

Unleashing Microsoft SharePoint Server 2010's
Web Content Management Features with DocAve



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The power of the World Wide Web has dramatically changed the way companies conduct business with their customers, partners, and employees. Intranet and Internet sites, initially created as static information stores, have quickly transformed into dynamic environments for managing customer relationships, collaborating with partners, and communicating with knowledge workers worldwide.

Due to the explosive growth of this burgeoning online channel, companies are struggling to manage websites and applications – particularly in terms of managing content targeted for different audiences in a diverse, global environment. That doesn't detract from the simple fact that up-to-date, compelling web content is a necessity today. As reliance on web content has increased, so has the demand for a solution that empowers both line-of-business and information technology (IT) users with the tools necessary for efficiently and effectively managing these internal- or external-facing complex websites.

Long heralded for its document management and collaboration abilities, Microsoft SharePoint Products and Technologies has quickly grown in popularity since its inception in 2001 as the go-to platform upon which organizations can centralize their business processes, key stakeholders, and enterprise-wide information. However, these deployments have been kept as an *internal, intranet* presence disconnected from organizations' rapidly growing *extranet, or Internet*, presence.

That is, until now.

Microsoft SharePoint Server 2010 provides new, richer sets of web content management (WCM) functionality primed to enable organizations to truly use SharePoint as the customer-facing aspect of its business. The ultimate goal, then, would be to consolidate both the internal and external presence for an organization on one platform – one set of securities, one governance policy, one set of processes – via SharePoint. The opportunity is great, but so are the potential challenges.

In this white paper, we will discuss the requirements for dynamic websites in today's hyper-competitive business landscape, the case for utilizing SharePoint Server 2010 for WCM, and how AvePoint's DocAve Software Platform enhances the native WCM functionality SharePoint offers.

About AvePoint

AvePoint is a global technology company and proven software leader headquartered in the United States. Since its founding in 2001, AvePoint has become the world's largest provider of infrastructure management software solutions for Microsoft SharePoint Products and Technologies. Propelled by the world's largest SharePoint-exclusive research & development team, AvePoint is the premier provider for EPG, SMB, Mid-Market and Government organizations demanding the most powerful and flexible infrastructure management solutions for their SharePoint environments and assets. AvePoint's award-winning DocAve Software Platform is recognized as the industry standard for comprehensive, scalable, and truly integrated SharePoint backup and recovery, administration, replication, migration, archiving, deployment management, reporting, storage optimization, and content lifecycle management solutions.

AvePoint is headquartered and maintains its principle engineering center in Jersey City, NJ, with wholly owned sales and engineering centers in the USA - San Jose, Los Angeles, Seattle, Chicago, Washington DC, Houston, Boston; Ontario, Canada; Melbourne, Australia; London, United Kingdom; Munich, Germany; Johannesburg, South Africa; Tokyo, Japan; Singapore; and China - Beijing, Changchun, Dalian. AvePoint's global team, fortified by an expansive network of certified partners, helps more than 6,000 enterprise customers – including many Fortune 500 companies and government agencies – to protect, manage, optimize, and integrate their mission-critical SharePoint environments. AvePoint is a Depth Managed Gold Certified Microsoft Partner and GSA provider.

SharePoint Server 2010 Requirements

Many organizations recognize the need for having a website today, as evidenced by the fact that virtually every business has one. However, many do not immediately recognize all the behind-the-scenes management that must go into the website in order to ensure it is successful, has fresh content, and helps promote – rather than detract from – the company’s brand.

There are many requirements for dynamic websites, depending upon business-specific needs, but there are three that apply to all organizations – regardless of size, scope, or vertical.

Scalability	While this may not be a primary concern when first launching a business or website, ensuring it is equipped to handle large volumes of website visits is important. If the website cannot handle the number of visits to it at any given time, or if portions of the website crash and fail, it can have negative consequences for the business’ reputation and brand.
Compliance	As with internal processes and documents, organizations must ensure that the content and data posted on external-facing websites meet the same compliance regulations it would if it only was leveraging a corporate intranet.
Global Management	As organizations have increasingly distributed office presences worldwide, ensuring that all relevant stakeholders have the appropriate access to updating and managing the website – at “Internet speed” – is an important consideration, as is providing support for multi-lingual website presences. If changes must be made quickly due to business-related or legal reasons, having a clear management policy will help prevent unnecessary business disruption.

