

# Symantec Enterprise Vault™

## Setting up SharePoint Server Archiving

10.0

# Symantec Enterprise Vault: Setting up SharePoint Server Archiving

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# About this guide

This chapter includes the following topics:

- [Introducing this guide](#)
- [Where to get more information about Enterprise Vault](#)
- [Comment on the documentation](#)

## Introducing this guide

This guide describes how to set up Enterprise Vault so that you can archive documents that are held on Microsoft SharePoint servers.

## Where to get more information about Enterprise Vault

[Table 1-1](#) lists the documentation that accompanies Enterprise Vault.

**Table 1-1** Enterprise Vault documentation set

Document	Comments
Symantec Enterprise Vault Help	Includes all the following documentation so that you can search across all files. You can access this file by doing either of the following: <ul style="list-style-type: none"><li>■ On the Windows <b>Start</b> menu, click <b>Start &gt; Programs &gt; Enterprise Vault &gt; Documentation</b>.</li><li>■ In the Administration Console, click <b>Help &gt; Help on Enterprise Vault</b>.</li></ul>
<i>Introduction and Planning</i>	Provides an overview of Enterprise Vault functionality.

**Table 1-1** Enterprise Vault documentation set (*continued*)

Document	Comments
<i>Deployment Scanner</i>	Describes how to check the prerequisite software and settings before you install Enterprise Vault.
<i>Installing and Configuring</i>	Provides detailed information on setting up Enterprise Vault.
<i>Upgrade Instructions</i>	Describes how to upgrade an existing Enterprise Vault installation to the latest version.
<i>Setting up Exchange Server Archiving</i>	Describes how to archive items from Microsoft Exchange user mailboxes, journal mailboxes, and public folders.
<i>Setting up Domino Server Archiving</i>	Describes how to archive items from Domino mail files and journal databases.
<i>Setting up File System Archiving</i>	Describes how to archive the files that are held on network file servers.
<i>Setting up SharePoint Server Archiving</i>	Describes how to archive the documents that are held on Microsoft SharePoint servers.
<i>Setting up SMTP Archiving</i>	Describes how to archive SMTP messages from other messaging servers.
<i>Administrator's Guide</i>	Describes how to perform day-to-day administration, backup, and recovery procedures.
<i>Reporting</i>	Describes how to implement Enterprise Vault Reporting, which provides reports on the status of Enterprise Vault servers, archives, and archived items. If you configure FSA Reporting, additional reports are available for file servers and their volumes.
<i>Utilities</i>	Describes the Enterprise Vault tools and utilities.
<i>Registry Values</i>	A reference document that lists the registry values with which you can modify many aspects of Enterprise Vault behavior.
Help for Administration Console	The online Help for the Enterprise Vault Administration Console.
Help for Enterprise Vault Operations Manager	The online Help for Enterprise Vault Operations Manager.

For the latest information on supported devices and versions of software, see the *Enterprise Vault Compatibility Charts* book, which is available from this address:

<http://www.symantec.com/docs/TECH38537>

## “How To” articles on the Symantec Enterprise Support site

Most of the information in the Enterprise Vault administration manuals is also available online as articles on the Symantec Enterprise Support site. You can access these articles by searching the Internet with any popular search engine, such as Google, or by following the procedure below.

### To access the “How To” articles on the Symantec Enterprise Support site

- 1 Type the following in the address bar of your Web browser, and then press **Enter**:  
[http://www.symantec.com/business/support/all\\_products.jsp](http://www.symantec.com/business/support/all_products.jsp)
- 2 In the Supported Products A-Z page, choose the required product, such as Enterprise Vault for Microsoft Exchange.
- 3 In the **Product Support** box at the right, click **How To**.
- 4 Search for a word or phrase by using the Knowledge Base Search feature, or browse the list of most popular subjects.

## Enterprise Vault training modules

The Enterprise Vault Tech Center ([http://go.symantec.com/education\\_evtc](http://go.symantec.com/education_evtc)) provides free, publicly available training modules for Enterprise Vault. Modules are added regularly and currently include the following:

- Installation
- Configuration
- Getting Started Wizard
- Preparing for Exchange 2010 Archiving
- Assigning Exchange 2007 and Exchange 2010 Permissions for Enterprise Vault

More advanced instructor-led training, virtual training, and on-demand classes are also available. For information about them, see [http://go.symantec.com/education\\_enterprisevault](http://go.symantec.com/education_enterprisevault).

## Comment on the documentation

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We appreciate your feedback.

# Configuring SharePoint archiving

This chapter includes the following topics:

- [About SharePoint archiving with Enterprise Vault](#)
- [Overview of configuring Enterprise Vault for SharePoint](#)
- [Configuring Enterprise Vault access to the SharePoint server](#)
- [Installing Enterprise Vault components on the SharePoint server](#)
- [Running the Enterprise Vault for SharePoint configuration wizard](#)
- [Creating objects in the Administration Console for SharePoint archiving](#)

## About SharePoint archiving with Enterprise Vault

You can use Enterprise Vault to archive documents from servers running any of the following:

- Microsoft SharePoint Foundation 2010
- Microsoft Windows SharePoint Services 3.0 (WSS 3.0)
- Microsoft SharePoint 2010
- Microsoft Office SharePoint Server 2007 (MOSS 2007)

At scheduled times, Enterprise Vault automatically copies documents from the SharePoint server and stores them in Enterprise Vault SharePoint archives.

Archived documents can be left on the SharePoint server or deleted, as required. Shortcuts can also be created on the SharePoint server. Deleting the original documents and creating shortcuts are configured using the SharePoint policy.

Enterprise Vault archives from the following SharePoint library types:

- Asset Library
- Document Library
- Form Library
- Picture Library
- Slide Library

If versioning is enabled for a document library, you can configure the number of versions of a document that are to be left on the SharePoint server after archiving. The archived version history link enables users to restore an older version of a document to the SharePoint Server.

