

# Enterprise Vault.cloud™ SharePoint Archival Tool Administration Guide

# Enterprise Vault.cloud: SharePoint Archival Tool Administration Guide

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# About the SharePoint Archival Tool

This chapter includes the following topics:

- [About the SharePoint Archival Tool](#)

## About the SharePoint Archival Tool

The Veritas Enterprise Vault.cloud™ SharePoint Archival Tool is an on-premises application that allows organizations to archive documents from SharePoint servers to Enterprise Vault.cloud. The configured tool collects all the documents on your selected SharePoint sites and sends them to Enterprise Vault.cloud in the form of email attachments.

The SharePoint Archival Tool runs as a Windows service that can be easily configured from the application. The application should be installed on a front-end server within a SharePoint server farm. The application requires access to a Simple Mail Transfer Protocol (SMTP) server to send the documents to Enterprise Vault.cloud.

This guide describes how to install, configure, and use the SharePoint Archival Tool, and how to generate reports on its activities.

# Installing the SharePoint Archival Tool

This chapter includes the following topics:

- [Prerequisites for the SharePoint Archival Tool](#)
- [Installing the SharePoint Archival Tool](#)

## Prerequisites for the SharePoint Archival Tool

For information on the versions of Microsoft SharePoint that the archival tool works with, see the Enterprise Vault.cloud *Compatibility List* at <http://www.veritas.com/docs/000016792>.

The prerequisites for the computer on which you install the SharePoint Archival Tool are as follows:

- Access to a Simple Mail Transfer Protocol (SMTP) server
- Microsoft .NET Framework version 3.5 SP1
- Microsoft SQL Server Compact 3.5

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**Note:** We recommend that you install the SharePoint Archival Tool on a front-end server within a SharePoint server farm.

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You also require:

- An account with local system administrator privileges for installing the application.
- The Enterprise Vault.cloud journaling address that is provided to you by customer support.

# Installing the SharePoint Archival Tool

## To install the SharePoint Archival Tool

- 1 Download the required version of the SharePoint Archival tool from the following location on our Support website:

<http://www.veritas.com/docs/000023526>

- 2 Decompress the SharePoint Archival Tool compressed file.
- 3 Run the `ArchiveTools.SharePoint.ArchivalSetup.msi` file to launch the setup wizard.

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**Note:** Do not try to install the application with the `Setup.exe` file.

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- 4 On the first page of the ArchiveTools SharePoint Archival Service Setup Wizard, click **Next** to start the installation.
- 5 Select the installation folder for the application, and click **Next** to continue.
- 6 Click **Next** to proceed with the installation.
- 7 The **Installation Complete** window displays when the SharePoint Archival Tool is installed. Click **Close** to exit from the setup wizard.

# Configuring the SharePoint Archival Tool

This chapter includes the following topics:

- [Configuring the SharePoint Archival Tool](#)
- [Selecting the SharePoint sites to archive from](#)

## Configuring the SharePoint Archival Tool

Once the SharePoint Archival Tool is installed you can perform the application configuration.

### To configure the SharePoint Archival Tool

- 1 Click **Start > Programs > ArchiveTools > ArchiveTools SharePoint Archival**.
- 2 In the left navigation pane of the SharePoint Archival Tool, select **Configuration**.
- 3 Complete the **SharePoint Administrator Credentials** section of the page as follows:

|                         |  |
|-------------------------|--|
| <b>Domain</b>           | Enter the SharePoint domain of the sites that you want to archive. |
| <b>SharePoint Admin</b> | Enter the user name of a SharePoint administrator.                 |
| <b>Password</b>         | Enter the password for the SharePoint administrator.               |
- 4 Click **Test Credentials** to verify the SharePoint administrator credentials you entered.



- 5** Complete the **SMTP Server Settings** to configure the details of the SMTP server that is to send the SharePoint documents to Enterprise Vault.cloud:

**SMTP Server does not require authentication** Check this option if the SMTP server does not require authentication for access.

If you select this option, the **User Name** and **Password** fields become disabled because these details are not required.

**Server Name/IP** Enter the server name or IP address with which to access the SMTP server.

**Port** Enter the port number with which to access the SMTP server. The supplied default is port 25.

**User Name** Enter the user name of the account to use for SMTP server access if you did not check the **SMTP Server does not require authentication** check box.

**Password** Enter the password of the account to use for SMTP server access if you did not check the **SMTP Server does not require authentication** check box.

- 6** Click **Test Connection** after to verify the SMTP server settings.

- 7** In the **Cloud Archive Journal Address** section, enter your Enterprise Vault.cloud journaling address.

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**Note:** This address is a unique journaling address created for your company. Contact customer support if you do not have this address available.