Consequently, IT professionals have three primary needs with regard to the creation and maintenance of external-facing websites:

Reduced Content Management Responsibility	IT professionals are already tasked with ensuring the infrastructure organizations’ technological deployments runs smoothly and properly – they do not need the additional burden of managing the lifecycle of content posted to intranet and internet presences. It is not their primary responsibility, and any website system should enable line-of-business users who create the content to be able to establish appropriate permissions and policies to update the web site with minimal IT involvement.
Efficient Administration	IT administrators have already worked with key stakeholders to establish appropriate management and administration processes for its intranet portal and other technological presences – they seek to have a similar, if not seamlessly integrated administrative approach for their internet presence that takes into account pre-established policies and permissions.
Streamlined Deployment	External-facing websites must be updated constantly with new content in varying forms – be it documentation, images, audio clips, or video clips. In order to move these from creation to publication, there must be an automated, intelligent method by which IT administrators and line-of-business users alike can work together to ensure updated content and applications for the website are propagated with minimal chance of human error.

Now that we have gone over three primary requirements for today’s successful, dynamic web presence and the basic needs for IT administrators, let’s discuss why SharePoint is an optimal platform for WCM.

Why SharePoint?

SharePoint provides a singular platform upon which organizations can seamlessly connect all of their business processes, knowledge workers, and enterprise-wide content and information – for both intranet and internet purposes. Being able to do this all on one platform unlocks the key to simplified IT management through a unified storage architecture, providing one home to create, edit, access, and publish content. By also utilizing Windows Active Directory and Forms Based Authentication permissions, SharePoint enables streamlined, pre-established permissions for enabling user access to the platform.

SharePoint also provides individual agility for line-of-business users. Functionality is accessible through the use of familiar tools to end-users, including Internet Explorer, Firefox, and Mozilla internet browsers, the Microsoft Office suite (including Word, Excel, and PowerPoint), and the “Ribbon” interface used in other Microsoft Office applications – newly introduced in SharePoint Server 2010 – offers a consistent experience by enabling quick access to the most common functionality based on the specific task at hand. For example, if an end-user is authoring a page that requires the addition of text, images, and videos, the Ribbon will show text formatting options such as styles, fonts, bold, and italics.

SharePoint also has an eye cast toward organizations with an international presence requiring multi-language support in order to show that, while they are global companies, they possess a local touch. There are several enhancements the platform has in its latest release with regard to simplified management of global web content, including:

- **Site Variations** feature for multi-language support
- Edits to site structure in **Master Site** are now rolled out automatically – which saves time and the potential for human error
- **One-click access** to view what has changed in source sites to better determine translation requirements
- **Workflow integration**, which aids in the establishment of approval processes for translated content
- **Social enhancements** for community building, including ratings, comments, and the extensibility of SharePoint blogs and wikis

Additionally, SharePoint’s vast ecosystem of partners – offering both services and software solutions – extends SharePoint’s WCM capabilities beyond what most traditional platforms offer natively, enabling the platform to expand and deepen its competitive footprint in this space.

The combination of optimized IT management and business user agility creates four additional benefits for utilizing SharePoint as an organization-wide WCM system:

1. Establishment of an enterprise platform for WCM
2. Increased IT manageability and efficiency of Web solutions
3. Simplified content publication lifecycle
4. Integration and extension of WCM solutions through customer development or third parties

Now, let’s delve into the opportunities – and challenges – SharePoint offers with regard to WCM scalability, compliance, IT efficiency, and content publication lifecycle management.

SharePoint for a Scalable WCM Solution

As organizations strive to differentiate amidst an ever-growing field of competitors, it is important they maintain up-to-date, fresh content on their external-facing websites.

With constantly updated content and access to the website from hundreds, if not thousands or millions of customers daily, it is important that the WCM platform can scale to these peaks in volume and demand, have the reliability necessary to not crash or fail when customers need it most, and provide an extensible management and publishing framework to keep up with demand.