Enterprise Vault does not create shortcuts when you archive from the following:

- A document library that has document publishing enabled; that is, if the document library is configured for minor versions.
- A document library that has content approval enabled.
- A document library that has the check-out requirement enabled.
- SharePoint Records Center sites.
- SharePoint publishing sites.

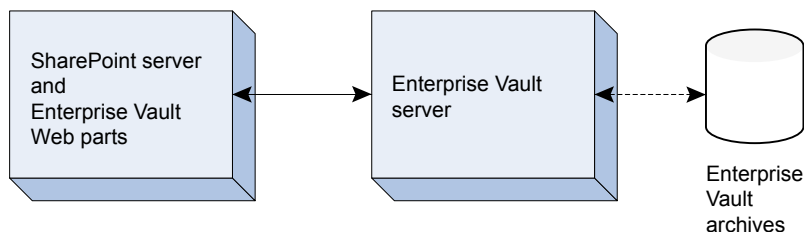
Archive Search and Archive Explorer Web Parts enable users to search or browse for archived documents in the SharePoint archives that they have permission to access.

A single Enterprise Vault SharePoint archiving task can archive documents from multiple SharePoint servers.

You can use the SharePoint archiving task to archive documents from SharePoint servers that are configured to accept client certificate authentication.

[Figure 2-1](#) shows an Enterprise Vault server archiving documents from a SharePoint server.

**Figure 2-1** An example SharePoint archiving configuration



On the Enterprise Vault server, you configure the target SharePoint sites, archiving tasks and archiving policies using the Enterprise Vault Administration Console.

You can use the EVSPShortcutManager utility to replace all HTML shortcuts in a SharePoint Server, site collection, or library, with their corresponding documents. For more information on managing Enterprise Vault shortcuts in SharePoint, see *EVSPShortcutManager* in *Utilities*.

See [“Installing Enterprise Vault and SharePoint on the same server”](#) on page 45.

## Overview of configuring Enterprise Vault for SharePoint

The following steps outline the tasks you need to perform to configure Enterprise Vault for SharePoint.

**Table 2-1** Tasks to set up SharePoint archiving

Step	Task	Where to find detailed instructions
Step 1	Ensure that Enterprise Vault server can access SharePoint servers.	See <a href="#">“Configuring Enterprise Vault access to the SharePoint server”</a> on page 15.
Step 2	Install Enterprise Vault SharePoint components.	See <a href="#">“Installing Enterprise Vault components on the SharePoint server”</a> on page 16.
Step 3	Run the Configuration Wizard.	See <a href="#">“Running the Enterprise Vault for SharePoint configuration wizard”</a> on page 17.
Step 4	Configure SharePoint archiving in the Administration Console.	See <a href="#">“Creating objects in the Administration Console for SharePoint archiving ”</a> on page 18.

## Configuring Enterprise Vault access to the SharePoint server

To ensure that Enterprise Vault can access the SharePoint servers, Internet Explorer security settings must be configured on all computers running Enterprise Vault tasks and services and also on any computers running a standalone Enterprise Vault Administration Console.

**To configure Enterprise Vault access to the SharePoint server**

- 1** Log on to the Enterprise Vault server computer using the Vault Service account.
- 2** Open Internet Explorer and click **Tools, Internet Options**.
- 3** Click the **Security** tab on the Internet Options window.
- 4** Select **Local intranet** and click **Sites**.
- 5** Click **Advanced** in the Local intranet dialog box.
- 6** Add the URL of each SharePoint Web application that you want to archive:  
  
`http://sharepoint_server_name`
- 7** Click **OK** twice to return to the Internet Options window.
- 8** Click **Custom Level**.
- 9** Scroll down to the **User Authentication** section, and select **Automatic logon only in Intranet zone**.
- 10** Click **OK**.
- 11** Click **OK** to close the Internet Options window.

## Installing Enterprise Vault components on the SharePoint server

The Enterprise Vault setup program installs the following:

- Web service extensions.  
These extensions are used to support the remote archiving task.
- The Enterprise Vault Archive Search application.  
The application enables users to search, restore, and view archive version history.
- The Enterprise Vault Admin service.  
This service provides support for the archive search Web application.
- SharePoint Web Parts.
- (HTML shortcuts only.) Restore From Archive feature.

If you install in a server farm, you must install the Enterprise Vault components on all the front-end Web servers.



### To install the Enterprise Vault components on your SharePoint server

- 1 Log on to the SharePoint Server as the SharePoint server farm account (also called the SharePoint database access account) or another account that has sufficient permissions to the SharePoint\_Config database.

The account must have the following SQL Server security roles in the SharePoint\_Config database:

- SharePoint\_Shell\_Access
- WSS\_Content\_Application\_Pools

If you use the Vault Service account, make sure it has the required permissions.

- 2 Load the Enterprise Vault media on your SharePoint Server computer.
- 3 Open the `Symantec Enterprise Vault version` folder.
- 4 Open the `Server` folder.
- 5 Double-click `SETUP.EXE` to start the installation.
- 6 Work through the installation wizard until you reach the **Select Components to Install** page.
- 7 Check **Microsoft SharePoint Components**.  
If you are installing only the Enterprise Vault SharePoint components on this computer, uncheck the other options.
- 8 Click **Next**.
- 9 Work through the rest of the wizard.

## Running the Enterprise Vault for SharePoint configuration wizard

After you have installed the Enterprise Vault SharePoint components you need to run the configuration wizard.

If you are installing in a server farm you must configure the Enterprise Vault components on all front-end Web servers. You do not need to run the configuration wizard on the SharePoint Central Administration server.

The SharePoint configuration wizard prompts you for details of the Vault Service account and configures the Enterprise Vault Admin service to log on using this account.

