

Archiver Help

NOTES:

Setup Screen – ECM Library Archive System

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Archive Setup and Management

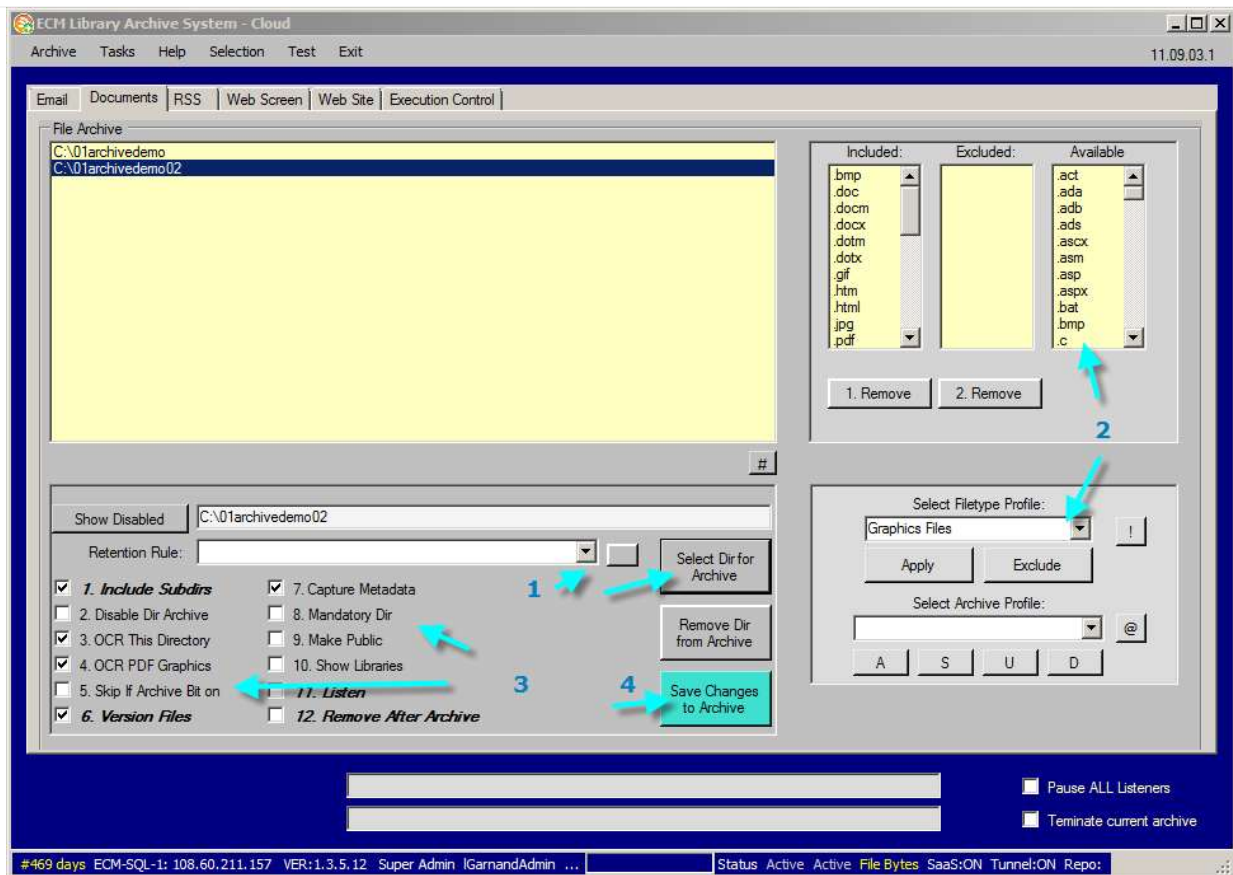
1. Document Archive Screen Section

The Setup process may appear a bit complex and intimidating at first, but it is very straight forward and then once it is done – it is done. It rarely has to be revisited.

This screen defines what content on your computer will be archived and made searchable including, pictures, music, documents, and anything else you might wish to have backed up and archived.

Once Archive is set up and content is initially archived, for future archives ECM Library will determine whether a file has changed or not by evaluating the create date, the last write date, length of the file and the “CRC” of the file. If there are any differences between the archived file and the scanned file, ECM Library will either archive that file again or it will version it, depending of the archive parameter used.

