

DocAve™ 4.1 Server and Client Installation Guide

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AvePoint reserves the right to make changes in the product design without reservation and without notification to its users.

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1 Revision History

This revision history summarizes the changes made in each published version of this document.

| Document No. | Publication Date | Description of Revisions |
|---|-------------------------|---|
| DocAve TM 4.1 Install Guide Rev 1.0 | January 2007 | Release version of the document. |
| DocAve 4.1 Install Guide Rev 1.1 | May 2007 | Update based on May 30 Release. Add TSM support for Server installation and New features included in Client installation. |



2 About This Publication

This preface provides the following information about this DocAve 4.1 Install Guide.

- Purpose
- Intended Audience
- How To Use This Publication
- Related Information

Purpose

This install guide explains in detail the installation procedures and accessing the AvePoint's DocAve 4.1 solution.

Intended Audience

This information is intended for:

- SharePoint administrators
- System integrators
- Value added resellers (VARs)
- Original Equipment Manufacturers (OEMs)

How To Use This Publication

This DocAve 4.1 install guide is organized as follows:

- Section 3, "Overview" gives a high level feature overview of the DocAve 4.1 product.
- Section 4, "System Requirements" detail the minimum system requirements needed to install both DocAve 4.1 server and client(s).
- Section 5, "Installation Location" describes DocAve 4.1's distributed server and client's system architecture.
- Section 6, "Installation Steps" goes into step by step installation procedures.
- Section 7, "Verifying the DocAve 4.1 Installation" describes the procedures to verify the installation.
- Section 8, "Accessing DocAve 4.1" describes steps to login to the DocAve 4.1
 Application.
- Section 9, "Uninstall Instructions" describes step by step uninstall procedures.



Related Information

For additional information related to DocAve 4.1 product configurations, and administration, please see DocAve 4.1 User Guide, and DocAve 4.1 usage Flash movies.



3 Overview

This install guide explains the product features of AvePoint's latest extension in the SharePoint backup solution space. DocAve 4.1 is an enterprise strength item-level backup, recovery, and content management solution for Microsoft Windows SharePoint Services, Microsoft SharePoint Portal Server, and Microsoft Project Server (including the x64 Editions).

DocAve 4.1 consists of two modules, DocAve 4.1 Server and DocAve 4.1 Client. Both modules must be installed in order to run DocAve 4.1.

Operating on AvePoint's latest distributed software platform, DocAve 4.1 run on any environment, accessible from anywhere in your network via Microsoft Internet Explorer (IE), and monitors multiple SharePoint environments across the network. Specifically, DocAve 4.1's main features include:

- Provide scheduled full, incremental, or differential backup at the site-level, subsite-level, and item-level.
- Real-time time restore of items, subsites, and sites directly onto your production server, or cross restore to any server on the network.
- Offer "point & click" simplicity to content management at the item-level, subsite level, and site level.
- Automated data-pruning and coalescing lets users manage backup data. Allow users to specify backup data size, storage medium, and location.
- Central administration of all SharePoint backup/recovery/management jobs scheduling/monitoring/reporting, user account management, and software agent management across multiple SharePoint farms from a SINGLE "accessible-from-ANYWHERE" web interface.



4 System Requirements

DocAve 4.1 Server

| Computer and processor | PC with an Intel Pentium III-compatible 700-MHz processor minimum, Intel Pentium 4-compatible processor recommended |
|------------------------------|---|
| Memory | 1GB of RAM minimum, 2GB recommended |
| Hard disk | 1GB minimum, 3GB Recommended |
| Operating system | Requires one of the following: Microsoft Windows XP, Microsoft Server 2000, Microsoft Windows Server 2003 Standard Edition, Windows Server 2003 Enterprise Edition, Windows Server 2003 Datacenter Edition, or Windows Server 2003 Web Edition (includes x64 editions) .Net Framework installed (Framework 1.1/2.0) |

DocAve 4.1 Media Server

| Computer and processor | PC with an Intel Pentium III-compatible 700-MHz processor minimum, Intel Pentium 4-compatible processor recommended |
|------------------------------|--|
| Memory | 1GB of RAM minimum, 2GB recommended |
| Hard disk | 1GB minimum, 3GB Recommended |
| Operating system | Requires one of the following: Microsoft Windows XP, Microsoft Server 2000, Microsoft Windows Server 2003 Standard Edition, Windows Server 2003 Enterprise Edition, Windows Server 2003 Datacenter Edition, or Windows Server 2003 Web Edition (includes x64 editions), .Net Framework installed (Framework 1.1/2.0) |



DocAve 4.1 Client

| Computer and processor | PC with an Intel Pentium III-compatible 700-MHz processor (dual Intel Xeon 3.0 GHz or faster recommended) |
|------------------------|---|
| Memory | 512 MB of RAM minimum, 1GB recommended |
| Hard disk | 1GB minimum, 3GB Recommended |
| Operating system | Requires one of the following servers: Microsoft Windows Server 2003 Standard Edition, Windows Server 2003 Enterprise Edition, Windows Server 2003 Datacenter Edition, or Windows Server 2003 Web Edition |
| Other | Front-End Web Server for SharePoint Portal Server 2003 and/or Windows SharePoint Services 2.0 |



5 Installation Location

5.1 DocAve 4.1 Server

DocAve 4.1 Server can be installed on any machine on your network meeting the above requirements. The machine it is installed on will essentially serve as the DocAve 4.1 server or the interface to access the DocAve 4.1 application from other machines. As such, it is recommended that you install DocAve 4.1 Server on a machine with high availability. This can be the same machine that you install the DocAve 4.1 Client on.

5.2 DocAve 4.1 Media Server

DocAve 4.1 Media Server can be installed on any machine on your network with enough disk space to accommodate the amount of backup data you are expecting to store. The machine it is installed on will serve as the backup data storage and management server. As such, it is recommended that you install DocAve 4.1 Media Server on a machine with high reliability. This can be the same machine that you install the DocAve 4.1 Server on.

5.3 DocAve 4.1 Client

The DocAve 4.1 Client should be installed on a SharePoint Server.



