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1 Introduction

1.1 Repstor custodian

Repstor custodian is an information management platform for Office 365 that allows you to structure your SharePoint system according to your business requirements. You can create repeatable workspaces that are ideal for managing projects, documents and emails, with the right structure, properties and security. You can then access your content through the standard Microsoft interfaces and the familiar Microsoft Outlook interface. You can also manage the lifecycle of those workspaces through to their completion.

Repstor custodian helps manage requests that come to the organization, team or individuals from customers and other businesses. Custodian replaces outdated document systems and shared drives with email and document management from within Outlook and other Office application. Custodian provides online and offline content management from mobile devices, increasing efficiency through seamless collaboration. All content is secured on the organization's SharePoint making optimum use of O365 security.

1.2 Installation

You must Install Custodian in an existing site within SharePoint - this is the host site for the custodian app. You can install the custodian app in multiple sites and configure each individual app instance to meet different departmental or enterprise needs. For example, a HR custodian for managing HR information, and a separate Marketing custodian for use by the Marketing and Sales team.
For more information see one or more of the following in the [online documentation](#).

**Custodian O365 Installation Guide**

**Custodian On-Premise Prerequisites**

**Custodian On Premise Installation Guide**

### 1.3 User Access

You can access the custodian functions and content using the following:

- Standard Microsoft interfaces for OneDrive and SharePoint – a web-based interface giving access to workspaces and including custodian web parts that make accessing the workspaces simpler.
- The Custodian web interface for administration and configuration.
- Outlook – using Repstor affinity to access workspaces.

**Note** To use Repstor affinity with Repstor custodian, you must add the Affinity Custodian module to the Affinity installations. When Repstor affinity users subscribe to workspaces, the structures and content associated with those work items are presented in the Outlook folder panel and users can access the content.

- Custodian Mobile – a Mobile client for navigation, subscription and access to workspaces.
- Repstor Mobile – to file emails from mobile devices and Outlook apps not based on Windows.
2 Basic Configuration Options

Basic configuration of Repstor custodian includes the following steps:

1. Create a hierarchy. To know more, click here.
2. Configure site columns in Custodian, to store properties associated with a hierarchy level. To know more, click here.
3. Create templates. To know more, click here.
4. Associate templates with hierarchy levels in a hierarchy. To know more, click here.
5. Create Precedent Documents. To know more, click here.
6. Create and use workflows. To know more, click here.

Steps 1 to 6 ensure that the hierarchy is fully defined, you can now start using the system. That is, you can:

7. Add items in a hierarchy level. To know more, click here.
8. Use Outlook to access custodian content. To know more, click here.

2.1 Creating a Hierarchy with many levels.

A hierarchy consists of levels which define the overall structure of the information managed by custodian. Each level stores a type of information, for example, “Customer”, “Project” etc. The information at a level is defined by a template. There can be more than one template used for a level in the hierarchy (e.g. different types of customers). Templates define the structures, properties and security associated with the different levels in the hierarchy. Templates map onto a specific structure in SharePoint (example: site collection, sites or document libraries). By default, the child hierarchy level inherits security permissions from the parent level, but you can change the security permissions.

![A Custodian Hierarchy Diagram]

**Warning** When you complete this procedure, only a hierarchy with many levels is created. You must create templates to use this hierarchy effectively.
To Create a Hierarchy with many Levels.

1. In the Settings page, click the HIERARCHY tab
2. Click Add new level..... The Create New Hierarchy Level dialog appears.

3. In the Singular Name box, type the singular form of the name for your hierarchy level.
4. In the Plural Name box, type the plural form of your hierarchy level.
5. Select the Create Required lists check box.
   Note It is recommended that you select the check box. If you clear the check box, you must create SharePoint data lists in step 8 and step 9.
6. In the Parent list, click a parent level for the hierarchy level you create.

Notes
- For the first hierarchy level you create, click No Parent.
- If it suits the business needs of your organization, you can create many levels without a parent level.
7. Click OK. The General tab appears with the new hierarchy level name.
8. If you chose not to create data lists in step 5, in the SharePoint Data List, click Create new list... to create a new list.
9. If you chose not to create data lists in step 5, in the My Items List, click Create new list... to create a new list.
10. To use an alternative title for My Items in custodian UI (User Interface), type in the My Items Alternative Title box.
11. If necessary, in the Show Only for Group box, type the group that alone can view the Items in the site navigation.
12. To pause SharePoint provisioning to a later time, in the Provisioning tab, select the Paused Provisioning check box.
13. Click Save Settings.
14. Repeat steps 2 to 12 to create numerous levels in your hierarchy.

15. To delete a hierarchy level, click **Delete** and then click **Save Settings**.

   The hierarchy is created with many levels but to use the hierarchy you must create templates. Because templates are dependent on SharePoint site columns, the next step in Custodian configuration is to **add SharePoint site columns to Custodian**.

---

**Pause Provisioning**

Pause provisioning is an effective way of controlling the creation of an item at a hierarchy level. In this way, you can allow requests for the creation of a new item, and then **use triggers and statuses to actually start the creation** at a later time.

- To pause provisioning at the time of hierarchy level creation and trigger provisioning through status changes, in the **HIERARCHY** tab click the **Provisioning** sub tab and then, click the **Paused Provisioning** check box.

You can **change provisioning specifics for a level in a hierarchy**.

---

### 2.2 Adding and Editing Site Columns in Custodian

Only when site columns are available in Custodian, can you use them as default properties on templates that you create.

**To Add and Edit Site Columns in Custodian**

1. In the Settings page, click the **PROPERTIES** tab.

   ![Settings Page](image)

2. In the **Select Properties from** list, click **All groups**. The SharePoint site columns appear under the **Available site columns** list.

   **Note** You can click a group to view columns applicable to the group only.
3. In the **Available site columns** list, click the site columns you want to make available in custodian and then click **Add**.

The site columns appear under the **Available in custodian** list.

4. Click **Save Settings**.

   **Note**  You can now add these site columns as **fields in a creation form** and **fields in a template** for users to use them meaningfully.

5. To remove a site column from Custodian, click the site column in the **Available in custodian** area, select **< Remove** >**Save Settings**.

6. To edit site columns available for a group or create new site columns or create new groups, click **Manage site fields** and make changes in the SharePoint site columns location.

7. Click **Refresh** and then repeat steps 2 to 5.

When you have added SharePoint site columns to Custodian, the next step in Custodian configuration is to **create templates**.

### 2.3 Creating and Editing Templates

A template is a SharePoint site, list or document library with a specific structural configuration. You can associate every level in the hierarchy with one or more templates. This means that when you create an item in any level in the hierarchy, you can choose one of the associated templates. Templates that you create are stored in a default site called the Template Site. You can use the **STORAGE Tab** of the **Settings page** to go to the site.

- Templates that are Folders and Lists (Document Library) are stored as Document Libraries in the Template Site.
- Templates that are Sites, Site Collections, Office365 Group or Microsoft Team are stored as sub sites of the Template Site.

#### To Create a Template

1. In the Repstor Custodian User Interface, click **Templates** in the **Templates page** appears.

2. Click, **CREATE**.
3. In the **Structure** tab, in the **Title** box, type a template name.

   ![Create All Templates](image)

4. In the **Type** area, click the type of template you want to create.

   **Note** If you click **Microsoft Team** the steps next steps are different. [Click here](#) to know more.

5. In the **Parent Template** drop-down list, click a template to use as the basis for the new template.

   **Note** If the template type you choose is Folder or List, this drop-down is not available.

6. In the **Structure** area, click **Add list...** or **Add folder...** to structure your template with lists, sub sites, document libraries or folders.

7. Click **Save**.

8. Click the **Properties** tab.
9. In the **Interested Parties** box, type the email address or usernames to search and add to the list.

10. In the **Creation form** list, click a form to use as a basis for the template.

    Click **None** if you do not have or want to use forms.

