



## Repstor custodian™

### Worked example - Training Manual

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Rev 10

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## Introduction

This document provides a step through of a sample Repstor custodian installation and configuration for training/evaluation purposes. The example used is a legal document management scenario, however terminology can be adjusted if desired to address a different scenario.

## Repstor custodian Overview

### High-level architecture

Repstor custodian consists of a web application, a provisioning engine and a SharePoint app.

SharePoint Online customers will normally use the Repstor hosted custodian service in Azure which is maintained by Repstor, but a dedicated service can also be supported.

On Premise SharePoint/Office365 customers can opt for an on-premise installation of custodian or a custom hybrid architecture.

### Functional concepts

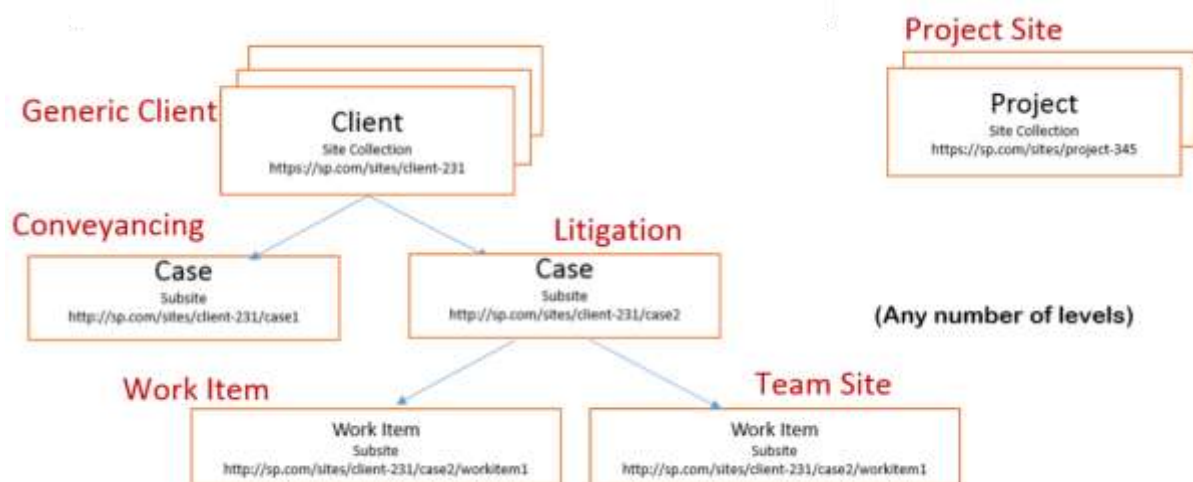
Repstor custodian is used to manage and provision SharePoint locations such as site collections, sites, and lists (e.g. document libraries). Usually these are organised into a hierarchy. For example, law firms refer to 'Clients' and 'Matters'. Logical ways to configure custodian in this scenario could be:

- Clients stored as Site Collections, and matters stored as subsites within their client site
- Clients stored as sites, and matters stored as subsites within their client site
- Clients stored as websites, and matters stored as document libraries in their client site
- Clients with no storage, and matters stored as sites

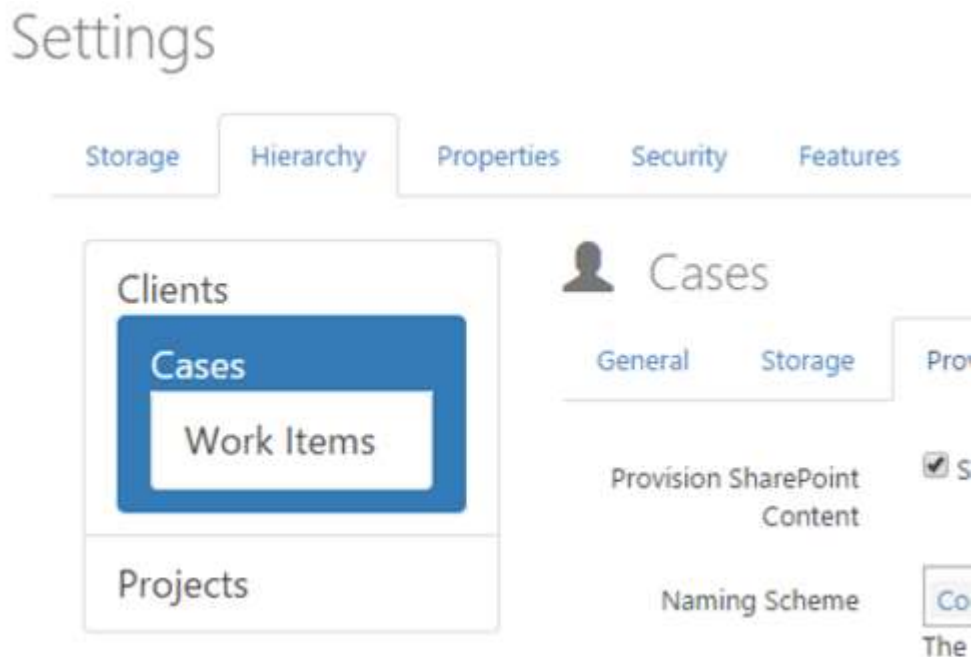
Any combination of site collections, sites, and lists is possible. Indeed, a hierarchy level (e.g. clients) does not necessarily have to have any SharePoint storage and can simply be an organisational entity.

When a matter or client is created in SharePoint, this process is called **provisioning**. When provisioning takes place, it is performed using a **template**. A template is simply a SharePoint Site or List with an appropriate configuration that which is copied to the new location.

The below diagram illustrates a Client->Case->Work Item hierarchy; the text in red illustrates examples of templates used to provision the relevant sites.



In custodian, this hierarchy appears as shown:



The Clients/Cases/Work Items/Projects hierarchy is visually presented reflecting how SharePoint provisioned sites and subsites will be created.

### Templates

Templates are stored in SharePoint, normally under the 'Templates' subsite. Site templates are stored as subsites, and when a new site (eg. for a Client) is provisioned, this site template will be copied to the new site, with property default values replaced by the app according to the configuration associated with the hierarchy and template.

List templates similarly are stored as lists within the Templates subsite, and their contents as well as configuration is copied when a new item is provisioned as a list.

Template content is updated via SharePoint. For example, to add a document to a template, simply browse to the appropriate document library in SharePoint and upload the document.

### Case/Matters List

Each hierarchy level has an associated data list. For the 'Matters' example, new matters are stored in the Matters List. This stores the title, template used, custom property values, matter code, status code and the SharePoint location where it was provisioned.