6 Installation Steps

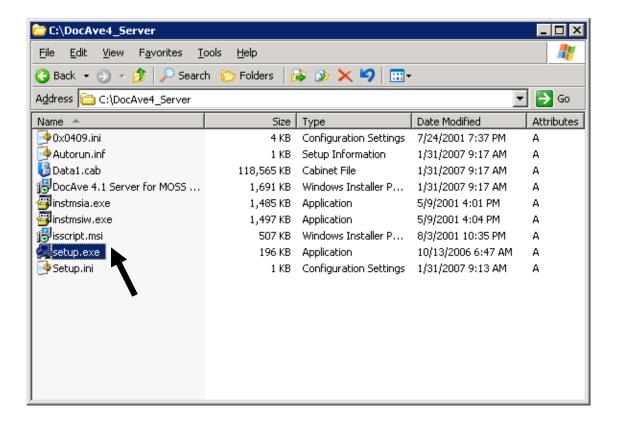
6.1 DocAve 4.1 Server Installation

Installation Prerequisites:

Account must have local administrator rights.

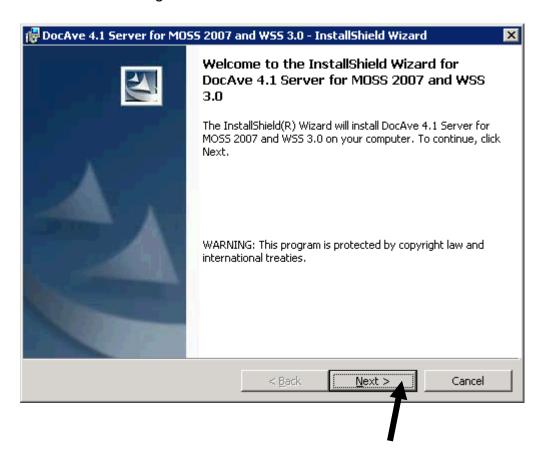
On the machine where you wish to install the DocAve 4.1 Server, open the DocAve 4.1 Server Folder. (see Section 2 for installation location)

1. Double Click on the file titled setup.exe (as indicated by the arrow below).



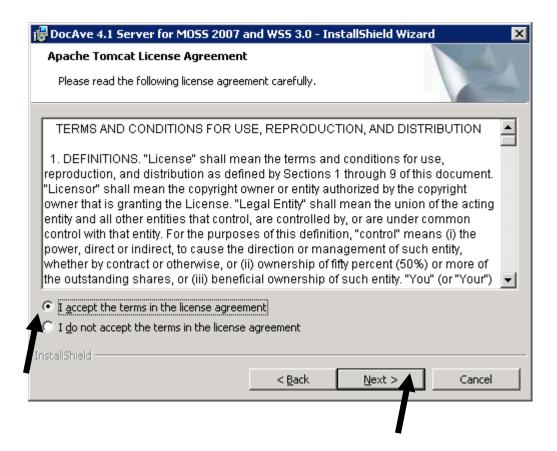


2. The DocAve 4.1 Install Wizard will launch. To advance, click "Next" on the bottom right of the window.



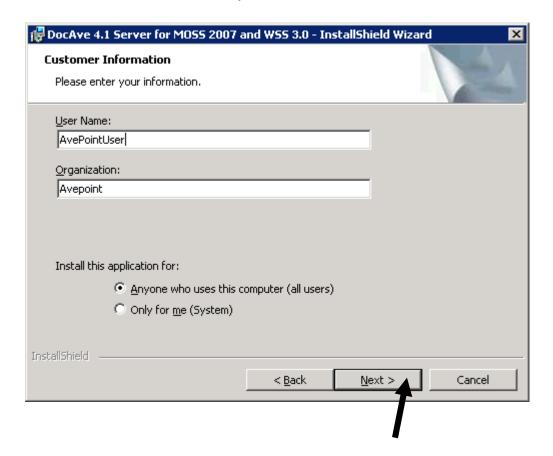


3. To advance through the install wizard, click "Next" on the bottom of each screen. Review the license agreements for Tomcat, Java Runtime Environment (JRE), and AvePoint DocAve 4.1. Read the terms of each agreement and click on the button to select "I accept the terms in the license agreement." Click "Next".





4. Enter the desired User Name and Organization name at the Customer Information screen. Verify all information, and click "Next".





5. Select the Setup Type by clicking the radio button next to the type of setup desired. Click "Next" to continue.

*Note: Select Custom to install the server on a drive different than the C drive.





6. On the next screen, choose which the type of server(s) to install.

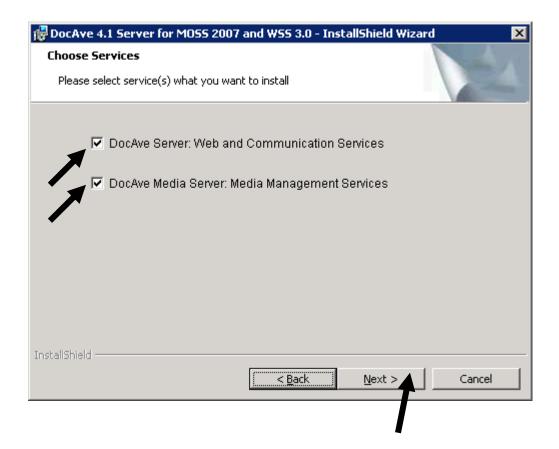
The DocAve Server is the web and communication server to access the DocAve 4.1 User Interface. The DocAve server component can be installed on any machine.

The DocAve Media Server is the media management server which will communicate with the SharePoint Front-End Servers as well as the SQL Server. This server component will take on the "process load" of the backup jobs.

*Note: It is recommended to install the Media Server on a server different from a SharePoint front-end server for performance purposes. This does not apply to DocAve 4.1 Small Business.

To install the DocAve Media Server on a separate machine, uncheck the box next to DocAve Media Server and follow the instructions in Section 6.3 to install the DocAve Media Server.

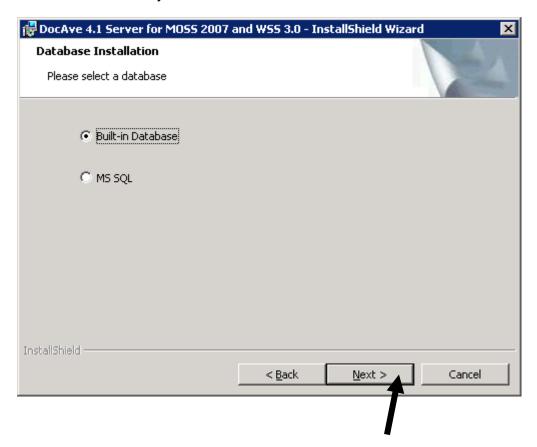
Click "Next" to continue.





7. The Database Installation screen allows you to use the Built-in Database packaged with DocAve 4.1 or an already existing MS SQL database server. The DocAve database stores DocAve user account information, DocAve settings, and backup plans created.

*Note: The MS SQL option currently works with the SQL SA account only.

