

Enterprise Vault™ Setting up SharePoint Server Archiving

12.3

Enterprise Vault™: Setting up SharePoint Server Archiving

Last updated: 2018-01-17.

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About this guide

This chapter includes the following topics:

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

Introducing this guide

This guide describes how to set up Enterprise Vault so that you can archive content from Microsoft SharePoint servers.

Throughout this guide, the term "content" refers to all the data that is stored on SharePoint. An "item" is any file or other entity that makes up the content in SharePoint. For example, an item can be a document, a blog post or comment, a custom list item, and so on. A "document" or "file" is specifically an item stored in the document library; for example, a Word document, spreadsheet, and so on.

Where to get more information about Enterprise Vault

[Table 1-1](#) lists the documentation that accompanies Enterprise Vault. This documentation is also available in PDF and HTML format in the [Veritas Documentation Library](#).

Table 1-1 Enterprise Vault documentation set

Document	Comments
Veritas Enterprise Vault Documentation Library	<p>Includes all the following documents in Windows Help (.chm) format so that you can search across them all. It also includes links to the guides in Acrobat (.pdf) format.</p> <p>You can access the library in several ways, including the following:</p> <ul style="list-style-type: none"> ■ In Windows Explorer, browse to the Documentation\language\Administration Guides subfolder of the Enterprise Vault installation folder, and then open the EV_Help.chm file. ■ On the Help menu in the Administration Console, click Help on Enterprise Vault.
<i>Introduction and Planning</i>	Provides an overview of Enterprise Vault functionality.
<i>Deployment Scanner</i>	Describes how to check the required 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 Domino Server Archiving</i>	Describes how to archive items from Domino mail files and journal databases.
<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 File System Archiving</i>	Describes how to archive files that are held on network file servers.
<i>Setting up IMAP</i>	Describes how to configure IMAP client access to Exchange archives and Internet Mail archives.
<i>Setting up SharePoint Server Archiving</i>	Describes how to archive documents from Microsoft SharePoint servers.
<i>Setting up Skype for Business Archiving</i>	Describes how to archive Skype for Business sessions.
<i>Setting up SMTP Archiving</i>	Describes how to archive SMTP messages from other messaging servers.

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

Document	Comments
<i>Classification using the Microsoft File Classification Infrastructure</i>	Describes how to use the classification engine that is built into recent Windows Server editions to classify all new and existing archived content.
<i>Classification using the Veritas Information Classifier</i>	Describes how to use the Veritas Information Classifier to evaluate all new and archived content against a comprehensive set of industry-standard classification policies. If you are new to classification with Enterprise Vault, we recommend that you use the Veritas Information Classifier rather than the older and less intuitive File Classification Infrastructure engine.
<i>Administrator's Guide</i>	Describes how to perform day-to-day administration procedures.
<i>PowerShell Cmdlets</i>	Describes how to perform various administrative tasks by running the Enterprise Vault PowerShell cmdlets.
<i>Auditing</i>	Describes how to collect auditing information for events on Enterprise Vault servers.
<i>Backup and Recovery</i>	Describes how to implement an effective backup strategy to prevent data loss, and how to provide a means for recovery in the event of a system failure.
<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>NSF Migration</i>	Describes how to import content from Domino and Notes NSF files into Enterprise Vault archives.
<i>PST Migration</i>	Describes how to migrate content from Outlook PST files into Enterprise Vault archives.
<i>Utilities</i>	Describes 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.
<i>Help for Administration Console</i>	The online Help for the Enterprise Vault Administration Console.

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

Document	Comments
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](#).

Enterprise Vault training modules

Veritas Education Services provides comprehensive training for Enterprise Vault, from basic administration to advanced topics and troubleshooting. Training is available in a variety of formats, including classroom-based and virtual training.

For more information on Enterprise Vault training, curriculum paths, and certification options, see <https://www.veritas.com/services/education-services>.

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 content from servers running any of the following:

- Microsoft SharePoint Server 2010
- Microsoft SharePoint Foundation 2010
- Microsoft SharePoint Server 2013
- Microsoft SharePoint Foundation 2013
- Microsoft SharePoint Server 2016

At scheduled times, Enterprise Vault automatically copies content from the SharePoint server and stores it in Enterprise Vault SharePoint archives. Archived content can be left on the SharePoint server or deleted, as required. Shortcuts can

also be created on the SharePoint server for certain content. You use the SharePoint policy to configure deleting the original content and creating shortcuts.