### Repository List

Each hierarchy level has an associated repository list. This is called, for example, "My Matters". It performs two duties:

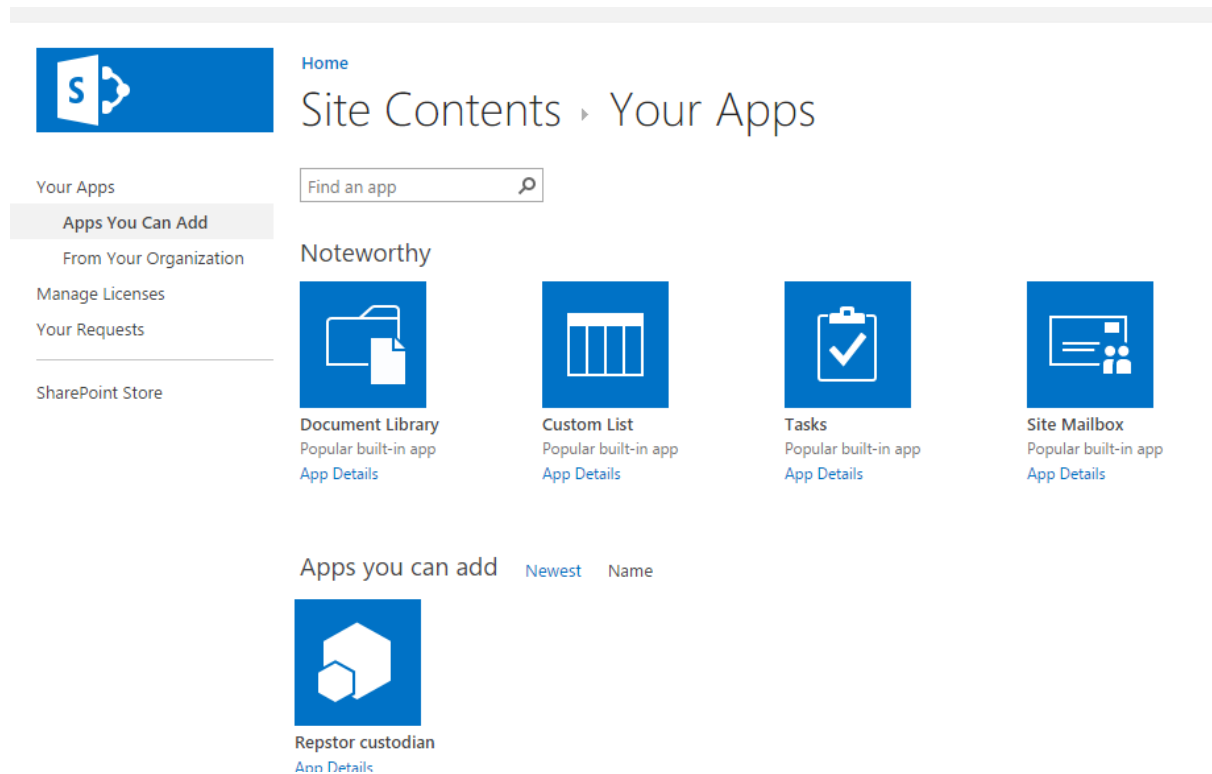
- Represents items in My Matters (matters currently in progress/of interest to individual users)

- Repstor affinity reads this list to select content to make available in Outlook to individual users

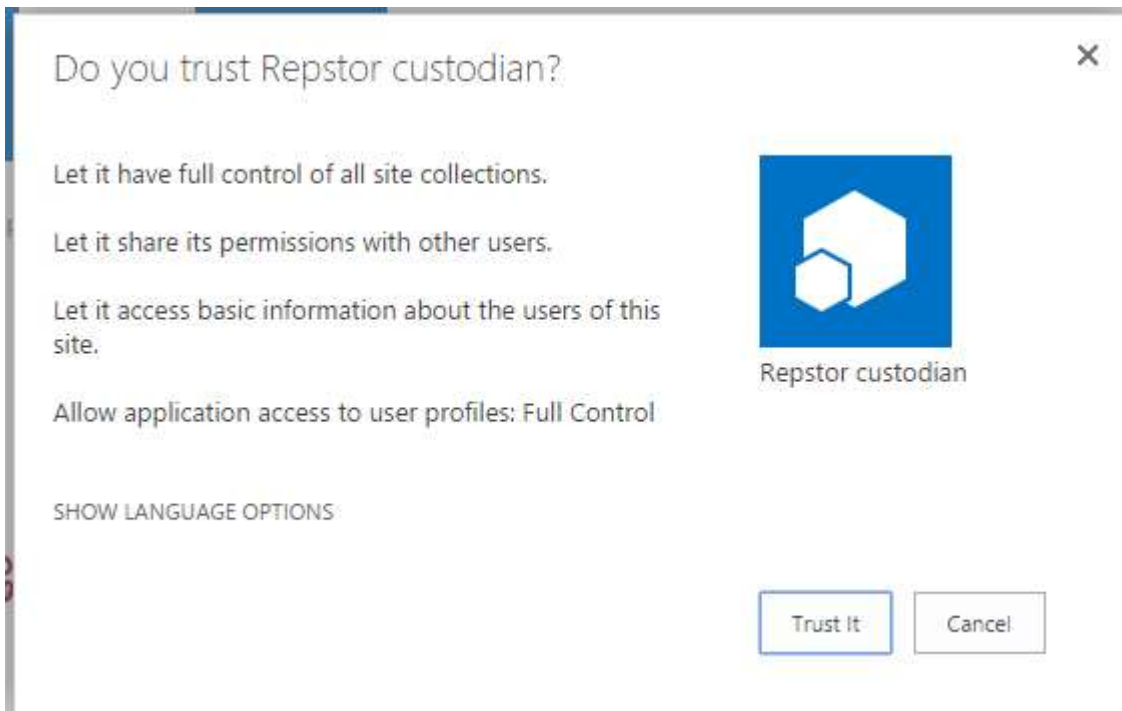
This means that if a user adds a matter to My Matters, its content will automatically be synchronised to Outlook.

## Installation

Browse to a SharePoint site on which to install custodian. Select Site Contents -> Add an App -> Repstor custodian (Note that the configuration of the site where you install the app will determine the initial metadata properties available for configuration of templates).



Click Repstor custodian and grant the appropriate permissions



Once SharePoint has added the custodian app, click it, and you will be presented with the licensing screen:

## License

Use this page to configure your Repstor product license key.

If you would like to purchase a license or request a 60-day evaluation key please visit or [contact@repstor.com](mailto:contact@repstor.com).

License Key

✓

Your Repstor custodian product license key.

[Continue Setup »](#)

Enter your license key and click Continue Setup. On the next screen, you may select to install a set of sample templates but for this exercise **uncheck** the 'Install default...' checkbox:

## Repstor custodian Quick Set Up

This process will create the necessary sites and lists required by custodian. All settings can be changed

Select this checkbox if you wish to automatically preconfigure your installation with sample templates. Repstor custodian will then be usable immediately. You can modify or delete these templates later.

Install default templates and Client/Matter hierarchy

[Perform Quick Setup >>](#)

A Client/Matter hierarchy is often the correct default required for a law firm. However, we are going to set up the hierarchy from scratch.

A couple of small steps are required to complete the initial installation, as detailed below:

## Quick Setup Complete!

Since demo data was not installed, please [click here](#) to configure your custodian hierarchy.

There are a number of optional configuration steps you may now complete.

- **Precedent Documents** - [click here](#) to edit the central repositories list. The single modification column of the first row. The members of that group will then have the precedent documents
- **Custodian Administrators group** - this group defines who has access to custodian settings [to add other people to this group](#).
- **Custodian Settings** - You should go through each of the options to configure custodian con

Click the Precedent Documents repositories link. Edit the single item in the list and enter your username (or any group in which you're a member)

Title *	<input type="text" value="precedentdocs"/>
Location	<input type="text" value="https://repstor.sharepoint.com/sites/test/custodian/Matters/Preced"/>
TargetUsers	<input type="text" value="Fill in this field with your name or a group"/>
Background Sync	<input checked="" type="checkbox"/>
Parent Folders	<input type="text" value="_ROAMHidden"/>
Include In Training	<input type="checkbox"/>
Header Download Type	<input type="text" value="1"/>
Created at 07/01/2016 11:51 by Repstor custodian	
Last modified at 07/01/2016 11:51 by Repstor custodian	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

This will allow precedent documents to synchronise to the Outlook client of users in the TargetUsers.