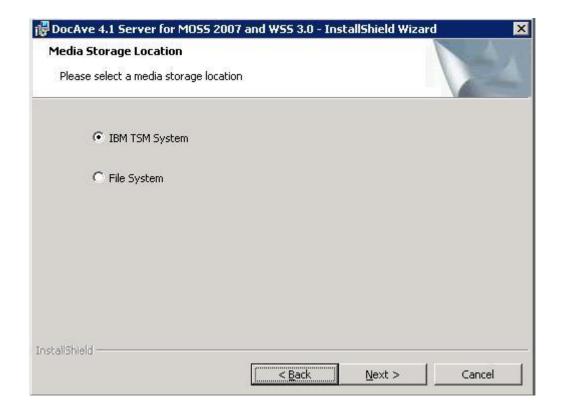




8. Then the end user will have the option to either select the type of Media Storage Location.

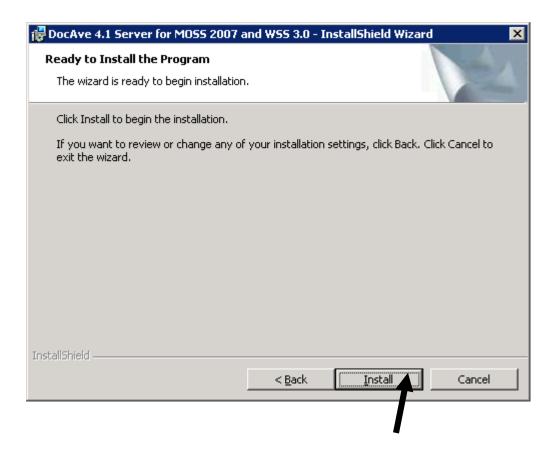
IBM TSM SYSTEM option will utilize the IBM Tivoli Storage Manager to backup the data into the Tivoli system.

FILE SYSTEM option will take the backup data and store the data onto either on a network drive or a local drive.





9. Click the Install button to begin installing DocAve 4.1 Server.





 If the end user selected the IBM TSM System, then the end user will be presented with a configuration screen for the IBM Tivoli System.

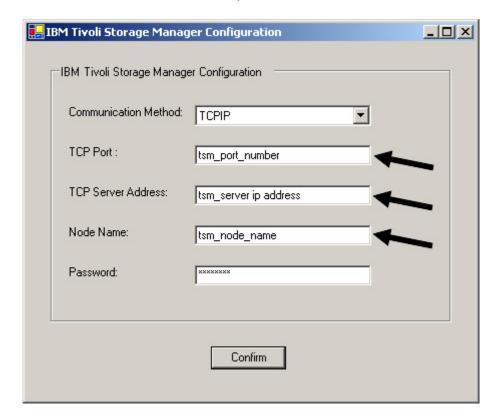
The TSM Configuration screen allows you to set information to communicate to the TSM server.

TCP port setting needs to reflect TSM configuration.

TCP server address is the "IBM Tivoli Storage Manager" (TSM) server's IP address.

The node is created in TSM manually, so create a Node in TSM before entering the Node Name.

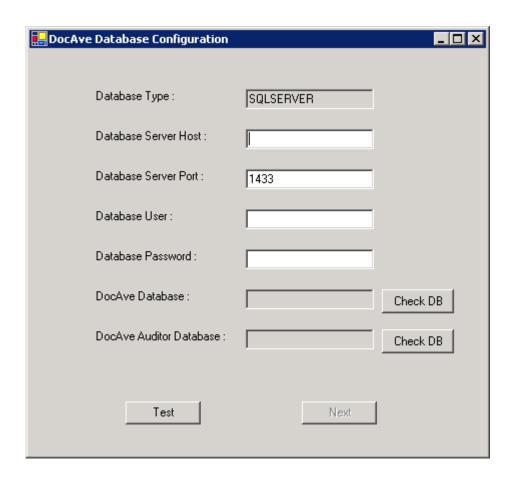
The Password is for specified TSM Node.





11. If the MS SQL option is chosen, the following DocAve Database screen will appear. Otherwise, proceed to section 6.1.11.

*Note: The MS SQL option currently works with the SQL SA account only.

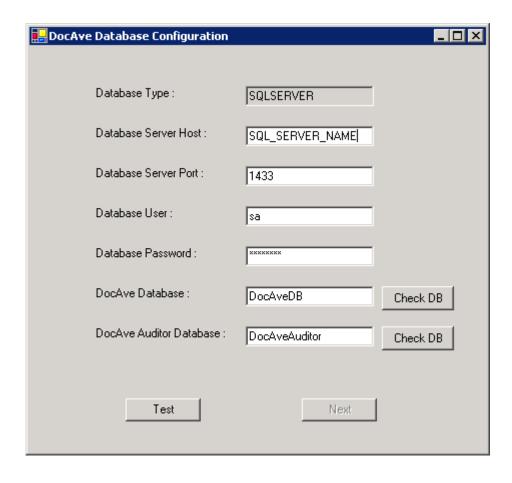




12. Enter the SQL Server name, followed by the sa account and sa password. The default Database Server Port is 1433. If this port was changed in SQL, please adjust the port for the Database Server Port accordingly.

Click on the CheckDB button for DocAve Database and enter a database name for the DocAve Database. Perform the same action for the DocAve Auditor Database.

Click on the Test button and the databases will be created in the SQL Server Host provided. Click Next to continue.





13. Once file installation is complete, the DocAve 4.1 Service(s) Configuration window will appear.

It is recommended to use the default settings unless a known conflict with an existing port exists.

Integration with Active Directory will allow system administrators to add already existing active directory accounts and assign group and user permissions to DocAve. To integrate DocAve 4.1 with an Active Directory domain, enter a domain account in the provided fields.

*Note: If you plan to install the media server on a different machine, enter the machine name of the media server next to Media Service Host Name. Otherwise, the Media Server Host Name should be the current machine name.

| Active Directory Account Name: Example: Domain\UserName | |
|--|---------|
| Active Directory Account Password: | |
| | Confirm |

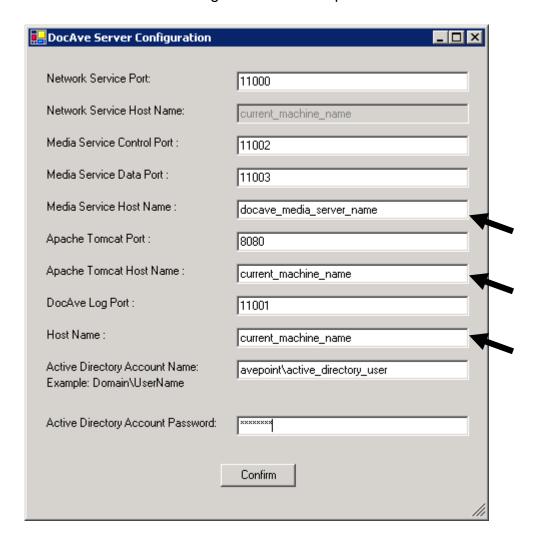
Installed as a local user – no Active Directory integration. Only local DocAve accounts can be created and added to DocAve.

| Active Directory Account Name: Example: Domain\UserName | avepoint\active_directory_user |
|--|--------------------------------|
| Active Directory Account Password: | ****** |
| | Confirm |

Installed as a domain user – DocAve integration with Active Directory. Gives ability to add existing AD accounts to use DocAve.