There are several new and enhanced features in SharePoint Server 2010 which firmly position it as a scalable, reliable WCM solution for today's organization:

- In Microsoft Office SharePoint Server (MOSS) 2007, the **Content Deployment** feature was added in order to enable companies hosting internet sites on SharePoint to have a separate environment for authors to modify and review content before publication on the production (or public-facing) farm. This was key for optimizing IT resources, allowing for the distribution of content publishing tasks, as content owners can modify and publish content that they own, versus relying on IT to implement any required changes.
 - **Note:** There were some challenges, however, when authoring was continuing while these deployment jobs were running. In SharePoint Server 2010, Content Deployment uses database snapshots to collect content, and then packages exported content for movement to the destination box. In sum, this improves the scalability and performance of the SharePoint platform to handle a consistent lifecycle of content creation and publication.
- With the evolution of the *type* of content hosted on websites, not just text and pictures but also rich media including audio and video, it is important page load times and the overall performance of the website are not affected. **SharePoint Server 2010 has improved its caching for BLOB** (or unstructured) data on the web front ends. The content from SQL is read in smaller chunks and will start sending file to the client immediately so the user doesn't need to wait for the whole file to download.
 - **Note:** MOSS 2007 provided the EBS (External Blob Store) API to externalize these BLOBs to improve performance. SharePoint Server 2010 also offers this API, but gives another option with SQL's RBS (Remote BLOB Storage) API, offering more flexibility as well as simplified implementation of the RBS API by supplying a free provider to enable this functionality. Both solutions improve SQL performance, increasing SharePoint's scalability.
- With the influx of content that must be created and published on today's dynamic websites, SharePoint has taken great strides to improve its capability for organizing and supporting voluminous content. The introduction of **Large Pages Library** supports thousands of pages in a given library.
- **Pages Library** introduces the ability to organize pages in folders in order to perpetuate a streamlined hierarchy for governance purposes.
- **Content Organizer** helps end-users organize web content with customizable rules that will decide where given pages should go. This lets authors concentrate on creating more compelling content, rather than sweating out whether or not the page will go to the proper location.
- The **Content Query Web Part** (CQWP) enables site designers to aggregate interesting and relevant slices of information on web pages by offering the creation of queries through an easy-to-use UI, and then display that content in unique, configurable ways. For example, showing "Top Rated News Stories" on a web page. The CQWP is designed to return roll-up content over several different scopes – from a single list and library, to all lists and libraries across an entire Site Collection. Keeping web content fresh is always a challenge, and by enabling these dynamic web parts to aggregate content, organizations are more easily able to meet this challenge head on.

While SharePoint Server 2010 has fantastic scalability features to aid in its being an ideal WCM platform, there are some concerns that remain – outlined in the table on the next page.

Challenge	Opportunity with DocAve
Optimize global access to SharePoint for highly distributed users .	DocAve Replicator for SharePoint allows organizations to maintain multiple, globally distributed farms by enabling one-way, two-way, and one-to-many replication of content and data among multiple SharePoint environments to provide fast, local access to SharePoint contents for all global users.
Granularly select content for publication based on customizable metadata triggers to various sites and farms for enhanced flexibility and simplified distribution of content publications while keeping bandwidth optimized.	DocAve Replicator , noted above, can also move content from staging and testing farms through to external-facing internet production farms according on-demand or according to a pre-defined, customizable schedule.
Relieve SQL Server content databases of storage burden by exposing large files through SharePoint without migration, and offloading existing BLOBs to existing hierarchal storage management (HSM) investments.	<p>DocAve Connector for SharePoint enables the presentation and management of content residing on legacy file shares via SharePoint without the need for import.</p> <p>DocAve Archiver for SharePoint removes existing BLOBs from the SQL Server content database, freeing up valuable space to improve SQL performance and overall platform scalability.</p> <p>DocAve Extender for SharePoint automatically routes BLOBs to cheaper, file- or cloud-based storage according to customizable business rules, so that they never enter SQL Server content databases.</p>
Enforce global policy, rights, and configurations management to simplify the administration of large deployments.	DocAve Administrator for SharePoint gives organizations universal control over enterprise-wide SharePoint Server 2010 deployments – be it a single farm or hundreds. DocAve enables the management of all configurations, security settings, solutions, and features from a single console, from both user- and SharePoint-centric perspectives.