Now, click the '[Click here to configure Repstor custodian](#)' link and proceed to the Configuration stage.

## Configuration

Here you will be configuring a custom hierarchy of Clients and Matters. Clients will be implemented as sites, and Matters as document libraries.

## Templates

Firstly create a template for Clients and two templates for Matters.

Open custodian and click 'Templates' -> 'New'. Set the client template up as follows:

The screenshot shows a configuration form for a new template. The fields are as follows:

- Title:** General client
- Type:** Radio buttons for List, Site (selected), and Site Collection.
- Parent Template:** A dropdown menu showing 'Team Site'. Below it is the text: 'Template used for the basis of this custodian Template.'
- Structure:** A list of folders: 'Correspondence' and 'Billing Information', followed by a link 'Add list ...'.
- Buttons:** A 'Save' button at the bottom.

Two callout boxes provide additional information:

- The first callout points to the 'Parent Template' dropdown and contains the text: 'Parent templates available depends on the site/site collection configuration where the app is installed'.
- The second callout points to the 'Add list ...' link and contains the text: 'Click on add list to add document libraries as required, these will then be generated for each new Client that is added'.

Click 'Save'.

Create another template, this time for a matter of type List:

The screenshot shows a configuration form for a new template. The fields are as follows:

- Title:** Conveyancing
- Type:** Radio buttons for List (selected), Site, and Site Collection.
- Structure:** A list of folders: 'Search and Property Certificates' and 'Correspondence', followed by a link 'Add folder ...'.
- Buttons:** A 'Save' button at the bottom.

Click 'Save'. Create more templates if you wish.



## Hierarchy

Click 'Settings', and select the 'Hierarchy' tab. Click 'add new level' and name it Clients:

Singular Name	<input type="text" value="Client"/>
Plural Name	<input type="text" value="Clients"/>
Create Required lists	<input checked="" type="checkbox"/> Check this box to create required SharePoint storage lists. Otherwise, you must create your own.
Parent	<input type="text" value="No parent"/>

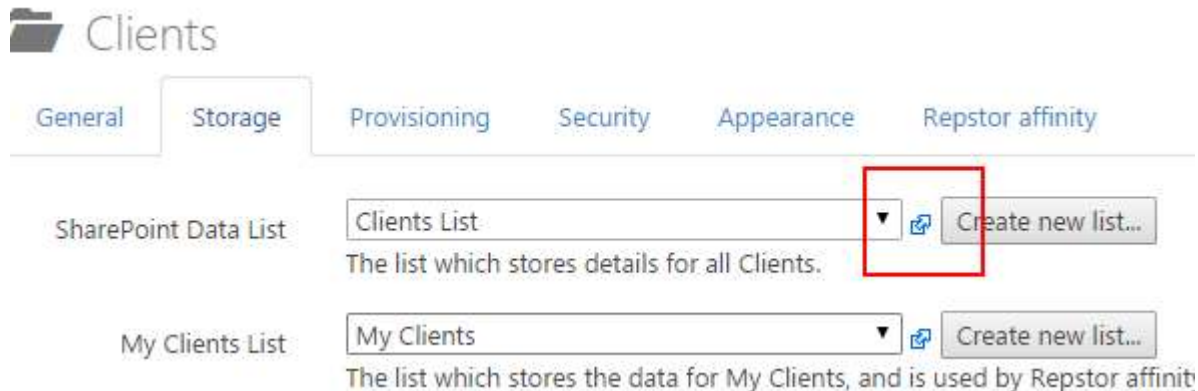
Click OK. Click 'Add new level' and again and create the Matter level, with Clients as the parent:

Singular Name	<input type="text" value="Matter"/>
Plural Name	<input type="text" value="Matters"/>
Create Required lists	<input checked="" type="checkbox"/> Check this box to create required SharePoint storage lists. Otherwise, you must create your own.
Parent	<input type="text" value="Client"/>

Click OK, then click 'Save' to save your new hierarchy which will appear on the left custodian menu:



Click on 'Settings' again and select the 'Hierarchy' tab. We will now look at the data lists that have been automatically set up. Click the blue link:



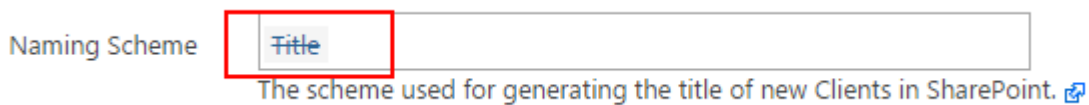
This list stores details of all the clients in the system. Items can also be added into this list if you wish to import matters from an existing system. This is covered later in the Import section.

Now to configure the provisioning settings. Click the Provisioning tab, and click the 'Choose site' button under 'Provisioning Site':

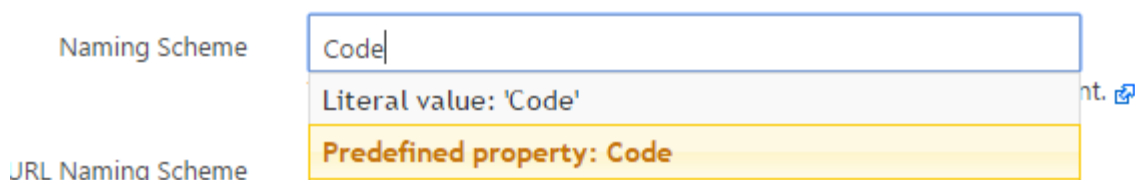


This is the site under which client sites will be created. You can select any site, or manually type the address to a site outside the current site collection.

Now we will change the naming scheme. This is the scheme used to generate titles for new client sites. In our case, we would like titles such as "MICR1 – Microsoft" which is "Client Code – Client Title". We set this up as follows. Delete the current naming scheme Title value by clicking on it:



Type "Code" and select the 'Predefined property' entry in the drop down that appears:



We want a dash between Code and Title, so after code, type " – " (don't forget two spaces: space-dash-space) and select the literal value option:

Naming Scheme

Code - |

Literal value: ' - '

Next, enter Title. This represents the client name. Select the Predefined property option:

Naming Scheme

Code ' - ' Title

Literal value: 'Title'

JRL Naming Scheme

Predefined property: Title

The naming scheme is now complete. URL naming scheme can be configured in the same way – it simply represents the value in the URL when you open a client SharePoint site. We will leave it at the default option of Code.

In the 'Templates available...' drop down, select the client template and click Add:

Templates available for Client creation

General client

Choose... Add

Only a single template is selected. This template will always be used for Client creation and the template selection UI will not be shown.

This indicates that only the selected templates can be used to create new Clients.

Click 'Save' before continuing.

We can now provision our first client. Click the main Clients menu, and select 'CREATE':

Clients

CREATE MY CLIENTS ALL CLIENTS

Details Properties

Client Title Berkshire Hathaway

Template General client

Interested Parties Peter Parker; Bruce Banner;

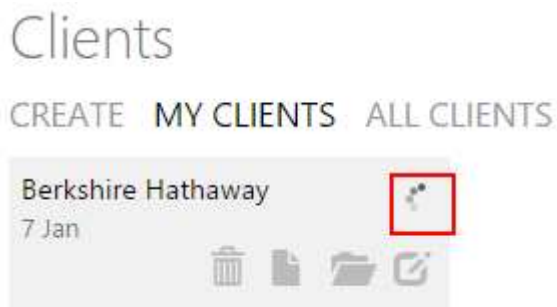
These people will be given automatic access to this Client.