    **Warning** When a template is associated with a form. When you create an item in a hierarchy level, the form is what you view and fill out.

11. In the **Attachments location** box, type the URL path to the location for attachment uploads.

12. In the **Default Properties** area, click a property from the drop-down list and click ![Add](image).

    Add all the properties you want to and make them mandatory, read only or optional using the relevant check boxes

    **Warning** You must add all the properties in the creation form to the template to make them available when you create an item in a hierarchy level.

13. Click ![X](image) to remove a property.

14. Click **Save**.

**To Edit a Template**

**Note** If the template is a Team template, the steps are different. Click [here](#) to know more.

1. In Repstor custodian, click ![Templates](image), the **Templates page** appears.

2. Click, **ALL TEMPLATES**.

3. Click ![Edit](image) for the template you want to edit.

4. In the **Structure** tab, you can change the title, parent template and structure of the template.

5. In the **Properties** tab, you can change the interested parties list, location for attachment uploads, creation form and default properties.
6. To save the templates as a built-in SharePoint template, in the Export tab click the link and then click Save.

   **Warning**  This is only for power users with advanced knowledge and experience in custodian templates.

7. To apply extra configuration when provisioning, you can add JSON code in the Advanced tab and then click Save.

8. To create a new template which is a copy of the current one you are editing, click the Copy tab and then click Create Copy. You can change the name of the template copy you create.

9. To view the content created using this template, click the Existing Content.

When you have a hierarchy with many levels and you have created templates, the next step in custodian configuration is to associate one or more templates to each level in the hierarchy.

**Creating and Editing Microsoft Team Template Type**

To Create a Microsoft Team Template
1. In the Repstor Custodian User Interface, click the Templates page appears.

2. Click, CREATE.

3. In the Structure tab, in the Title box, type a template name.

4. In the Type area, click Microsoft Team.

5. In the Team to clone box, type the group id of the Microsoft Team you want to use.

   **Note** In Microsoft teams, you can right-click a team and then click Get link to team. Paste the link in a Notepad and you can locate its group id as follows.
   https://teams.microsoft.com/l/team/19%3a8b981fe5c9b042cb9bb98c1819fb33ac%40thread.skype/conversations?groupId=1071ad86-e9f7-444d-a731-dd92adcf9c46&tenantId=4184f669-16bc-4341-acb5-293df7d28643

6. Click Save.

7. Click the Properties tab.
8. In the **Interested Parties** box, type the email address or usernames to search and add to the list.

9. In the **Creation form** list, click a form to use as a basis for the template.

Click **None** if you do not have or want to use forms.

**Warning**  When a template is associated with a form. When you create an item in a hierarchy level, the form is what you view and fill out.

10. In the **Attachments location** box, type the URL path to the location for attachment uploads.

11. In the **Default Properties** area, click a property from the drop-down list and click ![Add](image). Add all the properties you want to and make them mandatory, read only or optional using the relevant check boxes.

**Warning**  You must add all the properties in the creation form to the template to make them available when you create an item in a hierarchy level.

12. Click ![Remove](image) to remove a property.

13. Click **Save**.

**To Edit a Microsoft Team Template**

1. In Repstor custodian, click ![Templates](image), the Templates page appears.

2. Click, **ALL TEMPLATES**.

3. Click ![Edit](image) for the Team template you want to edit.

4. In the **Structure** tab, you can change the title.
5. To change the structure of the template, click and make changes in the SharePoint location.

6. In the **Properties** tab, you can change the interested parties list, location for attachment uploads, creation form and default properties.
7. To save the templates as a built-in SharePoint template, in the Export tab click the link and then click Save.

8. **Warning**  This is only for power users with advanced knowledge and experience in custodian templates.

9. To apply extra configuration when provisioning, you can add JSON code in the Advanced tab and then click Save.

10. To create a new template which is a copy of the current one you are editing, click the Copy tab and then click Create Copy. You can change the name of the template copy you create.

11. **Note**  You must provide an ID of Team to clone for the copied template to be able to use it. Click for the copied Team template to input the id.

12. To view the content created using this template, click the Existing Content.

### 2.4 Associate one or more Templates to each Level in the Hierarchy

**Caution**  You must have a hierarchy with a few levels and at least a few templates before you can complete this procedure.

1. In the Settings page, click the HIERARCHY tab and click a level in the hierarchy for which you want to associate templates.

2. Click the Provisioning tab

3. In the Templates available list, click one or more templates and click Add.
Note: In the image above, the hierarchy **customers** is associated with the templates called, Customer Template, Customer TEMP2 and Customer TEMP2.

4. Click **Save Settings**.

**Caution**: In the example above, you must associate the hierarchy level **Projects** with one template (or more) and the hierarchy level **Work items** with one template (or more).

When you have a hierarchy with many levels, created templates and associated one or more templates to each level in the hierarchy the next step in Custodian configuration is to **upload precedent documents**.

### 2.5 Uploading and Using Precedent Documents

Precedent documents are documents that are associated with one or more templates. You can upload documents from your machine using the **Documents page** in the custodian UI and link them to templates. The precedent documents library is the SharePoint location for all the documents you upload, irrespective of the templates they are relevant to.

- To open the precedent documents library, in the **CREATE** or **ALL DOCUMENTS** tab, click **Click here to open the Precedent Documents library in SharePoint**.
To Upload a Precedent Document

1. In the Repstor custodian, click **Documents**.

2. Click **CREATE**.

3. In the **File** box, click **Browse** and upload a document from your machine or SharePoint location.

4. File name is automatically assigned as the title. To change the title, type a title in the **Title** box.

5. To allow other non-admin users in your organization to use the precedent document you are currently uploading, select the **Availability** check box.

6. In the **Relevant Templates** list, click a template and click **Add**. You can add many templates, making the document relevant to those templates.

   **Note** If you do not link the document to any template, it is relevant to all templates.

7. Click **Create**.

To Use a Precedent Document through Outlook

1. In the Outlook Navigation Pane, under **Repstor affinity**, click the folder to which you want to add a document.

   **Note** The precedent documents are synchronized into Repstor affinity area.

2. In the Outlook Home Ribbon, in Repstor affinity, click **New Document**.

   The Precedent documents appear in the drop down.

3. Click a document. A New Document dialog appears where you can type the name of your new document.

4. Click **OK**.
5. The document opens in the relevant application, Word in this example. You can update the place holder values using the buttons in the **Insert** tab in the application.

6. When you complete editing the document is automatically saved in the relevant folder in the hierarchy level.

**To Edit Properties of a Document.**

1. In the Repstor custodian, click **Documents**.
2. Click **ALL DOCUMENTS**.
3. For a document, click ****.
4. To change the title, type in the **Title** box.
5. To make the document relevant to a template, in the **Relevant Templates** list, click the template and click **Add**.
6. To delete a template, click an already added template

   The document is no longer relevant to the deleted template.

7. To delete a document, for the document, click ****.
8. Click **Save**.

When you have a hierarchy with many levels, created templates, associated one or more templates to each level in the hierarchy, and uploaded precedent documents, the next step in Custodian configuration is to **create workflows for an item in a hierarchy level**.

### 2.6 Creating and Using Workflows

Custodian allows the lifecycle of an item in a hierarchy level to be managed through a workflow. The workflow consists of statuses, triggers and forms which allow the lifecycle to be managed. A workflow is created when an item in a hierarchy level, commonly item in the
lowest level of a hierarchy, moves across departments or individuals towards completion. For example, in the project management scenario, when a work item is identified as a potential opportunity. Let us say it must move from potential to being accepted by one department or individual, approved by another and closed by yet another. The status of the case or file helps construct a workflow. Each of these statuses can be associated with actions.

**To Create and use Workflows**

1. Create the possible statuses an item in a hierarchy level can be assigned, select an initial status and link statuses to other relevant statuses.
2. Create forms for each status.
3. Link a status to a form.
4. Create and store emails relevant to some or all statuses in SharePoint.
5. Create triggers for each status and add actions to the triggers.