14. DocAve Server Configuration – SQL Option selected

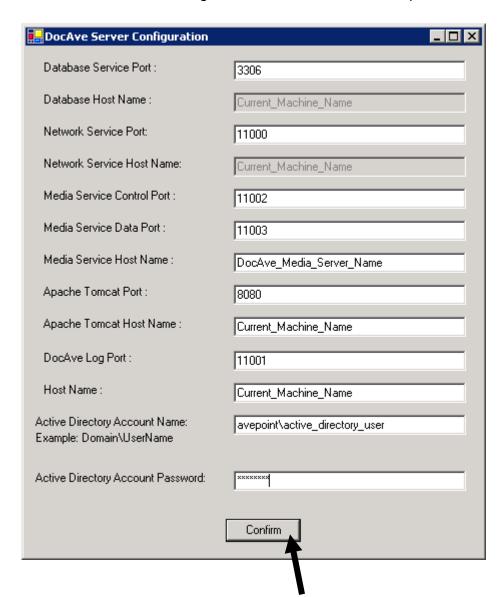


The Apache Tomcat Host name and Host Name should be the computer name of the current machine.

If you have chosen to install the media server on this machine, the Media Server Host Name be the current machine name.

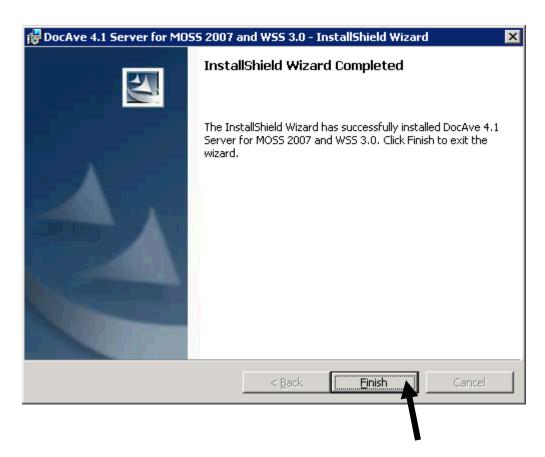


15. DocAve Server Configuration -Built-in Database Option selected





16. The installer will configure the DocAve 4.1 Server with the chosen name and port designations. Installation is now complete. Select "Finish" to exit the DocAve 4.1 Server Install Wizard.



The DocAve 4.1 Server component has now been installed. Proceed to the next section to install the DocAve 4.1 Client.



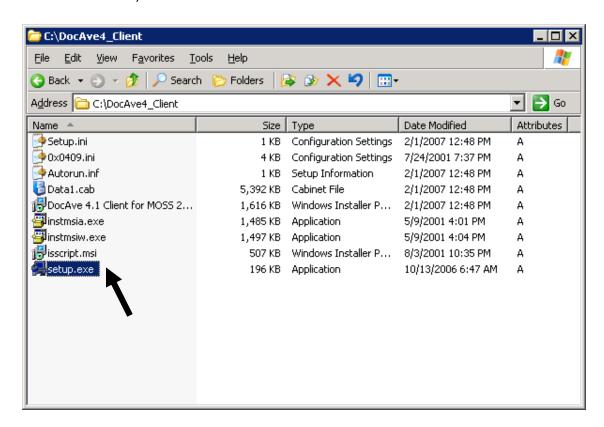
6.2 DocAve 4.1 Client Installation

Installation Prerequisites:

- Account must have local administrator rights.
- The machine must be a SharePoint Front-End Web Server

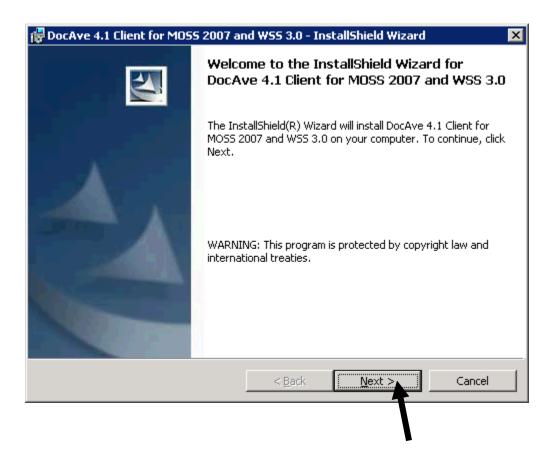
Open the DocAve 4.1 Client package and unzip the contents. (see Section 5 for installation location)

1. Double click on the file titled setup.exe (as indicated by the arrow below).



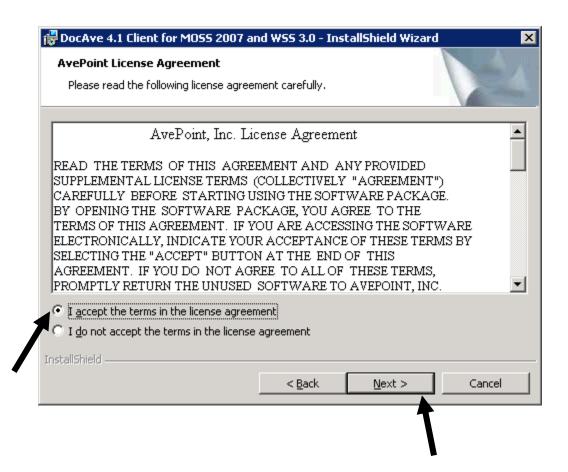


2. The DocAve 4.1 InstallShield Wizard will launch. Click "Next" to continue.



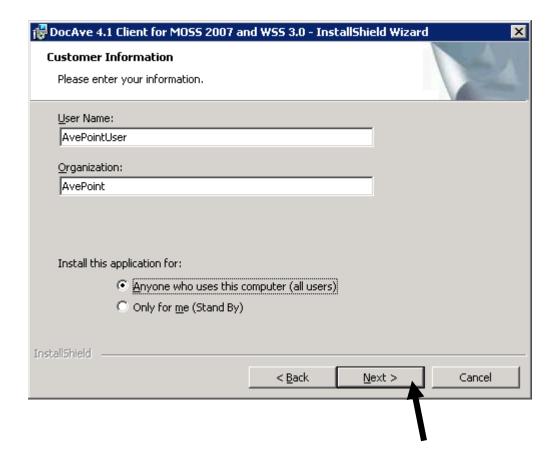


3. To advance through the install wizard, click "Next" on the bottom of the screen. Review the terms of the license agreement and click on the button to select "I accept the terms in the license agreement." Click "Next".