SharePoint Enables Compliant WCM Initiatives

As we mentioned earlier, content on external-facing websites must still satisfy ever-evolving regulatory compliance obligations. Oftentimes, organizations may just think of the end-product of a WCM initiative – such as a customer-facing website – and worry only about ensuring content is propagated quickly and seamlessly so customers do not access outdated information.

Compliance isn't necessarily top of mind, but regulations such as Sarbanes Oxley do not exclude web content. These regulations apply to *all* content and data an organization produces, and SharePoint offers several features to help enforce consistent compliance policies across the entire platform deployment:

- Organizations can extend their outward-facing look, feel, and brand to its SharePoint sites by utilizing cascading style sheets (CSS) enabled through **Site Themes**.
- Predefined site configurations that determine the lists, files, web parts, features or settings with which to provision a new SharePoint site, including the addition of publishing site, publishing site with workflow, and enterprise wiki frameworks, are available with **Site Templates**.
- Solutions can be created with Visual Studio 2010 and deployed as **Sandboxed Solutions** without IT's direct involvement, and will only have functionality on a site collection level and deployed by requisite site collection administrators – which can then be monitored by IT. This seeks to find the

middle ground between SharePoint farm administrators and line-of-business users often obstructed in past iterations of the platform.

- SharePoint Server 2010 now allows site administrators to look at **intra-site policies and permissions** at once, and while it is an improvement over the object-by-object view in MOSS 2007, it still does not extend outside of the particular object.
- In MOSS 2007, metadata management was only possible on a site collection level natively – anything broader could only be accomplished utilizing third-party solutions. In SharePoint Server 2010, enterprise-level taxonomy, really, a unified content store, is supported with the **Metadata Store**. Users can create their organization’s taxonomy structure – including hierarchy, product categories, and worldwide locations – and publish it to SharePoint. Additionally, they can now tag and browse page content with this managed metadata, as well as tag single content pieces with their own keywords.
- SharePoint Server 2010 gives organizations the opportunity to approve *and* schedule content for publishing via automated workflows with **Content Approval**. Appropriately designated site members can formalize and control the process of making content available to an audience. Document library owners can now approve content for a document library, web pages library, or associate a workflow with the library to run the approval process. This used to be a manual, case-by-case process in MOSS 2007.
- SharePoint Server 2010 provides a range of new **Web Analytics capabilities** that monitor different aspects of site usage. In addition to the out of box reports, you can subscribe to *alerts* to monitor changes on key metrics. Beyond traffic insight, there is support for *search insight* around search queries, popular terms and queries that are succeeding or failing.
- SharePoint Server 2010 has made some big investments in logging infrastructure from the analytic side that will help you monitor the performance of your SharePoint deployment. You can now easily find the *slowest pages* (in terms of rendering) on your site with **Health Monitor**.

While there are many improvements in SharePoint Server 2010 which enable organizations to enforce the same content policies to its WCM initiatives it would as other enterprise content, there are some challenges that must be addressed with third-party solutions such as DocAve in order to enhance SharePoint’s WCM functionality for streamlining policy management as well as more comprehensive auditing and reporting.

The table below outlines the challenges organizations still face when utilizing SharePoint Server 2010 for its WCM initiatives, and how several solutions from the DocAve Software Platform help to close any potential gaps left by native features.

Challenge	Opportunity with DocAve
Deploy security policies and master pages globally – across sites and site collections – to enforce data access and integrity policies.	DocAve Administrator enables the management of all configurations, security settings, solutions, and features from a single console – including considerations for security trimming policy management for sites or site collections. DocAve Deployment Manager for SharePoint automates the deployment of SharePoint solutions and customizations from staging through to production.
Monitor SharePoint content, users, and actions from a single interface to identify high-risk content or users, and take corrective action if necessary.	DocAve Auditor for SharePoint allows SharePoint administrators and managers to track and record all SharePoint interactions, including usage, search, and security changes.
Gain valuable insight in order to better decision making by trending audit and report data over time.	DocAve Report Center for SharePoint delivers real-time intelligence regarding SharePoint infrastructure, platform health, usage, and analyses – all from one fully integrated, customizable dashboard.