To configure Enterprise Vault components on the SharePoint Server

- 1

Log in to the SharePoint Server computer as the Vault Service account.
- 2

Click **Start > Programs > Enterprise Vault > SharePoint Configuration** to start the configuration wizard.
- 3

Click **Next** to continue.
- 4

When you are prompted for details of the account that Enterprise Vault services use, enter the details of the Vault Service account.

You must use the format `domain_name\username` when you specify the account. Alternatively, click **Browse** to browse for the account.

Enter the password for the account and confirm it.
- 5

Click **Next**.
- 6

On the last screen of the configuration wizard click **Finish** to exit the program.

**Note:** Whenever you add a new web application, you must re-install the Enterprise Vault SharePoint components.

See [“Installing Enterprise Vault components on the SharePoint server”](#) on page 16.

# Creating objects in the Administration Console for SharePoint archiving

On the Enterprise Vault server, open the Enterprise Vault Administration Console and create the following objects to configure SharePoint archiving.

**Table 2-2** Configuring SharePoint archiving in the Administration Console

Step	Task	Where to find detailed instructions
Step 1	Create a SharePoint archiving task.	See <a href="#">“Creating a SharePoint archiving task”</a> on page 19.
Step 2	Create one or more SharePoint archiving policies.	See <a href="#">“Creating an archiving policy for Enterprise Vault for SharePoint”</a> on page 21.
Step 3	If required, create a new vault store to use for the SharePoint archives.	See <a href="#">“About the vault stores for SharePoint archives”</a> on page 23.

Table 2-2

Configuring SharePoint archiving in the Administration Console  
(continued)

Step	Task	Where to find detailed instructions
Step 4	Add SharePoint archiving targets in Enterprise Vault.	See <a href="#">“Adding a SharePoint archiving target”</a> on page 24.
Step 5	Create archiving targets for the SharePoint site collections.	See <a href="#">“Creating archiving targets for SharePoint site collections”</a> on page 26.
Step 6	Create archiving target subsites to override archiving settings.	See <a href="#">“Creating archiving target subsites to override archiving settings”</a> on page 27.

Creating a SharePoint archiving task

You can create one or more SharePoint archiving tasks. A single task can support several SharePoint Web applications.

To create a new SharePoint task

- 1 In the explorer pane of the Enterprise Vault Administration Console, navigate to the Enterprise Vault computer that is to host the new SharePoint task. Click the computer name to display **Services** and **Tasks**.
- 2 Right-click **Tasks** and select **New, SharePoint Task**. This starts the **New SharePoint Task** wizard.
- 3 Work through the pages.

SharePoint archiving task properties

To customize property settings for this task, such as the logon account that runs the task, right-click the SharePoint task in the right hand pane and select "Properties".

Table 2-3

SharePoint task properties

Tab	Property	Description
General	Site	The Enterprise Vault site to which this task belongs.
	Computer	The computer on which this task is created.
	Task name	The name of the task.

**Table 2-3** SharePoint task properties (*continued*)

Tab	Property	Description
	Run in report mode	Check this to run in report mode. This mode lists the documents that meet the archiving criteria, without actually archiving any documents.
	Startup type	The startup type for this task.
	Administrative note	You can add a note for this task. This note is visible to other Enterprise Vault administrators, who have access to this task.
Schedule	Use site setting	If selected, this task uses the schedule configured for the Enterprise Vault site. Open site properties to view the site schedule.
	Run	Select <b>Never</b> to stop the scheduled running of the task, or <b>Selected times</b> , to start the task running at the times and days that you select on this page.
	Interval	This enables you to change the units used in the schedule grid below.
	Schedule grid	You can select or clear times in the grid, as required. Help on how to use the grid is given in the online help.
Log On	Select the account that this task will run under.	The SharePoint archiving task always runs as the Vault Service account. You can specify a different account for the SharePoint archiving task to use when communicating with SharePoint. The account that you specify on this tab must have full access permissions to content in the target SharePoint sites.
Reports	Generate report files for archive run	The <b>Reports</b> tab enables you to configure report generation. If you want reports generated each time the archiving task runs, select this check box. Reports are created in the <b>Reports</b> folder (for example C:\Program Files (x86)\Enterprise Vault\Reports\SharePoint Archiving).
	Logging level for Archiving and Report runs	You can select the amount of detail you want included in reports for this task.
	Number of reports to keep	You can also select the number of reports for this task that you want kept in the <b>Reports</b> folder.

Table 2-3                      SharePoint task properties (continued)

Tab	Property	Description
Targets	Targets	<p>This tab lists the sites to be archived on the SharePoint server. Targets are assigned to tasks when you create archiving target objects.</p> <p>See <a href="#">“Creating archiving targets for SharePoint site collections”</a> on page 26.</p> <p>A SharePoint task can service several targets. Alternatively, you can create multiple SharePoint archiving tasks and assign targets to each task, as required.</p>

Creating an archiving policy for Enterprise Vault for SharePoint

This section describes how to create a SharePoint archiving policy. A policy defines what documents are to be archived and, if versioning is enabled on the SharePoint server, how many versions are to be left in SharePoint after archiving.

To create an archiving policy for Enterprise Vault for SharePoint

- 1 In the Enterprise Vault Administration Console tree, expand the Enterprise Vault site and then click **Policies**.
- 2 Under **Policies**, click **SharePoint**.
- 3 To create a new policy, right-click in the right pane and select **New, Policy** (alternatively, right-click **SharePoint** under **Policies** in the tree). The **New SharePoint Policy** wizard starts.
- 4 In the first page, give the policy a name and description.
- 5 In the next page, check **Prune to n versions of the document** to set the number of versions of an archived document that you want to leave in SharePoint after archiving. Earlier versions will be available in the archive only.
- 6 In the next page you can configure how to handle the items that have already been archived. You can choose to retain the items in SharePoint, to delete the items from SharePoint, or to replace them with shortcuts.
- 7 In the next page you create one or more rules to select the documents that you want to process with this policy. Click **New** to display the Rule page.
- 8 Enter a **Name** and **Description** for this rule.
- 9 In the **Rule type** section, select the action to take with files that match the rule. This can be one of **Archive**, **Do not archive** or **Delete**.