The next logical step in custodian configuration after building workflows is to add items in a Hierarchy Level. When you create an item in the lowest level in the hierarchy, it is created with initial status assigned to it and you start using the workflow.

### 2.6.1 Creating Statuses for a Level in the Hierarchy

1. In the Settings page, click the HIERARCHY tab and click the hierarchy level for which you want to create statuses.
2. In the Status tab, click Add new status....
3. Click . A configuration dialog appears.

4. In the **General** tab, in the **Status** box, type the status name.

5. In the **Icon** box, type the name of the class for the icon you want to use. For example, folder-open or paperclip.

6. To prevent pinning for this status, select the **Prevent pinning** check box.

7. In the **Next statuses** area, click the one or more statuses that can come after the status you create.

   **Note** You must create at least two statuses to make a meaningful choice in the **Next statuses** area.
8. Click the Enter tab.

9. In the Group box, type the SharePoint group with permission to switch to the next status.

10. To show a reason when the status is entered, select the Reason check box. You must first configure an Event log to use this setting.

11. To show a comment box when the status is entered, select the Comment check box. You must first configure an Event log to use this setting.

12. In the Actions list, click an action and then click Add.

13. Click the Exit tab.

14. In the Action list, click an action that applies when moving on from this status, and then click Add.

15. Select the Allow Manual Exit check box.
**Caution** If the check box is cleared, switching to another status is possible only via a custom form or API.

16. Click the **Form** tab and in the drop-down click the form relevant to the status you create.
17. Click **Close**. The Status tab appears with the status you created.

**Note** If the status you create is the first status in the workflow, in the **Opening Status**, click the status you created.

Repeat steps 1 to 16 and create more statuses to associate with the level in the hierarchy. As the items you create in this hierarchy level move along the workflow, they will move between these statuses you create. In the image below individual work items that you create under the **Work Items** hierarchy level can move along the workflow from the **Requested** status to the **Closed** status.

- To edit a status, click the status and make changes between 4 to step 16 in the procedure above.
- To delete a status, click the status and then, click **Delete status**.

### 2.6.2 Creating Forms for Workflows

1. In the Settings page, click the **FORMS** tab and then Click **Add new**....
2. In the **General** tab, in the **Form Name** box type a name for the form. The name must be relevant to one status in the workflow. for example, **Request Form**.
3. To configure buttons on the form, click **Add** and type a name for the button.

   **Note** Name the buttons on the form to indicate the next possible statuses in your workflow.

   The buttons **Approve**, **Reject**, or **Need more info** indicate the next possible statuses in the workflow, when the current status is **Open**.

4. Under **Status** column, in the drop-down, click the status you want to associate the button with.

   In the image above for example, on the Work Item Approval form you can have the buttons **Approve**, **Reject**, or **Need more info** associated with the statuses Approved, More info required and Rejected

5. To delete a button, click **X**.

6. Click **Save Settings**.

### 2.6.3 Link a Status to a Form

**Caution** You must create statutes that apply to a level in the hierarchy and forms for work flows before you can complete this procedure.

1. In the Settings page, click the **HIERARCHY** tab and click the hierarchy level for which you want to link statuses to forms.

2. In the **Status** tab, click a status.
3. In the configuration dialog that appears, click the **Form** tab.

4. In the **Form** drop-down, click the form you want to associate with this status.

5. Click **Close**.

### 2.6.4 Create and Store Emails for Statuses

1. In Repstor custodian, in the **Settings** page, click the **REFERENCE** tab

2. In the **Template Reference** area, click the link.
3. Use the sample email template under **Emails** area to create email templates that suit the different statuses.

4. In the **Email Templates - File Storage** area, click the document library link and save the email templates you create.

### 2.6.5 Creating and Editing Triggers for Hierarchy Levels

A trigger consists of an expression and an action. An expression can be a condition or multiple conditions. Trigger actions can include, sending out emails, provisioning, re-provisioning, archiving etc. When the action is, send an email, the email is linked to status that you define in the expression of the trigger. This means that the email recipient can view the form linked to the status through their email and move the item to the next status.

1. In the Settings page, click the **HIERARCHY** tab and click the hierarchy level for which you want to create triggers.

2. In the **Triggers** tab, click **Add New Trigger**.
3. In the **Trigger name** box, type a name for the trigger.

4. Click **Edit Expression**.

5. Type an expression in the required syntax. One of the many expressions available, which indicates status change to closed is New.Status != Old.Status and New.Status = "Closed"

6. click **Confirm**

   **Note**  To view all expressions you can use, go to the Trigger Syntax Reference in the **REFERENCE tab**

7. Click **Edit Actions**.

8. Click an action from the list, click **Add action** and then click **Close**. You can add more than one action to a trigger. The most widely used actions are **Send email** and **Start provisioning**.

9. To remove an action for a trigger, click **Edit Actions**, click an existing action, click **Remove** and then click **Close**.

10. Click **Save Settings**.

11. To Remove the trigger, click **Remove**, and click **Save Settings**.

12. To edit a trigger, click on the trigger name and edit the name, expression or actions, and then click **Save Settings**.
2.7 Adding and Editing Items in a Hierarchy Level

To Add a unit in a Hierarchy level

1. In Repstor custodian, click the hierarchy level in which you want to add a unit.
   
   **Note** The tabs in this page, have the name of the hierarchy level you created in the Settings page.

2. Click CREATE.

3. Type the relevant name for the item you create.

4. Click a parent level hierarchy.

5. Do one of the following, in the **Type** drop-down.

   **Template Type drop-down**

<table>
<thead>
<tr>
<th>If the hierarchy Level is</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associated with one or more templates and each template is</td>
<td>Click a template. The form is what you view and fill out.</td>
</tr>
<tr>
<td>associated with a form</td>
<td></td>
</tr>
<tr>
<td>Associated with one or more templates</td>
<td>Click a template, from the list of associated templates.</td>
</tr>
<tr>
<td>Not associated with a template</td>
<td>Click a template from the list of all templates.</td>
</tr>
</tbody>
</table>

6. Click Create unit. An item is created in the hierarchy level with the opening status assigned to it.

7. Repeat steps 2 to 6 for every item you want to add to a hierarchy level.
To Pin and Unpin Units in a Hierarchy Level

Click the hierarchy level and then click the **ALL ITEMS** tab. All units in that hierarchy level appear.

- To pin an item, click next to the item.
- To unpin an item, click next to the item. You can also unpin items from the **MY ITEMS** tab.

To Update or Edit Units in a Hierarchy Level

1. In Repstor custodian, click the hierarchy level in which you want to edit a unit.
   
   **Note** The tabs in this page, have the name of the hierarchy level you created in the Settings page.

2. Click **ALL ITEMS**. All units in that hierarchy level appear.

3. For the unit you want to edit or update, click .

4. Make the updates.

   **Note** You can rename the unit, change the status, apply security permissions, add links or update structure of the template associated with the hierarchy level.
5. To view items from child-hierarchy levels, click.

6. To delete a unit, click. A confirmation window appears. Select the **Delete Content** check box to delete the SharePoint content and then click **Delete**.

**To Search for units in a Hierarchy Level**

1. In Repstor custodian, click the hierarchy level in which you want to search for one or more units.
   
   **Note**  The tabs in this page, have the name of the hierarchy level you created in the Settings page.

2. For a basic search, click the Search bar and type a title or code to search for. The **SEARCH RESULTS** tab appears with the relevant items.

![Search Results](image)

3. For an advanced search, click and choose an element(property) to search for.

![Advanced Search](image)

You can click one or more properties and the **SEARCH RESULTS** tab appears with the relevant items.