SharePoint Increases IT Efficiency

As noted before, IT administrators have enough to worry about with regard to using SharePoint as an internal collaboration and document repository across the enterprise – the last thing they want to deal with is yet another initiative that largely does not involve their native talents. WCM is the epitome of this, as IT administrators are generally not experts in creating content for websites, wikis, and other customer-facing portals – they are tasked with maintaining the back-end management and health of the technology deployed by their respective companies.

However, a delicate balance must be struck – line-of-business users have experience in creating content, but not so much with regard to administering permissions and propagating solutions within a technological platform such as SharePoint. So there must be a platform with the technological know-how to enable line-of-business users to feel unencumbered updating content according to unique business requirements, but IT must be able to step in when necessary and ensure the updates and customizations are made properly and according to pre-defined IT Governance policies.

SharePoint Server 2010 enables organizations to control how much flexibility content authors will have, how sophisticated the approval process needs to be to push content live, how the content should be organized, publish in different parallel sites, and determine whether to separate the authoring/staging environment from the live site.

- **SharePoint Groups** enable you to manage sets of users instead of individual users. The ability to view, configure, or manage a site is determined by the permission level that you assign to a user or group.
- When you create a site collection by using a non-publishing site template, SharePoint Server 2010 **automatically creates a standard set of groups and permission levels**.
- When you enable the **SharePoint Server Publishing Infrastructure** feature, other groups and permission levels are added to the site collection. These groups and permission levels enable you to assign users to specific publishing-related roles. For example, only users who have the Approve permission, or who are in the Approvers group can edit and approve pages, list items and documents for publishing.

The key to SharePoint administration is that, even when using it as a WCM system in addition to pre-existing initiatives such as ECM, collaboration, and centralized document repository, all the corporate governance policies you have already applied can include WCM.

This way, two sets of governance policies do not need to be maintained – one for the SharePoint deployment, and another the platform used for managing the external web presence.

Beyond simply using one platform for WCM as well as other initiatives, SharePoint Server 2010 has made several improvements for the sake of making administration more efficient.

- The introduction of the **Ribbon** from the Office applications in SharePoint Server 2010 provides a consistent interface, making it easier for users to discover SharePoint's features for content creation.
- **Content Approval** gives organizations the chance to formalize and control the process of making content available to an audience by appropriately designating site members to establish the policies.
- **Single Shared Services** for multiple farms in SharePoint Server 2010 greatly reduces the resources required to provide these services across multiple sites – enabling IT administrators to better allocate time, computing power, and monetary investment in other areas of the business.
- The **Metadata Store** enables enterprise-level taxonomy – including hierarchy, product categories, and worldwide locations.

SharePoint Server 2010 has also made improvements in the efficiency by which organizations can deploy updated content, including:

- Having separate environments for authors to modify and review content before it is published to the public-facing farm with **Content Deployment**.
- The ability to quickly publish content without waiting for the next standard content deployment job to run – automatically, at a specified interval – with **Quick Deploy**.
- **SharePoint Designer 2010** provides end-users with additional capabilities to implement customizations to their sites, empowering them to build workflows and reuse them across entire site collections – which can then be activated and used on multiple lists and libraries.
- Solutions can be created with Visual Studio 2010 and deployed as **Sandboxed Solutions** without IT’s direct involvement, and will only have functionality on a site collection level and deployed by appropriate site collection administrators.

There are additional opportunities for organizations to enhance IT efficiency for their WCM initiatives in SharePoint with DocAve – enabling companies to truly centralize SharePoint administration and deployment.

Challenge	Opportunity with DocAve
Manage all levels of SharePoint in batch mode to streamline administrative tasks.	<p><i>DocAve Administrator</i>, in addition to granting administrators with the ability to schedule all administrative functions for the entire SharePoint deployment from a single interface, offers security-trimmed access, so site collection owners can view and manage only their specific SharePoint content.</p>
Security trim access to DocAve, by SharePoint rights or Administrative role, to enforce task delegation	
Truly manage multiple farms via a single interface – not just through services shared by multiple farms.	
Granularly deploy customizations, workflows, and solutions from staging through to production automatically, in order to save time and minimize the risk of human error.	<p><i>DocAve Deployment Manager</i> automates the deployment of applications, customizations, solutions, and design elements across sites, and even farms. Administrators are enabled to control the process, limit project delays, and vastly lower the chance for human error since code is not being manually entered in various environments (testing, QA, etc.).</p>