Once something is archived, only an administrator with delete authority can “undo” and delete content out of the archive. Deleting something out of libraries does not delete it out of the repository.



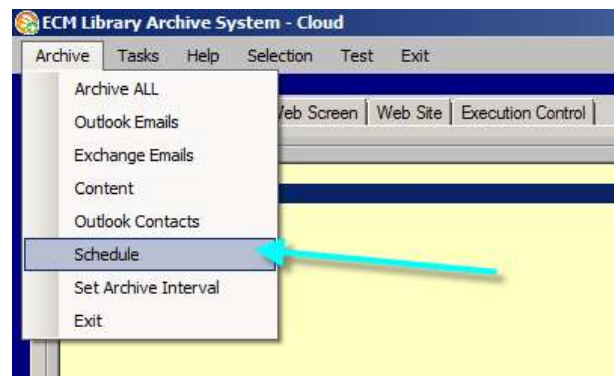
The example folder listed in the file archive yellow section shows what a user would see if an administrator has set a mandatory directory to archive.

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General Steps to Archive your Content:

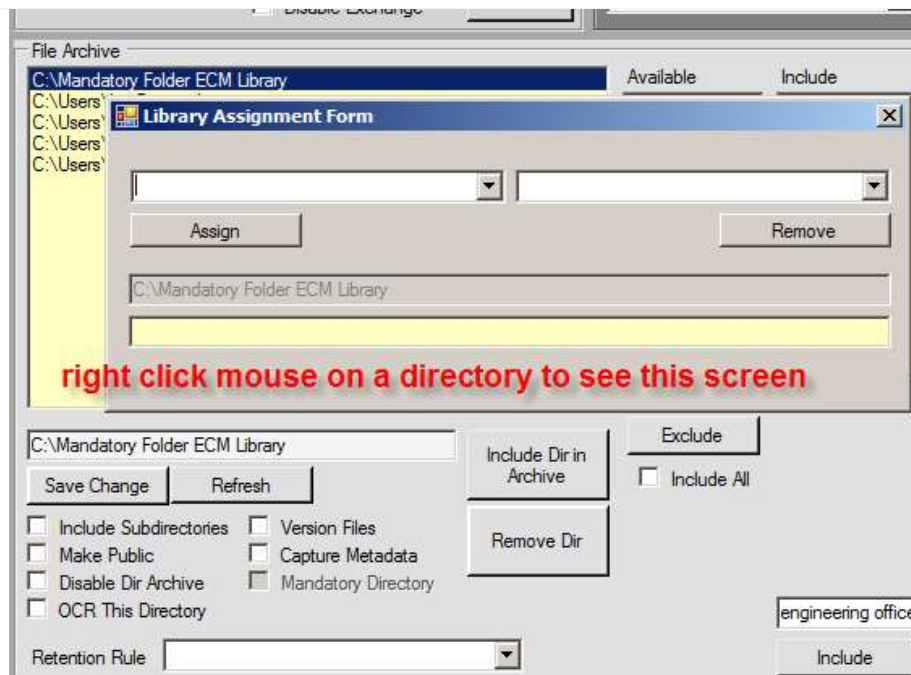
1. Identify a retention date with the drop-down-arrow menu. This setting cannot be changed to specific content that has been archived. The default minimum archive time set by ECM Library is 10 years, unless your administrator has modified this retention rule. *See your administrator if you are not sure which retention rule to use.* Select "Select Dir for Archive" button and select a directory.
2. On the very right of the screen notice a listing of file types. Highlight the file types to archive and then click on the "Include" button that appears. Select the file types you wish, by selecting all or a group of file types or by clicking one or more file types (using shift with the mouse click) you wish to archive. Your files will be now listed in the "Included" column. (As an alternative shortcut, click on the arrow below the "Select Filetype Profile" and select groupings of similar file types that your administrator may have set up like "Office Documents" and "Apply". You need to put in the beginning of the name to bring up the profile name. Example: Office% and click on the @ could bring up "Office Documents".)
3. Highlight this new directory by selecting it in the grid yellow/beige area. If desired, you can change the default archive parameters. Check on or off the parameters you wish to use:
 1. Include Subdirectories: By checking this parameter, any existing or new sub-folders created will be archived. This is recommended unless you have existing or future sub-folders that need to be archived with different parameters.
 2. Disable Dir Archive: Checking this parameter will stop future archives on this specific directory. Please note that anything archived to-date will remain in the repository.