Enterprise Vault archives and creates shortcuts for the following SharePoint content types:

- | | |
|---------------------|-------------------|
| ■ Announcements | ■ Form Library |
| ■ Asset Library | ■ Issue Tracking |
| ■ Blogs | ■ Links |
| ■ Contacts | ■ Picture Library |
| ■ Custom Lists | ■ Slide Library |
| ■ Discussion Boards | ■ Tasks |
| ■ Document Library | ■ Wikis |

The archiving of items and creation of shortcuts in their place usually results in space saving. However, in SharePoint 2013 or later, the shredded storage means that this space saving may be reduced.

If versioning is enabled for a document library, you can configure the number of versions of a document that need to remain on the SharePoint server after archiving. The archived version history link enables users to view the archived versions of the item and lets them restore items where applicable.

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

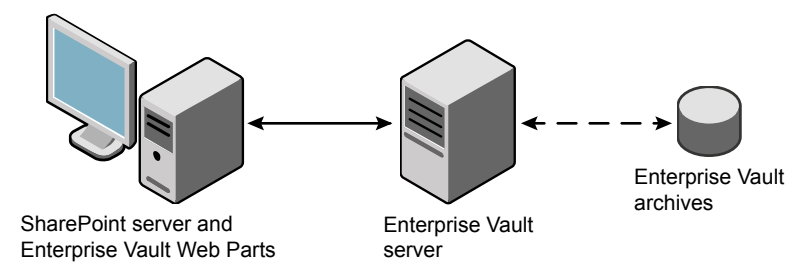
- A document library that has document publishing enabled; that is, if the document library is configured for minor versions.
- A document library or a list that has content approval enabled.
- SharePoint Records Center sites.
- An item that is marked as a record.
- SharePoint publishing sites or wikis.
- A list that has versioning enabled.
- A list that has moderation enabled.
- A list item with a workflow that starts when an item is changed.
- Read-only closed site collections.

You can restore archived document library items to SharePoint but you cannot restore archived social content and read-only closed site collections.

A single Enterprise Vault SharePoint archiving task can archive content from multiple SharePoint servers. You can use the SharePoint archiving task to archive content from SharePoint servers that are configured to accept client certificate authentication.

Figure 2-1 shows an Enterprise Vault server archiving content 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 new shortcuts that let you restore the archived items. For more information, see the *Utilities* guide.

Overview of configuring Enterprise Vault for SharePoint

Table 2-1 outlines the tasks that 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 the Enterprise Vault server can access the SharePoint servers.	See “Configuring Enterprise Vault access to the SharePoint server” on page 13.
Step 2	Install the Enterprise Vault SharePoint components.	See “Installing Enterprise Vault components on the SharePoint server” on page 14.
Step 3	Run the Configuration Wizard.	See “Running the Enterprise Vault for SharePoint configuration wizard” on page 15.

Table 2-1 Tasks to set up SharePoint archiving (*continued*)

Step	Task	Where to find detailed instructions
Step 4	Configure SharePoint archiving in the Administration Console.	See “Creating objects in the Administration Console for SharePoint archiving” on page 16.

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.

The Vault Service account you use to access SharePoint must have local administrator permissions on each of the target SharePoint site servers.

The account that the archiving task uses to access SharePoint is usually the Vault Service account. The Vault Service account must have site collection administrator privileges on the target SharePoint site collections.

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.

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 the 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 SharePoint_Shell_Access SQL Server security role in the SharePoint_Config database.

Make sure that you log on to the SharePoint Server as a site collection administrator.

- 2 Load the Enterprise Vault media on your SharePoint Server computer.
- 3 If Windows AutoPlay is enabled on the server, Windows shows an AutoPlay dialog box. Click **Run Setup.exe**.

If AutoPlay is not enabled, use Windows Explorer to open the root folder of the installation media and then double-click the file `Setup.exe`.

The Install Launcher opens.