- 10** In the **Filter files using the filename** section, specify the selection criteria.

The first box lets you include or exclude the files specified in the second box.

In the second box enter the files you want to target. You can include wildcards in the filenames. For example, \* means all files, whereas \*.doc means all files with the extension .doc.

Separate multiple file types with a comma.

- 11** In addition to selection by filename, you can select files by size using the **Filter files using file size** options.

- 12** If you want to archive files according to values in SharePoint library columns, click the **Content Type/Metadata** tab and then complete the details. Click **Help** for information about the fields.

- 13** Click **OK** to add the rule. One or more rules can be applied when selecting files to process with this policy. Click **New** to add further rules or **Edit** to change the highlighted rule.

During processing, the rules are applied in order from the top of the list. The first rule that matches is applied, so you need to ensure that the required default action is last. Use **Move Up** and **Move Down** to re-order rules.

To disable a rule, clear the check box for that rule.

Click **Next**.

- 14** When Enterprise Vault archives documents from SharePoint, the copy stored in the archive is given the same permissions as the folder that contained the original document. This means that users with read access to the folder in SharePoint will be able to access archived copies of any documents in the folder. You can configure whether or not Enterprise Vault is to archive documents with permissions that differ from those of other documents in the folder.

Click **Next**.

- 15 You can configure Enterprise Vault to archive drafts of documents. When archiving drafts, you can specify that drafts of a document will only be archived if users who have access to the SharePoint document also have access to drafts of that document.

If you select the option to archive drafts but do not select **Only archive drafts if they can be viewed by users with read access to the document**, then drafts of all documents archived from the target site are archived. This means that anyone with read access to the original document in SharePoint will also be able to view archived drafts of the document in Enterprise Vault, even if they do not have access to drafts in SharePoint.

- 16 Click **Finish** and then **Close**.

## Viewing or modifying a SharePoint archiving policy

### To view or modify SharePoint policies

- 1 Locate the policy in the right-hand pane of the Administration Console.
- 2 Right-click the policy and do one of the following:
  - To view or edit the properties of an existing policy, select **Properties**.
  - To copy an existing policy and give it a different name, select **Copy Policy**.

## About the vault stores for SharePoint archives

You can either create a new vault store to use for SharePoint archives, or you can assign an existing vault store.

If you want to use a new vault store, create the vault store and partition before you create the SharePoint Archiving Target.

When the archiving task runs, archives are created automatically in the open vault store partition. An archive is created for each SharePoint site collection. In the Administration Console tree, you can see the archives under "Archives", "SharePoint". Note that documents in the top level site and all subsites of that site collection are stored in the same archive.

Access permissions on Enterprise Vault archives and archive folders are synchronized automatically with permissions on the corresponding SharePoint sites and document libraries.

You can view and customize the properties of vault stores, partitions and archives by right-clicking the object in the Administration Console and selecting "Properties". For information on the properties for each object, see the Administration Console online help.

For information on how to create a vault store, See *Creating a Vault Store in Installing and Configuring*.

## Adding a SharePoint archiving target

Enterprise Vault associates SharePoint archiving target objects in the Administration Console tree (Targets > SharePoint) with parts of the SharePoint site architecture, as follows:

- A Web application object contains the URL of the SharePoint Web application to be archived.
- Site collection objects are associated with existing top-level sites on the SharePoint server.
- Site objects are associated with existing subsites on the SharePoint server.

Note that, before you can configure the archiving target objects in Enterprise Vault, the SharePoint Web application and site collections must exist in SharePoint and the Enterprise Vault components must be installed and configured on the SharePoint server.

If you add a secure (HTTPS) site, you must ensure that the SSL certificate is valid. If the certificate is not valid, the **New SharePoint Target** wizard shows the error 'SharePoint target cannot be found'.

See [“Configuring Enterprise Vault access to the SharePoint server”](#) on page 15.

### To add a SharePoint target object

- 1 In the left pane of the Vault Administration Console, locate the **Targets** node.
- 2 Under **Targets**, right-click the **SharePoint** container and select **New, SharePoint target**.
- 3 This starts the **New SharePoint Target** wizard. Click **Next** on the first screen.
- 4 Enter the URL for the Web application.

You must use host names and not IP addresses in the URL.

Click **Next**.



- 5 If you want Enterprise Vault to archive automatically all sites on this target, check **Auto-enable Site Collections**. The wizard guides you through the process of selecting the task, policy, vault store and retention category to be used for all sites on this SharePoint target.

If auto-enable archiving is on, Enterprise Vault automatically adds site collection objects under the SharePoint target object the first time the archiving task runs, and a new archive is created automatically for each of these site collections. Subsites are also archived using the default settings for the target site collection object, but target subsite objects are not displayed in the Administration Console. Documents in subsites are stored in the archive for the top-level site collection.

If you do not want Enterprise Vault to archive some top-level sites, or you want to assign a different policy, retention category or task, uncheck **Auto-enable Site Collections**. The final summary screen appears when you do this. You have to create target site collection objects manually for any site collections that you do want archived.

See [“Creating archiving targets for SharePoint site collections”](#) on page 26.

- 6 Before the SharePoint target object is created, the wizard displays a summary of the object details. If they are correct, click **Finish** and then **Close** to exit the wizard.

## Changing the default archiving settings for a SharePoint target

If you later decide to enable or disable automatic archiving or change default archiving settings, use the SharePoint target properties.

### To change default archiving settings

- ◆ Right-click the SharePoint target object in the Administration Console tree and select **Properties**.

## Stopping the archiving of sites on a target

You can stop the archiving of all site collections on a SharePoint target.