**Note**  If you choose to **hide default properties for the advanced search in the Features tab**, you will only see custom properties.
3 Repstor affinity custodian module

One of the key features and advantages of custodian is that it integrates navigation of SharePoint locations with Outlook through Repstor affinity. When you install custodian for the first time, you must provide a host URL. When Outlook opens for the first time after your custodian installation, it uses the host URL to synchronize your custodian pinned items. Your Outlook will have a Repstor custodian area in the Home ribbon and your custodian pinned items appear under the Repstor affinity in the Navigation pane.

Click Repstor custodian on the Outlook Home ribbon to access your pinned items, the folders under Repstor affinity in the Outlook Navigation Pane are synchronized. You can now create items in any level in your hierarchy from within Outlook.

3.1 Custodian Procedures from Outlook

The elements in the image above are used as example in the following procedures.

To use Precedent documents

The precedent documents are synchronized into Repstor affinity area.

1. In the Outlook Folder Pane, under Repstor affinity, under Time Record, click Documents. In the image above, Elite is a customer, Surveillance is a Project and Time record is a work Item.
2. In the Outlook Home Ribbon, in Repstor affinity, click **New Document**. The Precedent documents appear in the drop down.

![Image of Outlook Home Ribbon](image1)

3. Click **sampledocbox.docx**. A New Document dialog appears where you can type the name of your new document.

4. Click **OK**.

5. The document opens in the relevant application, Word in this example. You can update the place holder values using the buttons in the **Insert** tab in the application.

![Insert Tab](image2)

6. When you complete editing the document is automatically saved in **Documents**, under **Time Record**.

**To add a Document to a Folder in any Hierarchy level.**

1. In the Outlook Navigation Pane, under **Repstor affinity**, click the folder to which you want to add a document.

2. In the Outlook Home Ribbon, in Repstor affinity, click **Add Document**.

3. In the Files Explorer that appears, select a document from your PC and click **Open**.

4. A New Document dialog appears where you can change the name of your new document.

5. Click **OK**.

6. The document is added to the folder in the Outlook interface and you can use these commands.

![View Document](image3)

7. To update the place holder values, click **Edit Document** and use the buttons in the **Insert** tab in the application.

![Insert Tab](image2)

8. When you complete editing the document is automatically saved in the folder.

**To move Documents between Folders.**

From within Outlook, you can move documents between folders in different levels of your hierarchy.
In the example above, you can move documents from a folder under a work item, under a project for the Elite customer to a folder for any work item or project or customer.

1. In the Outlook Navigation Pane, under Repstor affinity, click the folder from which you want to move a document.
2. Click the document, drag and drop to the new folder.

To Edit a Document through Outlook

1. In Outlook, in Repstor affinity, click a folder and then click the document you want to edit.
2. Click ![Edit Document](image)
3. The document opens in the relevant application, for example, Word or Excel. You can update the place holder values using the buttons in the Insert tab in the application.

You can update the place holder values using the buttons in the Insert tab in the application.

4. When you complete editing the document is automatically saved.

To Create a New Item in any Level in the Hierarchy

1. In the Outlook Home ribbon, in Repstor custodian, click My Projects, My Customers or My Work Items.
2. A Repstor custodian pop-up window appears where you can view ALL ITEMS and your pinned ITEMS (MY ITEMS) for the hierarchy level you choose.
3. Click CREATE and complete the steps to create an item in a hierarchy level.
4. You can also delete items, pin and unpin items, view items from the child hierarchy levels and update items in the Features view.
4  Advance Configuration Options

Repstor custodian offers numerous advance configuration options that you can tailor to suit your organizational and business needs. The list of advanced configuration options available are as follows:

Changing Provisioning Specifics for a Level in a Hierarchy

Create Creation forms for templates.

Setting up Security for a Level in the Hierarchy

Changing Features for a Level in the Hierarchy

Changing Archiving Specifics for a Level in the Hierarchy

Changing Dashboard Details for a Level in the Hierarchy

Create an Event Log List

Changing the Name of the Documents Page

Create Data Containers as a solution for huge amounts of content stored in the hierarchy levels

4.1 Changing Provisioning Specifics for a Level in a Hierarchy
1. In the Settings page, in the **HIERARCHY** tab click the hierarchy level you want to define provisioning for, and then click the **Provisioning sub tab**.

2. To use the hierarchy level as an organizational entity without SharePoint storage, clear the **Provision Content** check box.

   **Note** Whenever a hierarchy level is created this check box is selected by default.

3. To prevent non-admin users from creating new units in the hierarchy level, clear the **Allow provisioning** check box.

   **Note** Whenever a hierarchy level is created this check box is selected by default.

4. To pause provisioning at the time of hierarchy level creation and trigger provisioning through status changes, click the **Paused Provisioning** check box.

5. To change the parent site under which data will be provisioned, in the **Static Site** box, type a URL.

   **Note** The custodian installation site is used by default.

6. To change the scheme for generating the title of new items in the hierarchy level, in the **Naming Scheme** type a property token. Click to view the property tokens you can use.

7. To change the scheme for URL of new items in the hierarchy level, in the **URL Naming Scheme** type a property token. Click to view the property tokens you can use.

8. To add one or more templates to the hierarchy level, in the **Templates available** list, click one or more templates and click .

9. In **Affinity** tab, to exclude the hierarchy level from synchronizing in affinity, click the **Exclude from affinity** check box.

10. To synchronize to affinity all child hierarchy level items within a parent item when the parent item is pinned, select the first **Auto Subscribe** check box.

11. To synchronize to affinity a parent hierarchy level items when one of its child level items is pinned, select the second **Auto Subscribe** check box.
4.2 Creating and Editing Creation Forms

**Note** You can associate a template with a form. When you create an item in a hierarchy level, the form is what you view and fill out.

**To Create a Creation Form**

1. In the Settings page, click the **FORMS** tab and then Click **Add new**....

2. In the **General** tab, in the **Form Name** box type a name for the form.
3. Select the **Attachments** check box to allow uploading of attachments for the form.
4. To configure buttons on the form, click **Add** and type the details for the button.
5. To delete a button, click **.**
6. If necessary, in the **Security Group** box type the group that can view the form and in the **Alternative Form** list, click a form user who do not belong to the security group.
7. Click the **Fields** tab.
8. Click **Add Section** and click 🖊 to delete the term **New Section**.

9. In the **Section fields** list, click a field and then click **Add**.

   **Warning**  The Site columns must be available in custodian to add to be able to add it to a form. See step 3 and 4 in [Adding SharePoint Site Columns into custodian](#).

   **Warning**  You must add all the properties in the form to the relevant template to make them available when you create an item in a hierarchy level. See step 12 in [Creating and Editing Templates](#).

10. To embed an existing form, in the **Embed form**, click a form and then click **Add**.

11. Click **Save Settings**.

**To Edit a Creation Form**

1. In the Settings page, click the **FORMS** tab, then click the form you want to edit.
2. Make edits in the **General** and **Fields** tabs.

3. To remove the form, click

4. To copy the form, click,

5. Click **Save Settings**.

### 4.3 Provisioning using Triggers and Statuses

**To use Triggers to Start Provisioning**

1. In the Settings page, click the **HIERARCHY** tab and then click the **Triggers** sub tab.
2. Click an existing trigger name or click **Add New Trigger** and type a name for the trigger.
3. Click **Edit Expression**, type an expression in the required syntax and then click **Confirm**
   - **Note** To view all expressions you can use, go to the **Trigger Syntax Reference** in the **REFERENCE** tab
4. Click **Edit Actions**.
5. In the drop-down list, click **Start Provisioning** and then click **Add action**. You can also add other actions to the trigger.

6. Click **Close**.

7. Click **Save Settings**.

**To use Statuses to Start Provisioning**

1. In the Settings page, click the **HIERARCHY** tab and then click the **Status** sub tab.

2. Click an existing status or click **Add New Status** and then click **New Status**. A configuration page appears.

3. Click the **Enter** tab
4. In the **Actions** drop-down list, click **Start Provisioning** and then click **Add**.
5. Click **Close**.
6. Click **Save Settings**.