Create Client

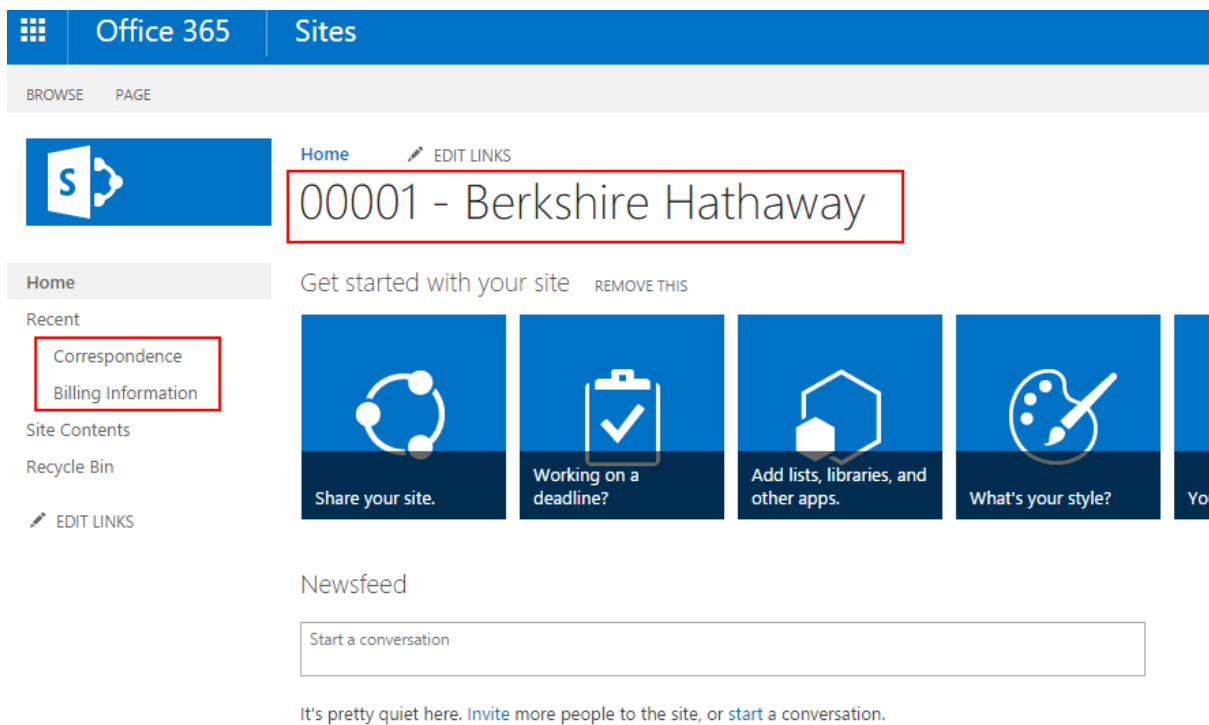
Enter a title. Since there's only one available template, it is automatically selected. Enter a username under Interested Parties.

Note – interested parties will get automatic access to the new client, plus, it will be listed in their My Clients.

Click Create Client and wait for provisioning to complete. The icon indicates that it's in progress:



When it is complete, click on it and you will be brought to the new SharePoint site for this client:



Note the following features:

- Title, which follows the specified naming scheme
- Correspondence and Billing Information libraries are created
- URL contains the client code.
- The site inherits security.

Click the back button to go back to custodian.

Click 'Settings' -> 'Hierarchy' -> Security and select Break Inheritance as below:

## Provisioned Content

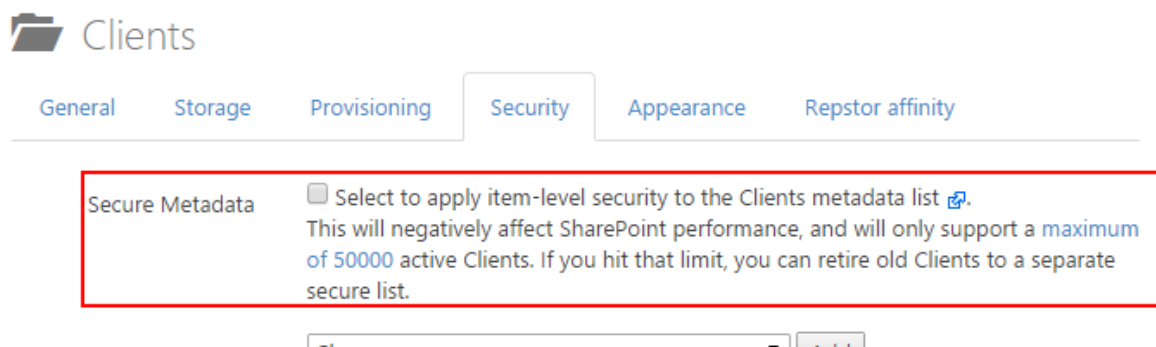
Default Role	<input type="text" value="Full Control"/>	Default role assigned to users who are given access, including followers and interested parties. <a href="#">?</a>
Break Inheritance	<input checked="" type="checkbox"/>	Select to break inheritance for new Client sites/lists (does not apply to Site Collections). Note that if this is unselected, permissions will be inherited from the relevant parent, and will not be assigned automatically by custodian.
Copy From Parent	<input type="checkbox"/>	Select to copy roles from the parent as a one-off when inheritance is broken.

Click 'Save', and create a new site. You will find that it does not inherit security, and that the users specified in Interested Parties are given Full Control (the Default Role above). 'Copy From Parent' causes security to be copied before it's broken, such that security is the same as the parent.

If custom roles are configured in SharePoint, they will be shown under the Default Role drop down.

## Advanced security

Although security inheritance may be turned off, it's still possible for everyone to see the names of clients, even if they can't see their content. This is because the Clients List is not security trimmed by default. To enable security trimming of the Clients List, select the 'Secure Metadata' option:



Clients

General Storage Provisioning Security Appearance Repstor affinity

Secure Metadata  Select to apply item-level security to the Clients metadata list [?](#).  
This will negatively affect SharePoint performance, and will only support a maximum of 50000 active Clients. If you hit that limit, you can retire old Clients to a separate secure list.

Note the SharePoint-imposed restrictions to security trimmed lists.

## Automatic Code Generation

By default, codes are generated automatically using a naming scheme. By default the scheme is 'ID – 5 digits'. So, your first client has an ID of 1, and a code of '00001'. To change this scheme, open 'Settings', click 'Hierarchy' -> Appearance and update the 'Code Format' field:

General Storage Provisioning Security Appearance Repstor affinity

Status Filter Value   
 Clients will only be shown if they match the value specified. This corresponds to Status field. New Clients are automatically set to Status **Open**.

Advanced Property Editing  Displays the advanced property editing options during creation.


Auto Code Generation  Check to generate the code for new Clients automatically.

Code Format   
 The scheme used for generating new Client codes. [🔗](#)

## Manual Code Entry

Normally, users will want to enter their own alphanumeric code.

Click 'Settings' -> Appearance and untick 'Auto code generation':

 Clients

General Storage Provisioning Security Appearance Repstor affinity

Status Filter Value   
 Clients will only be shown if they match the value specified. This corresponds to the Status field. New Clients are automatically set to Status **Open**.

Advanced Property Editing  Displays the advanced property editing options during creation.

Auto Code Generation  Check to generate the code for new Clients automatically.