- 4 In the right pane of the Install Launcher, click **View ReadMeFirst** under **Enterprise Vault**. Read the ReadMeFirst before you continue with the installation.
- 5 In the list in the left pane of the Install Launcher, click **Enterprise Vault**.
- 6 Click **Server Installation**.
- 7 In the right pane, click **Installation on first server in new site**.

- 8 Click **Install**. The Enterprise Vault installation wizard starts.
- 9 Work through the installation wizard until you reach the **Select Components to Install** page.
- 10 Select **Microsoft SharePoint Components**.
If you are installing only the Enterprise Vault SharePoint components on this computer, clear the other options.
- 11 Click **Next**.
- 12 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 run the Enterprise Vault for SharePoint configuration wizard

- 1 Log in to the SharePoint Server computer as the Vault Service account.
- 2 Start the Enterprise Vault for SharePoint 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 reinstall the Enterprise Vault SharePoint components.

See [“Installing Enterprise Vault components on the SharePoint server”](#) on page 14.

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 “Creating a SharePoint archiving task” on page 16.
Step 2	Create one or more SharePoint archiving policies.	See “Creating an archiving policy for Enterprise Vault for SharePoint” on page 18.
Step 3	If required, create a new vault store to use for the SharePoint archives.	See “About the vault stores for SharePoint archives” on page 21.
Step 4	Add SharePoint archiving targets in Enterprise Vault.	See “Adding a SharePoint archiving target” on page 21.
Step 5	Create archiving targets for the SharePoint site collections.	See “Creating archiving targets for SharePoint site collections” on page 24.
Step 6	Create archiving target subsites to override archiving settings.	See “Creating archiving target subsites to override archiving settings” on page 25.

Creating a SharePoint archiving task

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

The account that the archiving task uses to access SharePoint must have site collection administrator permissions in each of its target SharePoint site collections.

To create a SharePoint archiving 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 then 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.
	Run in report mode	Select this to run in report mode. This mode lists the items that meet the archiving criteria, without actually archiving any content.
	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 Never to stop the scheduled running of the task, or Selected times , 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.

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

Tab	Property	Description
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 must have site collection administrator permissions in each of the target SharePoint site collections.
Reports	Generate report files for archive run	The Reports 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 Reports 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 Reports folder.
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 “Creating archiving targets for SharePoint site collections” on page 24.</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 items 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.
Click **Next**.
- 4 Give the policy a name and description.
- 5 In the next page you create one or more rules to select the items that you want to process with this policy. Click **New** to display the **Rule** page.
- 6 Enter a **Name** and **Description** for this rule.
- 7 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**.

If you select **Archive**, the **Capture embedded images within content** option is available. You can use this option to archive images within the content.
- 8 To archive files according to content source and type, enter the details in the **Content** tab. Click **Help** for information about the options.

In the **Metadata** tab, you can define conditions so that Enterprise Vault archives items according to the values in the SharePoint lists or library columns.
- 9 To specify criteria to apply a rule to file types, click the **File** tab and specify the selection criteria.

For **File name**, 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 file names. For example, * means all files, whereas *.doc means all files with the extension .doc.

Separate multiple file types with a comma.

Similarly, specify the file size for the rule.
- 10 Specify a retention category for the content that you selected for the rule in the **Retention Category** tab.

Clear the check box **Use Retention Category assigned to the target** if you want to apply a retention category other than the one assigned to the target in the **Retention Category** list.

The options in this tab are available only if you select **Archive** as the rule type in the **General** tab.

- 11 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.

- 12 In the next page, you can configure how to handle the library 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.
- 13 In the next page, you can configure how to handle the list items that have already been archived. You can choose to retain the items in SharePoint, to delete the items from SharePoint, or to replace attachments of items with shortcuts.
- 14 In the next page, select **Prune SharePoint documents** and set **Prune versions of the document to** the specify number of versions of an archived document that you want to leave in SharePoint after archiving. Earlier versions will be available only in the archive.
- 15 In the next page, you can configure whether or not Enterprise Vault is to archive content with permissions that differ from those of other content in the folder. When Enterprise Vault archives items from SharePoint, the copy stored in the archive is given the same permissions as the folder that contained the original content. This means that users with read access to the folder in SharePoint will be able to access archived copies of any content in the folder.
- 16 In the next page, 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 **Archive drafts only if they can be viewed by users with read access to those items**, then drafts of all items archived from the target site are archived. This means that anyone with read access to the original item in SharePoint will also be able to view archived drafts of the item in Enterprise Vault, even if they do not have access to drafts in SharePoint.
- 17 The next page lists the various SharePoint policy settings that you created.
- 18 Click **Finish** and then **Close**.