### 4.4 Setting up Security for a Level in the Hierarchy

1. In Repstor custodian, click the hierarchy level you want to define security settings for.
2. In the Settings page, click the **HIERARCHY** tab and then click the **Security** sub tab.

![Security settings interface](image)

3. To break inherited permissions from the parent level for all new items you add in the current hierarchy level, click **Select to break inheritance for new items in the hierarchy level** check box.

   **Note** If you select this check box, the next check box is unavailable.

4. To break inherited permissions from the parent level on an individual basis while adding items to the hierarchy level, click the **Select to break inheritance for new items on an individual basis** check box.

   **Note** If you select this check box, the previous check box is unavailable.
5. To copy parent level permissions for a new item in the hierarchy level as an exception when inheritance is broken, click the **Select to copy roles from the parent as a one-off when inheritance is broken** check box.

6. To add interested parties through user fields, in the **Interested Parties** drop-down list, click one or more fields and then click **Add**.

   a. To view the **Interested Parties** box while adding a new item, click the **Show the default interested Parties input field** check box.

   b. To view the **Add to My Items for all interested parties** check box while adding a new item, Show the **Add to My Items for all interested parties** check box.

   c. To update My items when there is a change in interested parties, click the **Changing interested parties will update My Items** check box.

   d. To update security for non-inherited items when there is a change in interested parties, click the **Changing interested parties will update security for non-inherited Cities** check box.

7. Click **Save Settings**.

### 4.5 Changing Features for a Level in the Hierarchy

1. In the Settings page, in the **HIERARCHY** tab click the hierarchy level you want to specify features for, and then click the **Features** sub tab.

2. To prevent linking between individual items in this hierarchy level, select the **Disable links on creation of new item** check box.

3. To use a SharePoint form pop-up instead of the default HTML form for entering metadata during item creation in the hierarchy level, clear the **HTML Form** check box.

4. To prevent users from editing the code for an item in hierarchy level, clear the **Allow Custom Codes** check box.

5. To change the scheme for generating new unit (in the hierarchy level) code, in the **Code Format** box, type a new code.

   Click ![property tokens](property_tokens.png) to view the property tokens you can use.

6. To change the icon for an item in the hierarchy level, in the **Icon** box, type a name of the class for the icon you want to use. For example, folder-open or paperclip.

7. To give non-administrators read-only access to custodian UI, select the **Read-only UI Mode** check box.

8. To edit the tab, you want to view when you open an item in the hierarchy level, click your choice form the **Edit Screen Default Tab** drop-down.
9. To show only custom properties and hide default properties when performing an advanced search, select the **Hide default search properties** check box.

10. Click **Save Settings**.
4.6 Changing Archiving Specifics for a Level in the Hierarchy

1. In the Settings page, in the HIERARCHY tab click the hierarchy level you want to change archiving specifics for, and then click the Archival sub tab.
2. To assign permission levels for users when archiving an item, click the Permission level drop down and click a permission type.
3. To move metadata lists of archived items into a particular folder, in the Folder box type a value.
4. In the Document Library Description box, type a value for the descriptions of archived document libraries of the items in this hierarchy level.
5. Click Save Settings.

4.7 Changing Dashboard view for a Level in the Hierarchy

This image below is the default dashboard view for all items in a hierarchy level. While it is not necessary, you can change the view using the following steps.

To Change the Dashboard view for a Level in the Hierarchy

1. In the Settings page, in the HIERARCHY tab click the hierarchy level you want to change the dashboard view for, and then click the Dashboards sub tab.
2. To change the view for the My Items (custodian pinned items), in the My Items tab, click a view from the views available.
3. To change the view for the search results, in the **Search results** tab, click a view from the views available.

4. To change the All Items view, in the **All items** tab, in the **Title** box, type a new title.

5. To prevent viewing all items in the custodian UI, clear the **Show in custodian** check box.

6. To restrict access to A SharePoint group, in the **Group Name** box type the name of the group.

7. In the **Button options** area, select the check boxes if you want to prevent pinning and unpinning and want to hide the options column.

8. Click **Save Settings**.

   The image below tells you how the settings affect the dashboard appearance.
In the image below, click the UI items on the left pane or the tabs under Settings on the right to go the relevant pages.
4.8 Create an Event Log List

1. In the Settings page, in the HIERARCHY tab click the hierarchy level you want to create an event log list and then click the Events sub tab.

2. Click Create new list and type the name for the list and then click OK.

3. In the Narrative events area, select the check boxes corresponding to events you want to view in the Narrative in the Features view.

   Note If you do not select any check box, all the events are available in the Narrative.

4.9 Changing the Name of the Documents Page

1. In the Settings page, click SET UP tab.

2. In the General sub tab, in the Document Term, type the term you want to use to represent documents.

3. In the Plural Record Term, type the plural for of the document term
4. Click **Save Settings**.

### 4.10 Data Containers

Data Containers are a storage solution for huge amounts of content stored in the hierarchy levels in custodian. Data containers allow support for an advanced configuration in circumstances where each site collection requires more than 2000 sub sites. They are designed in a subtle fashion leaving the hierarchy unaltered and unaffected while increasing the number of sites and site collections to cater to customer needs. Data containers currently are designed to work for hierarchy levels that use a Site-template type.

**To Enable Data Containers**

1. In the Settings page, click the **FEATURES** tab and select the **Enable data Containers** check box.
2. In the Settings page, click **Add new level..** and create a new hierarchy level for Data Containers. **DC** in the example shown in the image.
3. In the Settings page, click the **HIERARCHY** tab and click the lowest hierarchy level. **Work Items** in the example shown in the image.

![Image](image-url)

4. In the **Provisioning** tab, click **Data Containers** sub tab and in the **Dynamic Containers** drop-down, click the name of the data container hierarchy, **DC** in the example.
5. In the Settings page, select **DC>Provisioning tab>Data Containers** and in the **Auto renew** box, type the maximum number of **Work Items** that can be added before a new data container (DC) is automatically created. **2** in the example shown in the image.
6. Click **Save Settings**.

7. In the Settings Page, select **DC>Provisioning tab>Content** and in the Templates available list, click only one template. The template must be a Site Collection template.

8. Select the **Hide the standard Title** check box.

9. Click **Save Settings**.

**Automatic Creation of Data Containers**

In the example shown in the image when more than two **Work Items** are created, a **DC** will automatically be created and be visible under **DC hierarchy level**.
1. In Repstor custodian, click the lowest hierarchy level. **Work Items** in the example.

2. Click **CREATE**.

![Create Work Item](image)

3. Type the relevant name for the item you create.

4. Repeat steps 2 to 4 and add more than two **Work Items**.

5. In Repstor custodian, click the Data Container hierarchy level and view All items. **ALL DC** in the example.
5  Custodian User Interface

You can access the *Repstor custodian* user interface (UI) from the host site where the custodian app is installed. The custodian app is listed under Site Contents. Usually the custodian app is added to the homepage of the site for convenience. You can use the custodian UI to configure settings, access content, create and store templates, upload and store documents.

### 5.1 Settings page

You can use the Settings page to define the settings for *Repstor custodian*. The Settings page consists of the following tabs.

- **HIERARCHY Tab**
- **STORAGE Tab**
- **PROPERTIES Tab**
- **FEATURES Tab**
- **FORMS Tab**
- **SITE COLLECTIONS Tab**
- **SET UP Tab**
- **REFERENCE Tab**

#### 5.1.1 HIERARCHY Tab

You can use the HIERARCHY tab to create and define the settings for a hierarchy level.

In the Settings page, click the **HIERARCHY** tab. The HIERARCHY tab consists of the following sub tabs.