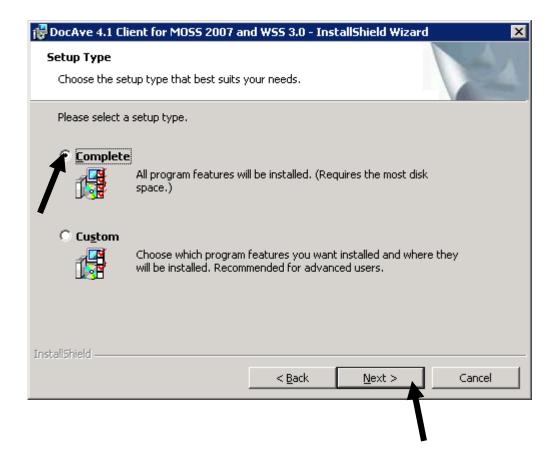
4. Enter the desired User Name and Organization name at the Customer Information screen. Verify all information, and click "Next".





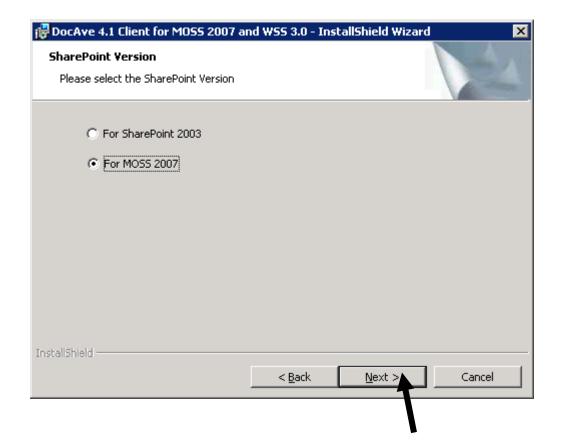
5. Select the Setup Type by clicking the radio button next to the type of setup desired. Click "Next" to continue.

*Note: Select Custom to install the server on a drive different than the C drive.



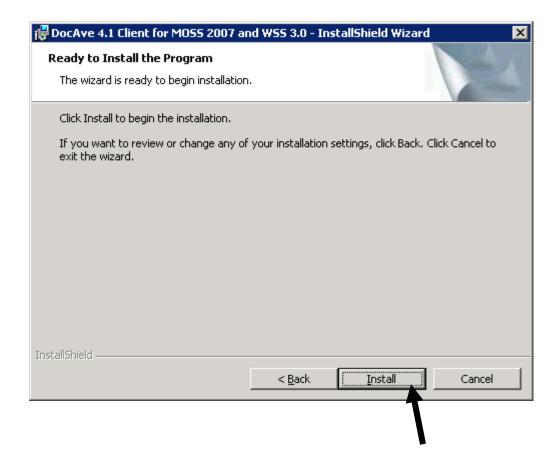


6. Select the corresponding SharePoint on which the DocAve Client is being installed.





7. Click the Install button to begin installing DocAve 4.1 Client.





8. Once file installation is complete, the DocAve 4.1 Agent Configuration window will appear.

The DocAve Server Name is the computer name for the machine which DocAve Server is installed.

The DocAve Agent Host Name and Agent Host Full Name is the name of the current machine.

It is recommended to use the default settings unless a known conflict with an existing port exists.

*IMPORTANT

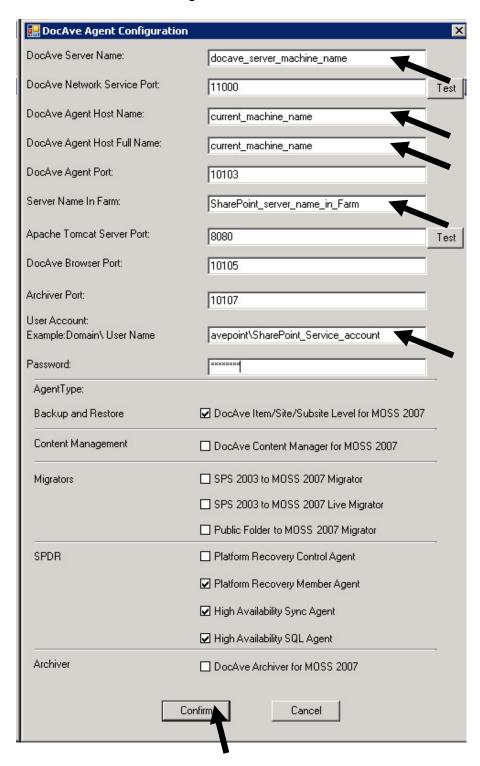
For User Account, an account which has administrative access to both the SharePoint Front-End Web Server and your SQL Server MUST be used. A SharePoint service account is recommended.

Under Agent Type, by default, the wizard automatically enables all possible agent functions. To remove agent functions, uncheck the box relating to the undesired agent function.

DocAve 4.1 Client requires identical Tomcat port and DocAve Network Service Port settings as DocAve 4.1 Server in order to function properly.



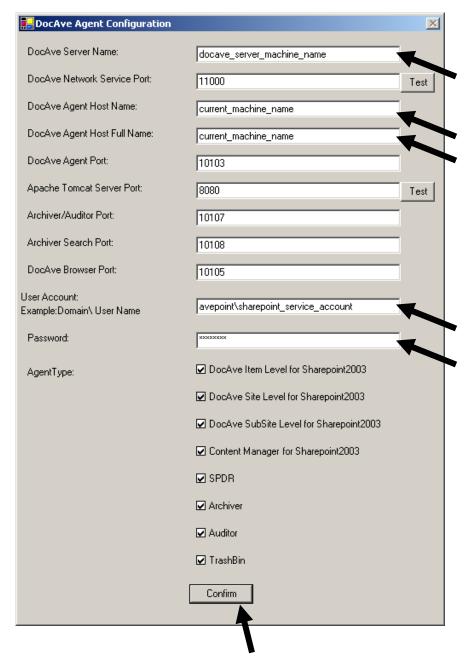
For DocAve Client Configuration on MOSS 2007



To accept the settings, click "Confirm".