Icon

Click 'Save', and click Clients -> CREATE. There is now a Code option:

# Clients

CREATE MY CLIENTS ALL CLIENTS

Details Properties

Client Title

Code  ✓

Template

When you type the Client Title, a code suggestion is populated. You may change it. The green tick indicates that the code entered is not currently in use by any other client.

Provision a new client to see the code in use in the resultant SharePoint site.

## Matter Configuration

All of the above hierarchy configuration steps can be repeated similarly for Matters – the configuration is entirely independent from Clients.

The following points should be noted:

- Under Settings->Provisioning, the relevant matter templates should be selected:

Templates available for [Conveyancing](#)  
Matter creation

- When configuring naming schemes, you can use the properties 'Parent Title', 'Parent Code', 'Parent Id' etc. This allows you, for example, to configure Matter titles to include the client name or code:

Naming Scheme

Once matter configuration is complete, click Matters -> CREATE:

# Matters

CREATE MY MATTERS ALL MATTERS

Details Properties

Client  ✓

Matter Title

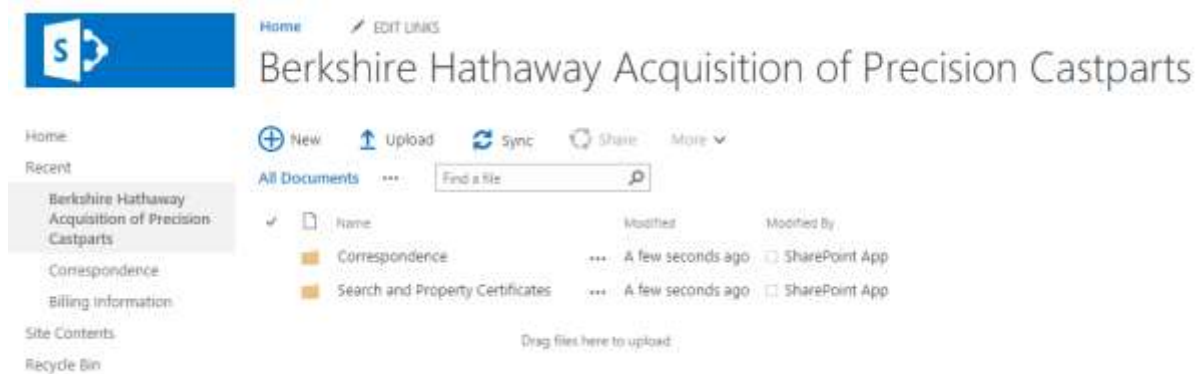
Template  ▼

Interested Parties

These people will be given automatic access to this Matter.

Create Matter

Once provisioning is complete, click the new matter and inspect its SharePoint list to ensure it's been provisioned as expected:



## Properties

Properties, and the setting of default properties, are a big feature of custodian.

Click 'Settings' -> Properties. Select some User properties, Site properties, and Content Types:



# Settings

Storage Hierarchy **Properties** Security Features Site Collections Set Up Refere

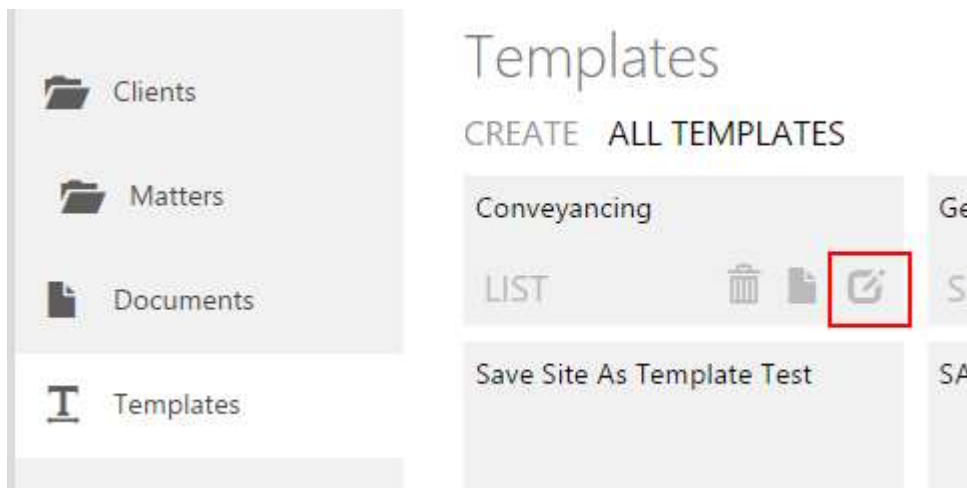
User Properties [FirstName](#) [FeeEarner](#)  
UserProfile\_GUID ▼ Add  
The user profile properties that will be available for selection.

Site Properties [Due Date \(DueDate\)](#) [Subject \(Subject\)](#)  
% Complete (PercentComplete) ▼ Add  
The web/list properties that will be available for selection. [Manage site fields](#)

Content Types [Audio](#) [E-mail Submission](#)  
Administrative Task ▼ Add  
The content types that will be available for selection in templates. [Manage content types](#)

Note that if you want to create custom SharePoint fields, you may do so at this point, but they won't appear in the drop-down list until you clear the custodian cache. To clear the cache, click 'Settings' -> Set Up -> Reset Cache.

We will now add properties to a template. Click 'Templates', then edit a template:



Click the Properties tab and add some default properties. The types of properties listed are:

- Provisioned item properties  
These are properties that are automatically generated based on the current matter/client. They include Title, ID, Code, etc.
- Site properties  
These are the Site Properties you chose earlier in 'Settings', the value of which you will fill in each time you create a new matter/client.
- User properties  
These are the User Properties you chose earlier in 'Settings'. Their values will be based on the user who is creating the matter/client.

Default Properties These properties will be applied to the item.

**Add Property** Choose...

- FeeEarner** *Value filled automatically*
  - Cascade to Content
  - Apply to Views
  - Enable for Reporting
  - Read Only
- Subject** *No value set*
  - Cascade to Content
  - Apply to Views
  - Enable for Reporting
  - Read Only
- Id - Minimum 5 Digits** *Value filled automatically*
  - Cascade to Content
  - Apply to Views
  - Enable for Reporting
  - Read Only

Select Enable for Reporting for any Site properties and User properties.

Click 'Save'.

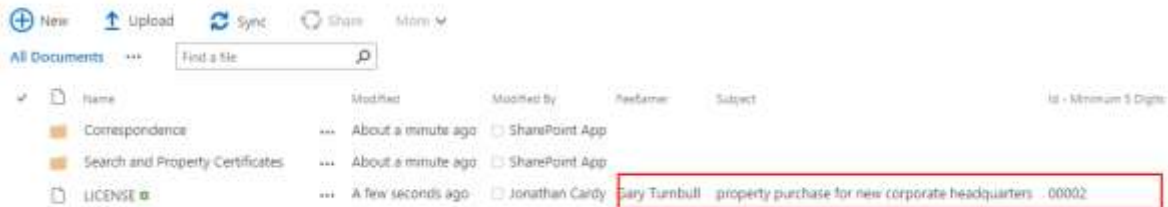
Now select Matters -> CREATE, and select the correct template. Select the properties tab. Your properties should be listed:

Click the edit icon. A popup dialog will appear:

Enter a value and click 'Save'.