3. OCR This Directory: If you have graphic files that you would like to have “Object Character Recognition” applied to, any file type ending with .bmp, .gif, .ico, .jpg, .png, .tif, and .tiff will be scanned and any OCR-readable text will be added to the text for searches. E.g. Screen shots, scans of forms or news articles, etc.
 4. OCR PDF Graphics: If you have graphic files that you would like to have “Object Character Recognition” applied to specific to PDF files, please select this parameter.
 5. Skip if Archive bit is on: Your computer keeps track of the file properties which include whether a file has a bit turned on or off. This feature will speed up your archiving process but should be used only if no other software process turns on the “bit”. We recommend you have this parameter turned off for the first archive and then use it for subsequent archives.
 6. Version Files: If you wish to keep a trail of all changes made to each file/document, check this window. If you prefer to have the most recent document archived which will over-write previous versions, do not check this box. The default set up by ECM Library is that all versions are archived.
 7. Capture Metadata: This allows the archive to include any metadata specific to particular files. Otherwise it will not be captured.
 8. Mandatory Directory: Only an administrator can set up a mandatory Directory. Mandatory directories look at a consistent directory path used across users and automatically archive each time the Archive is executed. Wildcards can be used. For example c:\Users\%userid%\Documents
 9. Make Public: *This may be invisible if not made available by your company's administrators.* We expect most users will NOT check this: if checked, ALL users across the whole enterprise will be able to see that archived content. Once archived, you cannot uncheck the public parameters and modify it to private/public for content that has already been archived. Changes on private or public can be done by changing content through the [Metadata Screen](#) after using the search and retrieval process. Specific Directories can be searched and retrieved through the content search screen.
 10. Show Libraries: This will bring up pop-up window that, as you highlight directory paths in the File Archive box, it will show you what libraries this directory path are being assigned. Unlike the other check boxes, this does not assign a parameter, but shows you what has been assigned. To assign a library to a directory path, highlight a directory path listed under “File Archive” and right click with your mouse. A separate window will appear that will list available libraries to the user. Select a library and it will be placed under “Assigned Libraries”.
 11. Listen: For active directories, this is helpful to place a priority to immediately queue a change for the next scheduled archive.
4. Select “Save changes to Archive” to keep this archive setting for each directory.
 5. You can now archive your content! You can also set up whatever automatic time you wish to have the archiver to run by using the Polling Set up section of this screen.



Assigning Folders or File Directories to a Library:

If you want to assign a directory to a Library you can right click mouse on the Directory to assign it to a Library. For information on how to set up a Library, see [Library Creation and Management Screen](#).



One or more libraries can be assigned at the time of archive. If you change assign or remove library, it will update all past and future archives of that particular directory path for the library name that has been assigned or removed.

Exchange & PST Archives: You will be asked to assign exchange emails or PST emails to a library at the time of archive. You can set up a library that is private: only you can see these emails, or you can create a library where a group of users that you select are included to view these emails.

Once a person is assigned to a library, their searches will automatically include all libraries to which they are a member. To not see library items in a search return, users can select on “my content only” in the content search screen.

Mandatory Folder User for administrators:

If you want to automatically identify each directory for multiple computers and identify it as mandatory, it will automatically archive any computer set up for archive that uses that file structure (e.g. c:\ will get all the identified files types under that folder). If the file structure changes based on the user you can use this wildcard to skip a user’s name and get all folders underneath that structure.