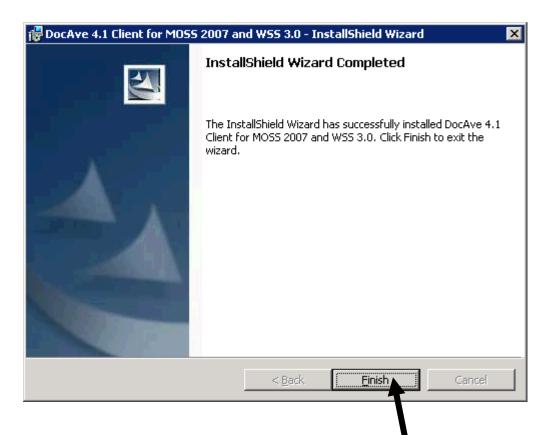
For DocAve Client Configuration on SharePoint 2003



To accept the settings, click "Confirm".



9. Click Finish to complete to DocAve 4.1 Client installation.



Proceed to the next section to install the DocAve 4.1 Media Server if the media server component has not been installed or to install an additional media server.

Otherwise, the DocAve 4.1 installation process is complete. Proceed to Section 7 to verify the DocAve installation.



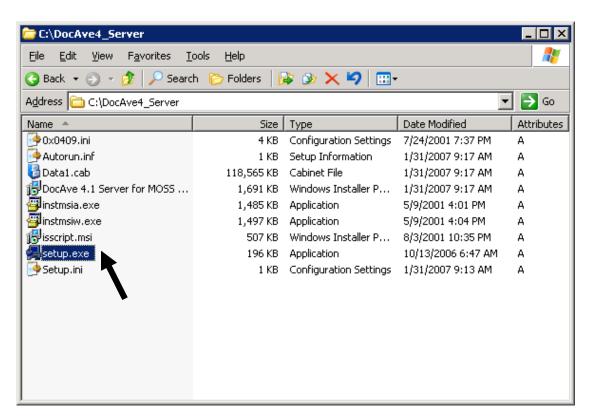
6.3 DocAve 4.1 Media Server Installation

Installation Prerequisites:

- DocAve 4.1 Server must be installed on a machine
- Account must have local administrator rights.

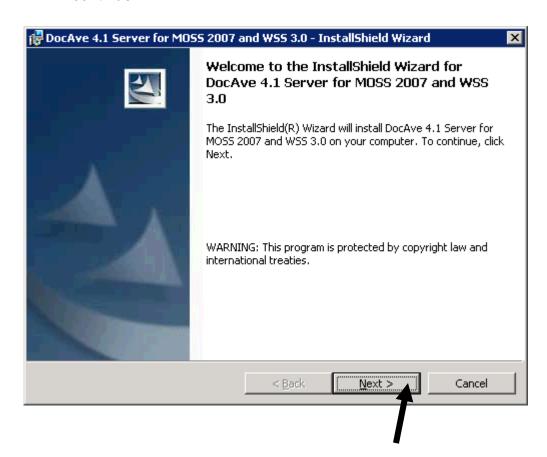
Multiple media servers may be installed for use with DocAve. The DocAve 4.1 Media Server is part of the DocAve 4.1 Server installation package. Open the extracted DocAve 4.1 Server folder. (see Section 5 for installation location)

1. Double click on the file titled setup.exe (as indicated by the arrow below).



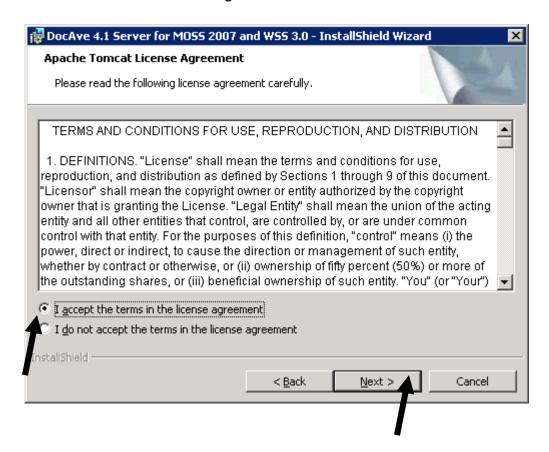


2. The DocAve 4.1 InstallShield Wizard will launch. Click "Next" to continue.



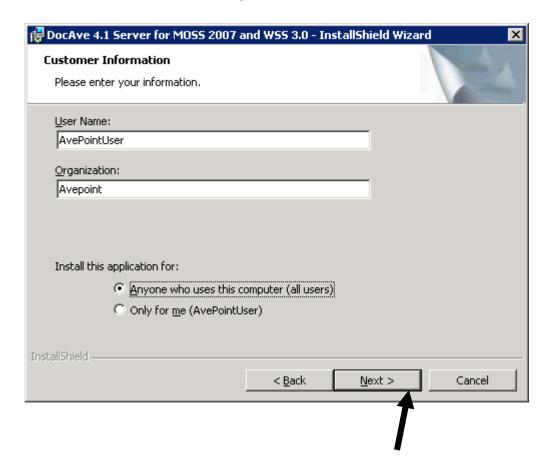


3. To advance through the install wizard, click "Next" on the bottom of each screen. Review the license agreements for Tomcat, Java Runtime Environment (JRE), and AvePoint DocAve 4.1. Read the terms of each agreement and click on the button to select "I accept the terms in the license agreement." Click "Next".





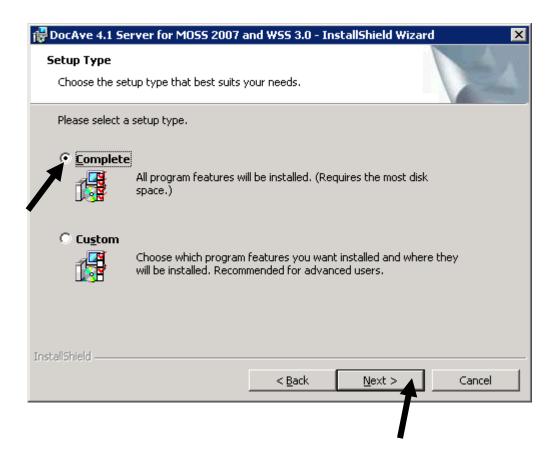
4. Enter the desired User Name and Organization name at the Customer Information screen. Verify all information, and click "Next".