Viewing or modifying a SharePoint archiving policy

To view or modify a SharePoint archiving policy

- 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 content in the top level site and all subsites of that site collection is 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'.

To add a web application in SharePoint 2013 or later as an archiving target, you must ensure that the web application has the following authentication settings:

- Integrated Windows authentication is enabled.
- Trusted identity providers and forms-based authentication for all zones in the target web application are disabled.

To add a web application in SharePoint 2010 as an archiving target, you must ensure that the web application has the classic mode authentication enabled.

Note: Authentication settings are required not only for adding the web application as a target but also for archiving its content. Archiving stops if these settings are changed after adding the target.

See [“Configuring Enterprise Vault access to the SharePoint server”](#) on page 13.

To add a SharePoint archiving target

- 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, select **Auto-enable Site Collections**. The wizard guides you through the process of selecting the task, policy, vault store, and retention category or retention plan to be used for all sites on this SharePoint target.

To add a SharePoint target that was previously added and then deleted, you must select the same vault store that was used previously for that 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 settings for the target site collection object, but target subsite objects are not displayed in the Administration Console. Content in subsites is 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, retention plan, or task, clear **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 24.

- 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 the default archiving settings for a SharePoint target

- ◆ 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 the archiving of sites on a target

- ◆ 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.

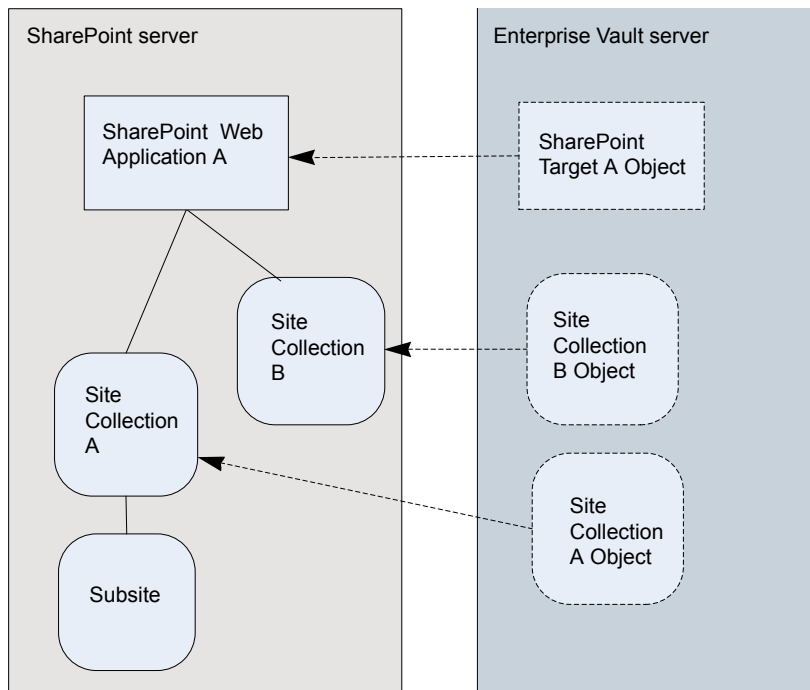
The account that the archiving task uses must have site collection administrator permissions in each of the target SharePoint site collections.

As an alternative to giving site collection administrator permissions in each of the target SharePoint site collections, you can give the task account full control permissions on the target SharePoint web application. This alternative can be useful when you use the auto-enable option.

You can set full control permissions using the Policy for Web Application page in SharePoint Central Administration.

[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 website 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.
To add a SharePoint site collection that was previously added and then deleted, you must select the same vault store that was used previously for that site collection.
Click **Next**.
- 7** Select the policy and archiving task to be used to archive the site collection. Click **Next**.
- 8** Select the retention category or retention plan to apply to any files that are archived. You can use **New** to create a new retention category or retention plan, 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.