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- 8** In the **SharePoint Storage Method** section, complete the options as follows:

**Archive Email Address** Enter an archive account email address that is to receive archived SharePoint documents.

The storage method you select determines the purpose of this email address:

- If you select the **Central** storage method, all of the archived documents are sent to this email address.
- If you select the **Distributed** storage method, archived documents are sent to this email address only when a document cannot be sent to the document owner.

**Central** Select this storage method if you want to send all archived documents to the address that you specified in **Archive Email Address**.

**Distributed** Select this storage method if you want to send the archived documents to the archive account email address of the document owner.

Archived documents are only sent to the **Archive Email Address** if Enterprise Vault.cloud cannot find the document owner in the archive.

- 9 When you have completed the application configuration, click **Save** at the top of the Configuration page.

## Selecting the SharePoint sites to archive from

When you have completed the SharePoint Archival Tool application configuration, the tool retrieves the title and URL for each of your SharePoint server sites. You can then select the sites that you want to archive from.

### To select the SharePoint sites to archive from

- 1 In the left navigation pane of the SharePoint Archival Tool, select **Archival Settings**.
- 2 In the table of your SharePoint sites on the Archival Settings page, check the check box for each site that you want to archive from.
- 3 To archive all of the existing versions of each document in a site when an archival event runs for the first time, check **Archive all document versions**. If you do not check this option, only the latest version of each document is sent for archiving when the archival event runs for the first time.

This setting determines the tool's behavior only on the first occasion that it archives from a site. Once the first archival event has run for a site, previous versions of the documents cannot be archived.

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**Note:** If you choose this option, be aware that the archival process may adversely affect the performance of both the SharePoint server and the SharePoint Archival Tool. To archive all of the previous versions of every document can involve a very large amount of data.

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- 4 Click **Save** to save your settings.

# Running and scheduling archival events

This chapter includes the following topics:

- [About running and scheduling archival events](#)
- [Starting archival events now](#)
- [Scheduling archival events](#)

## About running and scheduling archival events

From the SharePoint Archival Tool you can run an archival event immediately, or schedule future archival events to repeat as required.

## Starting archival events now

You can start an archival event in the SharePoint Archival Tool so that the event runs immediately.

**To start an archival event now**

- 1 In the left navigation pane of the SharePoint Archival Tool, select **Archival Settings**.
- 2 Click **Archive Now**.

## Scheduling archival events

The SharePoint Archival Tool includes an option to schedule archival events with the frequency and duration of your choice.

**To schedule archival events**

- 1 In the left navigation pane of the SharePoint Archival Tool, select **Archival Settings**.
- 2 On the Archival Settings page, click **Sync Schedule**. The Configure Schedule page displays.
- 3 On the **Sync Schedule** dialog, configure your sync schedule settings as follows:

**Schedule** Check **Enable Sync** to enable the Sync Schedule option. Enter a starting date and time for future synchronization events.

**Frequency** Select an option for how often to perform the synchronization events:

- **Repeat incrementally every:** Repeats the synchronization events according to the elapsed time that you select.
- **Repeat daily at:** Repeats the synchronization events at the selected time on the selected days.
- **Repeat monthly on the:** Repeats the synchronization events monthly on the specified day.

**Duration** Select an option for how long to perform the synchronization events:

- **Repeat forever:** Repeats the synchronization events until you disable synchronization or change the Sync Schedule settings.
- **Total recurrences:** Repeats the synchronization events the specified number of times.
- **End date:** Repeats the synchronization events until the specified end date and end time.

- 4 Click **Save**.

# Reports

This chapter includes the following topics:

- [About the SharePoint Archival Tool's reports](#)
- [Viewing reports in the SharePoint Archival Tool](#)
- [Subscribing to daily email reports](#)

## About the SharePoint Archival Tool's reports

The SharePoint Archival Tool creates a report every time that an archival event runs. You can view the archival reports from within the SharePoint Archival Tool. You can also configure the tool to send a daily summary report to one or more specified email addresses.

## Viewing reports in the SharePoint Archival Tool

You can view the SharePoint Archival Tool's archival reports from within the application.

### To view reports in the SharePoint Archival Tool

- 1 In the left navigation pane of the SharePoint Archival Tool, select **Reports**.
- 2 The **Display Reports** section lists all the reports.  
If required, use the **Month** and **Year** filters to reduce the number of listed reports.
- 3 In the row for the report that you want to view, click **Display**.  
The report displays in a new window.

# Subscribing to daily email reports

You can configure the SharePoint Archival Tool to email an archival report daily to one or more recipients.

## To subscribe to daily email reports

- 1 In the left navigation pane of the SharePoint Archival Tool, select **Reports**.
- 2 Check **Email Daily Report**.
- 3 To specify the report recipients, enter one or more email addresses. Separate the email addresses with commas.
- 4 Click **Save**.