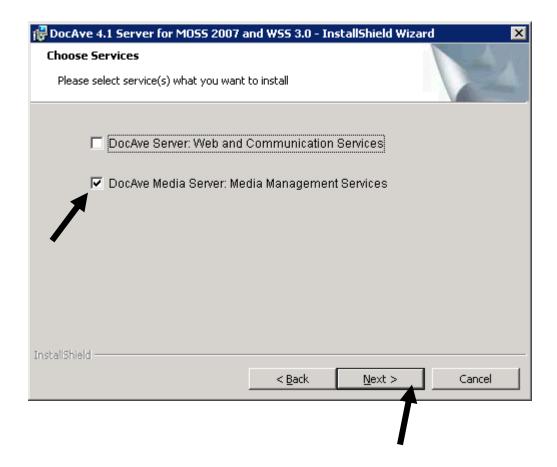
5. Select the Setup Type by clicking the radio button next to the type of setup desired. Click "Next" to continue.

*Note: Select Custom to install the server on a drive different than the C drive.





6. At the Choose Services screen, UNCHECK the box for DocAve Server: Web and Communication Services. Click Next to continue.

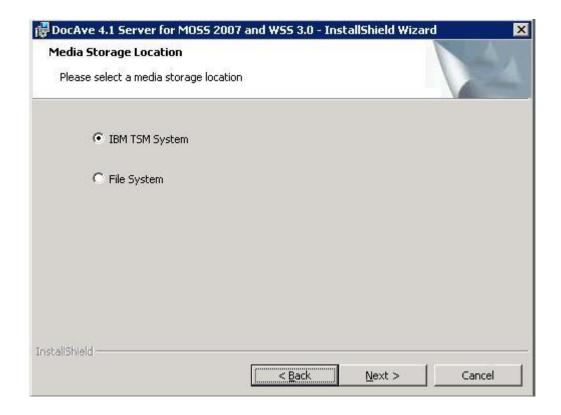




7. Then the end user will have the option to either select the type of Media Storage Location.

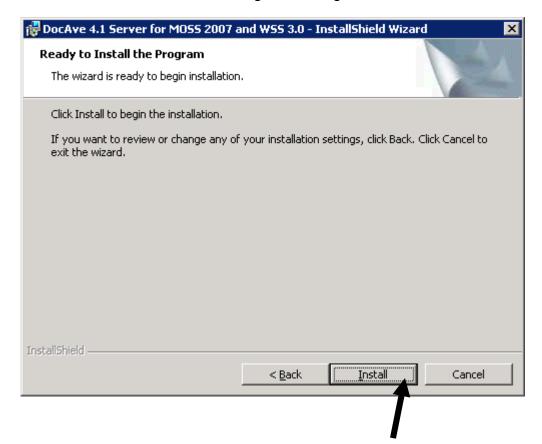
IBM TSM SYSTEM option will utilize the IBM Tivoli Storage Manager to backup the data into the Tivoli system.

FILE SYSTEM option will take the backup data and store the data onto either on a network drive or a local drive.





8. Click the Install button to begin installing DocAve 4.1 Media Server.





 If the end user selected the IBM TSM System, then the end user will be presented with a configuration screen for the IBM Tivoli System.

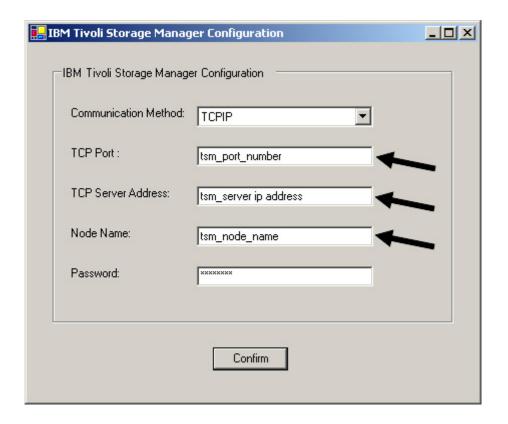
The TSM Configuration screen allows you to set information to communicate to the TSM server.

TCP port setting needs to reflect TSM configuration.

TCP server address is the "IBM Tivoli Storage Manager" (TSM) server's IP address.

The node is created in TSM manually, so create a Node in TSM before entering the Node Name.

The Password is for specified TSM Node.



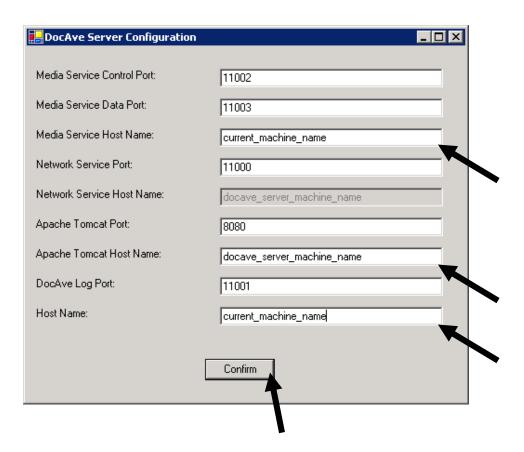


10. Once the installation is complete, the DocAve 4.1 Service(s) Configuration window will appear.

The DocAve 4.1 Media Server requires identical Tomcat and Network Service Port settings as the DocAve 4.1 Server to function properly.

The Media Service Host Name and Host Name should be the computer name of the current machine.

The Network Service Host Name and Apache Tomcat Host Name value must be the computer name of the DocAve Server machine.





11. Click Finish to compete the installation for the DocAve 4.1 Media Server.

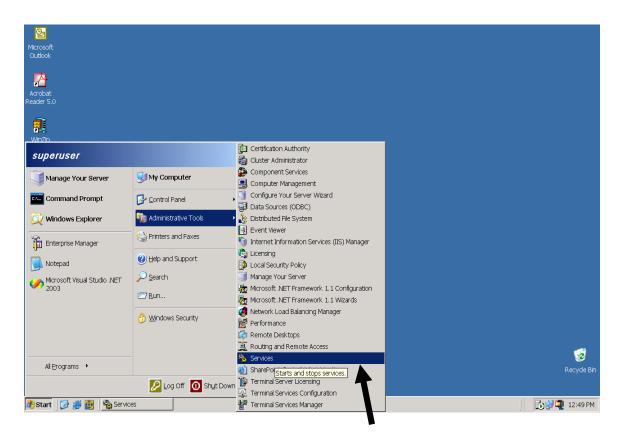


Proceed to the next section to verify the DocAve installation.



7 Verifying the DocAve 4.1 Installation

1. Open the Services tool on the machine where the DocAve 4.1 Server is installed.





2. In the services listing, multiple services are listed for the DocAve 4.1 Server, DocAve 4.1 Media Server, and DocAve 4.1 Client. The related service for each installation is listed below.