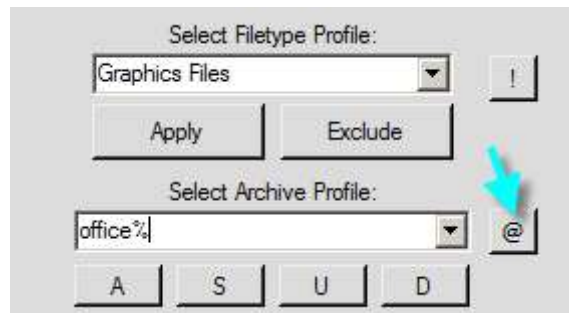
c:\Users\%userid%\Documents

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Set Up Directory Parameters for administrators:

If you want to create a directory parameter that can be recommended for all users, you can save it and let others know to use a particular “Archive Profile” name when they archive specific directories. For example,

here the profile includes subdirectories, version files, capture metadata and certain file types (not seen on the screen). *A= Apply the profile S= Save the new profile, U=Update and existing profile and D=Delete the existing profile.* As an administrator, if you make any changes to this parameter setting, any directory that uses profile rule within your enterprise will be affected for previous and future archives. (But nothing previously archived is deleted – just any new information will be added such as metadata or subdirectories. However OCR function will NOT be added in for previous archives.) For example, if you add in “.docx” then all existing filetypes ending with .docx will be archived under that directory structure. Once set up, any one within your enterprise can type in the beginning of the profile name you have created with a % wildcard following it, and by clicking on the @, it will display the name(s) ending with that wildcard. From there it can be applied (A).



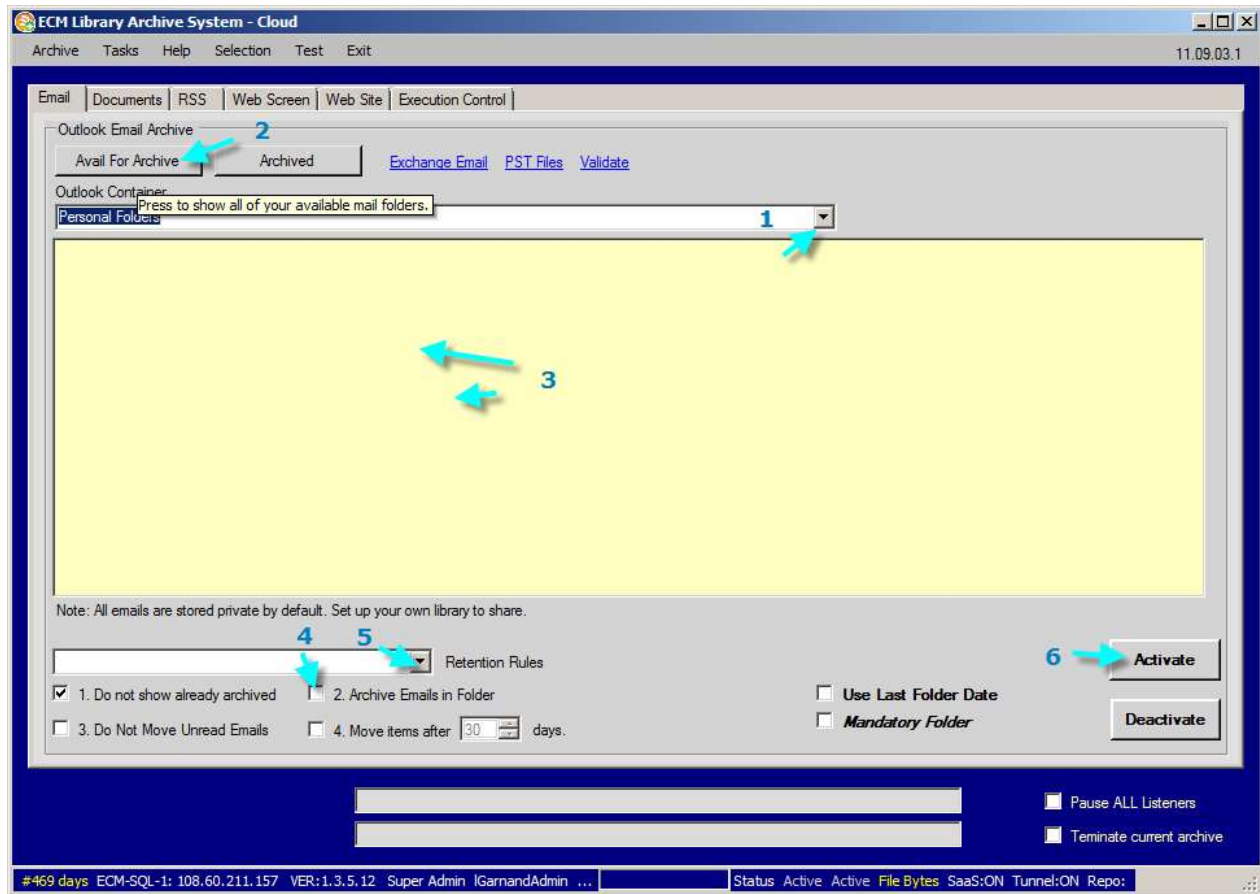
General Terminology in File Archive Screen Section