Click Create Matter. When the matter is ready, open it in SharePoint. The view should have your new fields present. Drag a document into the new document library to see the default property values applied (SharePoint normally takes a second or two to apply property defaults):

## Berkshire Hathaway Corporate headquarters



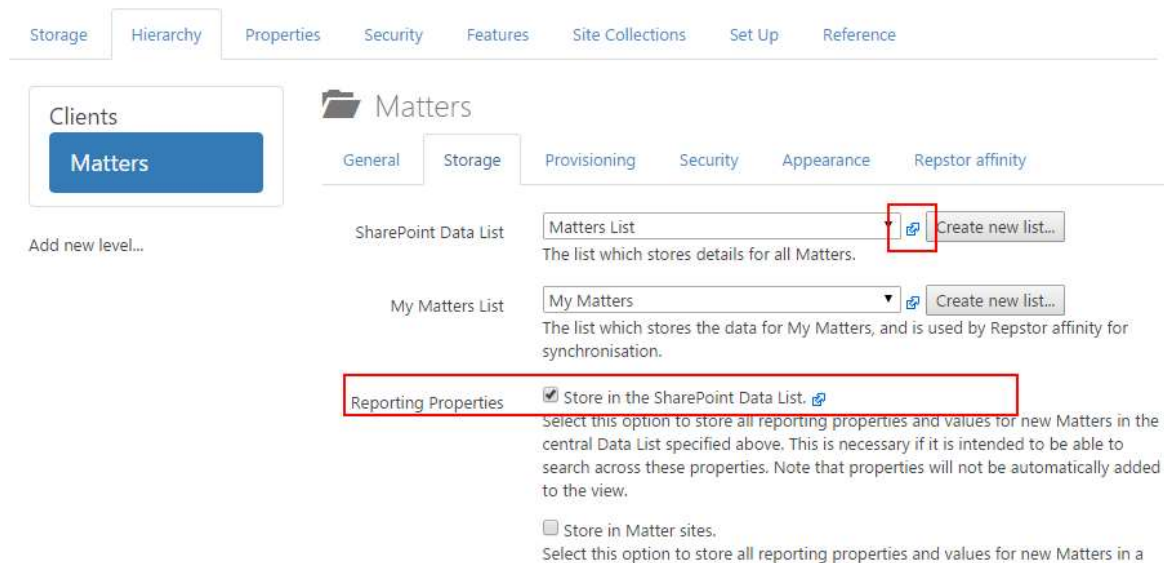
- FeeEarner is taken from the creating users' profile;
- Subject was manually entered;
- ID is automatically generated – it is the ID of the current matter.

## Reporting Properties

### Data List

Back in custodian, click 'Settings' -> 'Hierarchy' -> Matters -> Storage. Reporting Properties should be selected (it is, by default). Open the Matters Data List by clicking the blue link:

### Settings

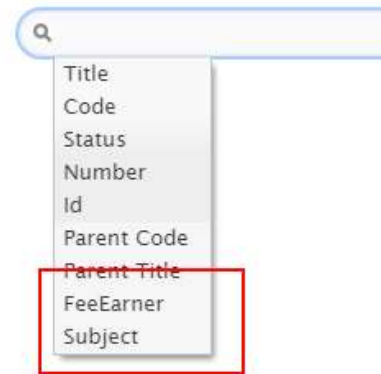
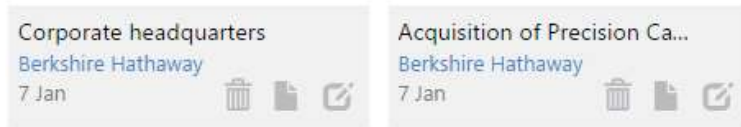


You will be taken to the Matters data list, where the reporting properties are also stored. The new matter should be present, with its custom property values populated.

Back in custodian, click Matters and highlight the Search box. A dropdown appears:

# Matters

CREATE MY MATTERS ALL MATTERS



It contains a number of properties, including the custom properties configured earlier. Select one and attempt a search.

## Reporting Properties list

The reporting properties list operates similarly to the data list, but stores property values within each SharePoint site. Click 'Settings' -> 'Hierarchy' -> Storage to enable it:

### Reporting Properties

Store in the SharePoint Data List. 

Select this option to store all reporting properties a central Data List specified above. This is necessary i search across these properties. Note that propertie to the view.

Store in Client sites.

Select this option to store all reporting properties a within their respective sites. This option is only app from a site template.

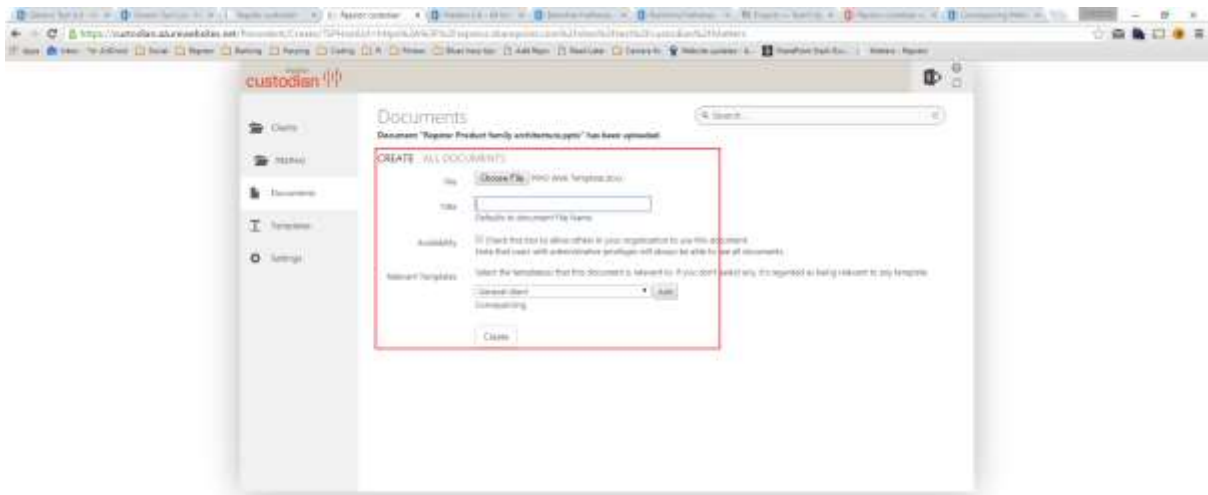
## Following

Following is normally disabled since it is a low-security scenario. When it is enabled, all of your SharePoint followers are automatically added to the Interested Parties list of any matters/clients you create. Select 'Settings' -> Features to enable it.

## Documents

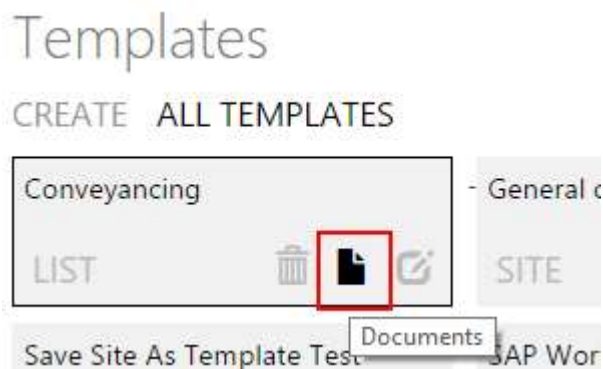
Documents is a feature whereby you can upload commonly used documents. The Repstor custodian for Outlook client then allows you to quickly and easily add any of these documents to a matter.

Click Documents -> CREATE. Select a document, and optionally give it a title. Select your matter template and click Add. Then click 'Save'. This will associate the document with that template.