DocAve 4.1 Client Service

AvePoint Communication Service

DocAve 4.1 Server Services

AvePoint DocAve Database

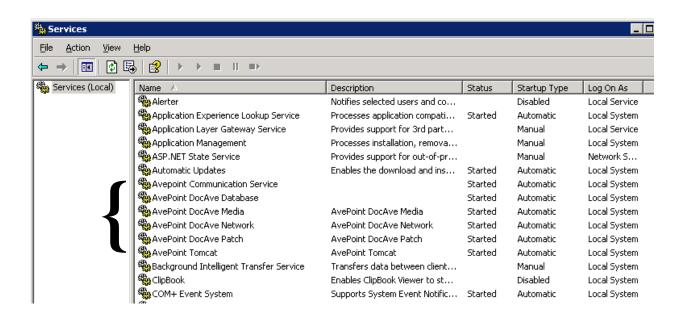
AvePoint DocAve Network

AvePoint Tomcat

DocAve 4.1 Media Server Services:

AvePoint DocAve Media

AvePoint DocAve Patch



*Note: The above example displays Server, Media Server, and Client installations on a single machine.



To change configuration settings within DocAve for the Server, Media Server, or Client installations, find the Configuration Tool in the Start Menu.

Also available in the Programs folder for DocAve 4.1 are a SharePoint Site Counter Tool and an AvePoint service restart tool for both the Server and Client.



- 3. All AvePoint services should be running in order to use DocAve 4.1.
- 4. To ensure proper communication between the DocAve Server and Client, the following ports must be open and available if a firewall is in place.

The DocAve Server uses the following ports: TCP Ports 11000, 11001, 11002, 11003, 8080

The DocAve Client uses TCP port 10103.



8 Accessing DocAve 4.1

1. Open an Internet Explorer window and type in:

http://<machine>:8080/docave

where <machine> is the name or IP address of the machine running DocAve 4.1 Server

*Note that all pop-up blockers (browser-based, third party toolbars, and LAN firewalls) must be disabled

2. The DocAve 4.1 Login screen will pop-up. Select "Local System", enter the Initial Login information, and click "Login".

The Initial Login is as follows:

Login ID: admin Password: admin

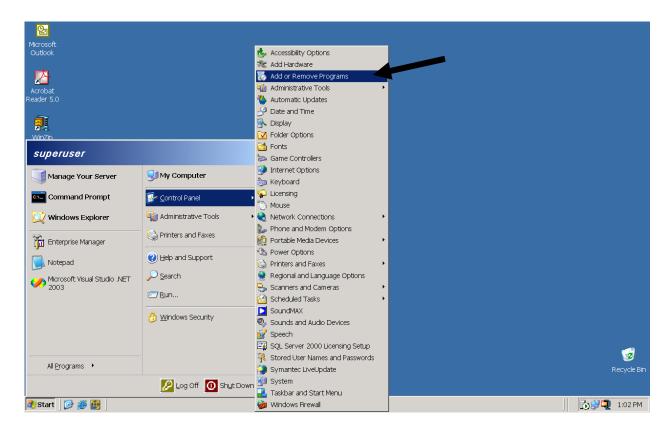






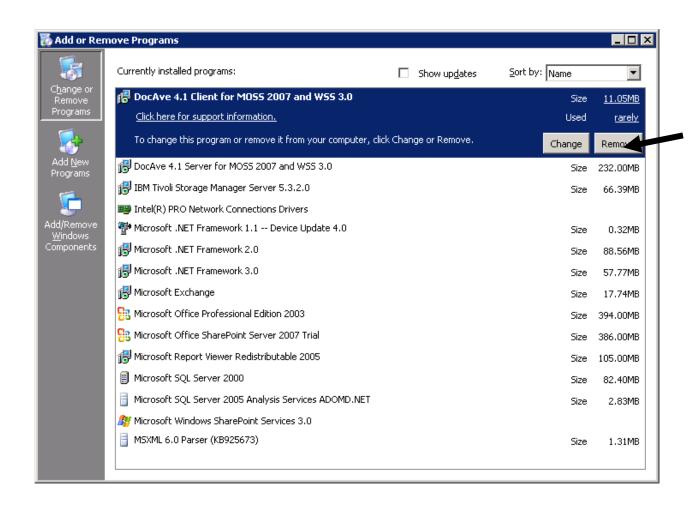
1. Uninstall Instructions

1. Both DocAve 4.1 Server and DocAve 4.1 Client can be removed using the Microsoft "Add or Remove Programs" tool.



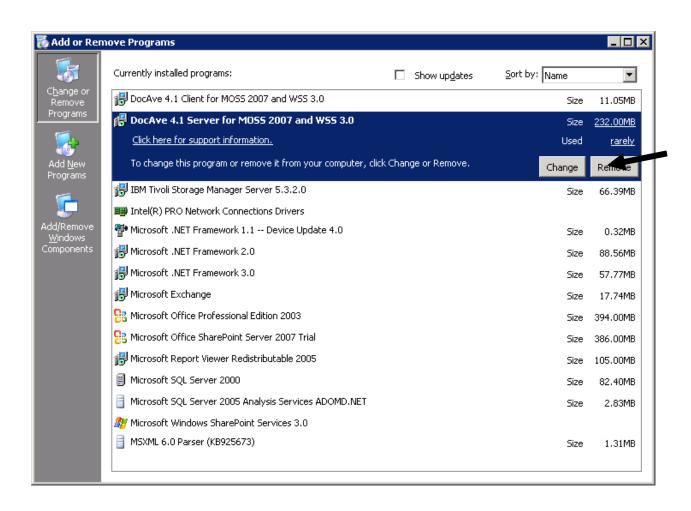


2. To uninstall the DocAve 4.1 Client, locate "DocAve 4.1 Client for SharePoint 2003 and WSS V2", and click "Remove".



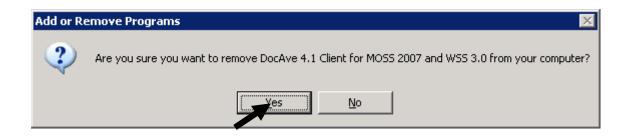


3. To uninstall the DocAve 4.1 Server, locate "DocAve 4.1 Server for SharePoint 2003 and WSS V2", and click "Remove".





4. To continue with the uninstallation of the DocAve 4.1 Client, click "Yes" to verify removal, and the DocAve 4.1 Client will be removed.



5. To continue with the uninstallation of the DocAve 4.1 Media Server, click "Yes" to verify removal, and the DocAve 4.1 Server will be removed.