### To stop archiving sites

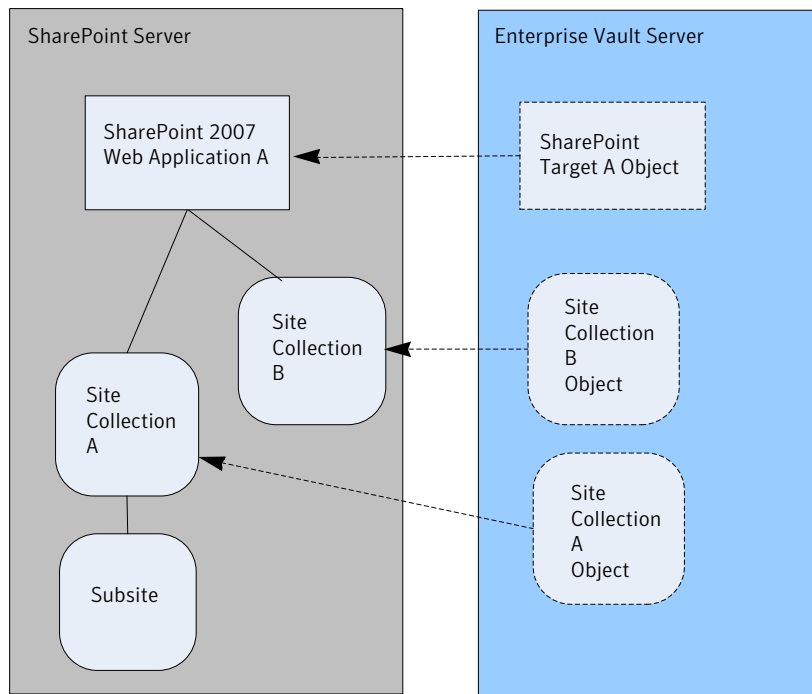
- ◆ Clear the **Archive this SharePoint target** check box on the SharePoint target properties page.

## Creating archiving targets for SharePoint site collections

If **Auto-enable Site Collections** is selected on the SharePoint target object, a target site collection object for each top level site is created automatically when the archiving task runs.

[Figure 2-2](#) illustrates the relationship between Web applications and sites on the SharePoint targets (on the left) and associated archiving target objects in the Enterprise Vault Administration Console (on the right).

**Figure 2-2** Archiving targets



If you only want to archive some site collections, clear the **Auto-enable Site Collections** check box on the SharePoint target object and create the required target site collection objects manually.

### To create SharePoint archiving target site collections manually

- 1 In the left pane of the Administration Console, locate the required SharePoint target object.
- 2 Right-click the object and select **New > SharePoint Site Collection**.

This starts a **New SharePoint Site Collection** wizard.

- 3 On the first page of the wizard, click **Next**.
- 4 Enter the URL for the top level site in the site collection, for example:  
  
`http://sharepoint/sites/marketing`  
  
Note that the default site collection in SharePoint may have the same URL as the Web application.
- 5 Select the required scope of archiving for this site collection: the top level Web site only, the subsites only, or both. Click **Next**.
- 6 Highlight the vault store to be used for the SharePoint archives. A separate archive is created automatically in the vault store for each top-level site. Click **Next**.
- 7 Select the policy and archiving task to be used to archive the site collection. Click **Next**.
- 8 Select the retention category to be applied to any files that are archived. You can use **New** to create a new retention category, if required. Click **Next**.
- 9 The next screen shows a summary of the details for archiving the site collection. If this is correct, click **Finish**.
- 10 A prompt confirms that the object has been created. Click **Close**.

## Creating archiving target subsites to override archiving settings

Target site objects are not added automatically for subsites in a SharePoint site collection, even if the subsites are being archived. If there is no target site object, the subsite is archived using the archiving settings of the top-level site in the site collection.

See [Creating archiving targets for SharePoint site collections](#) for an example of archiving targets. In this example, there is no target object in Enterprise Vault corresponding to the subsite under Site Collection A on the SharePoint server.

You only need to create a target site object manually if you want to override the default archiving settings to include a subsite (when the parent site is not being archived), or to exclude a site (or its subsites) from archiving.

Documents archived from all sites in a site collection are stored in the same archive.

Note that an archiving task can be assigned to a Web application or top-level site, but not to a subsite.

**To create archiving target subsites to override archiving settings**

- 1 Under **Targets, SharePoint**, expand the SharePoint target object and find the target site collection object for the subsite you want to archive.
- 2 Right-click the site collection object and select **New, SharePoint Site**. This starts a **New SharePoint Site** wizard. Click **Next** on the first screen.
- 3 The full path of the top-level site is displayed below the box. Enter in the box the relative path for the subsite. For example, if the top-level site is as follows:

`http://sharepoint/sites/marketing`

and if the full path for the subsite is as follows:

`http://sharepoint/sites/marketing/presentations`

you would just enter the following:

**presentations**

- 4 Select the required scope of archiving for this site; this site only, the subsites only, or both. Click **Next**.
- 5 Select the policy to be used to archive the site and subsites. Click **Next**.
- 6 Select the retention category to be applied to any files that are archived. You can use **New** to create a new retention category, if required. Click **Next**.
- 7 The next screen shows a summary of the archiving settings for the site. If this is correct, click **Finish**.
- 8 A prompt confirms that the object has been created. Click **Close**.
- 9 Target site objects for subsites are displayed in the right hand pane of the Administration Console when you click the site collection object in the tree. They are not shown in the tree.

# Running SharePoint archiving

This chapter includes the following topics:

- [Starting a SharePoint archiving run](#)
- [Scheduling SharePoint archiving runs](#)

## Starting a SharePoint archiving run

You can start an immediate archive run for all sites serviced by an archiving task, or for a particular site collection.