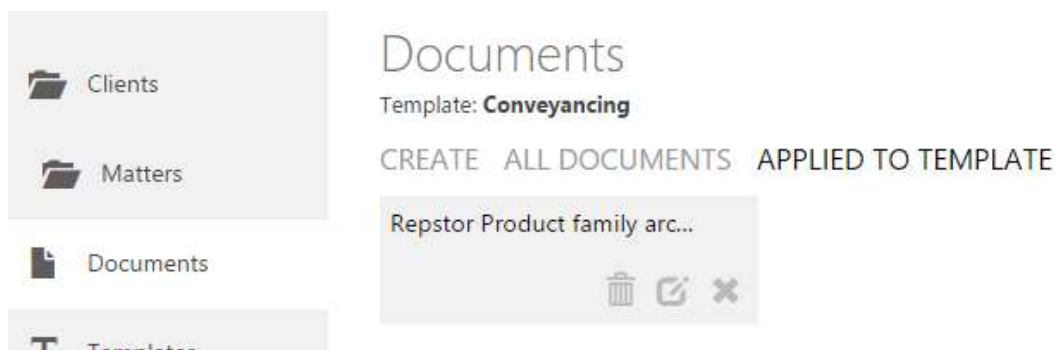


The Outlook client will then allow you to add that document to any matters which have been created from the selected template.

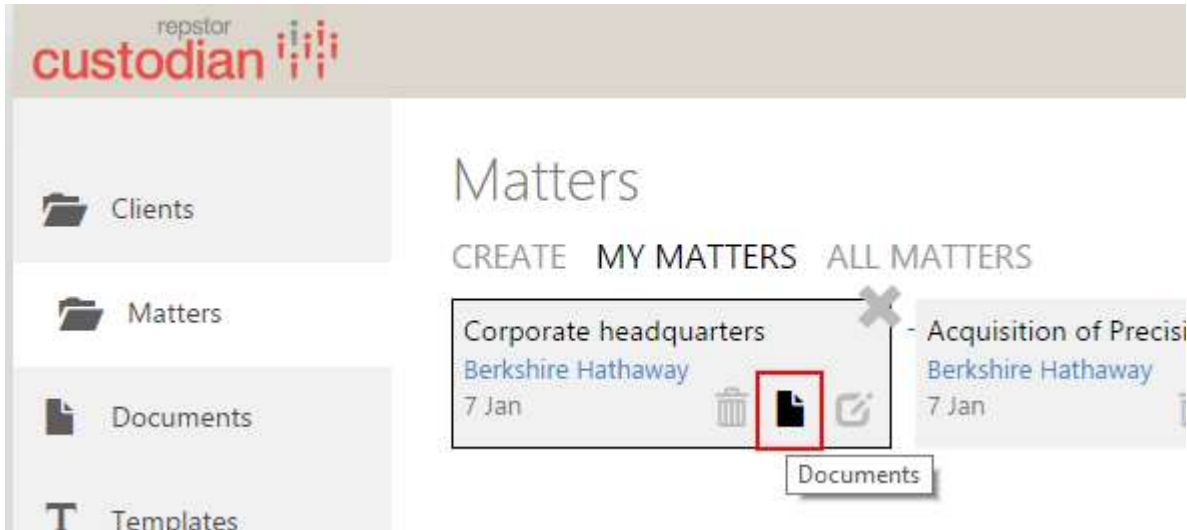
To confirm the association, click 'Templates' and click the Documents icon on the relevant template:



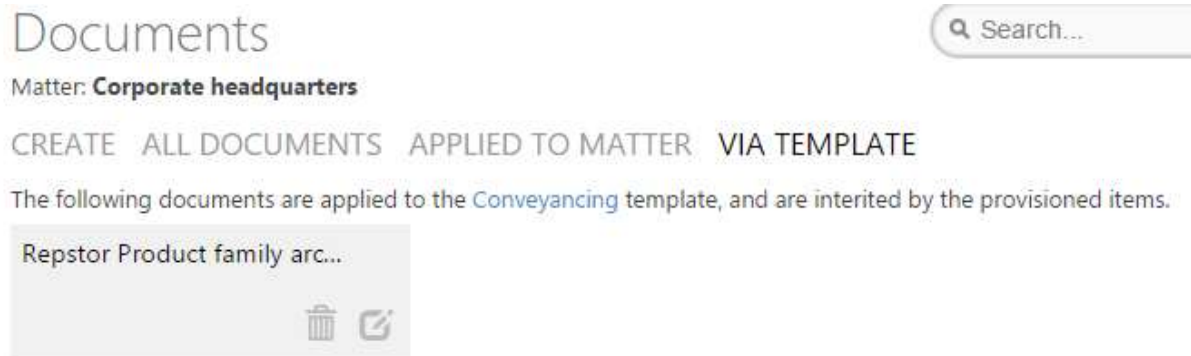
The previously uploaded document should appear:



You can also confirm that the document has been associated with the matter. Click Matters, and select the Documents icon on the relevant matter:



Again, the document should be shown since it was associated with the template from which this matter was provisioned. Click the VIA TEMPLATE tab to see it:

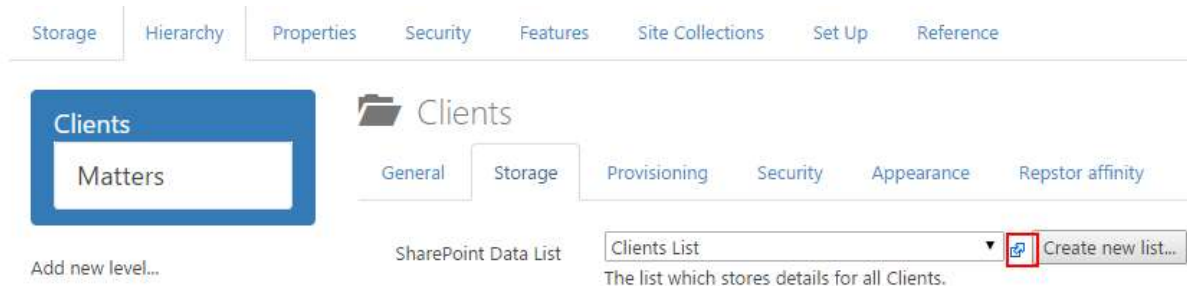


## Importing clients/matters

### Importing with SharePoint content

It is possible to import existing sites or lists into custodian, and treat them as though they were created in custodian.