List of Active Directories	Under the file Archive list is a list of all directories that have been defined to the system to be archived. By selecting a row of the list, all of its settings will be displayed and become editable.
Include all file types	When checked, all file types within the directory will be added to the repository. This does not mean they will become searchable as a word splitter must exist for a file type to make it searchable. But all metadata concerning the file, no matter what the type, will be searchable.
Available	The list of available file types with the asterisk representing all file types to be included.
Include	The list of file types included in this directory that will be archived.
Exclude	The list of file types NOT TO BE included in this directory and that will NOT be archived.
Select Dir for Archive	This selects and includes the directory you wish to archive. Once all archive parameters have been decided and selected or set, press save to keep the archive parameters for this selected directory.
Remove Dir from Archive	There are times when a directory will no longer be archived. Press this to delete the directory from the archival process. However, if content is already in the repository and tied directly to this directory, it cannot be deleted, as this would cause data corruption. Therefore, if data exists for this directory, the archival process can be disabled, but the directory cannot be deleted.

Save Change to Archive	When changes are made to the archival parameters for a directory, press this button to save the changes within the repository.
Include Sub-directories	When checked, will cause all subdirectories with the current directory to be included into the archival process, This will save you considerable time as one quick click and all data and all subdirectories can be archived.
Make Public	This allows all content within this directory to be made available company wide. This is only seen if made available by administrators.
Disable Dir Archive	There are times when a directory will no longer be archived. Press this to delete the directory from the archival process. However, if content s already in the repository and tied directly to this directory, it cannot be deleted, this would cause data corruption. Therefore, if data exists for this directory, the archival process can be disabled, but the directory cannot be deleted.
Version Files	When a file is deemed to already exist with the repository, it will not be added twice unless this check box is checked. When this is checked, a file will be added to the repository with a version number added. Without this, files are overwritten in the repository with the most current version.
Capture Metadata	In the case of Microsoft documents, this will open the document and capture all of the associated internal metadata from with that document and add it to the repository.
Include	This must be pressed in order to include the specified file types in the archival process.
Exclude	This must be pressed in order to exclude the specified file types from the archival process.
Remove under Include List	Removes the selected file type from the include list of files.
Remove under Exclude List	Removes the selected file type from the exclude list of files.
Status Bar	Provides status messages to you, the user.
Terminate current archive	Allows you to stop an archive from running and completing the process.
Refresh	This button allows you to refresh changes. For example, if you disable a directory, press the reset button to see the results.

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2. Email Archive Screen Section



For email set up when it is being archived from an individual's Outlook folders, the steps would be as follows:

1. Check your Outlook Folder Structure and verify that your top folder has been kept to the default "Personal Folders". If yours is different, contact your administrator. Administrators will need to change the line in your app config file that reads `<add key="EmailFolder1" value="Personal Folders" />` before you can archive.
2. Select "Avail for Archive".
3. Highlight in the yellow/beige grid below all the folders you wish to be archived.
4. Click on the parameters you wish to use, including a must – "archive emails in folder".
5. Activate.

Once these folders are "activated" you can select "Archived" button to see the listing of those email folders that will be available for an archive. (New subfolders created later under an archived folder or folders with name changes are NOT included in the archive. See Last Folder Date below.)

All Emails are automatically OCR'd (Object Character Recognition on specific graphic file types: .bmp, .gif, .ico, .jpg, .png, .tif) and anything that is OCR'd is included into the text for searches. For administrators, the text that has archived for ECM Library can be viewed through Microsoft SQL Manager through a Select query process.

Now you can archive your emails by selecting "Archive Outlook Emails" or "Archive All" if you also have content to archive.