**To archive immediately all target sites serviced by a SharePoint task**

- 1 In the Enterprise Vault Administration Console tree, navigate to the Enterprise Vault computer that hosts the SharePoint task. Click the computer name to display **Services** and **Tasks**.
- 2 Click **Tasks** to display the SharePoint task in the right pane.
- 3 Right-click the SharePoint task and select **Run Now**.
- 4 Select how the task is to run.

In report mode, Enterprise Vault does not archive any documents, but it generates a report to identify the documents that are ready for archiving. In normal mode, Enterprise Vault archives the documents. It may also generate a report, depending on the task report properties.

You can view the report in the `Reports\SharePoint Archiving` subfolder of the Enterprise Vault program folder (for example `C:\Program Files (x86)\Enterprise Vault\Reports\SharePoint Archiving`).

- 5 Click **OK** to start the archive run.

#### To archive a particular target site collection only

- 1 In the Enterprise Vault Administration Console tree, expand the **Targets** container and under this, the **SharePoint** container.
- 2 Expand the SharePoint target object to display the site collection objects.
- 3 To archive all sites in a site collection, right-click the site collection object and select **Run Now**.
- 4 Select report or normal mode for the task and click **OK** to start the archive run.

See [“Installing Enterprise Vault and SharePoint on the same server”](#) on page 45.

## Scheduling SharePoint archiving runs

To regularly archive all the target sites associated with a task, you can use an Enterprise Vault site schedule or you can set a separate schedule for the SharePoint task.

#### To use the Enterprise Vault site schedule

- 1 Check that the site schedule is suitable. In the left pane of the Administration Console, right-click the Enterprise Vault site container and click **Properties**.  
Click the **Site Schedule** tab to see the default schedule set for all archiving tasks.
- 2 In the Administration Console tree, expand the **Enterprise Vault Servers** container under the Enterprise Vault site and then expand the Enterprise Vault server that is configured to archive the SharePoint server.
- 3 Click **Tasks** in the tree.
- 4 In the right pane, right-click the required SharePoint task. (**SharePoint** is displayed in the **Type** column), and click **Properties**.
- 5 Click the **Schedule** tab.
- 6 Check **Use site setting**.
- 7 Click **OK**.

#### To create a separate schedule for the SharePoint task

- 1 In the Administration Console tree, expand the **Enterprise Vault Servers** container under the Enterprise Vault site and then expand the Enterprise Vault server that is configured to archive the SharePoint server.
- 2 Click **Tasks** in the tree.

- 3 In the right hand pane, right-click the required SharePoint task. (**SharePoint** is displayed in the **Type** column), and select **Properties**.
- 4 Select the **Schedule** tab.
- 5 Clear the **Use site setting** check box.
- 6 Set the required schedule for this task.
- 7 Click **OK**.





# Adding SharePoint archiving Web Parts

This chapter includes the following topics:

- [About the SharePoint archiving Web Parts](#)
- [Adding the Archive Search Web Part](#)
- [Adding the Archive Explorer Web Part](#)
- [Managing the archived version history link on version history pages](#)
- [Managing the Restore from Archive feature](#)

## About the SharePoint archiving Web Parts

Enterprise Vault web parts provide archive search features for SharePoint users.

- The Archive Search Web Part allows users to search SharePoint documents in the Enterprise Vault archives. From the search results page, users can view documents and copy archived documents or document versions to the SharePoint server.
- The Archive Explorer Web Part enables users to browse and search SharePoint archives that they have permission to access. Archived documents can be viewed but not restored using Archive Explorer.

A custom Web Part for Enterprise Vault Archive Search is added to the Web Part gallery during installation of the Enterprise Vault SharePoint components. Once installed, the name of the Web Part in the Web Part gallery is in the language of the base SharePoint server that you have installed. However, in SharePoint pages the Web Part text is displayed to users in the language of the SharePoint site.

## Adding the Archive Search Web Part

To modify a SharePoint page and add Web Parts you must be a site owner or administrator.

### To add the Archive Search Web Part to a page

- 1 In Internet Explorer, open the page where you want to add the Archive Search Web Part.
- 2 On the **Site Actions** menu, click **Edit Page**.
- 3 In the Web Part zone in which you want to add the Web Part, click **Add a Web Part**.
- 4 In the **Add Web Parts** dialog box, check **Archive Search Web Part** (located in the **Miscellaneous** section).
- 5 Click **Add**.

The **Archive Search** Web Part will now be displayed on the page. Irrespective of the language of the Web Part package that you installed, text in the Web Part will be displayed in the language of the site.

## Adding the Archive Explorer Web Part

We recommend that you import the Archive Explorer Web Part into an empty Web Part page.

### To create a new Web Part page for the Web Part

- 1 Navigate to the required site on your SharePoint server.
- 2 On the **Site Actions** menu, click **Create**.
- 3 Click **Web Part Page**.
- 4 Type a name for the Web Part; such as **Archive Explorer**.
- 5 Select **Full Page** and **Vertical layout** options.
- 6 Click **Create**.

### To import the Web Part into the Web Part Page

- 1 In the Web Part zone, click **Add a Web Part**.
- 2 In the **Add Web Parts** dialog box, click **Advanced Web Part gallery and options**.
- 3 Click **Browse**. On the drop-down menu click **Import**.

- 4 Specify the path to the required language version of the Archive Explorer Web Part file, `Archive Explorer.dwp`. This is in the appropriate language folder, for example `C:\Program Files (x86)\Enterprise Vault\Languages\Windows SharePoint Services Web Parts`.
- 5 **Click Upload.**  
 After uploading the Web part, the page is refreshed and the Enterprise Vault Archive Explorer Web Part is listed under **Uploaded Web Part**.
- 6 Drag the icon next to the Web Part to the **Full Page** zone on the Web Part page.  
 An error is displayed, because you need to set the Enterprise Vault server name.
- 7 Click the arrow beside the Web Part and click **Modify Shared Web Part**.
- 8 Change the link property to the following:  
`http://Fully_qualified_EVserver_alias/EnterpriseVault/ArchiveExplorerui.asp`  
 where *Fully\_qualified\_EVserver\_alias* refers to the computer running the Enterprise Vault Web Access application.
- 9 Click **OK**.