SharePoint Simplifies the Content Publication Lifecycle

Most organizations wishing to utilize one platform for a global WCM strategy will more than likely have multiple knowledge workers charged with creating, editing, approving, and posting the content onto external-facing websites and wikis. In a collaborative environment where chaos sometimes reigns supreme, one must not allow that to seep into – and negatively affect – the authoring, workflow, and publication process necessary to continually keep content fresh. In these regards, SharePoint Server 2010 has made additional improvements to help organizations looking to bring some sanity to a sometimes hectic world of content creation for clients and customers alike:

- There is much tighter integration between Microsoft’s latest platform release and the Office 2010 suite, enabling organizations to have multiple end-users edit and work on documents at the same time, as well as save directly to SharePoint.
- SharePoint’s **“What You See Is What You Get” (WYSIWYG) Editor** has tighter integration with the new user interface and Ribbon feature in SharePoint Server 2010, cutting down on page loads and confusion frequently cited with regard to the end-user experience in MOSS 2007.

- The latest platform release natively supports browsers besides Internet Explorer, including the latest versions of Firefox and Safari.
- **One-click page creation** allows you to simply enter the page title then you can immediately start authoring the page.
- **Page Layouts** (templates) provide a way to apply a consistent look and feel to a page.
- The **Rich Text Editor** (RTE) provides rich formatting of text, live preview of formatting options, easier embedding of images and videos directly into the RTE, and drag-and-drop capability to add them exactly where you want.
- Authors now have quick access to **Media, Video, and Silverlight Web Parts** they can add to their pages, and can now preview and play the rich media content.
- Organizations can use approval workflows or customize them in **SharePoint Designer 2010** to model your specific business requirements.
- Workflows can also be modeled in **Microsoft Visio 2010**, which can then be imported into SharePoint Designer 2010. This takes advantage of Visio Services for delivering workflow visualization, showing exactly where in the process the workflow is currently executing.
- **Workflows** can now be reused and applied to content types and site templates.
- **Check in/out and Versioning** capabilities ensure the appropriate people are editing content, and the most up-to-date version is being propagated closer to final publication.
- Having separate environments for authors to modify and review content before it is published to the public-facing farm with **Content Deployment**.
- The ability to quickly publish content without waiting for the next standard content deployment job to run – automatically, at a specified interval – with **Quick Deploy**.

Another benefit to utilizing SharePoint as a content management and publishing platform is its ability to incorporate additional third-party solutions to enhance the native features already offered.

Challenge	Opportunity with DocAve
Protect workflows – including Nintex – as well as content and its requisite metadata that is critical to WCM.	DocAve Backup and Restore for SharePoint backs up and restores all SharePoint items, externalized content, and farm-level components with full-fidelity, and offers flexible backup schedules in order to meet strict SLAs.
Security trimmed and granular selection of elements for deployment, including content, design elements, and solutions.	DocAve Deployment Manager automates the deployment of applications, customizations, solutions, and design elements across sites, and even farms. Administrators are enabled to control the process, limit project delays, and vastly lower the chance for human error.
Deploy to multiple destinations on a schedule to keep various lifecycle stages in sync and minimize potential human error.	

As organizations continue to utilize the web for daily productivity, they must find a platform that will empower business and IT users to efficiently and effectively manage multiple, complex sites. Particularly as the web is moving from a static, internal portal for team members into one that is dynamic and focusing on clients and customers, it is of paramount importance to ensure proper safeguards are in place to utilize websites for managing customer relationships, collaborating partners, and communicating with employees.

In short, a well-thought-out WCM strategy must be put into place. With many enhancements, SharePoint Server 2010 is firmly positioning itself as not simply an intranet platform, but a true enterprise ecosystem that can manage not only internal collaboration and act as a centralized document repository, but also power the external-facing sites and wikis so many organizations rely upon today. SharePoint can simplify management of enterprise content, increase IT efficiency, enforce compliance, and simplify content publication.

While SharePoint offers many features that make it a viable WCM solution, consider enhancing it by utilizing third-party solutions – such as AvePoint’s DocAve Software Platform – for streamlined deployment, administration, content management, and storage management.

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