Use Last Folder Date

At the top left hand side of the Email Archive section is a check box beside 'Use Last Folder Date'. If this box is checked, the archival process for emails is fast, significantly faster than if not. This is because you are telling the system to remember the last time you did a successful archive of your emails and the next time archive happens, ignore all emails older than that last archive date. This is because these older emails are already in the repository and do not have to be revisited. So a date check is performed and if the suspect email's create date is newer or equal the last date that a successful archive was accomplished, it will be added to the repository. If it is older than that date, it will be ignored as it has already been processed. The reason you can select and deselect it is so that a safety check is on place. If you ever suspect that all of your emails may not be in the repository, or if you just want to make sure, uncheck the box and run an archive. Then, rest assured, all emails will be revalidated as to whether they exist within the repository. If they are found, they are not added again, but if they are not there, they are added. This is done to every email without regard to date.

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Email Archive Details

When the "Avail for Archive" is pressed, you can see a list of every folder that is contained within your Outlook client. But it will also contain folders that are not email specific folders that are not email folders – do not select non-email folders. When the list is presented, select (click it with the mouse) the item (email folder) you wish to add to the archive list. It will high light and then you can specify how you wish the selected folder to be processed.

For example, check the '*Archive Emails in Folder*' checkbox and this folder will be added to the archive list of active email folders. This is exactly what you want so that the emails in this folder will be processed. This archives them and backups your emails in to the repository and also allows them to be searched as soon as they are added.

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The '*Do Not Delete Unread Emails*' check box causes the system to keep unread emails on your local machine. They will still be archived, but will not be removed. It is a safety measure that will insure you have a chance to read your emails before they are removed. This does not stop them from being archived and backed up into the repository.

'*Remove After Archive*' does just that – it removes each email from the local computer after it has been successfully archived. This is not the case if you have other controls set differently. For example, if the do not delete until read is checked, then the email will not be removed until such time. In fact, without specifically giving your permission to remove an email using this check box, it will stay on the local machine but will still be backed up into the repository during archive.

Email Subfolders

NOTE: If you activate a mail folder for archive, and later create sub folder under this folder, this new sub folder will not be automatically included in the archive. You can view what is archived and what is "available for

archive” at any time and add new folders at anytime, but each INDIVIDUAL folder needs to be “activated” for archive.

If your email is archived directly from the Exchange server, ECM Library will archive ALL your emails , unless your administrator sets up the archive differently.

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Archive Items after a specified number of days insure that even if items are not archived for any reason, they will be archived no matter what in the number of days you specify. Again, this is not used often, but it is a safety valve available to you to make certain all of your critical emails is archived, backed up and searchable.

Remove items after a specified number of days are set so that emails do not clog up your PC. If combined with Do Not Delete Unread Emails, the latter will take precedence. But when checked and the email is read, it will be removed from the email folder after the number of specified days.

Once these selections are completed for the selected folder, press the ACTIVATE button and you are done. All emails in this folder will be processed as you have instructed during every archive.

DEACTIVATE allows you to stop the selected folder from being archived. It takes the folder out of the active state unless an administrator has specifically set up a folder for archive. Then, deactivate will have no effect.

The *Default Folder* check box is set by an administrator and usually in large corporations where one folder will be the one designated to receive all emails. Otherwise, it is not used.

When the *Archived* button is pressed, a list of email folders you or an administrator has defined to be included into the archival process will be presented in the list. Once showing, a folder can be selected and its archival parameters can be modified.