## Managing the archived version history link on version history pages

The archived version link on version history pages is installed automatically but you can remove the link and add it again, as required.

### To add or remove the archived version link

- 1 In a browser, enter the following URL:  
`http://spcomputername/_layouts/versionsadmin.aspx`  
 where *spcomputername* is the name of your SharePoint server computer.  
 This displays the page **Enterprise Vault Archived Version History Administration**.
- 2 Choose to add or remove the archived version history link.
  - To remove the link, click **Remove the archived version history link**.
  - To add the link, click **Install the archived version history link**.  
 A confirmation message is displayed when installation is complete.

## Managing the Restore from Archive feature

The Restore from Archive feature provides users with the **Restore from Archive** option on the menu of Enterprise Vault HTML shortcuts that were created by Enterprise Vault 8.0 SP2 or earlier. The option is installed automatically, but you can deactivate it and activate it as required.

### To manage the Restore from Archive feature

- 1 Install the Enterprise Vault component on the SharePoint Central Administration server.
- 2 In SharePoint Central Administration, click the **Operations** tab and then click **Manage farm features**.
- 3 Activate or deactivate **Enterprise Vault Feature** as required.

# User access to archived SharePoint documents

This chapter includes the following topics:

- [About user access to archived SharePoint documents](#)
- [Modifying the Internet Explorer security settings for SharePoint users](#)

## About user access to archived SharePoint documents

Users can access documents that have been stored in the Enterprise Vault SharePoint archives as follows:

- Using the **Show archived versions for this document** link on the versions history page. From this page users can access versions of a document that are in the archive and also replace the current version of a document on the SharePoint server with a version in the archive.  
See [“Accessing archived versions on the SharePoint version history page”](#) on page 38.
- Using the **Restore from Archive** menu option on Enterprise Vault HTML shortcuts that were created with Enterprise Vault 8.0 SP2 or earlier. The option enables users to restore documents.  
See [“Restoring archived SharePoint documents”](#) on page 38.
- Using the Archive Search Web Part. The Archive Search Web Part enables users to search for archived documents in the archives. From the search results page, users can view documents and copy archived documents or document versions to the SharePoint server.  
See [“Using the Archive Search Web Part”](#) on page 39.

- Using the Archive Explorer Web Part. The Archive Explorer Web Part enables users to browse and search SharePoint archives that they have permission to access. Archived documents can be viewed but not restored using Archive Explorer.

See [“About the Archive Explorer Web Part”](#) on page 42.

---

**Note:** When Archive Explorer is launched from within Outlook, it does not display SharePoint archives.

---

In sites and document libraries, users can only see documents that they have permission to access.

To use Archive Search or Archive Explorer Web Parts, Internet Explorer 7.0 or later, with Java scripting enabled, must be installed on each user’s desktop computer.

## Accessing archived versions on the SharePoint version history page

If versioning is enabled in SharePoint for a document library, the versions history page displays the versions of a document on the SharePoint server. After the archiving task has run for the first time, a new link, **Show archived versions for this document**, is displayed under the SharePoint versions.

### To access archived SharePoint versions

- 1 Click **Show archived versions for this document**.
- 2 Select the following using the drop down menu from the document name:
  - **View** to open the archived document or save it on your computer.
  - **Restore** to restore the document to SharePoint as the latest version.

To display only the versions on SharePoint, click **Hide archived versions for this document**.

## Restoring archived SharePoint documents

The **Restore from Archive** menu option enables users to restore documents.

The option is available only for HTML shortcuts.

### To restore documents from the SharePoint archive

- 1 Open the document menu of the shortcut.
- 2 Select **Restore from Archive**.

## Using the Archive Search Web Part

You use the Archive Search Web Part to find documents stored in the Enterprise Vault SharePoint archive.

### To search for archived documents

- 1 In the first box, select the scope for your search: **This Site** or **Site Collection**.
- 2 In the second box, enter words to search for in the document name, subject or content, and click **Go**.

For example, entering the following would return documents with any of the words **press**, **updated** or **v5** in the name, subject or content:

**press updated v5**

The wildcard character \* can be used to denote one or more characters at the end of a word. At least three characters must precede the wildcard character. For example, **new\*** would find an archived document called **December newsletter.doc** and a document with the word **newer** in the content.

Note that to be able to search for phrases in the document content, indexing must be set to **Full** on the archive. To see the indexing level, right-click the site collection archive in the Enterprise Vault Administration Console, select **Properties** and then click the **Advanced** tab on the properties window.

The results of the search are displayed on the Archive Search Results page.

- 3 Use the links on the left of the Archive Search Results page to group or sort the results by **Author**, **Date**, and so on. When you sort the results, an arrow will indicate the sort order; click the link a second time to reverse the order.
- 4 Click the links in the **Actions** section to do the following:
  - **Show Less/Show More** to hide or display the preview information for each item.
  - **Collapse Groups/Expand Groups** to display just the group titles or the items in the groups.
  - **Advanced Search/Simple Search** to create a complex search filter or a simple search.

The links toggle between these actions, so when you select **Show Less**, for example, the link changes to **Show More**.

### SharePoint Archive Search Web Part advanced search

With the SharePoint Archive Search Web Part advanced search, you can search on a combination of the following criteria:

- Author
- Content
- Document type
- Document name
- Created or modified date

"Contains" means that in matching documents the selected property must contain the word or phrase as entered in the next box.

"Is exactly" means that in matching documents the selected property must contain exactly the word or phrase as entered in the next box.

For example, if the author of a document is John Peter Doe:

- Searching for "Author Contains John Peter" will result in a match.
- Searching for "Author Contains John Doe" or "Doe John" will not result in a match.
- Searching for "Author Is exactly John Peter Doe" will result in a match.
- Searching for "Author Is exactly John Peter" will not result in a match.

