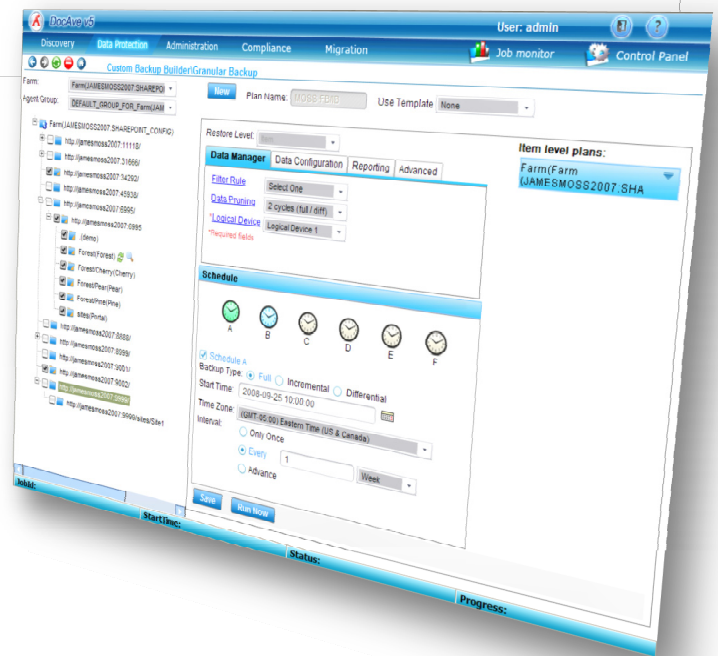


Quick Start Guide

Granular Backup and Restore

Performing a Simple Backup and Restore Using the New DocAve® 5 Platform

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



Backup & Recovery
Administration & Replication
Compliance
Migration to SharePoint

DocAve Setup Basics

Device Configuration

This section details the simple steps required to setup a storage device or location for use with DocAve. In order to run a backup job, you will only need to configure the information below.

Physical Device

Depending on the type of data being stored, DocAve has the capability of writing to any FTP, NetShare, or TSM device. For the example below, we will be defining a new backup data (storage) device using a standard Net-share drive.

1. Go to the *Control Panel* -> *Data Management* tab and open the **Device Manager**.
2. Under the *Physical Device* column, click **Add**.
3. Enter a **Name** for this physical device, followed by the **UNC path**. Simply entering "C:\. . ." will install the drive on the local machine for the Manager, but entering any drive of the format "\\<hostname>\c\$\ . . ." is also acceptable.

*Note: The folder does not have to exist on the destination; DocAve is capable of creating this on the fly after connecting to the physical drive.

4. Define the **Domain, Username** and **Password** for connecting to this drive.

You can create multiple physical devices for use in DocAve here, but only one is necessary to perform a successful backup.

Logical Device

DocAve has the ability to treat multiple storage drives as a single logical unit when saving backup data. This is especially helpful for very large backup plans as many small drives can be combined. A logical drive must be defined before creating a backup plan.

1. Enter a **Logical Device Name** in the field provided.
2. Drag the physical drive created in the previous section into the area marked **Physical Device**. This will allow you to arrange the order of disks to be written to during backup.
3. Switch to the **Media Agent** tab and drag any of the available services in the right column to this area.
4. Click **Save**.

Additional Setup

DocAve offers many flexible ways to backup your content. There are many other configurations that can be setup, such as "Email Notification", "Filter Rules", and "Pruning Policies". For more information regarding these features, please refer to the DocAve v5 User Guide.

Performing a Backup

This section will teach you a few simple steps to quickly setup a basic backup plan and perform a backup of your SharePoint environment using the DocAve **Custom Backup Builder**. The **Granular Backup** option provides the ability to utilize the DocAve Site Collection, Site, and Item-level restore granularities. For performance and usability reasons, we recommend using **Item Level**.

Choosing Content

With DocAve, you can backup content at any level in your SharePoint environment, down to backing up a single folder within a document library. DocAve uses a hierarchical tree to display all SharePoint data available for backup. To load this tree, follow the steps below.

1. Navigate to the *Data Protection -> Custom Backup Builder* tab and select the **Granular Backup** option.
2. In the left-hand column, select a **Farm** and an **Agent Group**. This will load the data tree.
3. Begin by expanding the Farm, Web Application, Site Collection, and other levels to locate the content you wish to back up.
4. Using the **Checkbox** next to each level, select the data you'd like to include in your plan. A check will indicate this content and all data beneath this node is being backed up, while a dash (-) will indicate that only this, or a few of the nodes beneath are included in this plan.