- **General tab**
- **Provisioning tab**
- **Security tab**
- **Features tab**
- **Status tab**
- **Triggers tab**
- **Archival tab**
- **Dashboard tab**
Events tab

5.1.1.1 General Tab

You can use the General tab to change the name of an existing hierarchy level. You will use the General tab when you create a new hierarchy level.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plural Name</td>
<td>Name of the hierarchy level in plural.</td>
</tr>
<tr>
<td>Singular Name</td>
<td>Name of the hierarchy.</td>
</tr>
<tr>
<td>Parent</td>
<td>Parent level to the hierarchy level you create. You can use No parent for the first level and for the levels equivalent to the first hierarchy level.</td>
</tr>
<tr>
<td>Type Guid</td>
<td>Identifier for the hierarchy level you create. Users cannot edit this id.</td>
</tr>
<tr>
<td>SharePoint Data List</td>
<td>The SharePoint list that stores details for items in the hierarchy level.</td>
</tr>
<tr>
<td>My Items List</td>
<td>The SharePoint list that stores details for pinned items in the hierarchy level.</td>
</tr>
<tr>
<td>My Items Alternative Title</td>
<td>The alternative title you can give to My Items in the dashboard view.</td>
</tr>
</tbody>
</table>
### Configuration Guide

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Only for Group</td>
<td>The group that alone can view this hierarchy level in the Custodian UI.</td>
</tr>
<tr>
<td></td>
<td><strong>Caution</strong> This is a view setting and not a security setting.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the hierarchy level and its settings.</td>
</tr>
</tbody>
</table>

#### 5.1.1.2 Provisioning Tab

You can use the Provisioning sub tab to define provisioning specifics for a hierarchy level.

![Provisioning Tab Screenshot](image)

**Items in Content sub tab in the Provisioning tab**

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provision Content</td>
<td>Indicates whether to provision SharePoint content for each new unit in a hierarchy level.</td>
</tr>
<tr>
<td>Static site</td>
<td>The parent location under which data is provisioned. By default, it is the custodian installation site.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong> Usually without content in the UI.</td>
</tr>
<tr>
<td>Allow provisioning</td>
<td>Indicates whether to allow non-admin users to create new units for a hierarchy level. Clear the check box to prevent non-admin users from creating a new unit for a hierarchy level.</td>
</tr>
</tbody>
</table>
### Item Configuration Guide

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Paused Provisioning</strong></td>
<td>Indicates whether to pause provisioning SharePoint content till it is started through status change or trigger. Clear the check box to provision immediately.</td>
</tr>
<tr>
<td><strong>Templates Available</strong></td>
<td>Templates you can include to use for creating a unit in the hierarchy level. To be able to use a template for an item in the hierarchy level, click the template and then click <strong>Add</strong>.</td>
</tr>
<tr>
<td><strong>Naming Scheme</strong></td>
<td>Token code that is used to name new units at this hierarchy level. Click <img src="image" alt="link" /> to view the property tokens you can use.</td>
</tr>
<tr>
<td><strong>URL naming Scheme</strong></td>
<td>Token code used to name the URL of provisioned sites at this hierarchy level. Click <img src="image" alt="link" /> to view the property tokens you can use.</td>
</tr>
</tbody>
</table>

### Items in Affinity sub tab in the Provisioning tab

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Exclude from affinity</strong></td>
<td>Indicates whether to exclude from synchronization in Repstor affinity, the current level in the hierarchy.</td>
</tr>
<tr>
<td><strong>Auto Subscribe</strong></td>
<td>Synchronizes to affinity all child hierarchy level items within a parent item, when the parent item is pinned. In the image above, pins all Projects of a parent Customer when the Customer is added to My Customers.</td>
</tr>
<tr>
<td><strong>Auto Unsubscribe</strong></td>
<td>Synchronizes to affinity the parent child hierarchy level items when a child item is pinned. In the image above, pins a Project to My Projects when Work Item under the Project is added to My Work Items.</td>
</tr>
<tr>
<td>Item</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Auto Unsubscribe</td>
<td>Removes from affinity all the child level items, when the parent level item is unpinned. In the image above, removes all Work Items of a Project when the Project is removed from My Projects.</td>
</tr>
<tr>
<td>Repstor affinity Folder Naming</td>
<td>The scheme used for naming new Projects folders within the central repository list that is reflected in the Repstor affinity folder structures in Outlook.</td>
</tr>
<tr>
<td>Naming Scheme</td>
<td></td>
</tr>
<tr>
<td>Affinity folder custom properties</td>
<td>Indicates whether you can use custom properties in the affinity naming scheme. Note Not recommended if you selected the Auto Subscribe check box.</td>
</tr>
</tbody>
</table>

5.1.1.3 Security Tab

You can use the Security sub tab to set up security for a hierarchy level.
<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Break Inheritance</td>
<td>Indicates whether to break inheritance from parent level for this hierarchy level. If you select this check box, use Interested Parties to define security settings.</td>
</tr>
<tr>
<td>Check box 1</td>
<td>Indicates whether to break inheritance for new items in the hierarchy level on an individual basis.</td>
</tr>
<tr>
<td>Check box 2</td>
<td>Indicates whether to inherit from parent level as a one-off.</td>
</tr>
<tr>
<td>Check box 3</td>
<td>Indicates whether to break inheritance from parent level for this hierarchy level.</td>
</tr>
<tr>
<td>Interested Parties</td>
<td>Select to view the Interested Parties box while adding a new item.</td>
</tr>
<tr>
<td>Show the default Interested Parties input field</td>
<td>a. To update My items when there is a change in interested parties, click the Changing interested parties will update My Items check box.</td>
</tr>
<tr>
<td></td>
<td>b. To update security for non-inherited items when there is a change in interested parties, click the Changing interested parties will update security for non-inherited Cities check box.</td>
</tr>
<tr>
<td>Add to My Items for all interested parties</td>
<td>Select to view the Add to My Items for all interested parties check box while adding a new item.</td>
</tr>
<tr>
<td>Changing interested parties will update My Items</td>
<td>Select to update My items when there is a change in interested parties.</td>
</tr>
<tr>
<td>Changing interested parties will update security for non-inherited Cities</td>
<td>Select to update security for non-inherited items when there is a change in interested parties.</td>
</tr>
<tr>
<td>Secure Item Field</td>
<td>Indicates whether to exclude the current user from the security list, when creating a new item in the hierarchy level.</td>
</tr>
<tr>
<td>Exclude current user</td>
<td></td>
</tr>
<tr>
<td>Security Scope</td>
<td>List of options to which you can apply security. The valid options are</td>
</tr>
<tr>
<td></td>
<td>• Content and Metadata</td>
</tr>
<tr>
<td></td>
<td>• Metadata</td>
</tr>
<tr>
<td></td>
<td>• SharePoint Content Only</td>
</tr>
<tr>
<td></td>
<td><strong>Warning</strong> The first option is strongly recommended. contact Repstor to understand the other options.</td>
</tr>
<tr>
<td>Additional Users</td>
<td>Users with access to new items in the hierarchy level.</td>
</tr>
<tr>
<td></td>
<td>Type and use commas to separate users and groups.</td>
</tr>
</tbody>
</table>
5.1.1.4 Hierarchy Features Tab

You can use the Features sub tab to specify features for a hierarchy level.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description or Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linking</td>
<td>Indicates whether a hierarchy level item can be linked to other items in the same or different hierarchy level.</td>
</tr>
<tr>
<td>Check box 1</td>
<td>Indicates whether to disable links for new units in the hierarchy level.</td>
</tr>
<tr>
<td>Check box 2</td>
<td>Indicates whether to restrict linking to other items within the same parent level.</td>
</tr>
<tr>
<td>HTML Form</td>
<td>Indicates whether to use the HTML form for entering metadata while creating an item in the hierarchy level.</td>
</tr>
<tr>
<td>Allow Custom Codes</td>
<td>Permits the user to edit the code for each new item in the hierarchy level.</td>
</tr>
<tr>
<td>Code Format</td>
<td>The scheme for generating new unit (in the hierarchy level) codes.</td>
</tr>
<tr>
<td></td>
<td>Click to view the property tokens you can use.</td>
</tr>
<tr>
<td>Item</td>
<td>Description or Action</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Icon</td>
<td>Name of the class for the icon you want to use. For example, folder-open or paperclip</td>
</tr>
<tr>
<td>Read only UI Mode</td>
<td>Indicates whether to allow non-admin users to create new units for a hierarchy level.</td>
</tr>
<tr>
<td>Timesheet list</td>
<td></td>
</tr>
<tr>
<td>Edit Screen: Default Tab</td>
<td>Click to select the tab you want to view when you open an item in the hierarchy level.</td>
</tr>
<tr>
<td>Hide default search properties</td>
<td>Indicates whether to show only custom properties for advanced search for an item in a hierarchy level.</td>
</tr>
<tr>
<td>See To Search for units in a Hierarchy Level in Adding and Editing items in a Hierarchy Level</td>
<td></td>
</tr>
</tbody>
</table>

### 5.1.1.5 Status Tab

You can use the status sub tabs to create statuses apply to the hierarchy level. You can define various statuses for workflow and records management purposes.