If you specify two properties, you can manage the way they are applied using the "And/Or" operator options. If three properties are specified, the second and third always use the "And" operator.

If you enter values for properties and select a "Modified/Created" date range, the search will look for documents that satisfy both the property criteria and the date criteria.

## Customizing the Archive Search Web Part search form

You can use the **Manage Scope** and **Manage Properties** links to customize the search form in the Archive Search Web Part by adding SharePoint sites to the scope list and custom properties to the properties listed.

- **Manage Scope** enables you to add sites to the **Search scope** drop-down box. For example, you may want to include a site that has been deleted, as there may still be archived documents from this site.
- **Manage Properties** enables you to add custom properties to the "Search by properties" drop-down box. Custom properties can be defined for document libraries. Enterprise Vault stores these additional properties when it archives documents.



### To add a site to the search scope list

- 1 In the Archive Search Web Part, click **Manage Scope**.
- 2 Click **Add a Site**.
- 3 Enter the **Site name** and the **URL** for the required site.
- 4 Click **OK**. The site is displayed on the Custom Sites page.
- 5 Click **Back** to return to the main search page.
- 6 When you click the arrow beside the **Search scope** drop-down box. The new site is now available in the list.

### To add a custom property to the Search by properties list

- 1 In the Archive Search Web Part, click **Manage Properties**.
- 2 Click **Add a Property**.
- 3 Enter the **Property name** of the required custom property.
- 4 Click **OK**. The site is displayed on the Custom Properties page.
- 5 Click **Back** to return to the main search page.

When you click the arrow beside the property box under **Search by properties**, the new site is now available in the list.

## Restoring a document using the Archive Search Web Part

On the Archive Search Results page, a "Restore" link is displayed below each document listed.

### To restore a copy of a search result document to the SharePoint server

- ◆ Click the **Restore** link below the required document.

The Document Restored page is displayed, showing the name and location of the restored copy.

When a document replaces an existing shortcut the behavior depends on the version of SharePoint on which the shortcut was created, as follows:

- If the shortcut was created on SharePoint Server 2007 (MOSS 2007), the restored copy overwrites the shortcut.
- If the shortcut was created by Enterprise Vault 8.0 SP3 or later, the restored copy overwrites the shortcut.
- If the shortcut was created by Enterprise Vault 8.0 SP2 or earlier, the restored copy is a new document with the name of the shortcut and a suffix (*n*). For example:

`my document (1) .doc`

If you restore the original document again from the Archive Search Results page, another new document is created with the following name:

`my document (2) .doc`

On the version history page for the new document, clicking **Show archived versions for this document** will display archived versions of the restored document, **my document(1).doc** in the example, and archived versions of the original document, `my document.doc` in the example.

## About the Archive Explorer Web Part

You can navigate and search SharePoint archives that you have permission to access using Archive Explorer Web Part.

The archives are displayed in a tree structure. All documents in a site collection are stored in the same archive. In the Archive Explorer tree, subsites and document libraries are displayed as child objects of the site collection archive.

Expand the required archive in the tree on the left. When you click the document library object in the tree, the documents archived from that library will be displayed on the right.

For more information on how to use Archive Explorer, see the online help on the Archive Explorer pages.

## Modifying the Internet Explorer security settings for SharePoint users

To avoid users having to enter credentials every time they access the SharePoint server or Enterprise Vault SharePoint archive, the Enterprise Vault server and SharePoint Server can be added to local intranet sites in Internet Explorer.

If you are using Active Directory, you can employ a group policy to apply the zone changes to all domain users by editing the Internet Explorer Maintenance settings within the policy.

### To modify the setting for an individual user

- 1 On each client computer, open Internet Explorer.
- 2 Go to **Tools, Internet Options** and click the **Security** tab.
- 3 Click **Trusted sites** and then **Sites**.

- 4** Enter the URL for the SharePoint server and click **Add**. For example:

`http://my_sharepoint_server`

- 5** Enter the URL for the Enterprise Vault Web Access application server and click **Add**. For example:

`http://myEnterpriseVaultServer`

- 6** Click **OK** to close the Trusted Sites window.
- 7** If a pop-up blocker is being used, configure it so that it does not block the Web Access application URL.
- 8** Close Internet Explorer.



# Installing Enterprise Vault and SharePoint on a single server

This appendix includes the following topics:

- [Installing Enterprise Vault and SharePoint on the same server](#)

## Installing Enterprise Vault and SharePoint on the same server

For demonstration systems you can install Enterprise Vault and SharePoint on the same computer. This configuration is not recommended for production purposes.

This section describes how to enable Enterprise Vault Web applications to work correctly when Enterprise Vault shares the same server as a SharePoint front-end Web server.

When you install SharePoint and Enterprise Vault on the same computer, the Enterprise Vault Web application is installed in the Default Web Site. By default, SharePoint stops the Default Web Site.

You must change the Default Web Site port number and then change the Enterprise Vault Web Access application port number to match.

---

**Note:** You must make these changes before you archive any data from SharePoint.

---

**To change the Default Web Site Port number**

- 1 Click **Start > Administrative Tools > Internet Information Services (IIS) Manager**.
- 2 Expand the local computer node.
- 3 Expand Web Sites node.
- 4 Right-click **Default Web Site**, and then click **Properties**.
- 5 On the **Web Site** tab, change **TCP port** to be an unused port number.
- 6 Start the Default Web Site.

**To change the Enterprise Vault Web Access application port number**

- 1 Start the Enterprise Vault Administration Console.
- 2 Right-click the name of the Vault Site and, on the shortcut menu, click **Properties**.
- 3 On the **General** tab, under **Web Access application**, change **Use TCP port** to match the port number of the Default Web Site.
- 4 Restart the Enterprise Vault services.

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