint\DocAve6\Agent\bin*.
3. Find the configuration file named *AgentCommonVCEnv.config*.

4. Copy the *AgentCommonVCEnv.config* file and save it to a local path.
5. Remotely log on each of the Agent servers which cannot be displayed in the Manager Interface.
6. Navigate to the installation path of DocAve Agent, by default it is *C:\Program Files\AvePoint\DocAve6\Agent\bin*.
7. Find the configuration file named *AgentCommonVCEnv.config*.
8. Open it with Notepad, and find the following two nodes.

```
<add key="agentFarmName" value="Farm(DocAveVM:SHAREPOINT_CONFIG)" />  
<add key="agentFarmId" value="226e10b4-2801-43da-b2ab-1c8b350bc4b8" />
```
9. Modify the values of **agentFarmName** and **agentFarmId** according to the *AgentCommonVCEnv.config* file obtained in Step 4.
10. Save the modification and restart the DocAve 6 Agent Service. Refer to [Use the DocAve Manager/Agent Restart Service Tool](#) for the detailed steps of restarting the DocAve 6 Agent Service.
11. Navigate to DocAve 6 > Control Panel > General System Settings > Monitor > Agent Monitor, and set the Agent Account of the Agents mentioned in Step 5. For more information on configuring the Agent Account, refer to the Control Panel user guide.
12. Save the modification and restart the DocAve 6 Agent Service. Refer to [Use the DocAve Manager/Agent Restart Service Tool](#) for the detailed steps of restarting the DocAve 6 Agent Service.

The issue will be resolved.

Other Issues

If you encounter other issues when installing the DocAve Manager or Agents, follow the prompt messages to resolve the issue, and run the installation program again.

If the issue persists, refer to the [AvePoint Technical Support](#) site for additional help.

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