# Setup Screen – ECM Library Archive System

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# Archive Setup and Management Screen

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

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The setup process defines what content on your computer will be archived and made searchable. This will include emails, email attachments and all of your pictures, music, documents, and anything else you might wish to have backed up and archived. The best place to start is with email.

## Email Setup

### Use Last Folder Date

The left hand side of the screen deals with email, this we cleverly titled it “Email Archive”. The first widget, a good technical term for anything that cannot really be named, is the ‘Use Last Folder Date’ check box. 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.

### Avail for Archive

Most people, if they are like me, do not really remember what email folders are defined on their PC. Rarely does it come up in casual conversation, so it is not an item that is reiterated to the brain on a regular basis. Therefore, we added this button so that when it is pressed, you can see a list of every folder that is contained within your Outlook client. This is the list of available folders – it will also contain folders that are not email specific folders. I guess we are expected to know which folders within Outlook are emails and which are not. But we are required to present all available folders for a whole bunch of different reasons – but at least every folder is presented. 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.

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 am email from the local machine after it is 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.

***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.

## Polling Setup

This is where you tell ECM Library how often you want to be backed up and archived into the repository.

**Run Archiver** In this drop down box, you can specify the frequency of the archive operation. In other words, how often it runs. The choices are Disable, Monthly, Daily, Hourly, Minutes.

**Every** In this entry box, you specify the sub-interval. For example, if monthly is selected, then this allows you to say which day of the month, if hourly is the selection, then when during the hour, etc.

**Load at startup** When checked, ECM Library will automatically start when your computer is started.

**Disable** Causes the archival process to be disabled from automatically running, but the archival process can still be manually started anytime.

**Save** You guessed it – causes the polling setup information to be saved.

## File Types Group

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.

**Drop down list of file types these are the file types defined and available currently within your SQL Server.**

**The \* Button** Add the file type specified within the drop down text as a new and available file type. This is needed in the case of PDF, for example. If you or an administrator downloads and installs the free PDF word splitter, an entry can be made here and it is available to all users.

**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.

**The 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.

## File Archive Group

This is the area in which you specify which directories on your computer to add to the archive, backup and make searchable. You can get as granular as you wish on the types of files to backup up within any directory also. This means you can select a directory to archive and then tell ECM Library to only back up word documents and excel spreadsheets from within this directory if you so desired. On the other hand, with the click of a mouse, you can tell ECM to backup everything in the directory. All subdirectories can as easily be included.

**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 member 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 is 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** Opens the directory search dialog box which allows you to search the computer for directories you might want to include in archive.

**Include Dir** Once all directory archive parameters have been decided and selected or set, press this to include this directory into the archival process.

**Remove Dir** 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.

**Save Change** When changes are made to the archival parameters for a directory, press this button to save the changes within the repository.

**Refresh** Brings back a new list of available directories.

**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.

**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 Button** This must be pressed in order to include the specified file types in the archival process.

**Exclude Button** 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.

**Skip if Archive bit is on** This adds a great deal of speed to the archival process. When a file is archived into the repository, its archive bit (a system file attribute) is set on or true. When this is selected, the archive skips all files that have the archive bit set on. Thus, if a directory holds 10,000 files and all but 10 have the archive bit set on, 9, 9990 are immediately skipped and only the 10 requiring archiving are processed. This can be deselected so that a directory can be processed insuring all files are evaluated and processed.

**Archive Content Button** This will cause the defined directories to be processed and archived immediately.

**Status Bar** Provides status messages to you, the user.

**Once Now Button when pressed, both email and content will be archived immediately.**