You can configure each status with an icon, permissions when the status is assigned, permissions when moving away from the status and an associated form.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add new status</td>
<td>Allows you to create a new status.</td>
</tr>
<tr>
<td>Opening Status</td>
<td>The first status assigned to a new item in the hierarchy level.</td>
</tr>
</tbody>
</table>

### 5.1.1.6 Triggers Tab

You can use the Trigger sub tab to create and edit triggers for a hierarchy level. A trigger consists of an expression and an action. An expression can be a condition or multiple conditions.
<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add New Trigger</td>
<td>Allows you to create a new trigger.</td>
</tr>
<tr>
<td>Trigger name</td>
<td>Name for the trigger you create.</td>
</tr>
<tr>
<td>Edit Expression</td>
<td>Allows you to enter multiple conditions separated by ‘and’, ‘or’ operators or a combination of the two.</td>
</tr>
<tr>
<td>Edit Actions</td>
<td>Allows you to add or edit actions for a trigger.</td>
</tr>
<tr>
<td>Remove</td>
<td>Deletes a trigger.</td>
</tr>
</tbody>
</table>

5.1.1.7 Archival Tab

You can use the Archival sub tab to change archiving specifics for level in the hierarchy.
<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permission level</td>
<td>Permission level when an item is archived. This is assigned to any user with access.</td>
</tr>
<tr>
<td>Folder</td>
<td>Folder to which meta data lists of archived hierarchy level items are moved.</td>
</tr>
<tr>
<td>Document Library</td>
<td>This value will be set for the descriptions of archived document libraries of the items in this hierarchy level.</td>
</tr>
</tbody>
</table>

### 5.1.1.8 Dashboard Tab

You can use the Dashboard sub tab to **change the dashboard details of items in a hierarchy level**.

**Item** | **Description**  
---|---
My (hierarchy) Items | List of views available to show the My Items view in the dashboard.
Search results | List of views available to show the search results in the dashboard.
### Item Description

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SharePoint View</td>
<td>This is the name of the SharePoint list</td>
</tr>
<tr>
<td>Title</td>
<td>Name for the All items view that appears in the dashboard view of the hierarchy level.</td>
</tr>
<tr>
<td>Show in custodian</td>
<td>Indicates whether you can view All Items tab in the custodian UI.</td>
</tr>
<tr>
<td>Group Name</td>
<td>Name of the SharePoint group that (alone) has access to the All Items view.</td>
</tr>
<tr>
<td>Alternative view</td>
<td>List of views available to show as alternative view to users who do not belong to the group mentioned in the <strong>Group Name</strong> field.</td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td>This drop-down list appears only if there are other views available. For example, the <strong>Inactive Items</strong> in the image above.</td>
</tr>
<tr>
<td>Default columns only</td>
<td>Indicates whether to show the default column set of the All Items list in SharePoint.</td>
</tr>
<tr>
<td>Button options</td>
<td></td>
</tr>
<tr>
<td>Check box 1</td>
<td>Indicates whether to hide the pin and unpin buttons in the dashboard view.</td>
</tr>
<tr>
<td>Check box 2</td>
<td>Indicates whether to hide the <strong>options</strong> column in the dashboard view.</td>
</tr>
</tbody>
</table>

### 5.1.1.9 Events Tab

You can use the Events tab to create an event log list for one or more levels in the hierarchy.
5.1.2 STORAGE Tab

You can use the Storage tab to view the template site, the central repositories site and the central repositories list. You can also change the central repositories list or create a new central repositories list.
### Items in STORAGE Tab

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template Site</td>
<td>SharePoint site where the Custodian templates are stored.</td>
</tr>
<tr>
<td></td>
<td>Click [link] to go to the site with the custodian templates.</td>
</tr>
<tr>
<td>Central Repositories Site</td>
<td>The site with the organization-wide central repositories list.</td>
</tr>
<tr>
<td></td>
<td>Click [link] to go to the central repositories site.</td>
</tr>
<tr>
<td>Central Repositories List</td>
<td>Your central repositories list.</td>
</tr>
</tbody>
</table>

#### 5.1.2.1 To change Your Central Repositories List

Do one of the following

- To change the central repositories list to another existing list, click [link] and then click a list.
- To create a new list, click [Create new list] and in the Create New list dialog box, type the list name and click [OK].

![Create New List](image)

**Note** The new list is created in the Central Repositories Site.

### 5.1.3 PROPERTIES Tab

You can use the PROPERTIES tab to [add and edit Site Columns in Custodian](#). Only when site columns are available in Custodian, can you use them as default properties on templates that you create.

In the Settings page, click the [PROPERTIES] tab.
Items in Settings Page PROPERTIES Tab

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select properties from</td>
<td>Groups you can select properties from. The properties for the group you click, appear under the Available Site columns.</td>
</tr>
<tr>
<td>Available site columns</td>
<td>SharePoint site columns of the group you clicked in Select properties from list.</td>
</tr>
<tr>
<td>Available in custodian</td>
<td>Site columns available in custodian. You can add or remove site columns available in custodian, using Add or Remove.</td>
</tr>
<tr>
<td>Manage site fields</td>
<td>Opens the SharePoint Site Columns location where you can create site columns or make site columns available under specific groups.</td>
</tr>
<tr>
<td>Refresh</td>
<td>Loads your changes to the Site columns location in the Available site columns list. Click whenever you make changes to the site columns.</td>
</tr>
<tr>
<td>Search properties</td>
<td>Properties you can have queried during a default search. You can click from the drop-down list and click Add</td>
</tr>
<tr>
<td>Save Settings</td>
<td>Saves changes you make to the PROPERTIES tab and takes you to the Hierarchy tab.</td>
</tr>
</tbody>
</table>

5.1.4 FEATURES Tab

You can use the FEATURES tab to change Features for a Level in the Hierarchy.
## Settings

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Following</td>
<td>Indicates whether you permit following. Anyone who follows you will have access to the items that you create.</td>
</tr>
</tbody>
</table>
| Enable Documents              | Two check boxes  
  - Makes the Documents page available in *custodian* where you can create and edit documents.  
  - Allows inheritance of documents from the parent hierarchy level.                                                                                   |
| Template Access Level         | Indicates whether all users can access all templates.                                                                                                                                                       |
| Secretary Sharing             | Indicates whether you want to share your repositories with multiple users in *Repstor affinity*.                                                                                                              |
| Single-Page Creation          | Indicates whether you want to enable single page creation form.                                                                                                                                              |
| SharePoint scripts            | Indicates whether you want to enable the cross-domain SharePoint scripts.                                                                                                                                   |
| Pin site URLs                 | Indicates whether to add site URLs to the repositories list for synchronization to affinity.                                                                                                                   |
| Enable data containers        | Indicates whether you want to enable data container options  
  Data containers allow support for an advanced configuration in circumstances where each site collection requires more than 2000 sub sites.                                                          |
| Office 365 Group Access       | Gives Custodian access to create and modify Office 365 groups.                                                                                                                                             |
| Save Settings                 | Saves changes you make to the Features tab and takes you to the Hierarchy tab.                                                                                                                               |
5.1.5  FORMS Tab

You can use the Forms tab to create and edit creation forms and workflow forms.