Content archived from all sites in a site collection is 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 or retention plan to apply to any content that is archived. You can use **New** to create a new retention category or retention plan, 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 content, but it generates a report to identify the content that is ready for archiving. In normal mode, Enterprise Vault archives the content. 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 39.

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 Select **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 to a SharePoint page](#)

About the SharePoint archiving Web Parts

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

Users can do the following with the Archive Search Web Part:

- Search SharePoint content in the Enterprise Vault archives. From the search results page, users can view documents and list items.
- Browse and search SharePoint archives that they have permission to access.
- Copy archived content and content versions of libraries to the SharePoint server.

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 a SharePoint page

You must be a site owner or administrator to modify a SharePoint page and add Web Parts.

To add the Archive Search Web Part to a SharePoint 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, select **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.

User access to archived SharePoint documents

This chapter includes the following topics:

- [About user access to archived SharePoint items](#)
- [Modifying the browser security settings for SharePoint users](#)

About user access to archived SharePoint items

Note: To view or edit archived items, you need to use your web browser in administrator mode when you open the SharePoint site.

You cannot restore archived social content.

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

- Using the **Show archived versions for this item** link on the versions history page. From this page users can access versions of an item that are in the archive and also replace the current version of an item on the SharePoint server with a version in the archive.
The **Show archived versions for this item** link is not available for blogs and discussions.
See [“Accessing archived versions on the SharePoint version history page”](#) on page 33.
- Using the Archive Search Web Part. The Archive Search Web Part enables users to search for archived items in the archives. From the search results page, users can view items and restore archived documents or document versions to the SharePoint server.

See [“Using the Archive Search Web Part to search for archived items”](#) on page 33.

Users can only see content that they have permission to access.

To use Archive Search, Internet Explorer 9.0 or later, with JavaScripting 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 item**, is displayed under the SharePoint versions.

You can view versions for all types of items except discussions and blogs.

To access archived versions on the SharePoint version history page

- 1 Click **Show archived versions for this item**.
- 2 Select the following using the drop down menu from the item name:
 - **View** to open the archived item or save it on your computer.
 - **Restore** to restore the item to SharePoint as the latest version.
The **Restore** option is available only for documents and not for list items.

Using the Archive Search Web Part to search for archived items

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

To use the Archive Search Web Part to search for archived items

- 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 name, subject or the item content, and click **Go**.

For example, entering the following would return items 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 item called **December newsletter** and an item with the word **newer** in the item content.

Note that to be able to search for phrases in the 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/Created by
- Content
- Item type

- Modified by
- Name
- Title

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

Equals means that in matching items the selected property must contain exactly the word or phrase as entered in the next box.

For example, if the author of an item 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 items that satisfy both the property criteria and the date criteria.

You cannot specify a search with custom Date and Time or Number fields using **contains** or **equals** in the Search Web Part. You need to use Enterprise Vault Search to do this.

Searching by created date on the Search Web Part may include modified social content in the search results.

You must do a content search when searching for information related to member reputation, rating, and badges in archived community sites.

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 content 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 item libraries. Enterprise Vault stores these additional properties when it archives.

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.

Note: Do not add multiline fields as a property. If you want to search for items with multiline fields, you can do a content search using text from the multiline fields. If you add multiline fields as a property, the search results may not contain the items you are looking for.

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.

Note: You cannot restore list items.

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 name `my document (2) .doc`.

On the version history page for the new document, clicking **Show archived versions for this item** 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.

Modifying the browser 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 the local intranet sites zone of the users' web browsers. As an illustration, the following procedure describes how to make this addition in Internet Explorer.

If you are using Active Directory, you can employ a group policy to apply the zone changes to all domain users.

To modify the security settings in Internet Explorer for a SharePoint user

- 1 On each client computer, open Internet Explorer.
- 2 Go to **Tools, Internet Options** and click the **Security** tab.
- 3 Click **Local Intranet** 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 **Local Intranet** 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** Start Internet Information Services (IIS) Manager.
- 2** Expand the local computer node.
- 3** Expand the 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 then 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.