Click 'Settings' -> 'Hierarchy' -> Storage and click the link for the SharePoint Data List:



In the list, create a new row as follows:

- Title: the client title
- Status: Open
- Code: any unique code
- TemplateId: either leave blank or enter the TemplateId of an existing custodian template
- SPTYPE: 1 for Site, 2 for List
- OpenDate: date of client creation
- ServerRelativeUrl: URL of existing client site

### Clients List

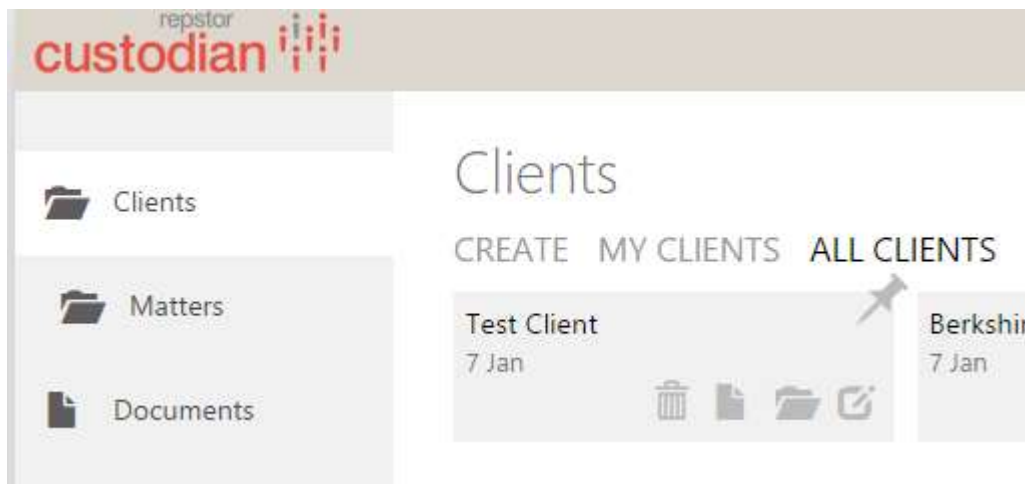
new item or edit this list

All items

Title	Status	Code	TemplateId	SPTYPE	ParentsNumber	ParentTitle	ParentCode	OpenDate	ServerRelativeUrl
Berkshire Hathaway	Open	00001	1,70216428-347d-47ac-8147-65b8b2276a1b	1	0			07/01/2016	/sites/test/custodiar
Test Client	Open	TESTCLIENT	1,70216428-347d-47ac-8147-65b8b2276a1b	1				07/01/2016	/sites/test/sub site

In custodian, you must clear the cache to pick up this new item. Click 'Settings' -> Set Up -> Reset Cache.

Now open Clients -> ALL CLIENTS to see the new item:

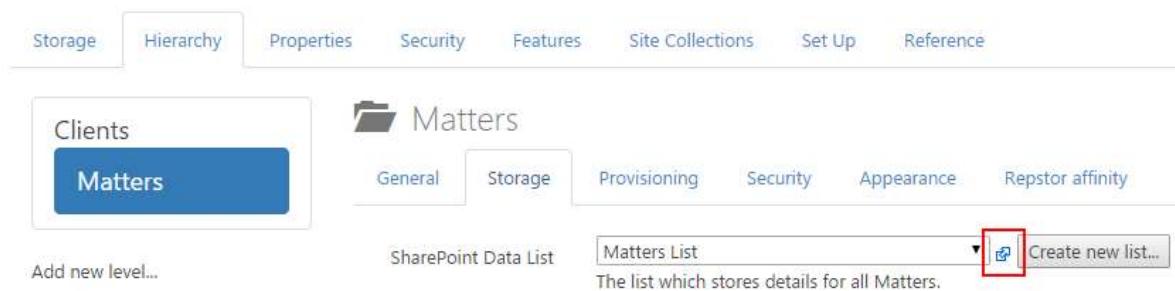


## Importing without SharePoint content

Importing without existing SharePoint content is a similar process. In this scenario, custodian will provision the SharePoint locations for you.

Again, edit the data list. In this case, open the Matters List:

## Settings



Enter some new items into the list as follows:

- Title: the matter title
- Status: Open
- Code: any unique code
- TemplateId: Enter the TemplateId of any existing custodian matter template
- SPTYPE: 1 for Site, 2 for List
- OpenDate: date of matter creation
- ParentCode: code of an existing client
- ServerRelativeUrl: Leave blank – this will be provisioned automatically



## Matters List

[+ new item](#) or edit this list

All Items

Title	Status	Code	TemplateId	SPType	ParentNumber	ParentTitle	ParentCode	OpenDate	Server
Acquisition of Precision Castparts #	Open	00001	2,5726272b-31a8-4ef8-8052-2f90e4a46284	2	1	Berkshire Hathaway	00001	07/01/2016	jwite
Corporate headquarters #	Open	00002	2,5726272b-31a8-4ef8-8052-2f90e4a46284	2	2	Berkshire Hathaway	00001	07/01/2016	jwite
Test import 1 #	Open	IMPORT1	2,5726272b-31a8-4ef8-8052-2f90e4a46284	2			00001	07/01/2016	

Once this is done, go back to custodian, click 'Settings' -> Set Up -> Open Import & Sync. Select 'Matters':

## Import

On this page you can import items from any level in your hierarchy. Importing involves:

- Creation of SharePoint content where provisioning is enabled, and a Template ID is present in the data list;
- Setting the Parent Title where it is blank but a Parent Code is present.

Before importing, you should ensure that your hierarchy is configured correctly within [Settings](#).

Type to import:

Type Guid: 7392aa14-113f-4f35-a44f-38d275237c7f

SharePoint Data List: [Matters List](#)

Provisioning Enabled: **true**

To bulk import Matters, first add them to the SharePoint Data List defined above.

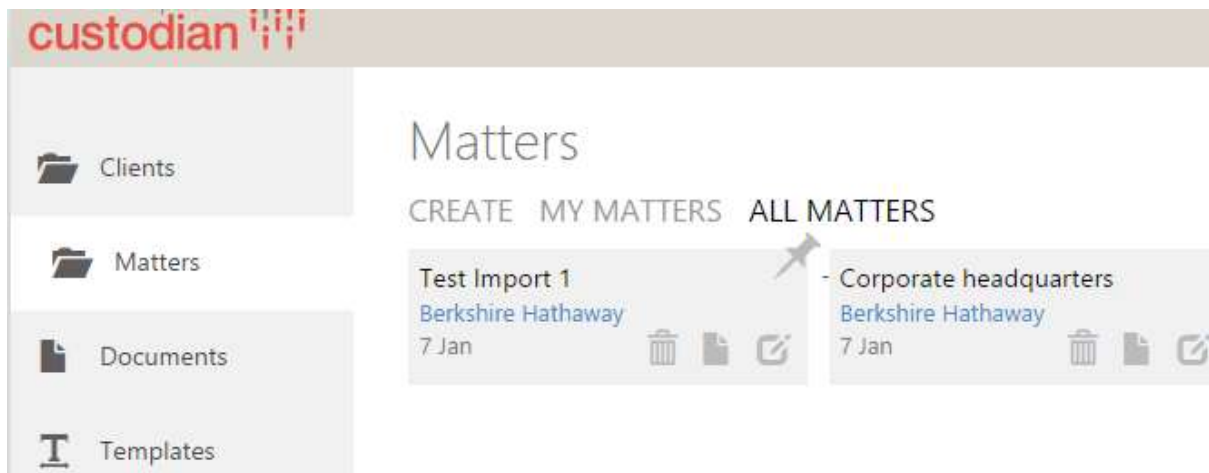
Parents ✓ All Matters are assigned a parent. No further action is required.

Sites ⚠ 1 Matters do not have a SharePoint location configured.

NOTE - this operation may take a long time to complete. Ensure the Matters naming scheme has been configured with

It should recognise that there are matters without SharePoint locations configured. If it is not picked up correctly, you may need to reset your cache.

Otherwise, click Start Importing Matters. When it says 'Import Complete', click Matters -> All Matters:



The new matter should be present. You may add it to your My Matters as normal. Additionally, it may take a few minutes to complete provisioning, especially if multiple matters have been imported.

## Affinity/Outlook integration

Setting up custodian for Outlook

Affinity naming scheme

## Advanced templating

- Site
  - Adding custom lists in SP
  - Quick Links
  - Master page
  - Welcome page
- List
  - List items/documents
  - Folders
  - Versioning settings

## Workflows

- Reusable list workflow