In the Settings page, click the FORMS tab.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add new</td>
<td>Allows you to create a new form.</td>
</tr>
<tr>
<td>General</td>
<td></td>
</tr>
<tr>
<td>Form Name</td>
<td>Indicates whether all users can access all templates.</td>
</tr>
<tr>
<td>Attachments</td>
<td>Indicates whether you want to share your repositories with multiple users in Repstor affinity.</td>
</tr>
<tr>
<td>Add button</td>
<td>Allows you to create a new button and associate it to a status.</td>
</tr>
<tr>
<td>Security Group</td>
<td>The group to which the form is available</td>
</tr>
<tr>
<td>Alternative Form</td>
<td>The alternative form that will appear for members outside of the security group. This is available only if the Security group is entered.</td>
</tr>
<tr>
<td>Fields</td>
<td></td>
</tr>
<tr>
<td>Add Section</td>
<td>Allows you to add sections to the form.</td>
</tr>
<tr>
<td>Embed form</td>
<td>Allows you to embed existing forms in the form you create. This is mostly used for template forms.</td>
</tr>
<tr>
<td>Sections fields</td>
<td>Allows you to add fields to the section in the form</td>
</tr>
</tbody>
</table>
### 5.1.6 SITE COLLECTIONS Tab

You can use the **SITE COLLECTIONS** tab to view the following details.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tenant Admin Site</td>
<td>Full URL to your tenant administration site.</td>
</tr>
<tr>
<td>Managed Path</td>
<td>Managed path name to provision site collections.</td>
</tr>
<tr>
<td>Owner</td>
<td>Site Collection owner. You can use Email Address or Login Name.</td>
</tr>
<tr>
<td>Administrators</td>
<td>List of usernames or email addresses of the site collection administrators. Separate the email address or usernames with semicolons.</td>
</tr>
<tr>
<td>Storage Limit</td>
<td>Maximum storage limit in GB. Minimum must be 1.</td>
</tr>
<tr>
<td>Resource level</td>
<td>Maximum resource usage level.</td>
</tr>
</tbody>
</table>

**Warning** It is strongly recommended that you contact Repstor if you want to make changes to the contents of this tab.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attachment field</td>
<td>Allows you to create a field for attachments.</td>
</tr>
<tr>
<td>Save Settings</td>
<td>Saves changes you make to the Features tab and takes you to the Hierarchy tab.</td>
</tr>
</tbody>
</table>
5.1.7 SET UP Tab

You can use the SET UP tab to view the following details and most importantly to reset cache.

Repstor custodian always caches some data, whenever you make custodian-related changes in the SharePoint you must reset cache.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td></td>
</tr>
<tr>
<td>License Key</td>
<td>Your Repstor custodian product license key.</td>
</tr>
<tr>
<td>Install Wizard</td>
<td>Opens the License page where you can configure your license key and can set up Repstor custodian.</td>
</tr>
<tr>
<td>Import &amp; Sync</td>
<td>Opens the Import page, where you can import items from any level in your hierarchy.</td>
</tr>
<tr>
<td>Document Term</td>
<td>The term you want to use in custodian UI to represent documents</td>
</tr>
<tr>
<td>Plural Document Term</td>
<td></td>
</tr>
</tbody>
</table>

![Settings screenshot](image)

---

Brings in your custodian-related SharePoint changes to the Custodian UI.
### Item Description

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default From Email</td>
<td>Maximum resource usage level.</td>
</tr>
<tr>
<td>Reset Cache</td>
<td>Resets the cache, reflecting your SharePoint changes in the Custodian UI.</td>
</tr>
<tr>
<td></td>
<td>Every time you make changes in the SharePoint it is mandatory that you Reset cache for the custodian UI to reflect the changes.</td>
</tr>
<tr>
<td>Export settings</td>
<td>Generates a .json file with all settings for your current custodian system.</td>
</tr>
<tr>
<td>Server deployment</td>
<td></td>
</tr>
<tr>
<td>Default Server Slot</td>
<td></td>
</tr>
<tr>
<td>My server Slot</td>
<td></td>
</tr>
<tr>
<td>Save Settings</td>
<td>Saves changes you make to the SET UP tab and takes you to the Hierarchy tab.</td>
</tr>
</tbody>
</table>

You can use the SET UP tab to change the name of the Documents page in your custodian UI.

### 5.1.8 REFERENCE Tab

The Reference tab contains details about the Custodian API and other technical aspects. You can view the following from this tab:
The trigger syntax reference
The custodian integration guide
Memory and cache statistics
Recent log events
Release notes

### 5.2 Templates Page

You can use the Template page to view custodian default templates, edit templates and creating new templates.

In Repstor custodian, click the Templates icon, the Templates page appears.
Items in the Templates Page

<table>
<thead>
<tr>
<th>Items</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td></td>
</tr>
<tr>
<td>Structure</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td>Name of the template</td>
</tr>
<tr>
<td>Type</td>
<td>Template type</td>
</tr>
<tr>
<td>Parent Template</td>
<td>An existing template that can become the basis for other custodian templates you create.</td>
</tr>
<tr>
<td>Structure</td>
<td>The structure of your template. This varies depending on the template type you chose. Templates that are Folders or Lists can contain sub folders. Templates that are sites can contain sub sites, lists and folders.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves the changes you make to the Structure tab.</td>
</tr>
</tbody>
</table>
### Items

<table>
<thead>
<tr>
<th>Items</th>
<th>Descriptions</th>
</tr>
</thead>
</table>
| **Properties**    | **Interested Parties**
|                   | Interested parties for the template. You can search using email address or username and then click to add.                                 |
|                   | **Creation form**
|                   | Lists of forms from which you can click one to associate with the current template.                                                            |
|                   | **Attachments location**
|                   | **Default Properties**
|                   | Properties that will appear in the template by default.
|                   | **Warning**
|                   | You must add all the properties in the creation form to the template to make them available when you create an item in a hierarchy level. |
|                   | **Save**
|                   | Saves the changes you make to the Properties tab.                                                                                               |
|                   | **All templates**
|                   | Shows all available templates.                                                                                                                  |

### 5.3 Documents Page

You can use the Documents page to upload precedent documents.

You can change the name of the Documents page in your custodian UI.

In the Repstor custodian, click **Documents**.

![Documents page](image)

### Items in the CREATE Tab

<table>
<thead>
<tr>
<th>Items</th>
<th>Descriptions</th>
</tr>
</thead>
</table>
| Create| **File**
|       | A file you can upload from your machine or a SharePoint location.
<p>|       | Click <strong>Browse</strong>, to upload a file.                                                                                                         |</p>
<table>
<thead>
<tr>
<th>Items</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Name of the document. The actual file name is used by default, but you can change it if necessary.</td>
</tr>
<tr>
<td>Availability</td>
<td>Indicates whether to allow others to use this document. Clear the check box to prevent non-admin users from using this document.</td>
</tr>
<tr>
<td>Relevant Templates</td>
<td>Templates that this document is relevant to. To make the document relevant to a template, click a template and then click [Add].</td>
</tr>
<tr>
<td>Create</td>
<td>Creates the document and makes it available under the All Documents tab.</td>
</tr>
<tr>
<td>All Documents</td>
<td>Shows all available documents.</td>
</tr>
<tr>
<td>Click here to open the Precedent Documents library in SharePoint</td>
<td>Opens the SharePoint location for the Precedent Documents library.</td>
</tr>
</tbody>
</table>