There are several things to take note of in the data tree:

- “🔄” – The refresh button next to each level will refresh any sub-trees for this node.
- “🔍” – The search button will allow you to refine the contents shown in any sub-tree. The results will be returned beneath the selected node.
- “« 1 of 2 Pages »»” – This page browser indicates that the sub-tree has been split across multiple pages. This is done to increase the load performance of the SharePoint tree. Using the numbers or paging icons available, please scroll left or right as necessary to find the data you'd like.

Setting Up a Plan

Plans can be configured with many options to meet your business needs. The details below show the minimum input required to configure a backup plan and quickly backup your SharePoint content.

Plan Options

Using the tabs along the top of the Custom Backup Builder, you can configure plan options such as Filter Rules, Data Pruning, Encryption and Compression, E-mail notification, and several others. To build a plan, follow the steps below:

1. A **Logical Device** is required for all backup plans. Please select one of the previously configured devices from this dropdown list.

2. Filter Rules, Pruning Policies, E-mail Notification, and Compression and Encryption are not required fields, and do not need to be selected. These settings and features are all described in the DocAve v5 User Guide, and can be configured based on the parameters mentioned there.
3. Under the *Advanced* tab, you can choose whether or not to **Include Workflows** or a **Full Text Index** to give greater flexibility on restore.

Schedule Options

Using the six clocks on the bottom of the screen, you can configure multiple schedules for this backup job. A schedule is not required to run a backup, but if you wish to setup a schedule, please follow these simple steps:

1. Check the box next to **Schedule** to enable the schedule and activate the options below.
2. Select a **Backup Type**. For this example, we recommend scheduling a **Full** backup. For a detailed description of Full, Incremental, and Differential backups, please refer to the DocAve v5 User Guide.
3. Using the Calendar Icon (📅) set a **Start Time** for this job. This can also be configured by the **Time Zone** field below.
4. Using the **Interval** options, you can make this a recurring job, or have it run only once. For a description of the Advanced options, please refer to the DocAve v5 User Guide.

Running the Plan

In order to run the plan, enter a Plan Name on top and simply click **Save**. If you have set a schedule, you can wait until the scheduled time, and the backup will initiate. If you do not plan on using a schedule or wish to perform a backup immediately, click **Run Now**. This will prompt you to select a Full, Incremental, or Differential backup. Select Full and click OK to perform a backup of the selected content.

Viewing the Progress

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

1. Navigate to the **Job Monitor** using the menu bar at the top of the interface.
2. From the dropdown menu on the top left, select **Granular Backup** and browse through the resulting table. This will display the current status and results of your backup jobs.

Restoring Data to SharePoint

Restoring or recovering data is a very quick and simple process using the DocAve Restore Controller. DocAve has the flexibility to restore data both to its original location within SharePoint or to any other SharePoint location or farm. We recommend reading the DocAve v5 User Guide for more details on this feature.

Loading the Timeline

In order to display all backup data available, you only need to specify the time-range for the data you are looking for, and the SharePoint Farm you are interested in restoring data from.


1. Choose a **Farm** from the available drop-down menu.
2. Select a **Time Window** using the calendar icons. This is the time window for any backup data you wish to find.
3. Click the **Load Timeline** button to display all available backup points.
4. Choose a **Point-in-Time** to restore from.

Each point-in-time represents one backup job. By default, choosing a point-in-time will display a SharePoint tree of all available content in the lower-left-hand-corner of the user interface. There are two modes available for display of the tree:

- **Historic View** – The historic view will show you the latest backup data available for all the content of your SharePoint tree. This could span multiple points, but it begins searching back from the point-in-time that you have selected and displays the latest backup available for each piece of content of the SharePoint farm that has backup data.
- **Single Point View** – This view will show you only what backup data is contained in this single backup job that was performed at the point-in-time selected.

Restoring Content

In order to perform a restore, follow these few simple steps:

1. Choose the content to restore using the **Checkboxes** next to each level. The information or “

Congratulations!

This document has provided you with instructions for performing a select number of basic operations within DocAve v5 *Backup and Recovery*, but it is nowhere near an exhaustive guide. This powerful module has a rich feature set, and allows for a broad array of configuration and scheduling options – as well as ‘intelligent’ backup features via the Criticality Matrix™. For more guides like this on DocAve’s other features, or detailed guidance regarding the DocAve *Backup and Recovery* module, please reference the DocAve v5 User Guides at <http://www.avepoint.com/support/user-guides>.

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