On Outlook

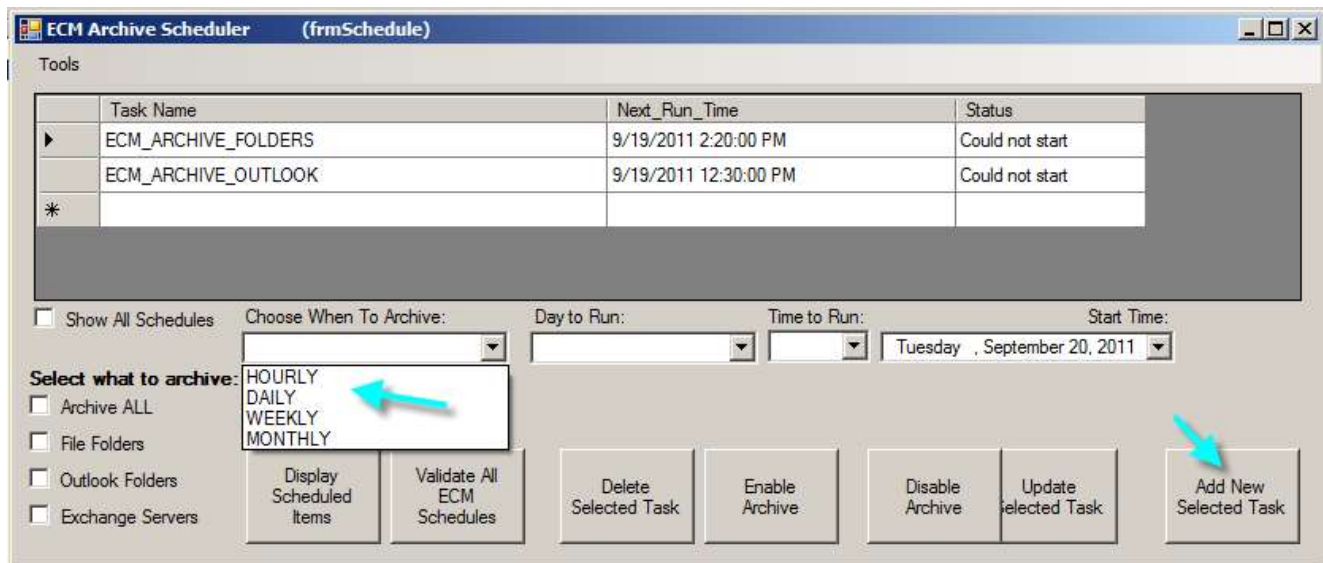
If you change your computer directory structure, Email Folder names, or add in subfolders under a folder, ECM Library will be unable to archive it until you change your set up. For more detail see [Outlook Folder Archive Considerations](#).

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Setting up Scheduling of Automatic Future Archives:

To automatically archive any changes or additions to content and emails going forward, go under the “Menu Archive” and select “Schedule”. This will bring up the separate Archive application. This application takes advantage of Microsoft Scheduler, and makes archiving easy, whether or not your application is running at the time or not. To set up your schedule, click on what you want to have archived (All, file folders, Outlook, Exchange), add in when to archive (e.g. Daily), time to run and start time. Finally, click “Add New Selected Task” and it will the new task will appear in the grid above. Note that the specific email folders, directory paths and/or exchange accounts need to be set up in the Archive Set Up screen, with all their archive parameters in order for anything to be identified during Archive.

Finally, highlight your Task Name, and click on “Enable Archive” to turn on the Scheduled Task. You can “Disable Archive” by highlighting the Task name. This capability allows you to choose to turn the automatic schedule on or off by task.



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3. File Types Screen Section (top right)

When the archival process loads an email, email attachment, or any other type of content, it needs to know how to split apart the words contained within that content and index them for search. This is the area in which ‘other types of content’ can be defined. When a word splitter is installed, whether it is from Microsoft or a third party such as Adobe, there are many times when it will work on other types of content or documents. An example is the VBA splitter that comes from Microsoft. Not only does it work for VBA, but can work well for .NET VB, VB 4,5,6 and so on. Therefore, by setting up a “process as” entry, all of your existing VB programs could be entered into the repository and searched. This applies to text, word documents, rtf files, and a myriad of others. NOTE: We strongly recommend you have research first whether using a particular file type to process another file type can be done first before applying these changes.

File types	These are the file types defined and available currently within your SQL Server repository.
The + Button	Add the file type specified within the drop down text as a new and available file type.
The “X” button	Delete the selected file type.
Process Type	Select the existing file type that you wish to use as the designated file type to be applied to another file type.

As Type	Enter the file type you wish to be processed as the type specified in the “Process Type” drop down box.
List of assigned types	This presents a list of file types as they are defined to be processed with then system
Add Button	When you have defined a “process as” file type, press this button to save it as part of the system. It will immediately be available to all users.
Remove Button	Press to remove a “process as” file type.
Exchange	If an Exchange or POP server has been set up by an administrator (see frmExchangeMail.htm) then the exchange archive will be performed, but only at the administrator level.
PST	Opens up a separate window where exported PST old archive files can be identified that have been exported from Outlook. This selects those directory paths for the next scheduled Archive.

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